



Informatica®  
10.1.1 HotFix 1

# Developer Transformation Guide

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# Preface

The *Informatica Developer Transformation Guide* contains information about transformation functionality in the Developer tool. It is written for data quality, big data, and data services developers. This guide assumes that you have an understanding of data quality concepts, flat file and relational database concepts, and the database engines in your environment.

Each of the run-time engines in the Hadoop environment can process mapping logic differently. In the Hadoop environment, Informatica transformations might be fully supported, supported with restrictions, or not supported. Similarly, in the native environment, some Informatica transformations and transformation behavior might not be supported.

Before you validate and run a mapping in the Hadoop environment, refer to the *Big Data Management User Guide* to learn about the transformations that are supported in the Hadoop environment and the processing restrictions.

## Informatica Resources

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If you are an Informatica Network member, you can use Online Support at <http://network.informatica.com>.

# CHAPTER 1

## Introduction to Transformations

This chapter includes the following topics:

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- [Handling Transformation Data Types, 36](#)
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## Introduction to Transformations Overview

A transformation is an object that generates, modifies, or passes data.

Informatica Developer provides a set of transformations that perform specific functions. For example, an Aggregator transformation performs calculations on groups of data.

Transformations in a mapping represent the operations that the Data Integration Service performs on the data. Data passes through transformation ports that you link in a mapping or mapplet.

Transformations can be active or passive. Transformations can be connected to the data flow, or they can be unconnected.

### Active Transformations

An active transformation changes the number of rows that pass through a transformation. Or, it changes the row type.

For example, the Filter transformation is active, because it removes rows that do not meet the filter condition. The Update Strategy transformation is active, because it flags rows for insert, delete, update, or reject.

You cannot connect multiple active transformations or an active and a passive transformation to the same downstream transformation or transformation input group, because the Data Integration Service might not be able to concatenate the rows passed by active transformations.

For example, one branch in a mapping contains an Update Strategy transformation that flags a row for delete. Another branch contains an Update Strategy transformation that flags a row for insert. If you connect these transformations to a single transformation input group, the Data Integration Service cannot combine the delete and insert operations for the row.

## Passive Transformations

A passive transformation does not change the number of rows that pass through the transformation, maintains the transaction boundary, and maintains the row type.

You can connect multiple transformations to the same downstream transformation or to the same transformation input group when all transformations in the upstream branches are passive. The transformation that originates the branch can be active or passive.

## Unconnected Transformations

Transformations can be connected to the data flow, or they can be unconnected. An unconnected transformation is not connected to other transformations in the mapping. An unconnected transformation is called within another transformation, and returns a value to that transformation.

## Multi-Strategy Transformations

A strategy is a set of one or more operations that a transformation can perform on data. You can assign a different set of input ports and output ports to each strategy in a transformation. The transformation stores the strategies that you define in a single transformation object.

Use the **Dependencies** view to view the ports that each strategy uses.

You can define multiple transformation strategies in the following transformations:

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

To use multiple strategies in a Parser transformation, configure the transformation to parse tokens.

## Transformation Descriptions

The Developer tool contains common and data quality transformations. Common transformations are available in Informatica Data Quality and Informatica Data Services. Data quality transformations are available in Informatica Data Quality.

The following table describes each transformation:

| Transformation             | Type                                    | Description  |
|----------------------------|---|--|
| Address Validator          | Active or Passive/<br>Connected         | Verifies and enhances the accuracy of postal address records, and adds information that helps users to select the mail recipients and to deliver the mail. |
| Association                | Active/<br>Connected                    | Creates links between the duplicate records that a Match transformation assigns to different clusters.   |
| Aggregator                 | Active/<br>Connected                    | Performs aggregate calculations.   |
| Bad Record Exception       | Active/<br>Connected                    | Identifies records that might contain data errors, and loads the records to tables that an Analyst tool user can review and update.                        |
| Case Converter             | Passive/<br>Connected                   | Standardizes the case of strings.  |
| Classifier                 | Passive/<br>Connected                   | Writes labels that summarize the information in input port fields. Use when the fields contain significant amounts of text.                                |
| Comparison                 | Passive/<br>Connected                   | Generates numeric scores that indicate the degree of similarity between pairs of input strings.  |
| Consolidation              | Active/<br>Connected                    | Creates a consolidated record from records identified as duplicates by the Match transformation.   |
| Data Masking               | Passive/<br>Connected or<br>Unconnected | Replaces sensitive production data with realistic test data for non-production environments.   |
| Data Processor             | Active/<br>Connected                    | Processes unstructured and semi-structured file formats in a mapping.  |
| Decision                   | Passive/<br>Connected                   | Evaluates conditions in input data and creates output based on the results of those conditions.  |
| Duplicate Record Exception | Active/<br>Connected                    | Identifies records that might contain duplicate information, and loads the records to tables that an Analyst tool user can review and update.              |
| Expression                 | Passive/<br>Connected                   | Calculates a value.  |
| Filter                     | Active/<br>Connected                    | Filters data.  |

| Transformation             | Type  | Description   |
|----------------------------|---|---|
| Hierarchical to Relational | Active/<br>Connected                              | Processes hierarchical input and transforms it into relational output.  |
| Java                       | Active or Passive/<br>Connected                   | Executes user logic coded in Java. The repository stores the byte code for the user logic.  |
| Joiner                     | Active/<br>Connected                              | Joins data from different databases or flat file systems.   |
| Key Generator              | Active/<br>Connected                              | Assigns records to groups based on data values in a column that you select.   |
| Labeler                    | Passive/<br>Connected                             | Writes labels that describe the characters or strings in an input port field.   |
| Lookup                     | Active or Passive/<br>Connected or<br>Unconnected | Look up and return data from a flat file, logical data object, reference table, relational table, view, or synonym.                   |
| Match                      | Active/<br>Connected                              | Generates scores that indicate the degrees of similarity between input records.   |
| Merge                      | Passive/<br>Connected                             | Reads the data values from multiple input columns and creates a single output column.   |
| Normalizer                 | Active/<br>Connected                              | Processes source rows that contain multiple-occurring data and returns a target row for each instance of the multiple-occurring data. |
| Output                     | Passive/<br>Connected                             | Defines mapplet output rows.  |
| Parser                     | Passive/<br>Connected                             | Parses the values on an input port into separate output ports based on the types of information that the values contain.              |
| Rank                       | Active/<br>Connected                              | Limits records to a top or bottom range.  |
| Read                       | Passive/<br>Connected                             | Reads data from a source.   |
| Relational to Hierarchical | Active/<br>Connected                              | Processes relational input and transforms it into hierarchical output.  |
| REST Web Service Consumer  | Active/<br>Connected                              | Connects to a REST web service as a web service client to access or transform data  |
| Router                     | Active/<br>Connected                              | Routes data into multiple transformations based on group conditions.  |

| Transformation       | Type                            | Description   |
|----------------------|---------------------------------|---|
| Sequence Generator   | Passive/<br>Connected           | Generates a numeric sequence of values.   |
| Sorter               | Active/<br>Connected            | Sorts data based on a sort key.   |
| SQL                  | Active or Passive/<br>Connected | Executes SQL queries against a database.  |
| Standardizer         | Passive/<br>Connected           | Generates standardized versions of input strings.   |
| Union                | Active/<br>Connected            | Merges data from different databases or flat file systems.  |
| Update Strategy      | Active/<br>Connected            | Determines whether to insert, delete, update, or reject rows.   |
| Web Service Consumer | Active/<br>Connected            | Connects to a web service as a web service client to access or transform data.  |
| Weighted Average     | Passive/<br>Connected           | Reads the match scores that a Match transformation generates for the records in a data set, and calculates an average score for each pair of records. You can apply different weights to the scores that the transformation generates for each pair of records. |
| Write                | Passive/<br>Connected           | Represents a target that the mapping writes data to.  |

## Transformations in the Native and Hadoop Environments

Mappings that run in the Hadoop environment can return different results than mappings that run in the native environment.

Consider the following processing differences:

- Hadoop uses distributed processing and processes data on different nodes. Each node does not have access to the data that is being processed on other nodes. As a result, the Hadoop execution engine might not be able to determine the order in which the data originated. So, when you run a mapping in a Hadoop environment and you run the same mapping in the native environment, both mappings return correct results, but the results might not be identical.
- Each of the run-time engines in the Hadoop environment can process mapping logic differently. In the Hadoop environment, Informatica transformations might be fully supported, supported with restrictions, or not supported. Similarly, in the native environment, some Informatica transformations and transformation behavior might not be supported.

Before you validate and run a mapping in the Hadoop environment, refer to the *Big Data Management User Guide* to learn about the transformations that are supported in the Hadoop environment and the processing restrictions.

## Handling Transformation Data Types

Transformations can process data type specific functions or allow pass-through of data without processing the data. The Data Integration Service processes some data types, such as Decimal, Timestamp with Timezone, and Timestamp with Local Timezone based on transformations.

### Decimal Data Type

You can use the Decimal data type to read and write data to flat files and supported databases, such as Oracle, Microsoft SQL Server, IBM DB2, and ODBC.

For transformations that support precision up to 38 digits, the precision is 1 to 38 digits, and the scale is 0 to 38.

#### Transformations that Support Decimal Data Type

The following transformations support the Decimal data type with precision up to 38 digits and can perform calculations on the data:

- Aggregator
- Data Masking
- Expression
- Filter
- Java
- Joiner
- Lookup
- Normalizer
- Rank
- Router
- Sequence Generator
- Sorter
- Union
- Update Strategy

#### Transformations with Pass-Through Support for Decimal Data Type

Some transformations can only pass decimal data with precision up to 38 digits through the transformation. The transformation cannot perform any calculations on the data. When you use a Decimal data type with precision up to 38 digits for performing calculations on the transformations, the Data Integration Service processes the data type as Double.



The following transformations have pass-through support for Decimal data type with precision up to 38 digits:

- Data Processor
- Hierarchical to Relational
- REST Web Service Consumer Transformation
- SQL
- Web Services Consumer

### Transformations that do not Support Decimal Data Type

Some transformations do not support Decimal data type, such as Data Quality transformations.

The following applicable list of Data Quality transformations do not support Decimal data type with precision up to 38 digits:

- Address Validator
- Association
- Case Converter
- Classifier
- Comparison
- Consolidation
- Decision
- Key Generator
- Labeler
- Match
- Merge
- Parser
- Standardizer
- Weighted Average

For transformations that do not support the Decimal 38 data type, when a Decimal data type has precision greater than 28 digits, the Data Integration Service converts decimal values to double in high precision mode.

## Timestamp with Time Zone

Timestamp with Time Zone is a variant of the Timestamp data type that includes a time zone offset or a time zone region.

The following transformations support the Timestamp with Time Zone data type:

- Aggregator
- Expression
- Filter
- Java
- Joiner
- Lookup
- Normalizer

- Rank
- Router
- Sequence Generator
- Sorter
- Union
- Update Strategy

Pass-through support implies that you can pass the data through the transformations but you cannot perform any functions on the Timestamp with Time Zone data type.

The following transformations have pass-through support for the Timestamp with Time Zone data type:

- Data Masking
- Data Processor
- Hierarchical to Relational
- SQL

## Timestamp with Local Time Zone

Timestamp with Local Time Zone is implicitly supported by transformations as the functionality is equivalent to Timestamp.

# Developing a Transformation

When you build a mapping, you add transformations and configure them to handle data according to a business purpose.

Complete the following tasks to develop a transformation and incorporate it into a mapping:

1. Add a non-reusable transformation to a mapping or maplet. Or, create a reusable transformation that you can add to multiple mappings or maplets.
2. Configure the transformation. Each type of transformation has a unique set of options that you can configure.
3. If the transformation is reusable, add it to the mapping or maplet.
4. Link the transformation to other objects in the mapping or maplet.

You drag ports from upstream objects to the transformation input ports. You drag output ports from the transformation to ports on downstream objects. Some transformations use predefined ports that you can select.

**Note:** If you create a reusable transformation, you add the input and output ports you need before you link the transformation to other objects. You cannot add ports to the transformation instance on the maplet or mapping canvas. To update the ports on a reusable transformation, open the transformation object from the repository project and add the ports.

# Multi-Group Transformations

A transformation can have multiple input and output groups. A group is a set of ports that define a row of incoming or outgoing data.

A group is analogous to a table in a relational source or target definition. Most transformations have one input and one output group. However, some have multiple input groups, multiple output groups, or both. A group is the representation of a row of data entering or leaving a transformation.

All multi-group transformations are active transformations. You cannot connect multiple active transformations or an active and a passive transformation to the same downstream transformation or transformation input group.

Some multiple input group transformations require the Integration Service to block data at an input group while the Integration Service waits for a row from a different input group. A blocking transformation is a multiple input group transformation that blocks incoming data. The following transformations are blocking transformations:

- Custom transformation with the Inputs May Block property enabled
- Joiner transformation configured for unsorted input

When you save or validate a mapping, some mappings that contain active or blocking transformations might not be valid.

## Rules and Guidelines for Multi-Group Transformations

When you connect transformations in a mapping, you must consider some rules and guidelines for connecting multi-group transformations.

Consider the following rules and guidelines for multi-group transformations:

- You can connect one group to one transformation or target.
- You can connect one or more output ports in a group to multiple transformations or targets.
- You cannot connect fields from multiple output groups in a transformation to the same input group of another transformation.
- You cannot connect fields from multiple output groups in different transformations to the same input group of another transformation unless each transformation between the source and the transformation are passive transformations.
- You cannot connect fields from multiple output groups in a transformation to the same input group of another transformation, unless the other transformation is a blocking transformation.
- You cannot connect an output field to multiple input fields in the same input group, unless the group is in a Normalizer transformation.

## Expressions in Transformations

You can enter expressions in the **Expression Editor** in some transformations. Expressions modify data or test whether data matches conditions.

Create expressions that use transformation language functions. Transformation language functions are SQL-like functions that transform data.

Enter an expression in a port that uses the value of data from an input or input/output port. For example, you have a transformation with an input port IN\_SALARY that contains the salaries of all the employees. You might use the values from the IN\_SALARY column later in the mapping. You might also use the transformation to calculate the total and average salaries. The Developer tool requires you to create a separate output port for each calculated value.

The following table lists the transformations in which you can enter expressions:

| Transformation  | Expression   | Return Value   |
|-----------------|--|--|
| Aggregator      | Performs an aggregate calculation based on all data passed through the transformation. Alternatively, you can specify a filter for records in the aggregate calculation to exclude certain kinds of records. For example, you can find the total number and average salary of all employees in a branch office using this transformation.  | Result of an aggregate calculation for a port.   |
| Expression      | Performs a calculation based on values within a single row. For example, based on the price and quantity of a particular item, you can calculate the total purchase price for that line item in an order.  | Result of a row-level calculation for a port.  |
| Filter          | Specifies a condition used to filter rows passed through this transformation. For example, if you want to write customer data to the BAD_DEBT table for customers with outstanding balances, you could use the Filter transformation to filter customer data.  | TRUE or FALSE, based on whether a row meets the specified condition. The Data Integration Service passes rows that return TRUE through this transformation. The transformation applies this value to each row that passes through it.                |
| Joiner          | Specifies an advanced condition used to join unsorted source data. For example, you can concatenate first name and last name master ports and then match them with the full name detail port.  | TRUE or FALSE, based on whether the row meets the specified condition. Depending on the type of join selected, the Data Integration Service either adds the row to the result set or discards the row.   |
| Rank            | Sets the conditions for rows included in a rank. For example, you can rank the top 10 salespeople who are employed with the organization.  | Result of a condition or calculation for a port.   |
| Router          | Routes data into multiple transformations based on a group expression. For example, use this transformation to compare the salaries of employees at three different pay levels. You can do this by creating three groups in the Router transformation. For example, create one group expression for each salary range.   | TRUE or FALSE, based on whether a row meets the specified group expression. The Data Integration Service passes rows that return TRUE through each user-defined group in this transformation. Rows that return FALSE pass through the default group. |
| Update Strategy | Flags a row for update, insert, delete, or reject. You use this transformation when you want to control updates to a target, based on some condition you apply. For example, you might use the Update Strategy transformation to flag all customer rows for update when the mailing address has changed. Or, you might flag all employee rows for reject for people who no longer work for the organization. | Numeric code for update, insert, delete, or reject. The transformation applies this value to each row passed through it.   |

## The Expression Editor

Use the **Expression Editor** to build SQL-like statements.

You can enter an expression manually or use the point-and-click method. Select functions, ports, variables, and operators from the point-and-click interface to minimize errors when you build expressions. The maximum number of characters you can include in an expression is 32,767.

## Port Names in an Expression

You can enter transformation port names in an expression.

For connected transformations, if you use port names in an expression, the Developer tool updates that expression when you change port names in the transformation. For example, you write an expression that determines the difference between two dates, Date\_Promised and Date\_Delivered. If you change the Date\_Promised port name to Due\_Date, the Developer tool changes the Date\_Promised port name to Due\_Date in the expression.

**Note:** You can propagate the name Due\_Date to other non-reusable transformations that depend on this port in the mapping.

## Adding an Expression to a Port

You can add an expression to an output port.

1. In the transformation, select the port and open the **Expression Editor**.
2. Enter the expression. Use the Functions and Ports tabs and the operator keys.  
**Note:** You cannot use an escape character in an expression. If you include an escape character in the expression, the Developer tool might display a parse error.
3. Optionally, add comments to the expression.  
Use comment indicators -- or //.
4. Click the Validate button to validate the expression.
5. Click **OK**.
6. If the expression is not valid, fix the validation errors and validate the expression again.
7. When the expression is valid, click **OK** to close the **Expression Editor**.

## Comments in an Expression

You can add comments to an expression to describe the expression or to specify a valid URL to access business documentation about the expression.

To add comments within the expression, use -- or // comment indicators.

## Expression Validation

You need to validate an expression to run a mapping or preview mapplet output.

Use the Validate button in the **Expression Editor** to validate an expression. If you do not validate an expression, the Developer tool validates it when you close the **Expression Editor**. If the expression is invalid, the Developer tool displays a warning. You can save the invalid expression or modify it.

## Test Expressions

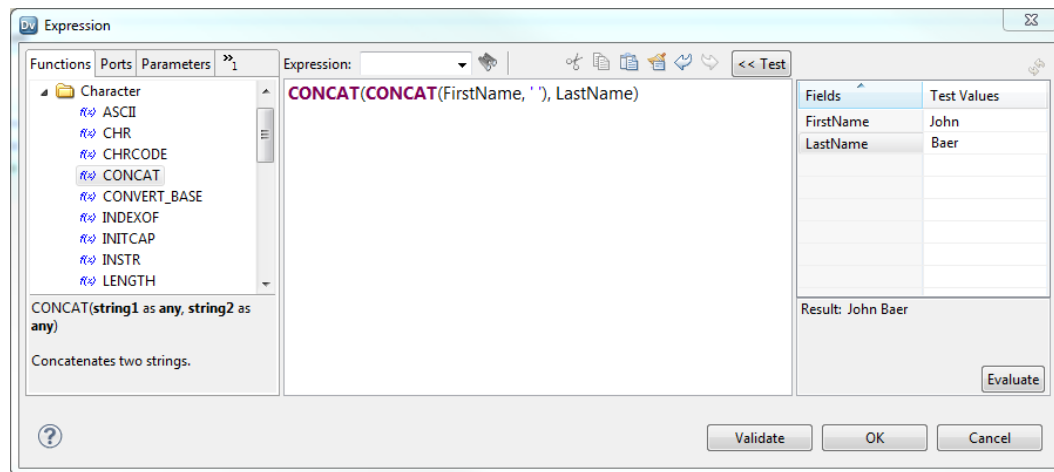
You can test some expressions that you configure in the Expression Editor. When you test an expression, you enter sample data and then evaluate the expression.

You can test expressions when you configure expressions in the following ways:

- In an output or variable port in the Expression transformation
- In the Mapping Outputs view of an Expression transformation after adding the transformation to a mapping

For example, after configuring an expression that concatenates the first name, a space, and the last name, you can enter sample data for the ports, and then evaluate the expression to verify the result.

The following image shows the results of an expression that concatenates a sample first name and last name:



## Date Format Strings for Sample Data

When you test an expression that uses a port with the Date/Time or Timestamp with Time Zone data type, you must enter sample data for the port using the required date format string.

To enter sample data for a port with the Date/Time data type, use the format MM/DD/YYYY HH24:MI:SS. When you evaluate the expression, the Expression Editor displays the result using the format that you specify in the expression. If you omit the format string in the expression, the Expression Editor displays the result using the same format MM/DD/YYYY HH24:MI:SS.

To enter sample data for a port with the Timestamp with Time Zone data type, use the format MM/DD/YYYY HH24:MI:SS TZR. When you evaluate the expression, the Expression Editor displays the result using the format YYYY-MM-DD HH24:MI:SS.NS TZR.

## Data Type Conversion

Multiple expression and aggregation functions might generate data of a data type that is different from the input data.

For example, when you multiply two decimal numbers with a precision of 18 digits, the resulting data type could be a decimal with a precision of 28 digits.

For input data type of Decimal with a precision of 38 digits, the result of certain operations might produce data that may not fit into resultant data type. So the user might get an overflow exception.

The following functions might require a data type conversion to accommodate an increase in the size of the data when compared to the input data types:

- avg
- cume
- divide
- median
- movingavg
- movingsum
- multiply
- Percentile
- Sum

For example, when the input data is of the Integer data type and you use multiplication operation, the resulting data type could be of the bigint data type. Similarly, when the input data type is of the Decimal data type of precision as 18 digits, the result of the multiplication operation might be large and within Decimal data type of the precision as 28 digits.

## Local Variables

Use local variables in Aggregator, Expression, and Rank transformations to improve performance. You can reference variables in an expression or use them to temporarily store data.

You might use variables to complete the following tasks:

- Temporarily store data.
- Simplify complex expressions.
- Store values from prior rows.
- Capture multiple return values from a stored procedure.
- Compare values.
- Store the results of an unconnected Lookup transformation.

## Temporarily Store Data and Simplify Complex Expressions

Variables increase performance when you enter multiple related expressions in the same transformation. You can define components as variables instead of parsing and validating the same expression components multiple times in the transformation.

For example, if an Aggregator transformation uses the same filter condition before calculating sums and averages, you can define this condition as a variable, and then reuse the condition in both aggregate calculations.

You can simplify complex expressions. If an Aggregator includes the same calculation in multiple expressions, you can increase performance by creating a variable to store the results of the calculation.

For example, you might create the following expressions to find both the average salary and the total salary with the same data:

```
AVG( SALARY, ( ( JOB_STATUS = 'Full-time' ) AND (OFFICE_ID = 1000 ) ) )  
SUM( SALARY, ( ( JOB_STATUS = 'Full-time' ) AND (OFFICE_ID = 1000 ) ) )
```

Instead of entering the same arguments for both calculations, you might create a variable port for each condition in this calculation, and then change the expression to use the variables.

The following table shows how to use variables to simplify complex expressions and temporarily store data:

| Port         | Value   |
|--------------|---|
| V_CONDITION1 | JOB_STATUS = 'Full-time'                      |
| V_CONDITION2 | OFFICE_ID = 1000                              |
| AVG_SALARY   | AVG(SALARY, (V_CONDITION1 AND V_CONDITION2) ) |
| SUM_SALARY   | SUM(SALARY, (V_CONDITION1 AND V_CONDITION2) ) |

## Store Values Across Rows

You can configure variables in transformations to store data from source rows. You can use the variables in transformation expressions.

For example, a source file contains the following rows:

```
California
California
California
Hawaii
Hawaii
New Mexico
New Mexico
New Mexico
```

Each row contains a state. You need to count the number of rows and return the row count for each state:

```
California,3
Hawaii      ,2
New Mexico,3
```

You can configure an Aggregator transformation to group the source rows by state and count the number of rows in each group. Configure a variable in the Aggregator transformation to store the row count. Define another variable to store the state name from the previous row.

The Aggregator transformation has the following ports:

| Port        | Port Type    | Expression                                      | Description  |
|-------------|--------------|---|--|
| State       | Pass-through | n/a   | The name of a state. The source rows are grouped by the state name. The Aggregator transformation returns one row for each state.  |
| State_Count | Variable     | IIF (PREVIOUS_STATE = STATE, STATE_COUNT +1, 1) | The row count for the current State. When the value of the current State column is the same as the Previous_State column, the Integration Service increments State_Count. Otherwise, it resets the State_Count to 1. |



| Port           | Port Type | Expression  | Description  |
|----------------|-----------|-------------|--|
| Previous_State | Variable  | State       | The value of the State column in the previous row. When the Integration Service processes a row, it moves the State value to Previous_State. |
| State_Counter  | Output    | State_Count | The number of rows the Aggregator transformation processed for a state. The Integration Service returns State_Counter once for each state.   |

## Capture Values from Stored Procedures

Variables provide a way to capture multiple columns of return values from stored procedures.

## Guidelines for Configuring Variable Ports

Consider the following factors when you configure variable ports in a transformation:

- **Port order.** The Integration Service evaluates ports by dependency. The order of the ports in a transformation must match the order of evaluation: input ports, variable ports, output ports.
- **Datatype.** The datatype you choose reflects the return value of the expression you enter.
- **Variable initialization.** The Integration Service sets initial values in variable ports, where you can create counters.

### Port Order

The Integration Service evaluates the input ports first. The Integration Service evaluates the variable ports next, and the output ports last.

The Integration Service evaluates ports in the following order:

1. **Input ports.** The Integration Service evaluates all input ports first since they do not depend on any other ports. Therefore, you can create input ports in any order. The Integration Service does not order input ports because input ports do not reference other ports.
2. **Variable ports.** Variable ports can reference input ports and variable ports, but not output ports. Because variable ports can reference input ports, the Integration Service evaluates variable ports after input ports. Variables can reference other variables, so the display order for variable ports is the same as the order in which the Integration Service evaluates each variable.

For example, if you calculate the original value of a building and then adjust for depreciation, you might create the original value calculation as a variable port. This variable port needs to appear before the port that adjusts for depreciation.

3. **Output ports.** The Integration Service evaluates output ports last, because output ports can reference input ports and variable ports. The display order for output ports does not matter because output ports cannot reference other output ports. Be sure output ports display at the bottom of the list of ports.

### Data Type

When you configure a port as a variable, you can enter any expression or condition in it. The data type you choose for this port reflects the return value of the expression you enter. If you specify a condition through the variable port, any numeric data type returns the values for TRUE (non-zero) and FALSE (zero).

## Variable Initialization

The Integration Service does not set the initial value for variables to NULL.

The Integration Service uses the following guidelines to set initial values for variables:

- Zero for numeric ports
- Empty strings for string ports
- 01/01/0001 for Date/Time ports

Therefore, use variables as counters, which need an initial value. For example, you can create a numeric variable with the following expression:

```
VAR1 + 1
```

This expression counts the number of rows in the VAR1 port. If the initial value of the variable were set to NULL, the expression would always evaluate to NULL. This is why the initial value is set to zero.

## Default Values for Ports

All transformations use default values that determine how the Integration Service handles input null values and output transformation errors.

Input, output, and input/output ports have a system default value that you can sometimes override with a user-defined default value. Default values have different functions in different types of ports:

- **Input port.** The system default value for null input ports is NULL. The default value appears as a blank in the transformation. If an input value is NULL, the Integration Service leaves it as NULL.
- **Output port.** The system default value for output transformation errors is ERROR. The default value appears in the transformation as ERROR('transformation error'). If a transformation error occurs, the Integration Service skips the row. The Integration Service notes all input rows that the ERROR function skips in the log file.

The following errors are transformation errors:

- Data conversion errors, such as passing a number to a date function.
- Expression evaluation errors, such as dividing by zero.
- Calls to an ERROR function.
- **Pass-through port.** The system default value for null input is the same as input ports, NULL. The system default value appears as a blank in the transformation. The default value for output transformation errors is the same as output ports. The default value for output transformation errors does not display in the transformation.

**Note:** The Java Transformation converts PowerCenter® datatypes to Java datatypes, based on the Java Transformation port type. Default values for null input differ based on the Java datatype.

The following table shows the system default values for ports in connected transformations:

| Port Type            | Default Value | Integration Service Behavior  | User-Defined Default Value Supported |
|----------------------|---------------|---|--------------------------------------|
| Input, Pass-through  | NULL          | Integration Service passes all input null values as NULL.   | Input, Input/Output                  |
| Output, Pass-through | ERROR         | Integration Service calls the ERROR function for output port transformation errors. The Integration Service skips rows with errors and writes the input data and the error message in the log file. | Output                               |

Variable ports do not support default values. The Integration Service initializes variable ports according to the datatype.

You can override some of the default values to change the Integration Service behavior when it encounters null input values and output transformation errors.

## User-Defined Default Values

You can override the system default values with user-defined default values for supported input, pass-through, and output ports within a connected transformation.

Use the following rules and guidelines to override the system default values for ports:

- **Input ports.** You can enter user-defined default values for input ports if you do not want the Integration Service to treat null values as NULL.
- **Output ports.** You can enter user-defined default values for output ports if you do not want the Integration Service to skip the row or if you want the Integration Service to write a specific message with the skipped row to the log.
- **Pass-through ports.** You can enter user-defined default values for pass-through ports if you do not want the Integration Service to treat null values as NULL. You cannot enter user-defined default values for output transformation errors in an pass-through port.

**Note:** The Integration Service ignores user-defined default values for unconnected transformations. For example, if you call a Lookup or Stored Procedure transformation through an expression, the Integration Service ignores any user-defined default value and it applies the system default value.

Use the following options to enter user-defined default values:

- **Constant value.** Use any constant (numeric or text), including NULL.
- **Constant expression.** You can include a transformation function with constant parameters.
- **ERROR.** Generate a transformation error. Write the row and a message in the mapping log or row error log.
- **ABORT.** Abort the mapping.

## Constant Values

You can enter any constant value as a default value. The constant value must match the port datatype.

For example, a default value for a numeric port must be a numeric constant. Some constant values include:

```
0
9999
NULL
'Unknown Value'
'Null input data'
```

## Constant Expressions

A constant expression is any expression that uses transformation functions (except aggregate functions) to write constant expressions. You cannot use values from input, input/output, or variable ports in a constant expression.

Some valid constant expressions include:

```
500 * 1.75
TO_DATE('January 1, 1998, 12:05 AM', 'MONTH DD, YYYY, HH:MI AM')
ERROR ('Null not allowed')
ABORT ('Null not allowed')
SESSSTARTTIME
```

You cannot use values from ports within the expression because the Integration Service assigns default values for the entire mapping when it initializes the mapping.

The following examples are not valid because they use values from ports:

```
AVG(IN_SALARY)
IN_PRICE * IN_QUANTITY
:LKP(LKP_DATES, DATE_SHIPPED)
```

**Note:** You cannot call a stored procedure or lookup table from a default value expression.

## ERROR and ABORT Functions

Use the ERROR and ABORT functions for input and output port default values, and input values for input/output ports. The Integration Service skips the row when it encounters the ERROR function. It aborts the mapping when it encounters the ABORT function.

## User-Defined Default Input Values

You can enter a user-defined default input value if you do not want the Integration Service to treat null values as NULL.

To override null values, complete one of the following tasks:

- Replace the null value with a constant value or constant expression.
- Skip the null value with an ERROR function.
- Abort the mapping with the ABORT function.

The following table summarizes how the Integration Service handles null input for input and input/output ports:

| Default Value                   | Default Value Type | Description  |
|---------------------------------|--------------------|--|
| NULL (displays blank)           | System             | Integration Service passes NULL.   |
| Constant or Constant expression | User-Defined       | Integration Service replaces the null value with the value of the constant or constant expression. |

| Default Value | Default Value Type | Description  |
|---------------|--------------------|--|
| ERROR         | User-Defined       | Integration Service treats this as a transformation error: <ul style="list-style-type: none"> <li>- Increases the transformation error count by 1.</li> <li>- Skips the row, and writes the error message to the log file or row error log.</li> </ul> The Integration Service does not write rows to the reject file. |
| ABORT         | User-Defined       | The mapping aborts when the Integration Service encounters a null input value. The Integration Service does not increase the error count or write rows to the reject file.   |

## Replace Null Values

Use a constant value or expression to substitute a specified value for null values in a port.

For example, if an input string port is called DEPT\_NAME and you want to replace null values with the string 'UNKNOWN DEPT', you could set the default value to 'UNKNOWN DEPT'. Depending on the transformation, the Integration Service passes 'UNKNOWN DEPT' to an expression or variable within the transformation or to the next transformation in the data flow.

For example, the Integration Service replaces all null values in a port with the string 'UNKNOWN DEPT.'

| DEPT_NAME  | REPLACED VALUE |
|------------|----------------|
| Housewares | Housewares     |
| NULL       | UNKNOWN DEPT   |
| Produce    | Produce        |

## Skip Null Records

Use the ERROR function as the default value when you do not want null values to pass into a transformation. For example, you might want to skip a row when the input value of DEPT\_NAME is NULL. You could use the following expression as the default value:

```
ERROR('Error. DEPT is NULL')
```

When you use the ERROR function as a default value, the Integration Service skips the row with the null value. The Integration Service writes all rows skipped by the ERROR function into the log file. It does not write these rows to the reject file.

| DEPT_NAME  | RETURN VALUE                           |
|------------|--|
| Housewares | Housewares                             |
| NULL       | 'Error. DEPT is NULL' (Row is skipped) |
| Produce    | Produce                                |

The following log shows where the Integration Service skips the row with the null value:

```
TE_11019 Port [DEPT_NAME]: Default value is: ERROR(<<Transformation Error>> [error]:
Error. DEPT is NULL
... error('Error. DEPT is NULL')
).
CMN_1053 EXPTRANS: : ERROR: NULL input column DEPT_NAME: Current Input data:
CMN_1053 Input row from SRCTRANS: Rowdata: ( RowType=4 Src Rowid=2 Targ Rowid=2
DEPT_ID (DEPT_ID:Int): "2"
DEPT_NAME (DEPT_NAME:Char.25): "NULL"
MANAGER_ID (MANAGER_ID:Int): "1"
)
```

## Abort the Mapping

Use the ABORT function to abort a mapping when the Integration Service encounters null input values.

## Default Value Validation

The Developer tool validates default values as you enter them.

The Developer tool validates default values when you save a mapping. If you enter a default value that is not valid, the Developer tool marks the mapping as not valid.

## User-Defined Default Output Values

You can create user-defined default values to override the system default values for output ports.

You can enter user-defined default values for output ports if you do not want the Integration Service to skip rows with errors or if you want the Integration Service to write a specific message with the skipped row to the log. You can enter default values to complete the following functions when the Integration Service encounters output transformation errors:

- Replace the error with a constant value or constant expression. The Integration Service does not skip the row.
- Abort the mapping with the ABORT function.
- Write specific messages in the log for transformation errors.

You cannot enter user-defined default output values for input/output ports.

The following table summarizes how the Integration Service handles output port transformation errors and default values in transformations:

| Default Value                   | Default Value Type | Description  |
|---------------------------------|--------------------|--|
| Transformation Error            | System             | When a transformation error occurs and you did not override the default value, the Integration Service performs the following tasks: <ul style="list-style-type: none"><li>- Increases the transformation error count by 1.</li><li>- Skips the row, and writes the error and input row to the session log file or row error log, depending on session configuration.</li></ul> The Integration Service does not write the row to the reject file. |
| Constant or Constant Expression | User-Defined       | Integration Service replaces the error with the default value. The Integration Service does not increase the error count or write a message to the log.  |
| ABORT                           | User-Defined       | Mapping aborts and the Integration Service writes a message to the log. The Integration Service does not increase the error count or write rows to the reject file.  |

## Replace Errors

If you do not want the Integration Service to skip a row when a transformation error occurs, use a constant or constant expression as the default value for an output port.

For example, if you have a numeric output port called NET\_SALARY and you want to use the constant value '9999' when a transformation error occurs, assign the default value 9999 to the NET\_SALARY port. If there is any transformation error (such as dividing by zero) while computing the value of NET\_SALARY, the Integration Service uses the default value 9999.

## Abort the Mapping

Use the ABORT function to abort a session when the Integration Service encounters null input values.

## Write Messages in the Mapping Log

You can configure a user-defined default value in an output port if you want the Integration Service to write a specific message in the mapping log for a skipped row. The system default is ERROR ('transformation error'), and the Integration Service writes the message 'transformation error' in the log along with the skipped row. You can replace 'transformation error' if you want to write a different message.

## ERROR Functions in Output Port Expressions

If you enter an expression that uses the ERROR function, the user-defined default value for the output port might override the ERROR function in the expression.

For example, you enter the following expression that instructs the Integration Service to use the value 'Negative Sale' when it encounters an error:

```
IIF( TOTAL_SALES>0, TOTAL_SALES, ERROR ('Negative Sale'))
```

The following examples show how user-defined default values may override the ERROR function in the expression:

- **Constant value or expression.** The constant value or expression overrides the ERROR function in the output port expression.  
  
For example, if you enter '0' as the default value, the Integration Service overrides the ERROR function in the output port expression. It passes the value 0 when it encounters an error. It does not skip the row or write 'Negative Sale' in the log.
- **ABORT.** The ABORT function overrides the ERROR function in the output port expression.  
  
If you use the ABORT function as the default value, the Integration Service aborts the when a transformation error occurs. The ABORT function overrides the ERROR function in the output port expression.
- **ERROR.** If you use the ERROR function as the default value, the Integration Service includes the following information in the log:
  - Error message from the default value
  - Error message indicated in the ERROR function in the output port expression
  - Skipped row

For example, you can override the default value with the following ERROR function:

```
ERROR('No default value')
```

The Integration Service skips the row, and includes both error messages in the log.

```
TE_7007 Transformation Evaluation Error; current row skipped...
TE_7007 [<<Transformation Error>> [error]: Negative Sale
... error('Negative Sale')
]
Sun Sep 20 13:57:28 1998
TE_11019 Port [OUT_SALES]: Default value is: ERROR(<<Transformation Error>> [error]:
No default value
... error('No default value')
```

## General Rules for Default Values

Use the following rules and guidelines when you create default values:

- The default value must be either a NULL, a constant value, a constant expression, an ERROR function, or an ABORT function.
- For input/output ports, the Integration Service uses default values to handle null input values. The output default value of input/output ports is always ERROR('Transformation Error').
- Variable ports do not use default values.
- You can assign default values to group by ports in the Aggregator and Rank transformations.
- Not all port types in all transformations allow user-defined default values. If a port does not allow user-defined default values, the default value field is disabled.
- Not all transformations allow user-defined default values.
- If a transformation is not connected to the mapping data flow, the Integration Service ignores user-defined default values.
- If any input port is unconnected, its value is assumed to be NULL and the Integration Service uses the default value for that input port.
- If an input port default value contains the ABORT function and the input value is NULL, the Integration Service immediately stops the mapping. Use the ABORT function as a default value to restrict null input values. The first null value in an input port stops the mapping.
- If an output port default value contains the ABORT function and any transformation error occurs for that port, the mapping immediately stops. Use the ABORT function as a default value to enforce strict rules for transformation errors. The first transformation error for this port stops the mapping.
- The ABORT function, constant values, and constant expressions override ERROR functions configured in output port expressions.

## Default Value Validation

The Developer tool validates default values as you enter them.

The Developer tool validates default values when you save a mapping. If you enter a default value that is not valid, the Developer tool marks the mapping as not valid.

## Tracing Levels

When you configure a transformation, you can set the amount of detail that the Data Integration Service writes in the log.

By default, the tracing level for every transformation is Normal. Change the tracing level to a Verbose setting when you need to troubleshoot a transformation that is not behaving as expected. Set the tracing level to Terse when you want the minimum amount of detail to appear in the log.

Configure the following property on the Advanced tab:

### **Tracing Level**

Amount of detail that appears in the log for a transformation.



The following table describes the tracing levels:

| Tracing Level          | Description   |
|------------------------|---|
| Terse                  | Logs initialization information and error messages and notification of rejected data.   |
| Normal                 | Logs initialization and status information, errors encountered, and skipped rows due to transformation row errors. Summarizes mapping results, but not at the level of individual rows.<br>Default is normal.   |
| Verbose Initialization | In addition to normal tracing, logs additional initialization details, names of index and data files used, and detailed transformation statistics.  |
| Verbose Data           | In addition to verbose initialization tracing, logs each row that passes into the mapping. Also notes where string data was truncated to fit the precision of a column and provides detailed transformation statistics.<br>When you configure this tracing level, row data for all rows in a block are written to the log when a transformation is processed. |

## Reusable Transformations

Reusable transformations are transformations that you can use in multiple mappings or mapplets.

For example, you might create an Expression transformation that calculates value-added tax for sales in Canada to analyze the cost of doing business in that country. Rather than perform the same work every time, you can create a reusable transformation. When you need to incorporate this transformation into a mapping, you add an instance of it to the mapping. If you change the definition of the transformation, all instances of it inherit the changes.

The Developer tool stores each reusable transformation as metadata separate from any mapping or mapplet that uses the transformation. It stores reusable transformations in a project or folder.

When you add instances of a reusable transformation to mappings, changes you make to the transformation might invalidate the mapping or generate unexpected data.

## Reusable Transformation Instances and Inherited Changes

When you add a reusable transformation to a mapping or mapplet, you add an instance of the transformation. The definition of the transformation still exists outside the mapping or mapplet, while an instance of the transformation appears within the mapping or mapplet.

When you change the transformation, instances of the transformation reflect these changes. Instead of updating the same transformation in every mapping that uses it, you can update the reusable transformation one time, and all instances of the transformation inherit the change. Instances inherit changes to ports, expressions, properties, and the name of the transformation.

## Editing a Reusable Transformation

When you edit a reusable transformation, all instances of that transformation inherit the changes. Some changes might invalidate the mappings that use the reusable transformation.

You can open the transformation in the editor to edit a reusable transformation. You cannot edit an instance of the transformation in a mapping. However, you can edit the transformation runtime properties.

If you make any of the following changes to a reusable transformation, mappings that use instances of it might not be valid:

- When you delete one or more ports in a transformation, you disconnect the instance from part or all of the data flow through the mapping.
- When you change a port datatype, you make it impossible to map data from that port to another port that uses an incompatible datatype.
- When you change a port name, expressions that refer to the port are no longer valid.
- When you enter an expression that is not valid in the reusable transformation, mappings that use the transformation are no longer valid. The Data Integration Service cannot run mappings that are not valid.

## Editor Views for a Reusable Transformation

You define properties and create Java code for a reusable Java transformation in views in the editor.

For reusable transformations, the following views are available:

### Overview

Enter the name and description of the transformation, and create and configure input and output ports.

### Advanced

Set advanced properties for the transformation.

## Non-Reusable Transformations

A non-reusable transformation is a transformation that you create in a specific mapping. You cannot use the transformation in any other mapping.

For example, you might create a mapping that contains multiple transformations. Each transformation performs calculations on the source data. You create a non-reusable Aggregator transformation at the end of the mapping to process the results. When you create a non-reusable transformation, you can drag the ports from one transformation to another transformation in the mapping and create the input ports.

The Developer tool stores the non-reusable Aggregator transformation as metadata that it keeps with the mapping.

## Editor Views for a Non-Reusable Transformation

Define properties for a non-reusable transformation in the editor views.

The following views appear for non-reusable transformations:

### General

Enter the name and description of the transformation.

### Ports

Create and configure input and output ports.

### Advanced

Set advanced properties for the transformation.

## Creating a Transformation

You can create a reusable transformation to reuse in multiple mappings or mapplets. Or, you can create a non-reusable transformation to use one time in a mapping or mapplet.

To create a reusable transformation, click **File > New > Transformation** and complete the wizard.

To create a non-reusable transformation in a mapping or mapplet, select a transformation from the Transformation palette and drag the transformation to the editor.

Certain transformations require you to choose a mode or perform additional configuration when you create the transformation. For example, when you create a Lookup transformation, you must choose a data object to use as a lookup source.

After you create a transformation, it appears in the editor. Some transformations contain predefined ports and groups. Other transformations are empty.

## CHAPTER 2

# Transformation Ports

This chapter includes the following topics:

- [Transformation Ports Overview, 56](#)
- [Create Ports, 56](#)
- [Configure Ports, 57](#)
- [Linking Ports, 57](#)
- [Propagating Port Attributes, 60](#)
- [Copying Ports from Excel, 63](#)

## Transformation Ports Overview

Transformation ports are the individual columns of data that you connect in a mapping or mapplet. Transformations receive the data from input ports and send the data out using output ports. Input/output ports receive data and pass it unchanged.

Every input object, output object, mapplet, and transformation contains a collection of ports. Input objects provide data, so they contain only output ports. Output objects receive data, so they contain only input ports. Mapplets contain only input ports and output ports. Transformations contain a combination of input, output, and input/output ports, depending on the transformation and its application.

A dynamic port can receive one or more columns from an upstream transformation. Dynamic ports can receive new or changed columns based on the data flow.

After you create a transformation in a mapping, create the ports and define the port properties. Complete the mapping by linking it to targets and other transformations through the ports. Propagate port attributes to pass changed attributes to a port throughout a mapping.

## Create Ports

When you create some transformations, you do not have to create all of the ports manually. For example, you might create a Lookup transformation and reference a lookup table. If you view the transformation ports, you can see that the transformation has an output port for each column in the table that you referenced. You do not need to define those ports.

Create a port in the following ways:

- **Drag a port from another transformation.** When you drag a port from another transformation the Designer creates a port with the same properties, and it links the two ports.
- **Click the Add button on the Ports tab.** The Designer creates an empty port you can configure.

## Configure Ports

When you define the transformation ports, you define port properties. Port properties include the port name, the data type, the port type, and the default value.

Configure the following port properties:

- **Port name.** The name of the port. Use the following conventions while naming ports:
  - Begin with a single- or double-byte letter or single- or double-byte underscore (\_).
  - Port names can contain any of the following single- or double-byte characters: a letter, number, underscore (\_), \$, #, or @.
- **Datatype, precision, and scale.** If you plan to enter an expression or condition, verify that the datatype matches the return value of the expression.
- **Port type.** Transformations can contain a combination of input, output, input/output, and variable port types.
- **Default value.** Assign a default value for a port that contains null values or an output transformation error. You can override the default value in some ports.
- **Description.** A description of the port.
- **Other properties.** Some transformations have properties specific to that transformation, such as expressions or group by properties.

## Linking Ports

After you add and configure input, output, transformation, and mapplet objects in a mapping, complete the mapping by linking ports between mapping objects.

The Developer tool creates the connection only when the connection meets link validation and concatenation requirements.

You can leave ports unconnected. The Data Integration Service ignores unconnected ports.

When you link ports between input objects, transformations, mapplets, and output objects, you can create the following types of link:

- One to one
- One to many

You can manually link ports or link ports automatically.

## One to One Links

Link one port in an input object or transformation to one port in an output object or transformation.

## One to Many Links

When you want to use the same data for different purposes, you can link the port providing that data to multiple ports in the mapping.

You can create a one to many link in the following ways:

- Link one port to multiple transformations or output objects.
- Link multiple ports in one transformation to multiple transformations or output objects.

For example, you want to use salary information to calculate the average salary in a bank branch through the Aggregator transformation. You can use the same information in an Expression transformation configured to calculate the monthly pay of each employee.

## Manually Linking Ports

You can manually link one port or multiple ports.

Drag a port from an input object or transformation to the port of an output object or transformation.

Use the Ctrl or Shift key to select multiple ports to link to another transformation or output object. The Developer tool links the ports, beginning with the top pair. It links all ports that meet the validation requirements.

When you drag a port into an empty port, the Developer tool copies the port and creates a link.

## Automatically Linking Ports

When you link ports automatically, you can link by position or by name.

When you link ports automatically by name, you can specify a prefix or suffix by which to link the ports. Use prefixes or suffixes to indicate where ports occur in a mapping.

### Linking Ports by Name

When you link ports by name, the Developer tool adds links between input and output ports that have the same name. Link by name when you use the same port names across transformations.

You can link ports based on prefixes and suffixes that you define. Use prefixes or suffixes to indicate where ports occur in a mapping. Link by name and prefix or suffix when you use prefixes or suffixes in port names to distinguish where they occur in the mapping or mapplet.

Linking by name is not case sensitive.

1. Click **Mapping > Auto Link**.  
The **Auto Link** dialog box appears.
2. Select an object in the **From** window to link from.
3. Select an object in the **To** window to link to.
4. Select **Name**.
5. Optionally, click **Show Advanced** to link ports based on prefixes or suffixes.

6. Click **OK**.

## Linking Ports by Position

When you link by position, the Developer tool links each output port to the corresponding input port. For example, the first output port is linked to the first input port, the second output port to the second input port. Link by position when you create transformations with related ports in the same order.

1. Click **Mapping > Auto Link**.

The **Auto Link** dialog box appears.

2. Select an object in the **From** window to link from.
3. Select an object in the **To** window to link to.
4. Select **Position** and click **OK**.

The Developer tool links each output port to the corresponding input port. For example, the first output port is linked to the first input port, the second output port to the second input port.

## Rules and Guidelines for Linking Ports

Certain rules and guidelines apply when you link ports.

Consider the following rules and guidelines when you connect mapping objects:

- If the Developer tool detects an error when you try to link ports between two mapping objects, it displays a symbol indicating that you cannot link the ports.
- Follow the logic of data flow in the mapping. You can link the following types of port:
  - The receiving port must be an input or input/output port.
  - The originating port must be an output or input/output port.
  - You cannot link input ports to input ports or output ports to output ports.
- You must link at least one port of an input group to an upstream transformation.
- You must link at least one port of an output group to a downstream transformation.
- You can link ports from one active transformation or one output group of an active transformation to an input group of another transformation.
- You cannot connect an active transformation and a passive transformation to the same downstream transformation or transformation input group.
- You cannot connect more than one active transformation to the same downstream transformation or transformation input group.
- You can connect any number of passive transformations to the same downstream transformation, transformation input group, or target.
- You can link ports from two output groups in the same transformation to one Joiner transformation configured for sorted data if the data from both output groups is sorted.
- You can only link ports with compatible datatypes. The Developer tool verifies that it can map between the two datatypes before linking them. The Data Integration Service cannot transform data between ports with incompatible datatypes.
- The Developer tool marks some mappings as not valid if the mapping violates data flow validation.

# Propagating Port Attributes

Propagate port attributes to pass changed attributes to a port throughout a mapping.

1. In the editor, select a port in a transformation.
2. Click **Mapping > Propagate Attributes**.  
The **Propagate Attributes** dialog box appears.
3. Select a direction to propagate attributes.
4. Select the attributes you want to propagate.
5. Optionally, preview the results.
6. Click **Apply**.

The Developer tool propagates the port attributes.

## Dependency Types

When you propagate port attributes, the Developer tool updates dependencies.

The Developer tool can update the following dependencies:

- Link path dependencies
- Implicit dependencies

## Link Path Dependencies

A link path dependency is a dependency between a propagated port and the ports in its link path.

When you propagate dependencies in a link path, the Developer tool updates all the input and input/output ports in its forward link path and all the output and input/output ports in its backward link path. The Developer tool performs the following updates:

- Updates the port name, datatype, precision, scale, and description for all ports in the link path of the propagated port.
- Updates all expressions or conditions that reference the propagated port with the changed port name.
- Updates the associated port property in a dynamic Lookup transformation if the associated port name changes.

## Implicit Dependencies

An implicit dependency is a dependency within a transformation between two ports based on an expression or condition.

You can propagate datatype, precision, scale, and description to ports with implicit dependencies. You can also parse conditions and expressions to identify the implicit dependencies of the propagated port. All ports with implicit dependencies are output or input/output ports.

When you include conditions, the Developer tool updates the following dependencies:

- Link path dependencies
- Output ports used in the same lookup condition as the propagated port
- Associated ports in dynamic Lookup transformations that are associated with the propagated port
- Master ports used in the same join condition as the detail port



When you include expressions, the Developer tool updates the following dependencies:

- Link path dependencies
- Output ports containing an expression that uses the propagated port

The Developer tool does not propagate to implicit dependencies within the same transformation. You must propagate the changed attributes from another transformation. For example, when you change the datatype of a port that is used in a lookup condition and propagate that change from the Lookup transformation, the Developer tool does not propagate the change to the other port dependent on the condition in the same Lookup transformation.

## Propagated Port Attributes by Transformation

The Developer tool propagates dependencies and attributes for each transformation.

The following table describes the dependencies and attributes the Developer tool propagates for each transformation:

| Transformation    | Dependency  | Propagated Attributes   |
|-------------------|---|---|
| Address Validator | None.   | None. This transform has predefined port names and datatypes.   |
| Aggregator        | <ul style="list-style-type: none"><li>- Ports in link path</li><li>- Expression</li><li>- Implicit dependencies</li></ul> | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li><li>- Port name</li><li>- Datatype, precision, scale</li></ul> |
| Association       | <ul style="list-style-type: none"><li>- Ports in link path</li></ul>  | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li></ul>  |
| Case Converter    | <ul style="list-style-type: none"><li>- Ports in link path</li></ul>  | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li></ul>  |
| Classifier        | <ul style="list-style-type: none"><li>- Ports in link path</li></ul>  | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li></ul>  |
| Comparison        | <ul style="list-style-type: none"><li>- Ports in link path</li></ul>  | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li></ul>  |
| Consolidator      | None.   | None. This transform has predefined port names and datatypes.   |
| Data Masking      | <ul style="list-style-type: none"><li>- Ports in link path</li></ul>  | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li></ul>  |
| Data Processor    | <ul style="list-style-type: none"><li>- Ports in link path</li></ul>  | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li></ul>  |
| Decision          | <ul style="list-style-type: none"><li>- Downstream ports in link path</li></ul>   | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li></ul>  |
| Expression        | <ul style="list-style-type: none"><li>- Ports in link path</li><li>- Expression</li><li>- Implicit dependencies</li></ul> | <ul style="list-style-type: none"><li>- Port name, datatype, precision, scale, description</li><li>- Port name</li><li>- Datatype, precision, scale</li></ul> |

| Transformation             | Dependency  | Propagated Attributes  |
|----------------------------|---|--|
| Filter                     | <ul style="list-style-type: none"> <li>- Ports in link path</li> <li>- Condition</li> </ul>   | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> <li>- Port name</li> </ul>  |
| Hierarchical to Relational | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Joiner                     | <ul style="list-style-type: none"> <li>- Ports in link path</li> <li>- Condition</li> <li>- Implicit Dependencies</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> <li>- Port name</li> <li>- Datatype, precision, scale</li> </ul>                      |
| Key Generator              | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Labeler                    | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Lookup                     | <ul style="list-style-type: none"> <li>- Ports in link path</li> <li>- Condition</li> <li>- Associated ports (dynamic lookup)</li> <li>- Implicit Dependencies</li> </ul> | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> <li>- Port name</li> <li>- Port name</li> <li>- Datatype, precision, scale</li> </ul> |
| Match                      | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Merge                      | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Normalizer                 | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name</li> </ul>  |
| Parser                     | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Rank                       | <ul style="list-style-type: none"> <li>- Ports in link path</li> <li>- Expression</li> <li>- Implicit dependencies</li> </ul>   | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> <li>- Port name</li> <li>- Datatype, precision, scale</li> </ul>                      |
| Read                       |   |  |
| REST Web Service Consumer  | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Router                     | <ul style="list-style-type: none"> <li>- Ports in link path</li> <li>- Condition</li> </ul>   | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> <li>- Port name</li> </ul>  |
| Sequence Generator         | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |
| Sorter                     | <ul style="list-style-type: none"> <li>- Ports in link path</li> </ul>  | <ul style="list-style-type: none"> <li>- Port name, datatype, precision, scale, description</li> </ul>   |

| Transformation   | Dependency  | Propagated Attributes   |
|------------------|---|---|
| SQL              | - Ports in link path  | - Port name, datatype, precision, scale, description  |
| Standardizer     | - Ports in link path  | - Port name, datatype, precision, scale, description  |
| Union            | - Ports in link path<br>- Implicit dependencies                 | - Port name, datatype, precision, scale, description<br>- Datatype, precision, scale                |
| Update Strategy  | - Ports in link path<br>- Expression<br>- Implicit dependencies | - Port name, datatype, precision, scale, description<br>- Port name<br>- Datatype, precision, scale |
| Weighted Average | - Ports in link path  | - Port name, datatype, precision, scale, description  |
| Write            |   |   |

## Copying Ports from Excel

You can configure ports and port properties in Excel and copy them into transformation ports in the Developer tool. Port properties include the column name, data type, precision, and scale. You might want to do this when you need to develop or edit a transformation with many ports.

You can copy metadata to the following transformation types:

- Aggregator
- Expression
- Filter
- Java
- Joiner
- Lookup
- Normalizer
- Rank
- Read
- Router
- Sequence
- Sorter
- SQL
- Union
- Update Strategy
- Web Service Consumer

- Window
- Write

## Editing Transformations in Excel

When you need to edit a large portion of a transformation, you do not need to change every value in the Developer tool. Instead, you can copy the transformation ports to Excel, change all the values simultaneously using Auto Fill, and then **Paste (Replace)** the transformation ports back into the Developer tool.

1. In the mapping editor of the Developer tool, select the transformation that you want to copy ports from.
2. To copy the original transformation from the Developer tool, right-click within Ports and click **Select All**.
3. Copy the ports to an Excel spreadsheet.
4. Make changes within the Excel spreadsheet. If you are changing large portions of metadata, you can use the Auto Fill feature in Excel. This allows you to fill in data based on adjacent cells by dragging the fill handle. See [“Example: Editing a Transformation in Excel” on page 65](#) for more information.
5. Copy the metadata from Excel.
6. To update the transformation with the changes, right-click within Ports and click **Paste (Replace)**.

## Copying Metadata to the Developer Tool

You can create transformation ports in Excel and then copy them to the Developer tool.

1. Create a mapping in the Developer tool with the required transformations.
2. Define metadata for a transformation in Excel.
3. Copy the metadata from Excel.
4. To move the metadata to the transformation in the Developer tool, right-click within Ports and click **Paste (Replace)**.

The following image shows a sample Excel table and the resulting transformation after you copy the metadata to the Developer tool:

|   | A        | B       | C         | D     |
|---|----------|---------|-----------|-------|
| 1 | Name     | Type    | Precision | Scale |
| 2 | EMPNO    | decimal | 10        | 0     |
| 3 | ENAME    | string  | 6         | 0     |
| 4 | JOB      | string  | 9         | 0     |
| 5 | MGR      | decimal | 4         | 0     |
| 6 | HIREDATE | string  | 19        | 0     |
| 7 | SAL      | decimal | 7         | 0     |
| 8 | COMM     | string  | 7         | 0     |
| 9 | DEPTNO   | decimal | 2         | 0     |

→

Properties Data Viewer Alerts

General

**Ports**

|   | Name     | Type    | Precision | Scale | Input | Output | Variable | Expression |
|---|----------|---------|-----------|-------|-------|--------|----------|------------|
| 1 | EMPNO    | decimal | 10        | 0     | ✓     | ✓      |          | EMPNO      |
| 2 | ENAME    | string  | 6         | 0     | ✓     | ✓      |          | ENAME      |
| 3 | JOB      | string  | 9         | 0     | ✓     | ✓      |          | JOB        |
| 4 | MGR      | decimal | 4         | 0     | ✓     | ✓      |          | MGR        |
| 5 | HIREDATE | string  | 19        | 0     | ✓     | ✓      |          | HIREDATE   |
| 6 | SAL      | decimal | 7         | 0     | ✓     | ✓      |          | SAL        |
| 7 | COMM     | string  | 7         | 0     | ✓     | ✓      |          | COMM       |
| 8 | DEPTNO   | decimal | 2         | 0     | ✓     | ✓      |          | DEPTNO     |

Sample Excel table

After metadata is copied to the Developer tool

**Note:** You must confirm that the values in each cell are valid before copying the values to a transformation. For example, a string type cannot have a scale value other than "0." Precision values cannot be words and type values cannot be numbers. If the metadata is incorrect, an error message appears.

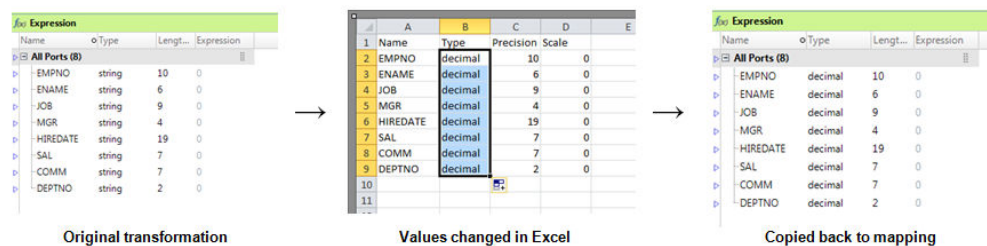
## Example: Editing a Transformation in Excel

You are developing a transformation and you need to change all the string data types to decimal. Instead of changing each field individually, you make global changes in Excel and copy them to the Developer tool.

1. You right-click within Ports, click **Select All**, and paste the metadata into Excel.
2. You change the first data type value from "string" to "decimal" and then use the fill handle to automatically change the remaining cells in the column.
3. To update the transformation with the changes, you copy the metadata from Excel, right-click within Ports, and click **Paste (Replace)**.

By using Excel, you avoid having to change each field individually.

The following image shows the process of moving a transformation to Excel, using Auto Fill to change certain values, and then copying the transformation back to the Developer tool:



## Rules and Guidelines for Copying from Excel

Consider the following rules and guidelines when you copy metadata from Excel to the Developer tool:

- You must confirm that the values in each cell are valid before copying the values to a transformation. For example, a string type cannot have a scale value other than "0." Precision values cannot be words and type values cannot be numbers. If the metadata is incorrect, an error message appears.
- The location that you can copy metadata to depends on the type of transformation that you are updating. For example, the Paste (Replace) option might be unavailable when you right-click in the Properties view of a transformation. However, the option will still be available when you right-click directly within the transformation ports in the editor.

## CHAPTER 3

# Transformation Caches

This chapter includes the following topics:

- [Transformation Caches Overview, 66](#)
- [Cache Types, 67](#)
- [Cache Files, 67](#)
- [Cache Size, 68](#)
- [Cache Size Increase by the Data Integration Service, 70](#)
- [Cache Size for Partitioned Caches, 70](#)
- [Cache Size Optimization, 71](#)

## Transformation Caches Overview

The Data Integration Service allocates cache memory for Aggregator, Joiner, Lookup, Rank, and Sorter transformations in a mapping. The Data Integration Service creates index and data caches for the Aggregator, Joiner, Lookup, and Rank transformations. The Data Integration Service creates one cache for the Sorter transformation.

You can configure the cache sizes for these transformations. The cache size determines how much memory the Data Integration Service allocates for each transformation cache at the start of a mapping run.

If the cache size is larger than the available memory on the machine, the Data Integration Service cannot allocate enough memory and the mapping run fails.

If the cache size is smaller than the amount of memory required to run the transformation, the Data Integration Service processes some of the transformation in memory and stores overflow data in cache files. When the Data Integration Service pages cache files to the disk, processing time increases. For optimal performance, configure the cache size so that the Data Integration Service can process the complete transformation in memory.

By default, the Data Integration Service automatically calculates the memory requirements at run time, based on the maximum amount of memory that the service can allocate. After you run a mapping in auto cache mode, you can tune the cache sizes for the transformations. You analyze the transformation statistics in the mapping log to determine the cache sizes required for optimal performance, and then configure specific cache sizes for the transformations.

# Cache Types

Aggregator, Joiner, Lookup, and Rank transformations require an index cache and a data cache. The Data Integration Service stores key values in the index cache and output values in the data cache. Sorter transformations require a single cache. The Data Integration Service stores sort keys and the data to be sorted in the Sorter cache.

The following table describes the type of information that the Data Integration Service stores in each cache:

| Mapping Object | Cache Types and Descriptions  |
|----------------|---|
| Aggregator     | <ul style="list-style-type: none"><li>- Index. Stores group values as configured in the group by ports.</li><li>- Data. Stores calculations based on the group by ports.</li></ul>        |
| Joiner         | <ul style="list-style-type: none"><li>- Index. Stores all master rows in the join condition that have unique keys.</li><li>- Data. Stores master source rows.</li></ul>                   |
| Lookup         | <ul style="list-style-type: none"><li>- Index. Stores lookup condition information.</li><li>- Data. Stores lookup data that is not stored in the index cache.</li></ul>                   |
| Rank           | <ul style="list-style-type: none"><li>- Index. Stores group values as configured in the group by ports.</li><li>- Data. Stores ranking information based on the group by ports.</li></ul> |
| Sorter         | <ul style="list-style-type: none"><li>- Sorter. Stores sort keys and data.</li></ul>  |

# Cache Files

When you run a mapping, the Data Integration Service creates at least one cache file for each Aggregator, Joiner, Lookup, Rank, and Sorter transformation. If the Data Integration Service cannot run a transformation in memory, it writes the overflow data to the cache files.

The following table describes the types of cache files that the Data Integration Service creates for different mapping objects:

| Mapping Object                                       | Cache File   |
|--|--|
| Aggregator, Joiner, Lookup, and Rank transformations | The Data Integration Service creates the following types of cache files: <ul style="list-style-type: none"><li>- One header file for each index cache and data cache</li><li>- One data file for each index cache and data cache</li></ul> |
| Sorter transformation                                | The Data Integration Service creates one sorter cache file.  |

When you run a mapping, the Data Integration Service writes a message in the mapping log indicating the cache file name and the transformation name. When a mapping completes, the Data Integration Service releases cache memory and usually deletes the cache files. You might find index and data cache files in the cache directory under the following circumstances:

- You configure the Lookup transformation to use a persistent cache.
- The mapping does not complete successfully. The next time you run the mapping, the Data Integration Service deletes the existing cache files and creates new ones.

Because writing to cache files can slow mapping performance, configure the cache sizes to run the transformation in memory.

## Cache File Directory

For Aggregator, Joiner, Lookup, and Rank transformations, the Data Integration Service creates the cache files in the directory specified in the Cache Directory property. For Sorter transformations, the service creates the cache files in the directory specified in the Work Directory property.

If the Data Integration Service process does not find the directory, it fails the mapping and writes a message to the mapping log indicating that it could not create or open the cache file. The Data Integration Service may create multiple cache files. The number of cache files is limited by the amount of disk space available in the cache directory.

## Cache Size

Cache size determines how much memory the Data Integration Service allocates for each transformation cache at the start of a mapping run. You can configure a transformation cache size to use auto cache mode or to use a specific value.

### Auto Cache Size

By default, a transformation cache size is set to Auto. The Data Integration Service automatically calculates the cache memory requirements at run time. You define the maximum amount of memory that the service can allocate.

The Data Integration Service uses the following guidelines to automatically allocate the memory:

**Allocates more memory to transformations with higher processing times.**

The Data Integration Service allocates more memory to transformations that typically have higher processing times. For example, the Data Integration Service allocates more memory to the Sorter transformation because the Sorter transformation typically takes longer to run.

**Allocates more memory to the data cache than to the index cache.**

Aggregator, Joiner, Lookup, and Rank transformations require an index cache and a data cache. When the Data Integration Service divides the memory allocated for the transformation across the index and data cache, it allocates more memory to the data cache.

Sorter transformations require a single cache. The service allocates all of the memory allocated for the transformation to the Sorter cache.

### Maximum Memory for Auto Cache Size

You define the maximum amount of memory that the Data Integration Service can allocate to transformation caches in the Maximum Memory Per Request property for Data Integration Service modules in the Administrator tool.

Each module runs different types of requests that have different memory requirements. For example, mapping and profile requests typically require more cache memory than SQL service or web service requests.



You can configure the Maximum Memory Per Request property for the following Data Integration Service modules:

- Mapping Service Module
- Profiling Service Module
- SQL Service Module
- Web Service Module

**Note:** Mapping Service Module requests include mappings and mappings run from Mapping tasks within a workflow.

For the Profiling Service Module, Maximum Memory Per Request defines the maximum amount of memory that the Data Integration Service can allocate for each mapping run for a single profile request.

For the remaining modules, the behavior of Maximum Memory Per Request depends on the Data Integration Service configuration. The behavior depends on the Launch Job Options property and the Maximum Memory Size property on the Data Integration Service.

The following table describes the behavior of Maximum Memory Per Request for the mapping, SQL service, and web service modules based on the Data Integration Service configuration:

| Data Integration Service Configuration  | Maximum Memory Per Request Behavior  |
|---|--|
| Runs jobs in separate local or remote system processes, or Maximum Memory Size is 0 (default) | <p>Maximum amount of memory, in bytes, that the Data Integration Service can allocate for all transformations that use auto cache mode in a single request.</p> <p>The value that you define for Maximum Memory Per Request affects only transformations that use auto cache mode. The Data Integration Service allocates memory separately to transformations for which you configure a specific cache size. The total memory used by the request can exceed the value of Maximum Memory Per Request.</p> <p>For example, Maximum Memory Per Request is set to 800 MB. A mapping has three transformations that require caching. You configure two transformations to use auto cache mode and configure the third transformation to use a total of 500 MB for the cache sizes. The Data Integration Service allocates a total of 1,300 MB of memory for all of the transformation caches.</p> |
| Runs jobs in the Data Integration Service process, and Maximum Memory Size is greater than 0  | <p>Maximum amount of memory, in bytes, that the Data Integration Service can allocate for a single request.</p> <p>The value that you define for the Maximum Memory Per Request property affects all transformations. The total memory used by the request cannot exceed the value of Maximum Memory Per Request.</p>  |

When you increase the maximum amount of memory used for auto cache mode, you increase the maximum cache size that can be used for all requests to the module. You can increase the maximum amount of memory to ensure that no cache files are paged to the disk. However, because this value is used for all requests, the Data Integration Service might allocate more memory than is needed for some requests.

## Specific Cache Size

You can configure a specific cache size for a transformation. The Data Integration Service allocates the specified amount of memory to the transformation cache at the start of the mapping run. Configure a specific value in bytes when you tune the cache size.

The first time that you configure a cache size, use auto cache mode. After you run the mapping, analyze transformation statistics in the mapping log to determine the cache sizes required to run the transformations in memory. When you configure the cache size to use the value specified in the mapping log, you can ensure

that no allocated memory is wasted. However, the optimal cache size varies based on the size of the source data. Review the mapping logs after subsequent mapping runs to monitor changes to the cache size. If you configure a specific cache size for a reusable transformation, verify that the cache size is optimal for each use of the transformation in a mapping.

To define specific cache sizes, configure the cache size values in the transformation properties in the Developer tool.

## Cache Size Increase by the Data Integration Service

The Data Integration Service creates each memory cache based on the configured cache size. In some situations, the Data Integration Service might increase the configured cache size because it requires more cache memory.

The Data Integration Service might increase the configured cache size for one of the following reasons:

**Configured cache size is less than the minimum cache size required to process the operation.**

The Data Integration Service requires a minimum amount of memory to initialize each mapping. If the configured cache size is less than the minimum required cache size, then the Data Integration Service increases the configured cache size to meet the minimum requirement. If the Data Integration Service cannot allocate the minimum required memory, the mapping fails.

**Configured cache size is not a multiple of the cache page size.**

The Data Integration Service stores cached data in cache pages. The cached pages must fit evenly into the cache. For example, if you configure 10 MB (1,048,576 bytes) for the cache size and the cache page size is 10,000 bytes, then the Data Integration Service increases the configured cache size to 1,050,000 bytes to make it a multiple of the 10,000-byte page size.

When the Data Integration Service increases the configured cache size, it continues to run the mapping and writes the following messages in the mapping log:

```
INFO: MAPPING,      TE_7212,      Increasing [Index Cache] size for transformation
<transformation name> from <configured cache size> to <new cache size>.
INFO: MAPPING,      TE_7212,      Increasing [Data Cache] size for transformation
<transformation name> from <configured cache size> to <new cache size>.
```

## Cache Size for Partitioned Caches

If you have the Partitioning option, cache partitioning creates a separate cache for each partition that runs an Aggregator, Joiner, Rank, Lookup, or Sorter transformation. During cache partitioning, each partition stores different data in a separate cache. When the Data Integration Service uses cache partitioning for these transformations, the service divides the allocated cache size across the partitions.

For example, you configure the transformation cache size to be 100 MB. The Data Integration Service uses four partitions to run the transformation. The service divides the cache size value so that each partition uses a maximum of 25 MB for the cache size.

# Cache Size Optimization

For optimal mapping performance, configure the cache sizes so that the Data Integration Service can run the complete transformation in memory.

To configure optimal cache sizes, perform the following tasks:

1. Set the tracing level to verbose initialization.
2. Run the mapping in auto cache mode.
3. Analyze caching performance in the mapping log.
4. Configure specific values for the cache sizes.

## Step 1. Set the Tracing Level to Verbose Initialization

In the Developer tool, set the tracing level to verbose initialization to enable the Data Integration Service to write transformation statistics to the mapping log. The transformation statistics list the cache sizes required for optimal performance. By default, the tracing level is set to normal.

Set the tracing level to verbose initialization in one of the following ways:

- Modify the advanced properties for each transformation that uses a cache.
- Modify the default mapping configuration properties if you plan to run the mapping for the first time from the Developer tool. For more information, see the *Informatica Developer Tool Guide*.
- Modify the advanced properties for an application that contains the mapping if you plan to run the deployed mapping for the first time from the command line. For more information, see the *Informatica Developer Tool Guide*.

## Step 2. Run the Mapping in Auto Cache Mode

The first time that you run the mapping, use auto cache mode for the transformation cache sizes.

You can run the mapping from the Developer tool. Or, you can add the mapping to an application and then deploy the application to the Data Integration Service so that you can run the mapping from the command line.

## Step 3. Analyze Caching Performance

After you run the mapping in auto cache mode, analyze the transformation statistics in the mapping log to determine the cache sizes required for optimal mapping performance.

When an Aggregator, Joiner, Lookup, or Rank transformation pages to the disk, the mapping log specifies the index and data cache sizes required to run the transformation in memory. For example, you run an Aggregator transformation called AGG\_TRANS. The mapping log contains the following text:

```
CMN 1791, The index cache size that would hold [1098] aggregate groups of input rows for
[AGG_TRANS], in memory, is [286720] bytes
CMN 1790, The data cache size that would hold [1098] aggregate groups of input rows for
[AGG_TRANS], in memory, is [1774368] bytes
```

The log shows that the index cache requires 286,720 bytes and the data cache requires 1,774,368 bytes to run the transformation in memory without paging to the disk.

When a Sorter transformation pages to the disk, the mapping log states that the Data Integration Service made multiple passes on the source data. The Data Integration Service makes multiple passes on the data when it has to page to the disk to complete the sort. The message specifies the number of bytes required for

a single pass, which is when the Data Integration Service reads the data once and performs the sort in memory without paging to the disk.

For example, you run a Sorter transformation called SRT\_TRANS. The mapping log contains the following text:

```
SORT_40427,      Sorter Transformation [SRT_TRANS] required 2-pass sort (1-pass temp I/O:
13126221824 bytes). You may try to set the cache size to 14128 MB or higher for 1-pass
in-memory sort.
```

The log shows that the Sorter cache requires 14,128 MB so that the Data Integration Service makes one pass on the data.

## Step 4. Configure Specific Cache Sizes

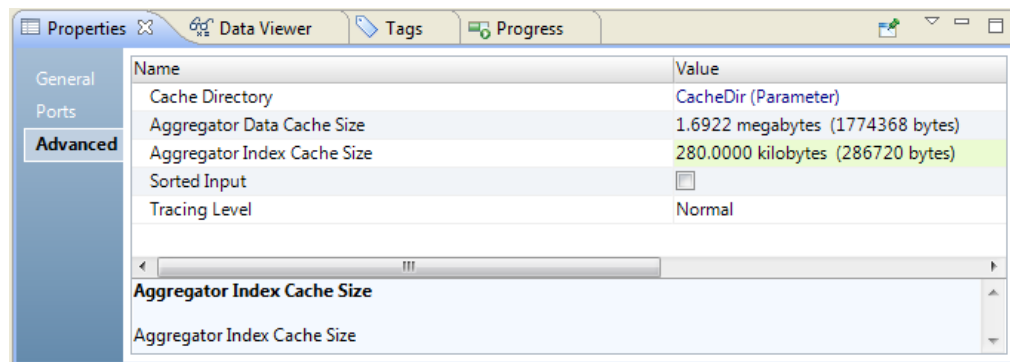
For optimal performance, configure the transformation cache sizes to use the values specified in the mapping log. Update the index and data cache size transformation properties in the Developer tool.

1. In the Developer tool, open the reusable or non-reusable transformation.
2. Locate the cache size properties depending on the following transformation types:

| Option  | Description  |
|---|--|
| Reusable Aggregator, Joiner, Rank, or Sorter transformation     | Click the <b>Advanced</b> view.                              |
| Non-reusable Aggregator, Joiner, Rank, or Sorter transformation | Click the <b>Advanced</b> tab in the <b>Properties</b> view. |
| Reusable Lookup transformation                                  | Click the <b>Run-time</b> view.                              |
| Non-reusable Lookup transformation                              | Click the <b>Run-time</b> tab in the <b>Properties</b> view. |

3. Enter the values in bytes that the mapping log recommended for the index and data cache sizes.

The following image shows a non-resuable Aggregator transformation that has specific values configured for the index and data cache sizes:



4. Click **File > Save**.

## CHAPTER 4

# Address Validator Transformation

This chapter includes the following topics:

- [Address Validator Transformation Overview, 73](#)
- [Address Reference Data, 74](#)
- [Modes and Templates, 76](#)
- [Port Groups and Port Selection, 76](#)
- [Address Validator Transformation Input Port Groups, 77](#)
- [Address Validator Transformation Output Port Groups, 77](#)
- [Multiple-Instance Ports, 80](#)
- [Address Validation Projects, 81](#)
- [Formatted Addresses and Mail Carrier Standards, 82](#)
- [Partial Address Completion , 83](#)
- [Address Validator Status Ports, 84](#)
- [Address Reference Data File Status, 95](#)
- [Address Validator Transformation General Settings, 95](#)
- [Address Validator Transformation Advanced Properties, 96](#)
- [Certification Reports, 112](#)
- [Configuring an Address Validator Transformation, 115](#)
- [Adding Ports to the Address Validator Transformation, 116](#)
- [Creating User-Defined Templates, 116](#)
- [Defining Address Validator Models, 116](#)
- [Defining a Certification Report, 117](#)

## Address Validator Transformation Overview

The Address Validator transformation is a multiple-group transformation that compares input address data with address reference data. It determines the accuracy of the addresses and fixes errors in the addresses.

The transformation creates records that meet mail delivery standards for data content and structure. The transformation also adds status information to each address.

The Address Validator transformation performs the following operations on address data:

- The transformation compares address records in the source data to address definitions in the address reference data.
- It generates detailed status reports on the validity of each input address, its deliverable status, and the nature of any errors or ambiguities it contains.
- It fixes errors and completes partial address records. To fix an address, the transformation must find a positive match with an address in the reference data. The transformation copies the required data elements from the address reference data to the address records.
- It adds information that does not appear in the standard address but that helps postal delivery, such as delivery point information and geocoding information.
- It writes output addresses in the format that the data project and the mail carrier requires. You define the format when you select the output ports on the transformation.

## Address Reference Data

An address reference data set describes the addresses that a national mail carrier recognizes in a country. Before you perform address validation with the Address Validator transformation, install the address reference data on the Informatica services machine in the domain. You buy and download the address reference data from Informatica.

Install an address reference data file for each country that the source address data identifies. A country that has a large population might require multiple files. In addition, you can install data files that enrich the address data. The mail carrier can use the data enrichments to certify the accuracy of the addresses and to accelerate mail delivery.

When you perform address validation, the Address Validator transformation compares each input record to the address reference data. If the transformation finds the input address in the address reference data, the transformation can update the record with the correct and complete address data. If you purchased additional reference data sets, the transformation can also enrich the address data.

Use the **Preferences** window in the Developer tool to view information about the address reference data files on the Informatica services machine in the domain.

## Types of Address Reference Data

The validation mode that you select determines how the transformation compares the input address to the address reference data.

The Address Validator transformation can read the following types of address reference data:

### Address code lookup data

Install address code lookup data to retrieve a partial address or full address from a code value on an input port. The completeness of the address depends on the level of address code support in the country to which the address belongs. To read the address code from an input address, select the country-specific ports in the Discrete port group.

You can select ports for the following countries:

- Germany. Returns an address to locality, municipality, or street level.
- Japan. Returns an address to the unique mailbox level.
- South Africa. Returns an address to street level.
- South Korea. Returns an address to the unique mailbox level.
- Serbia. Returns an address to street level.
- United Kingdom. Returns an address to the unique mailbox level.

The Address Validator transformation reads address code lookup data when you configure the transformation to run in address code lookup mode.

#### **Batch and interactive data**

Install batch and interactive data to perform address validation on a set of address records. Use batch and interactive data to verify that the input addresses are fully deliverable and complete based on the current postal data from the national mail carrier.

When you configure the transformation to run in batch mode, the Address Validator transformation return a single address for each input address. When you configure the transformation to run in interactive mode, the Address Validator transformation return one or more addresses for each input address.

#### **CAMEO data**

Install CAMEO data to add customer segmentation data to residential address records. Customer segmentation data indicates the likely income level and lifestyle preferences of the residents at each address.

The Address Validator transformation reads CAMEO data when you configure the transformation to run in batch mode or certified mode.

#### **Certified data**

Install certified data to verify that address records meet the certification standards that a mail carrier defines. An address meets a certification standard if contains data elements that can identify a unique mailbox, such as delivery point data elements. When an address meets a certification standard, the mail carrier charges a reduced delivery rate.

The following countries define certification standards:

- Australia. Certifies mail according to the Address Matching Approval System (AMAS) standard.
- Canada. Certifies mail according to the Software Evaluation And Recognition Program (SERP) standard.
- France. Certifies mail according to the National Address Management Service (SNA) standard.
- New Zealand. Certifies mail according to the SendRight standard.
- United States. Certifies mail according to the Coding Accuracy Support System (CASS) standard.

The Address Validator transformation reads certified data when you configure the transformation to run in certified mode.

#### **Geocode data**

Install geocode data to add geocodes to address records. Geocodes are latitude and longitude coordinates.

The Address Validator transformation reads geocode data when you configure the transformation to run in batch mode or certified mode.

**Note:** Informatica provides different types of geocode data. If you need arrival point or parcel centroid geocodes for addresses, you must purchase additional geocode data sets.

#### **Suggestion list data**

Install suggestion list data to find alternative valid versions of a partial address record. Use suggestion list data when you configure an address validation mapping to process address records one by one in real time. The Address Validator transformation uses the data elements in the partial address to perform a duplicate check on the suggestion list data. The transformation returns any valid address that includes the information in the partial address.

The Address Validator transformation reads suggestion list data when you configure the transformation to run in suggestion list mode.

#### **Supplementary data**

Install supplementary data to add data to an address record that can assist the mail carrier in mail delivery. Use the supplementary data to add detail about the geographical or postal area that contains the address. In some countries, supplementary data can provide a unique identifier for a mailbox within the postal system.

The Address Validator transformation reads supplementary data when you configure the transformation to run in batch mode or certified mode.

**Note:** The transformation does not read address reference data in country recognition mode or in parse mode.

#### **RELATED TOPICS:**

- [“Address Validator Transformation General Settings” on page 95](#)

## Modes and Templates

When you configure the Address Validator transformation, you can select the type of validation that the transformation performs. The transformation defines the validation type as the mode. Select the mode on the **General Settings** tab or as an advanced property of the transformation.

You can create a port template in the transformation. A template is a subset of ports from one or more port groups. Use a template to organize the ports that you expect to use in a project.

## Port Groups and Port Selection

The Address Validator transformation contains predefined port groups that contain the input and output ports that you can use. When you configure an Address Validator transformation, you browse the groups and select the ports that you need.

Select input ports that correspond to the structure of the address input data. Select output ports that contain the address data that the project requires.

You can add input and output ports directly to the transformation, or you can create a default model that contains input and output ports. When you add ports directly to the transformation, the ports you select apply to that transformation only. When you add ports to the default model, the ports you select apply to future Address Validator transformations that you create.



You can also add pass-through ports to the transformation for columns that you do not want the Address Validator transformation to process.

## Address Validator Transformation Input Port Groups

Before you can connect address data to input ports on the transformation, you browse the input groups and select the ports that correspond to the structure and content of the input data. Browse the output groups and select the ports that match your data requirements.

The Address Validator transformation displays the port groups in a Basic Model and Advanced Model. You can define most addresses using a port group in the Basic Model. If your addresses are highly complex, use the additional ports available in the Advanced Model.

**Note:** Select ports from one input port group only.

The transformation has the following input port groups:

### Discrete

Reads data columns that contain complete information on a single data element, such as house number, street name, or post code. The Discrete group is available in the Basic and Advanced models.

### Hybrid

Reads data columns that contain one or multiple data elements. The Hybrid group combines ports from the Discrete and Multiline groups. Use Hybrid ports to create address records that you can submit to a mail carrier. Hybrid ports structure an address to mail carrier standards and identify the type of data on each line. The Hybrid group is available in the Basic and Advanced models.

### Multiline

Reads data columns that contain multiple data elements. Each input string corresponds to a line of an address that is structured in the format required by the mail carrier. Connect address columns to Multiline ports to create a printable set of address records.

Each Multiline port represents one line in the printed address, such as the following line of street data:

```
"123 Main Street Apartment 2"
```

Multiline ports do not specify the type of data that appears on each address line. The Multiline group is available in the Basic and Advanced models.

## Address Validator Transformation Output Port Groups

Before you can connect the Address Validator transformation to other transformations or data objects, you determine the types of information you need and the structure that the output addresses will take.

Browse the output groups and select the ports that match your data requirements.

**Note:** You can select ports from multiple output groups, and you can select ports that have common functionality.

The transformation has the following predefined output groups:

**Address Elements**

Writes street data elements such as house number, apartment number, and street name to separate parts. Find the Address Elements group in the Basic and Advanced models.

**AT Supplementary**

Writes data to addresses in Austria that can help postal delivery, such as building-level post code data. Find the AT Supplementary group in the Basic model.

**Australia Specific**

Writes data to addresses in Australia that enables the addresses to meet the Address Matching Approval System (AMAS) standards of Australia Post. Find the Australia Specific group in the Basic and Advanced models.

**BE Supplementary**

Writes data to addresses in Belgium that can help postal delivery. The data includes locality and neighborhood identification codes from the statistics directorate in Belgium. Find the BE Supplementary group in the Basic model.

**BR Supplementary**

Writes data to addresses in Brazil that can help postal delivery, such as district identification codes from the Institute of Geography and Statistics (IBGE). Find the BR Supplementary group in the Basic model.

**CAMEO**

Generates demographic and income summary data that you can use in customer segmentation analysis. Find the CAMEO group in the Basic model.

**Canada Specific**

Writes data to addresses in Canada that enables the addresses to meet the Software Evaluation and Recognition Program (SERP) standards of Canada Post. Find the Canada Specific group in the Basic model.

**CH Supplementary**

Writes data to addresses in Switzerland that can help postal delivery, such as extended post code data. Find the CH Supplementary group in the Basic model.

**Contact Elements**

Writes person or contact data, such as names, salutations, and job titles. Find the Contact Elements group in the Advanced model.

**Country**

Writes the country name or country code defined by the International Organization for Standardization (ISO). Find the Country group in the Basic and Advanced models.

**DE Supplementary**

Writes data to addresses in Germany that can help postal delivery, such as municipality and district code data. Find the DE Supplementary group in the Basic model.

**ES Supplementary**

Writes data to addresses in Spain that can help postal delivery. Find the ES Supplementary group in the Basic model.

**Formatted Address Line**

Writes addresses that are formatted for printing and mailing. Find the Formatted Address Line group in the Basic and Advanced models.

**FR Supplementary**

Writes data to addresses in France that can help postal delivery, such as identification codes from the National Institute of Statistics and Economic Studies (INSEE). Find the FR Supplementary group in the Basic model.

**France Specific**

Writes data to addresses in France that enables the addresses to meet the National Address Management Service (SNA) standards of La Poste. Find the France Specific group in the Basic model.

**Geocoding**

Generates geocode data, such as latitude and longitude coordinates, for an address. Find the Geocoding group in the Basic model.

**ID Elements**

Writes Record ID and Transaction Key data. Find the ID Elements group in the Advanced model.

**IT Supplementary**

Writes data to addresses in Italy that can help postal delivery. Find the IT Supplementary group in the Basic model.

**JP Supplementary**

Writes data to addresses in Japan that can help postal delivery, such as Choumei Aza codes. Find the JP Supplementary group in the Basic model.

**KR Supplementary**

Writes data to addresses in South Korea that can help postal delivery, such as unique identifiers that can specify current and non-current versions of a given address. Find the KR Supplementary group in the Basic model.

**Last Line Elements**

Writes data that can appear on the last line of a domestic address. Find the Last Line Elements group in the Basic and Advanced models.

**New Zealand Specific**

Writes data to addresses in New Zealand that enables the addresses to meet the SendRight standards of New Zealand Post. Find the New Zealand Specific group in the Basic model.

**PL Supplementary**

Writes data to addresses in Poland that can help postal delivery, such as Territorial Division (TERYT) data. Find the PL Supplementary group in the Basic model.

**Residue**

Writes data elements that the transformation cannot parse to other ports. Find the Residue group in the Basic and Advanced models.

**RS Supplementary**

Writes data to addresses in Serbia that can help postal delivery, such as post code suffix data. Find the RS Supplementary group in the Basic model.

**RU Supplementary**

Writes data to addresses in Russia that can help postal delivery, such as the Federal Information Addressing System identifier for the address. Find the RU Supplementary group in the Basic model.

**Status Info**

Generates detailed data on the quality of each input and output address. Find the Status Info group in the Basic model.

**UK Supplementary**

Writes data to addresses in the United Kingdom that can help postal delivery, such as delivery point data and ordnance survey data. Find the UK Supplementary group in the Basic model.

**US Specific**

Writes data to addresses in the United States that enables the addresses to meet the Coding Accuracy Support System (CASS) standards of the United States Postal Service. Find the US Specific group in the Basic model.

**US Supplementary**

Writes geographic and demographic data such as Federal Information Processing Standard (FIPS) codes for United States addresses. Find the US Supplementary group in the Basic model.

**XML**

Writes address record data in an XML structure that the Address Verification software library defines. Find the XML group in the Advanced model.

**ZA Supplementary**

Writes data to addresses in South Africa that can help postal delivery, such as National Address Database data. Find the ZA Supplementary group in the Basic model.

## Multiple-Instance Ports

Many types of address data can occur more than once in an address. You can select multiple instances of a port when the address contains multiple cases of a data element.

A multiple-instance port can contain up to six instances. Many addresses use one instance of a port for each data element that they contain. Some addresses use a second instance of a port. A small set of addresses use more than one port instance.

Often, the first instance of a port is the primary name or the largest area that the port identifies. You must verify the relationship between the port instances for any port that you select.

### Street Complete Ports Example

A United Kingdom address record can contain two street names when one street is part of a larger street plan.

The following table contains an address that uses two Street Complete ports:

| Port                     | Data         |
|--------------------------|--------------|
| Street Number Complete 1 | 1A           |
| Street Complete 1        | THE PHYGTLE  |
| Street Complete 2        | SOUTH STREET |

| Port            | Data     |
|-----------------|----------|
| Locality Name 1 | NORFOLK  |
| Postcode 1      | NR25 7QE |

In the example, the street data in Street Complete 1 is dependent on the street data in Street Complete 2. The data in Street Number Complete 1 refers to the data in Street Complete 1.

**Note:** Although Street Complete 1 specifies the location of the mailbox, Street Complete 2 might be the larger street.

### Contact Ports Example

An address record can contain multiple contacts when each contact is a member of the same household.

The following table contains an address that uses two Contact Name ports:

| Port                     | Data                  |
|--------------------------|-----------------------|
| Contact Name 1           | MR. JOHN DOE          |
| Contact Name 2           | MS. JANE DOE          |
| Formatted Address Line 1 | 2 MCGRATH PLACE EAST  |
| Formatted Address Line 2 | ST. JOHN'S NL A1B 3V4 |
| Formatted Address Line 3 | CANADA                |

In the example, the organization can decide on the precedence to apply to Contact Name 1 or Contact Name 2. The Address Validator transformation does not prioritize the contact data.

If you format addresses for printed output, you might use multiple instances of the Formatted Address Line ports. You can select up to 12 Formatted Address Line ports.

## Address Validation Projects

You can use the Address Validator transformation in many types of project. You create an address template with different ports for each project type.

You can define an address validation project with one or more of the following objectives:

### Create formatted addresses that conform to mail carrier standards

You can prepare a large address record set for a mail campaign. If you create the addresses in the format that the mail carrier prefers, your mail costs are significantly reduced. When you prepare addresses for mailing, select output ports that write each line of the formatted address to a single port. You can select a different port for the contact name, the street address lines, and the locality and post code lines.

### Organize addresses by income and lifestyle indicators

You can add customer segmentation data to residential address records. Customer segmentation data indicates the likely income level and lifestyle preferences of the residents at each address. You select ports from the CAMEO output group to add customer segmentation data to address records. You can use customer segmentation data in mail campaigns that target multiple consumer markets.

### Create addresses that are certified by the mail carrier

When you prepare a record set for Australia Post, Canada Post, or the United States Postal Service (USPS), you can add data that confirms the deliverability of each address.

The Address Validator transformation can generate reports to certify that the address records are complete and accurate to the data standards of each mail carrier.

### Create addresses that meet regulatory requirements

You can verify that the address records held by your organization are accurate to industry or government regulations. Select output ports that write each address data element to a separate field. Also select the address validation status ports that provide detailed information on the accuracy and completeness of the output data.

### Complete partial addresses

You can enter a partial address and retrieve the valid complete addresses that match the partial address in the reference data. To complete partial addresses, configure the transformation to run in suggestion list mode or interactive mode. You can enter the input address as a single line on the Complete Address port.

### Improve the data quality of addresses

In parallel with other data projects, you can to improve the structure and general data quality of the address data set. For example, the data set may contain more columns that you need, or it may contain the same type of data across multiple columns. You can reduce the number of columns in the data set, and you can simplify the columns that you use for different types of data.

## Formatted Addresses and Mail Carrier Standards

When you prepare address records for a mail campaign, you create a printable address structure that matches the formatting standards of the mail carrier.

For example, the USPS maintains the following address format for domestic United States addresses:

|        |                                     |                       |
|--------|-------------------------------------|-----------------------|
| Line 1 | Person/Contact Data                 | JOHN DOE              |
| Line 2 | Street Number, Street, Sub-Building | 123 MAIN ST NW STE 12 |
| Line 3 | Locality, State, ZIP Code           | ANYTOWN NY 12345      |

You can define a printable address format that writes each line of the address to a single port. You can use ports that recognize the types of data on each line, or you can use ports that populate the address structure regardless of the data on each line.

The following table shows different ways you can format a United States address for printing:

| For This Address      | Use These Ports              | Or Use These Ports       |
|-----------------------|------------------------------|--------------------------|
| JOHN DOE              | Recipient Line 1             | Formatted Address Line 1 |
| 123 MAIN ST NW STE 12 | Delivery Address Line 1      | Formatted Address Line 2 |
| ANYTOWN NY 12345      | Country Specific Last Line 1 | Formatted Address Line 3 |

Use Formatted Address Line ports when the data set contains different types of address, such as business and residential addresses. A business address may need three address lines for contact and organization data. The Address Validator transformation ensures that each business or residential address is correctly formatted by using Formatted Address Line ports only when they are needed. However, Formatted Address Line ports do not identify the type of data that they contain.

Use Recipient Line, Delivery Address Line, and Country Specific Last Line ports when all address follow one format. The Recipient Line, Delivery Address Line, and Country Specific Last Line ports separate the address data elements by information type and make the data set easy to understand.

**Note:** You can select other ports to process this address. This example focuses on ports that format the addresses for printing and delivery.

### Demographic and Geographic Data

When you create a record set for a mail campaign, you can add multiple types of data that may not otherwise appear in the address. Use this data to review the demographic and geographic spread of the mail items.

For example, you can identify the Congressional District that a United States address belongs to. You can also generate latitude and longitude coordinates if the destination country includes the coordinates in its mail system reference data.

## Partial Address Completion

When you use suggestion list mode or interactive mode, you can enter an incomplete address and retrieve valid and complete addresses from the reference data.

Select suggestion list mode when you are uncertain of an address and you want to view a list of valid address candidates. Select interactive mode when you are confident of an address and you want to validate the complete form. In each case, the Address Validator transformation searches the address reference data and returns all addresses that contain the input data.

Consider the following rules and guidelines when you configure the transformation to run in suggestion list mode or interactive mode:

- You can define an input address on multiple ports, or you can enter all address elements on the Complete Address input port.
- When you configure the transformation in suggestion list mode, select ports from the Discrete input group. Alternatively, select a Complete Address port and optionally select a Country Name port from the Multiline group.
- Suggestion list mode and interactive mode can return multiple addresses for each input address. The Max Result Count property specifies an upper limit for the number of addresses returned. If the number of

matching address is greater than the Max Result Count value, the Count Overflow port returns the number of additional addresses.

- Informatica Address Verification refers to suggestion list mode as fast completion mode.

## Address Validator Status Ports

The Address Validator transformation writes status information on the address elements that it reads and writes on input and output ports. Use the Status Info ports to view the status information.

You can select the following status ports:

### **Address Resolution Code**

Describes the non-valid address elements in the address. Select the port from the Status Info port group in the Basic Model.

### **Address Type**

Indicates the address type in cases where the mail carrier recognizes more than one form of an address. Select the port from the Status Info port group in the Basic Model.

### **Element Input Status**

Describes the levels of similarity between the input address elements and the reference data. Select the port from the Status Info port group in the Basic Model.

### **Element Relevance**

Identifies the address elements that the mail carrier requires to identify a mailbox for the address. Select the port from the Status Info port group in the Basic Model.

### **Element Result Status**

Describes any update that address validation makes to the to the input address. Select the port from the Status Info port group in the Basic Model.

### **Extended Element Result Status**

Indicates the presence of additional data for an address in the reference data. The port can contain detailed information about the updates that address validation makes to an address. Select the port from the Status Info port group in the Basic Model.

### **Geocoding Status**

Describes the type of geocoding data that address validation returns for an address. Select the port from the Geocoding port group in the Basic Model.

### **Mailability Score**

Indicates the overall deliverability of an input address. Select the port from the Status Info port group in the Basic Model.

### **Match Code**

Describes the results of address validation on an input address. Select the port from the Status Info port group in the Basic Model.

### **Result Percentage**

Represents the degree of similarity between an input address and the corresponding output address as a percentage value. Select the port from the Status Info port group in the Basic Model.



## Element Status Code Definitions

The Element Input Status, Element Relevance, Element Result Status, and Extended Element Result Status ports provides status information about the validity of input and output data elements. Select the element ports to review the outcomes of an address validation operation.

The codes contain the following information:

- Element Input Status codes represent the quality of the match found between the input address data and the reference data.
- Element Relevance codes identify the address elements that are necessary for address delivery in the destination country.
- Element Result Status codes describe any change made to the input data during processing.
- Extended Element Result Status codes indicate that the address reference data contains additional information about the address element.

Each port returns a 20-character code in which each character refers to a different address data element. When you read the output codes on element ports, you must know the element that each character refers to. The 20 characters consist of 10 pairs. The two codes in each pair represent a type of address information. For example, the first position in the return code represents basic postal code information.

**Note:** The Address Resolution Code port returns a 20-character string based on the same address elements as the Element Status ports.

The following table describes the address elements that the values at each position identify:

| Position | Address Element     | Description  | Address Element Example                         |
|----------|---------------------|--|---|
| 1        | Postal code level 0 | Basic postal code information, such as a five-digit ZIP Code.  | The five-digit ZIP Code 10118                   |
| 2        | Postal code level 1 | Additional postal code information, such as the final four digits of a ZIP+4 Code.                         | 0110, in the ZIP+4 Code 10118-0110              |
| 3        | Locality level 0    | Primary location, such as city or town.  | London, in England                              |
| 4        | Locality level 1    | Dependent locality, suburb, village.   | Islington, in London                            |
| 5        | Province level 0    | Primary region within a country, such as a United States state name, Canadian province name, Swiss canton. | New York State                                  |
| 6        | Province level 1    | United States county name.   | Queens County, in New York State                |
| 7        | Street level 0      | Primary street information.  | South Great George's Street                     |
| 8        | Street level 1      | Dependent street information.  | George's Arcade, on South Great George's Street |
| 9        | Number level 0      | Building or house number related to the primary street.  | 460, on South Great George's Street             |

| Position | Address Element          | Description  | Address Element Example  |
|----------|--------------------------|--|--|
| 10       | Number level 1           | Building or house number related to the dependent street.                                  | 81, on George's Arcade   |
| 11       | Delivery service level 0 | Case postale or post box descriptor and number.  | PO Box 111   |
| 12       | Delivery service level 1 | Code of the post office that is responsible for delivery.                                  | MAIN STN   |
| 13       | Building level 0         | Building name or number. Does not identify a house number.                                 | Alice Tully Hall   |
| 14       | Building level 1         | Additional building name or number.  | Starr Theater, at Alice Tully Hall                             |
| 15       | Sub-building level 0     | Apartment, suite, or floor name or number.   | 80, in 350 5th Avenue, Floor 80                                |
| 16       | Sub-building level 1     | Apartment, suite, or floor information, when paired with Sub-building level 0 information. | 80-18, where 18 is the suite number and 80 is the floor number |
| 17       | Organization level 0     | Company name.  | Address Doctor GmbH  |
| 18       | Organization level 1     | Additional corporate information, such as a parent company.                                | Informatica Corporation  |
| 19       | Country level 0          | Country name.  | United States of America                                       |
| 20       | Country level 1          | Territory.   | United States Virgin Islands                                   |

When a port name has a number suffix, level 0 refers to data on port number 1 and level 1 refers to data on port numbers 2 through 6.

Level 0 information can precede or follow level 1 information in a printed address. For example, Postal code level 1 follows Postal code level 0, and Locality level 1 precedes Locality level 0.

## Address Resolution Code Output Port Values

Address Resolution Code is a 20-character string in which each character in the string represents a different input address element. The value for a character describes any non-valid address element at the corresponding position in the address.

The following table describes the Address Resolution Code port values:

| Code | Description   |
|------|---|
| 2    | The address element is required for delivery but is not present in the input address. The address reference data contains the missing address element.<br>An output of 2 indicates that address is not valid for delivery without the address element.  |
| 3    | The address element is a house number or street number that is outside the valid range for the address. For example, the address element contains a house number that does not exist on the specified street. Suggestion list mode returns alternative addresses.                               |
| 4    | Address validation cannot verify or correct the address element because the input address contains more than one instance of the element.   |
| 5    | The address element is ambiguous in the current address, and the address reference data contains alternatives. Address validation copies the input element to the output address.<br>For example, the address element is a valid post code that does not match a valid locality in the address. |
| 6    | The address element contradicts another element in the address. Address validation cannot determine the correct element for the address. The output address copies the input address.   |
| 7    | The address element cannot be corrected without multiple changes to the address. Address validation can correct the address, but the number of changes indicate that the address is not reliable.   |
| 8    | The data does not conform to mail carrier validation rules.   |

## Element Input Status Output Port Values

Element Input Status is a 20-character string in which each character represents a different input address element. The value for each character represents the type of processing performed on the address element.

Find the port in the Status Info port group.

The following table describes the codes that Element Input Status can return in each position on the output string in batch, certified, or suggestion list mode:

| Code | Description   |
|------|---|
| 0    | The input address contains no data at the current position.           |
| 1    | The reference data does not contain the data at the current position. |
| 2    | Cannot check the data because the reference data is missing.          |

| Code | Description  |
|------|--|
| 3    | The data at the current position is incorrect. The reference database suggests that the number or delivery service value is outside the range that the reference data expects. In batch and certified modes, the transformation passes the input data at the current position uncorrected as output. |
| 4    | The data at the current position matches the reference data but contains errors.   |
| 5    | The data at the current position matches the reference data, but the transformation corrected or standardized the data.  |
| 6    | The data at the current position matches the reference data without any error.   |

The following table describes the codes that Element Input Status can return in each position on the output string in parse mode:

| Code | Description  |
|------|--|
| 0    | The input address contains no data at the current position.  |
| 1    | The transformation moved the element at the current position to another position in the output address.                                    |
| 2    | The element at the current position matched the reference data value, but the transformation normalized the element in the output address. |
| 3    | The data at the current position is correct.   |

## Element Relevance Output Port Values

Element Relevance values indicates if an address element is required for postal delivery. Find the port in the Status Info port group.

The Element Relevance value is a 20-character string in which each character can represent a different type of address data. After you run the address validation mapping, review the port output to identify the address elements that are necessary for each address. Use the results to verify that you selected the right output ports for the address data. If you do not select an output port for a relevant address data element, the output for that address will not be valid.

The following table describes the codes that Element Relevance can return in each position on the output string:

| Code | Description   |
|------|---|
| 0    | Not relevant to delivery to the address.  |
| 1    | Relevant to delivery to the address.<br>The national postal carrier cannot deliver to the address without the data at this position in the output string. |

**Note:** Element Relevance values are available for addresses with a Match Code value of Cx or Vx in batch mode or Cx, Vx, I3, or I4 in interactive mode. Other assessment codes such as Element Input Status, Element

Result Status, Extended Element Result Status, and Address Resolution Code return values regardless of the Match Code value.

## Element Result Status Output Port Values

Element Result Status is a 20-character string in which each character represents a different input address element. The value for each character describes any update that the validation process makes to the address element.

Find the port in the Status Info port group.

The following table describes the Element Result Status port values:

| Code | Description  |
|------|--|
| 0    | The output address contains no data at the current position.   |
| 1    | The transformation cannot find the data at the current position in the reference data. The transformation copies the input data to the output data.  |
| 2    | Data at the current position is not checked but is standardized.   |
| 3    | Data at the current position is checked but does not match the reference data. The reference data suggests that the number data is not in the valid range. The transformation copies the input data to the output port.<br>Applies in batch mode.  |
| 4    | The transformation copies the input data to the output data because the reference data is missing.   |
| 5    | Data at the current position is validated but not changed because multiple matches exist in the reference data.<br>Applies in batch mode.  |
| 6    | Data validation deleted the input value at the current position.   |
| 7    | Data at the current position is validated but the input data contained a spelling error. Validation corrected the error with a value from the reference data.  |
| 8    | Data at the current position is validated and updated with a value from the reference data.<br>A value of 8 can also mean that the reference database contains additional data for the input element. For example, validation can add a building number or sub-building number if it finds a perfect match for the street name or building name. |
| 9    | Data at the current position is validated but not changed, and the delivery status is not clear. For example, the DPV value is wrong.  |
| C    | Data at the current position is validated and verified, but the name data is out of date. Validation changed the name data.  |
| D    | Data at the current position is validated and verified but changed from an exonym to an official name.   |

| Code | Description  |
|------|--|
| E    | Data at the current position is validated and verified. However, address validation standardized the character case or the language.<br>Address validation can change the language if the value fully matches a language alternative. For example, address validation can change "Brussels" to "Bruxelles" in a Belgian address. |
| F    | Data at the current position is validated, verified, and not changed, due to a perfect match with the reference data.  |

Positions 19 and 20 in the output string relate to country data.

The following table describes the values that validation may return for positions 19 and 20:

| Code | Description   |
|------|---|
| 0    | The output address contains no data at the current position.  |
| 1    | Address validation does not recognize the country data.   |
| 4    | Address validation identifies the country from the Default Country value in the Address Validator transformation.   |
| 5    | Address validation cannot determine the country because the reference data contains multiple matches.               |
| 6    | Address validation identifies the country from a script.  |
| 7    | Address validation identifies the country from the address format.  |
| 8    | Address validation identifies the country from major town data.   |
| 9    | Address validation identifies the country from province data.   |
| C    | Address validation identifies the country from territory data.  |
| D    | Address validation identifies the country from the country name, but the name contains errors.                      |
| E    | Address validation identifies the country from the address data, for example from an ISO code or a country name.    |
| F    | Address validation identifies the country from the Force Country value set in the Address Validator transformation. |

## Extended Element Result Status Output Port Values

Extended Element Result Status is a 20-character string in which each character represents a different input address element. The port output codes supplement the status data on the Element Input Status port and Element Result Status port. The port output code can also indicate the presence of additional information about an address element in the reference data.

Find the port in the Status Info port group.

The following table describes the Extended Element Result Status port values:

| Code | Description  |
|------|--|
| 1    | Address reference data contains additional information about the address element. Address validation does not require the additional information.  |
| 2    | Address validation updated the address element to resolve a data error or format error. Address validation did not verify the address element.   |
| 3    | Address validation updated the address element to resolve a data error or format error. Address validation verified the number data in the address element.  |
| 4    | Address validation moved the address element to another field to resolve a format error.   |
| 5    | Address reference data contains an alternative version of the address element, such as a preferred locality name.  |
| 6    | Address validation did not verify all parts of the address element. The element includes data that address validation cannot validate.   |
| 7    | Address validation found a valid address element in the wrong position in an address. Address validation moved the address element to the correct position.  |
| 8    | Address validation found a valid address element in the wrong data field. Address validation moved the address element to the correct field.   |
| 9    | Address validation generated the output element according to mail carrier validation rules.  |
| A    | Address validation found address elements from different address types that are eligible for the current position. Address validation selected the output address element that conforms the mail carrier rules in the destination country. |
| B    | Address validation cannot determine the element relevance. Address validation returns the default value for the country that the address specifies.  |
| C    | Suggestion list mode. Address validation can return additional address suggestions for the address element. To return the additional suggestions, update the Max Result Count property for the Address Validator transformation.           |
| D    | Address validation interpolated the numeric data in the address element.   |
| E    | Address validation cannot return the address element in the preferred language. Address validation returns the element in the default language.  |
| F    | Address code lookup mode. The input address is out of date.  |

## Mailability Score Output Port Values

The following table describes the Mailability Score output port values. Find this port in the Status Info port group.

The Address Validator transformation estimates the deliverability of an address and writes a figure representing the estimate to the Mailability Score port. Consult this figure if the Match Code value is in the range I1 through I4.

The following table describes the Mailability Score output codes:

| Code | Description                      |
|------|----------------------------------|
| 5    | Fully certain of delivery        |
| 4    | Almost certain of delivery       |
| 3    | Confident of delivery            |
| 2    | Reasonably confident of delivery |
| 1    | Delivery is doubtful             |
| 0    | Undeliverable                    |

## Match Code Output Port Values

The following table describes the Match Code output port values. Find this port in the Status Info port group.

| Code | Description  |
|------|--|
| A1   | Address code lookup found a partial address or a complete address for the input code.  |
| A0   | Address code lookup found no address for the input code.   |
| C4   | Corrected. All postally relevant elements are checked.   |
| C3   | Corrected. Some elements cannot be checked.  |
| C2   | Corrected, but the delivery status is unclear due to absent reference data.  |
| C1   | Corrected, but the delivery status is unclear because user standardization introduced errors.                                |
| I4   | Data cannot be corrected completely, but there is a single match with an address in the reference data.                      |
| I3   | Data cannot be corrected completely, and there are multiple matches with addresses in the reference data.                    |
| I2   | Data cannot be corrected. Batch mode returns partial suggested addresses.  |
| I1   | Data cannot be corrected. Batch mode cannot suggest an address.  |
| N7   | Validation error. Validation did not take place because single-line validation is not unlocked.                              |
| N6   | Validation error. Validation did not take place because single-line validation is not supported for the destination country. |
| N5   | Validation error. Validation did not take place because the reference database is out of date.                               |



| Code | Description  |
|------|--|
| N4   | Validation error. Validation did not take place because the reference data is corrupt or badly formatted.  |
| N3   | Validation error. Validation did not take place because the country data cannot be unlocked.   |
| N2   | Validation error. Validation did not take place because the required reference database is not available.  |
| N1   | Validation error. Validation did not take place because the country is not recognized or not supported.  |
| Q3   | Suggestion List mode. Address validation can retrieve one or more complete addresses from the address reference data that correspond to the input address.                   |
| Q2   | Suggestion List mode. Address validation can combine the input address elements and elements from the address reference data to create a complete address.                   |
| Q1   | Suggestion List mode. Address validation cannot suggest a complete address. To generate a complete address suggestion, add data to the input address.                        |
| Q0   | Suggestion List mode. There is insufficient input data to generate a suggestion.   |
| RB   | Country recognized from abbreviation. Recognizes ISO two-character and ISO three-character country codes. Can also recognize common abbreviations such as "GER" for Germany. |
| RA   | Country recognized from the Force Country setting in the transformation.   |
| R9   | Country recognized from the Default Country setting in the transformation.   |
| R8   | Country recognized from the country name.  |
| R7   | Country recognized from the country name, but the transformation identified errors in the country data.  |
| R6   | Country recognized from territory data.  |
| R5   | Country recognized from province data.   |
| R4   | Country recognized from major town data.   |
| R3   | Country recognized from the address format.  |
| R2   | Country recognized from a script.  |
| R1   | Country not recognized because multiple matches are available.   |
| R0   | Country not recognized.  |
| S4   | Parse mode. The address was parsed perfectly.  |
| S3   | Parse mode. The address was parsed with multiple results.  |
| S1   | Parse mode. There was a parsing error due to an input format mismatch.   |

| Code | Description   |
|------|---|
| V4   | Verified. The input data is correct. Address validation checked all postally relevant elements, and inputs matched perfectly.                         |
| V3   | Verified. The input data is correct, but some or all elements were standardized, or the input contains outdated names or exonyms.                     |
| V2   | Verified. The input data is correct, but some elements cannot be verified because of incomplete reference data.                                       |
| V1   | Verified. The input data is correct, but user standardization has negatively impacted deliverability. For example, the post code length is too short. |

## Geocoding Status Output Port Values

The following table describes the Geocoding Status output port values. Find this port in the Geocoding port group.

Select this port if you have installed geocoding reference data for an input address country.

| Value  | Description   |
|--------|---|
| EGC0   | Cannot append geocodes to the input address because geocodes are not available for the address.   |
| EGC1-3 | Reserved for future use.  |
| EGC4   | Geocodes are partially accurate to the postal code level.   |
| EGC5   | Geocodes are accurate to the postal code level.   |
| EGC6   | Geocodes are accurate to the locality level.  |
| EGC7   | Geocodes are accurate to the street level.  |
| EGC8   | Geocodes are accurate to the house number level. The geocodes estimate the house number location and include an offset to the side of the street that contains the mailbox. |
| EGC9   | Geocodes are accurate to the arrival point or rooftop.  |
| EGCA   | Geocodes are accurate to the center of the parcel of land.  |
| EGCC   | The geocode database is corrupted.  |
| EGCN   | Cannot find the geocode database.   |
| EGCU   | The geocode database is not unlocked.   |

# Address Reference Data File Status

Use the Developer tool to review the status of the address reference data files on the domain. The status information includes the license expiry date for each file and the type of processing that you can perform with the file.

Use the **Preferences** window in the Developer tool to review the address reference data file status. Select the **Content Status** option on the **Preferences** window to review the status information.

The following table describes the status properties that display by default when you select **Content Status**:

| Property           | Description  |
|--------------------|--|
| Country ISO        | The country to which the address reference data file applies. This property shows the ISO three-character abbreviation for the country.  |
| Expiry Date        | The date on which the file is due to be replaced by a newer file. You can use an address reference data file after its expiry date, but the data in the file may no longer be accurate.  |
| Country Type       | The type of address processing that you can perform with the data. You select the processing type in the Mode option on the <b>General Settings</b> tab. If the mode you select does not correspond to an address data file on the domain, the address validation mapping will fail. |
| Unlock Expiry Date | The date on which the file license expires. You cannot use the file after the unlock expiry date.  |
| Unlock Start Date  | The date on which the license is effective for the file. You cannot use the file before the unlock start date.   |

Right-click the property table to view a list of additional properties.

## Address Validator Transformation General Settings

Configure the general settings to set up parameters required for address validation.

You can configure the following properties on the **General Settings** view:

### Default Country

Specifies the address reference data set that the transformation uses if it cannot identify a country destination in the input address. Select None if your data includes country information.

You can also set the default country as an advanced property on the transformation.

### Force Country

Optional property. Replaces the country name or abbreviation in the input address with the name or abbreviation of the default country. If the input address does not identify a country, the transformation appends the default country data to the address.

### Line Separator

Specifies the delimiter symbol that separates data fields within a single-line address.

You can also specify a line separator as an advanced property on the transformation.

### Casing Style

Sets the character case style for output data. Select the Mixed option to follow the address reference data standard for initial capital letters. Select the Preserved option to write the address in the casing style that the address reference data uses.

You can also set the casing style as an advanced property on the transformation.

### Mode

Determines the type of validation that the transformation performs.

Select one of the following options:

| Mode Type           | Description  |
|---------------------|--|
| Address code lookup | Returns a partial address or a complete address from the reference data when you provide an address code as an input. Several countries support address codes that represent the locality, street, building, or unique mailbox for an address.   |
| Batch               | Performs address validation on the records in a data set. Batch validation focuses on address completeness and deliverability. Batch mode does not return suggestions for poor-quality addresses. Batch is the default mode.   |
| Certified           | Performs address validation on the records in a data set to the certification standards of the specified country. The certification standards require that each address identifies a unique mailbox. You can perform certified address validation on addresses in Australia, France, New Zealand, the United Kingdom, and the United States. |
| Country recognition | Determines a destination country for the postal address. The transformation does not perform address validation in country recognition mode.   |
| Interactive         | Completes an incomplete valid address. When an incomplete input address matches more than one address in the reference data, the transformation returns all valid addresses up to the limit that the Max Result Count specifies.   |
| Parse               | Parses data into address fields. The transformation does not perform address validation in parse mode.   |
| Suggestion list     | Returns a list of valid addresses from the reference data when an input address contains fragmentary information. When an address fragment matches more than one address in the reference data, the transformation returns all valid addresses up to the limit that the Max Result Count specifies.  |

You can also set the mode as an advanced property on the transformation.

## Address Validator Transformation Advanced Properties

Configure advanced properties to determine how the Data Integration Service processes data for the Address Validator Transformation.

## Alias Locality

Determines whether address validation replaces a valid locality alias with the official locality name.

A locality alias is an alternative locality name that the USPS recognizes as an element in a deliverable address. You can use the property when you configure the Address Validator transformation to validate United States address records in Certified mode.

The following table describes the Alias Locality options:

| Option   | Description  |
|----------|--|
| Off      | Disables the Alias Locality property.  |
| Official | Replaces any alternative locality name or locality alias with the official locality name. Default option.  |
| Preserve | Preserves a valid alternative locality name or locality alias. If the input locality name is not valid, address validation replaces the name with the official name. |

## Alias Street

Determines whether address validation replaces a street alias with the official street name.

A street alias is an alternative street name that the USPS recognizes as an element in a deliverable address. You can use the property when you configure the Address Validator transformation to validate United States address records in Certified mode.

The following table describes the Alias Street options:

| Option   | Description  |
|----------|--|
| Off      | Does not apply the property.   |
| Official | Replaces any alternative street name or street alias with the official street name. Default option.  |
| Preserve | Preserves a valid alternative street name or street alias. If the input street name is not valid, address validation replaces the name with the official name. |

## Casing Style

Specifies the character case style that the transformation applies to the output address data.

The following table describes the Casing Style options:

| Option           | Description   |
|------------------|---|
| Assign Parameter | Uses a parameter that you define to set the casing style.                             |
| Lower            | Writes the output address in lowercase letters.                                       |
| Mixed            | Uses the casing style in use in the destination country when it is possible to do so. |

| Option    | Description  |
|-----------|--|
| Preserved | Applies the casing style that the address reference data uses. Default option.   |
| No Change | Does not apply a casing style to the address.<br><b>Note:</b> The <b>No Change</b> option does not guarantee that the output address will match the case of the input address. If address validation replaces an address element with an element from the reference data, the element follows the case that the reference data uses. |
| Upper     | Writes the output address in uppercase letters.  |

You can also configure the casing style on the **General Settings** tab.

### Parameter Usage

You can use one of the following parameters to specify the casing style:

- LOWER. Writes the output address in lowercase letters.
- MIXED. Uses the casing style in use in the destination country when it is possible to do so.
- NATIVE. Applies the casing style that the address reference data uses. Default option. Matches the **Preserved** option.
- NOCHANGE. Does not apply a casing style to the address.
- UPPER. Writes the output address in uppercase letters.

Enter the parameter value in uppercase.

## Country of Origin

Identifies the country in which the address records are mailed.

Select a country from the list. The property is empty by default.

## Country Type

Determines the format of the country name or abbreviation in Complete Address or Formatted Address Line port output data. The transformation writes the country name or abbreviation in the standard format of the country you select.

The following table describes the Country Type options:

| Option       | Country                          |
|--------------|----------------------------------|
| ISO 2        | ISO two-character country code   |
| ISO 3        | ISO three-character country code |
| ISO #        | ISO three-digit country code     |
| Abbreviation | (Reserved for future use)        |
| CN           | Canada                           |

| Option | Country                   |
|--------|---------------------------|
| DA     | (Reserved for future use) |
| DE     | Germany                   |
| EN     | Great Britain (default)   |
| ES     | Spain                     |
| FI     | Finland                   |
| FR     | France                    |
| GR     | Greece                    |
| IT     | Italy                     |
| JP     | Japan                     |
| HU     | Hungary                   |
| KR     | Korea, Republic of        |
| NL     | Netherlands               |
| PL     | Poland                    |
| PT     | Portugal                  |
| RU     | Russia                    |
| SA     | Saudi Arabia              |
| SE     | Sweden                    |

## Default Country

Specifies the address reference data set that the transformation uses when an address record does not identify a destination country.

Select a country from the list. Use the default option if the address records include country information. Default is None.

You can also configure the default country on the **General Settings** tab.

### Parameter Usage

You can use a parameter to specify the default country. When you create the parameter, enter the ISO 3166-1 alpha-3 code for the country as the parameter value. When you enter a parameter value, use uppercase characters. For example, if all address records include country information, enter NONE.

## Dual Address Priority

Determines the type of address to validate. Set the property when input address records contain more than one type of valid address data.

For example, use the property when an address record contains both post office box elements and street elements. Address validation reads the data elements that contain the type of address data that you specify. Address validation ignores any incompatible data in the address.

The following table describes the options on the Dual Address Priority property:

| Option           | Description  |
|------------------|--|
| Delivery service | Validates delivery service data elements in an address, such as post office box elements.                |
| Postal admin     | Validates the address elements required by the local mail carrier. Default option.                       |
| Street           | Validates street data elements in an address, such as building number elements and street name elements. |

## Element Abbreviation

Determines if the transformation returns the abbreviated form of an address element. You can set the transformation to return the abbreviated form if the address reference data contains abbreviations.

For example, the United States Postal Service (USPS) maintains short and long forms of many street and locality names. The short form of HUNTSVILLE BROWNSFERRY RD is HSV BROWNS FRY RD. You can select the Element Abbreviation property when the street or locality values exceed the maximum field length that the USPS specifies.

The option is cleared by default. Set the property to ON to return the abbreviated address values. The property returns the abbreviated locality name and locality code when you use the transformation in batch mode. The property returns the abbreviated street name, locality name, and locality code when you use the transformation in certified mode.

## Execution Instances

Specifies the number of threads that the Data Integration Service tries to create for the current transformation at run time. The Data Integration Service considers the Execution Instances value if you override the Maximum Parallelism run-time property on the mapping that contains the transformation. The default Execution Instances value is 1.

The Data Integration Service considers multiple factors to determine the number of threads to assign to the transformation. The principal factors are the Execution Instances value and the values on the mapping and on the associated application services in the domain.

The Data Integration Service reads the following values when it calculates the number of threads to use for the transformation:

- The *Maximum Parallelism* value on the Data Integration Service. Default is 1.
- Any *Maximum Parallelism* value that you set at the mapping level. Default is Auto.
- The *Execution Instances* value on the transformation. Default is 1.

If you override the Maximum Parallelism value at the mapping level, the Data Integration Service attempts to use the lowest value across the properties to determine the number of threads.



If you use the default Maximum Parallelism value at the mapping level, the Data Integration Service ignores the Execution Instances value.

The Data Integration Service also considers the *Max Address Object Count* property on the Content Management Service when it calculates the number of threads to create. The *Max Address Object Count* property determines the maximum number of address validation instances that can run concurrently in a mapping. The *Max Address Object Count* property value must be greater than or equal to the *Maximum Parallelism* value on the Data Integration Service.

## Rules and Guidelines for the Execution Instances Property

Consider the following rules and guidelines when you set the number of execution instances:

- Multiple users might run concurrent mappings on a Data Integration Service. To calculate the correct number of threads, divide the number of central processing units that the service can access by the number of concurrent mappings.
- In PowerCenter, the *AD50.cfg* configuration file specifies the maximum number of address validation instances that can run concurrently in a mapping.
- When you use the default Execution Instances value and the default Maximum Parallelism values, the transformation operations are not partitionable.
- When you set an Execution Instances value greater than 1, you change the Address Validator transformation from a passive transformation to an active transformation.

## Flexible Range Expansion

Imposes a practical limit on the number of addresses that the Address Validator transformation returns when you set the Ranges to Expand property. You can set the Ranges to Expand property and the Flexible Range Expansion property when you configure the transformation to run in suggestion list mode.

The Ranges to Expand property determines how the transformation returns address suggestions when an input address does not contain house number data. If the input address does not include contextual data, such as a full post code, the Ranges to Expand property can generate a large number of very similar addresses. The Flexible Range Expansion property restricts the number of addresses that the Ranges to Expand property generates for a single address. Set the Flexible Range Expansion property to On when you set the Ranges to Expand property to All.

The following table describes the options on the Flexible Range Expansion property:

| Option | Description   |
|--------|---|
| On     | Address validation limits the number of addresses that the Ranges to Expand property adds to the suggestion list. Default option. |
| Off    | Address validation does not limit the number of addresses that the Ranges to Expand property adds to the suggestion list.         |

**Note:** The Address Validator transformation applies the Flexible Range Expansion property in a different way to every address that it returns to the suggestion list. The transformation does not impose a fixed limit on the number of expanded addresses in the list. The transformation also considers the Max Result Count property setting when it calculates the number of expanded addresses to include in the list.

## Geocode Data Type

Determines how the Address Validator transformation calculates geocode data for an address. Geocodes are latitude and longitude coordinates.

You can select one of the following geocode options:

### **Arrival point**

Returns the latitude and longitude coordinates of the entrance to a building or parcel of land. Default option.

You can select the arrival point option for addresses in the following countries:

Australia, Austria, Canada, Croatia, Denmark, Estonia, Finland, France, Germany, Hungary, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Mexico, Monaco, Netherlands, Norway, Poland, Slovakia, Slovenia, Sweden, Switzerland, and the United States.

If you specify arrival point geocodes and the Address Validator transformation cannot return the geocodes for an address, the transformation returns interpolated geocodes.

### **Parcel centroid**

Returns the latitude and longitude coordinates of the geographic center of a parcel of land at ground level.

You can select the parcel centroid option for addresses in the following countries:

Austria, Canada, Denmark, Finland, Germany, Hungary, Latvia, Luxembourg, Netherlands, Norway, Slovenia, Sweden, and the United States.

If you specify parcel centroid geocodes and the Address Validator transformation cannot return the geocodes for an address, the transformation does not return any geocode data.

### **Rooftop**

Returns the latitude and longitude coordinates that identify the physical center of the building that contains the mailbox. The Address Validator transformation returns rooftop coordinates for Ireland and United Kingdom addresses.

If you specify rooftop geocodes and the Address Validator transformation cannot return the geocodes for an address, the transformation does not return any geocode data.

### **Standard**

Returns the estimated latitude and longitude coordinates of the entrance to the building or parcel of land. An estimated geocode is also called an interpolated geocode.

The Address Validator transformation uses the nearest available geocodes in the reference data to estimate the geocodes for the address.

## Parameter Usage

You can use a parameter to specify the geocode type. Enter `ARRIVAL_POINT`, `PARCEL_CENTROID`, `ROOFTOP`, or `NONE`. To return the standard geocodes, enter `NONE`.

Enter the parameter value in uppercase.

## Global Max Field Length

Determines the maximum number of characters on any line in the address. If the Address Validator transformation writes an output address line that contains more characters than you specify, the transformation abbreviates the address elements on the line.

Use the property to control the line length in the address. For example, the SNA standards require that an address contains no more than 38 characters on any line. If you generate addresses to the SNA standard, set the Global Max Field Length to 38.

Default is 1024.

### Parameter Usage

You can use a parameter to specify the maximum number of addresses. To set the parameter value, enter an integer from 0 through 1024.

## Global Preferred Descriptor

Determines the format of the building descriptor, sub-building descriptor, and street descriptor that the Address Validator transformation writes to the output data. Select a descriptor when the address reference data for the destination country contains a range of descriptors for one or more of the data elements.

The following table describes the options on the property:

| Option         | Description  |
|----------------|--|
| Database       | Returns the descriptor that the reference database specifies for the element in the address. If the database does not specify a descriptor for the address, the transformation copies the input value to the output address.<br>Database is the default value. |
| Long           | Returns the complete form of the descriptor, for example <i>Street</i> .   |
| Preserve Input | Copies the descriptor from the input address to the output address.<br>If the input descriptor is not a valid version of the descriptor, the transformation returns an equivalent valid descriptor from the reference database.                                |
| Short          | Returns an abbreviated form of the descriptor, for example <i>St</i> .   |

## Input Format Type

Describes the most common type of information contained in unfielded input data. Use the Input Format Type property when you connect input data to the Complete Address or Formatted Address Line ports. Select the option that best describes the information in the mapping source data.

Select one of the following options:

- All
- Address
- Organization
- Contact
- Organization/Contact  
The address includes organization information and contact information.

- Organization/Dept  
The address includes organization information and department information.
- Default is All.

## Input Format With Country

Specifies whether the input contains country data. Select the property if you connect input data to the Complete Address or Formatted Address Line input ports and if the data contains country information.

The option is cleared by default.

## Line Separator

Specifies the delimiter symbol that indicates line breaks in a formatted address.

Select one of the following options:

- Assign a parameter to identify the line separator
- Carriage return (CR)
- Comma
- Line Feed (LF)
- None
- Semicolon
- Tab
- Windows New Line (CRLF)

Default is semicolon.

You can also configure the line separator on the **General Settings** tab.

### Parameter Usage

You can use a parameter to specify the line separator. The parameter value is case-sensitive. Enter the parameter value in uppercase characters.

Enter one of the following values:

- CR
- CRLF
- COMMA
- LF
- PIPE
- SEMICOLON
- SPACE
- TAB

## Matching Alternatives

Determines whether address validation recognizes alternative place names, such as synonyms or historical names, in an input address. The property applies to street, locality, and province data.

**Note:** The Matching Alternatives property does not preserve alternative names in a validated address.

The following table describes the Matching Alternatives options:

| Option        | Description   |
|---------------|---|
| All           | Recognizes all known alternative street names and place names. Default option.  |
| Archives only | Recognizes historical names only. For example, address validation validates "Constantinople" as a historical version of "Istanbul." |
| None          | Does not recognize alternative street names or place names.   |
| Synonyms only | Recognizes synonyms and exonyms only. For example, address validation validates "Londres" as an exonym of "London."                 |

## Matching Extended Archive

Determines whether address validation returns a unique delivery point code for an out-of-date Japanese address.

The address reference data files for Japan include data for out-of-date or retired addresses alongside the current addresses for the corresponding mailboxes. When you select the Matching Extended Archive property, address validation returns the delivery point code for the current version of each address. Address validation also writes a value to the Extended Element Result Status port to indicate that the input address is out of date.

To retrieve the current address from the address reference data, enter the address code as an input element.

The following table describes the Matching Extended Archive options:

| Option | Description  |
|--------|--|
| Off    | Does not apply the property.   |
| On     | Returns the address code for the current version of an out-of-date Japanese address. |

The Matching Extended Archive property uses supplementary data and address code lookup data for Japan. To apply the property in address validation, configure the transformation to run in address code lookup mode.

## Matching Scope

Determines the amount of data that the transformation matches against the address reference data during address validation.

The following table describes the Matching Scope options:

| Option         | Description  |
|----------------|--|
| All            | Validates all selected ports. Default option.  |
| Delivery Point | Validates building and sub-building address data in addition to data that the Street option validates. |

| Option   | Description   |
|----------|---|
| Locality | Validates province, locality, and postcode data.                                      |
| Street   | Validates street address data in addition to data that the Locality option validates. |

## Max Result Count

Determines the maximum number of addresses that address validation can return in suggestion list mode.

You can set a maximum number in the range 1 through 100. Default is 20.

**Note:** Suggestion list mode performs an address check against address reference data and returns a list of addresses that are possible matches for the input address. When you verify an address in suggestion list mode, address validation returns the best matches first.

### Parameter Usage

You can use a parameter to specify the maximum number of addresses. To set the parameter value, enter an integer from 0 through 100.

## Mode

Determines the type of address analysis that the transformation performs. You can also configure the mode on the **General Settings** tab of the transformation.

### RELATED TOPICS:

- [“Address Validator Transformation General Settings” on page 95](#)

## Optimization Level

Determines how the transformation matches input address data and address reference data. The property defines the type of match that the transformation must find between the input data and reference data before it can update the address record.

The following table describes the Optimization Level options:

| Option   | Description   |
|----------|---|
| Narrow   | The transformation parses building numbers or house numbers from street information before it performs validation. Otherwise the transformation validates the input address elements strictly according to the input port structure. The narrow option performs the fastest address validation, but it can return less accurate results than other options. |
| Standard | The transformation parses multiple types of address information from the input data before it performs validation. When you select the standard option, the transformation updates an address if it can match multiple input values with the reference data.<br>Default is Standard.  |
| Wide     | The transformation uses the standard parsing settings and performs additional parsing operations across the input data. When you select the wide option, the transformation updates an address if it can match at least one input value with the reference data. The wide option increases mapping run times.   |

### Parameter Usage

You can use a parameter to specify the optimization level. Enter NARROW, STANDARD, or WIDE. Enter the parameter value in uppercase.

## Output Format Type

Describes the most common type of information that the transformation writes on the Complete Address or Formatted Address Line output port. Select the option that best describes the data that you expect on the output port.

Select one of the following options:

- All
- Address
- Organization
- Contact
- Organization/Contact  
The address includes organization information and contact information.
- Organization/Dept  
The address includes organization information and department information.

Default is All.

## Output Format With Country

Determines if the transformation writes country identification data to the Complete Address or Formatted Address Line output ports.

The option is cleared by default.

## Preferred Language

Determines the languages in which the Address Validator transformation returns address elements when the reference data sets contain data in more than one language. You can set a preferred language for addresses in Belgium, Canada, China, Ireland, and Switzerland.

The Address Validator transformation can return address data in the following languages:

- The default language for the address in the address reference data. The default language is the main spoken language in the region to which each address belongs.
- Any other language that the address reference data supports for an address. For example, the Belgium reference data contains address elements in Flemish, French, and German.

The address reference data might contain data for a single address element or for a complete address in multiple languages. For example, address validation can return all address elements for Ireland in the English language and can return street, locality, and province information in the Irish language. Additionally, the reference data might specify different default languages for addresses in different parts of a country. For example, in the Switzerland reference data, the default language varies from region to region between French, German, and Italian.

The following table describes the options that you can select on the Preferred Language property:

| Option  | Description   |
|---|---|
| Alternative 1,<br>Alternative 2,<br>Alternative 3 | Returns address elements in one of the alternative languages in the reference data. The alternative languages depend on the country to which the address belongs.   |
| Database  | Returns each address in the language that the address reference data specifies. The address reference data might specify different languages for addresses in different regions in a country. Database is the default option. |
| English   | Returns address elements in English when the reference data contains the data in English. Returns the other address elements in the default language of the region to which the address belongs.                              |
| Preserve Input                                    | Returns each address in the language that the input address uses. The transformation preserves the input language when the address reference data contains the address in the input language.                                 |

**Note:** An address reference data set might contain some address elements in a non-default language but not others. If the transformation cannot find an element in the language that the property specifies, the transformation returns the element in the default language.

When you set a preferred language option, verify that the character set that the Preferred Script property specifies is compatible with the output address data that you expect.



## Multilanguage Support for Belgium, Canada, and Switzerland Addresses

By default, address validation returns addresses in the local language of each region in Belgium, Canada, and Switzerland. You can configure the Preferred Language property to use the same language or languages for all addresses within each country. Use the Alternative 1, Alternative 2, and Alternative 3 options to specify the language.

The following table describes the options and the languages that you can specify for addresses in Belgium:

| Option        | Language |
|---------------|----------|
| Alternative 1 | Flemish  |
| Alternative 2 | French   |
| Alternative 3 | German   |

The following table describes the options and the languages that you can specify for addresses in Canada:

| Option        | Language |
|---------------|----------|
| Alternative 1 | English  |
| Alternative 2 | French   |

When you select the Alternative 2 option for Canadian addresses, address validation returns the street descriptors and the province names in French. Address validation returns all other address elements in English.

The following table describes the options and the languages that you can specify for addresses in Switzerland:

| Option        | Language |
|---------------|----------|
| Alternative 1 | German   |
| Alternative 2 | French   |
| Alternative 3 | Italian  |

When you select the Alternative 3 option for Swiss addresses, address validation returns the locality names in Italian. Address validation returns all other address elements in the default language for the region.

## Multilanguage Support for China Addresses

By default, address validation returns addresses in China in the Chinese language. You can configure the Preferred Language property to return the English-language versions of the street descriptor and street directional information in the addresses.

To return the street descriptor and street directional information in English, set the Preferred Language property to ENGLISH. The English elements omit transliteration elements such as "shi." Address validation returns the other address elements in the Chinese language.

## Multilanguage Support for Ireland Addresses

By default, address validation returns addresses in Ireland in the English language. You can configure the Preferred Language property to return the street, locality, and county information in the Irish language.

To return the street, locality, and county information in Irish, set the Preferred Language property to Alternative 2. Address validation returns all other information in the English language.

## Preferred Script

Determines the character set that the Address Validator transformation uses for output data.

The transformation can process a data source that contains data in multiple languages and character sets. The transformation converts all input data to the Unicode UCS-2 character set and processes the data in the UCS-2 format. After the transformation processes the data, it converts the data in each address record to the character set that you specify in the property. The process is called transliteration. By default, the property uses the character set that the local address reference data uses.

The following table describes the options on the property:

| Option             | Description   |
|--------------------|---|
| ASCII (Simplified) | Returns address data in ASCII characters.   |
| ASCII (Extended)   | Returns address data in ASCII characters and expands special characters. For example, Ö transliterates to OE.   |
| Database           | Returns address data in the character set of the address reference data that applies to the address.<br>Default is Database.                                  |
| Latin              | Returns address data in Latin I characters.   |
| Latin (Alt)        | Returns address data in Latin I characters with alternative transliteration.  |
| Postal Admin       | Returns address data in Latin I or ASCII characters according to the preference of the mail carrier in the destination country.                               |
| Postal Admin (Alt) | Returns address data in Latin I or ASCII characters. Includes alternative characters, if the mail carrier in the destination country supports the characters. |
| Preserve Input     | Returns address data in the character set that the input address uses.  |

Transliteration can use the numeric representations of each character in a character set when it converts characters for processing. Transliteration can also convert characters phonetically when there is no equivalent numeric representation of a character. If the Address Validator transformation cannot map a character to UCS-2, it converts the character to a space.

**Note:** If you set a preferred language and preferred script for the output data, verify that the language and the character code that you select are compatible.

## Ranges To Expand

Determines how the Address Validator transformation returns suggested addresses for a street address that does not specify a house number. Use the property when the transformation runs in suggestion list mode.

The Address Validator transformation reads a partial or incomplete street address in suggestion list mode. The transformation compares the address to the address reference data, and it returns all similar addresses to the end user. If the input address does not contain a house number, the transformation can return one or more house number suggestions for the street. The Ranges to Expand property determines how the transformation returns the addresses.

The transformation can return the range of valid house numbers in a single address, or it can return a separate address for each valid house number. The transformation can also return an address for each number in the range from the lowest to the highest house number on the street.

The following table describes the options on the property:

| Option                | Description  |
|-----------------------|--|
| All                   | Address validation returns a suggested address for every house number in the range of possible house numbers on the street.                |
| None                  | Address validation returns a single address that identifies the lowest and highest house numbers in the valid range for the street.        |
| Only with valid items | Address validation returns a suggested address for every house number that the address reference data recognizes as a deliverable address. |

**Note:** Suggestion list mode can use other elements in the address to specify the valid range of street numbers. For example, a ZIP Code might identify the city block that contains the address mailbox. The Address Validator transformation can use the ZIP Code to identify the lowest and highest valid house numbers on the block.

If the transformation cannot determine a house number range within practical limits, the number of suggested addresses can grow to an unusable size. To restrict the number of addresses that the Ranges to Expand property generates, set the Flexible Range Expansion property to On.

## Standardize Invalid Addresses

Determines if the address validation process standardizes the data values in an undeliverable address. The property applies to address records that return a Match Code status in the range I1 through I4.

When you standardize the data, you increase the likelihood that a downstream data process returns accurate results. For example, a duplicate analysis mapping might return a higher match score for two address records that present common address elements in the same format.

Address validation can standardize the following address elements:

- Street suffix elements, such as road and boulevard.
- Predirectional and postdirectional elements, such as north, south, east, and west.
- Delivery service elements, such as Post Office Box.
- Sub-building elements, such as apartment, floor, and suite.
- State or province names. Standardization returns the abbreviated forms of the names.

The following table describes the options on the property:

| Option | Description  |
|--------|--|
| Off    | Address validation does not correct data errors. Default option. |
| On     | Address validation corrects data errors.                         |

### Parameter Usage

You can assign a parameter to specify the standardization policy for data errors. Enter OFF or ON as the parameter value. Enter the value in uppercase.

## Tracing Level

Sets the amount of detail that is included in the log.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Certification Reports

You can generate a report for a mail carrier that certifies the address validation operations of the Address Validator transformation.

The report verifies that the address validation operations meet the standards of the mail carrier. For example, the United States Post Office (USPS) can certify a software engine that validates United States addresses to ZIP+4 Code level. The Address Validator transformation validates United States address to ZIP+4 Code level and can provide additional data that assists in mail sorting and delivery.

The Address Validator transformation generates reports for the following standards:

### Address Machine Approval System (AMAS)

Australia Post defines the AMAS certification standard.

### Coding Accuracy Support System (CASS)

The USPS defines the CASS certification standard.

### SendRight

New Zealand Post defines the SendRight certification standard.

### Software Evaluation and Recognition Program (SERP)

Canada Post defines the SERP certification standard.

A mail carrier can offer price discounts if you use certified software to validate address data.

When you provide mail items to the mail carrier, you submit a report with the list of mailing addresses. The report contains data about the organization. You enter the data when you configure the Address Validator transformation. The transformation writes the report file to a path that you specify.

**Note:** You can use the Address Validator transformation to certify French address records to the National Address Management Service (SNA) certification standard. You do not generate a report for SNA address certification.

## AMAS Report Fields

When you configure an AMAS report, you provide information about the organization that submits the certified address record set to Australia Post. Save or print the report, and include the report with the address records that you submit to Australia Post.

Use the **Reports** view to enter the information.

The following table describes the information that you enter:

| Field                      | Description  |
|----------------------------|--|
| Report File Name           | Name and location of the report that address validation creates. By default, the Address Validator creates the report in the <code>bin</code> directory of the Data Integration Service machine.<br>To write the report file to another location on the Data Integration Service machine, enter the file path and file name. You can enter a fully qualified path or a relative path. The relative path uses the <code>bin</code> directory as a root directory.<br>The directory that you specify must exist before you run the address validation mapping. |
| Name of Address List       | Name of the address record set that you submit to Australia Post.  |
| List Processor Name        | Name of the organization that submits the address record set.  |
| Name of List Manager/Owner | Name of the manager or owner of the address data in the organization.  |
| Phone Number               | Contact telephone number of the organization that submits the address record set.  |
| Address                    | Address of the organization that submits the address record set.   |

### RELATED TOPICS:

- [“Defining a Certification Report” on page 117](#)

## CASS Report Fields

When you configure a CASS report, you provide information about the organization that submits the certified address record set to the USPS. Save or print the report, and include the report with the address records that you submit to the USPS.

Use the **Reports** view to enter the information.

The following table describes the information that you enter:

| Field               | Description  |
|---------------------|--|
| Report File Name    | Name and location of the report that address validation creates. By default, the Address Validator creates the report in the <code>bin</code> directory of the Data Integration Service machine.<br>To write the report file to another location on the Data Integration Service machine, enter the file path and file name. You can enter a fully qualified path or a relative path. The relative path uses the <code>bin</code> directory as a root directory.<br>The directory that you specify must exist before you run the address validation mapping. |
| List Name/ID        | Name or identification number of the address list that you submit to the mail carrier.   |
| List Processor Name | Name of the organization that performs the address validation.   |
| Name/Address        | Postal name and address of the organization that performs the address validation.  |

## RELATED TOPICS:

- [“Defining a Certification Report” on page 117](#)

## SendRight Report

When you configure a SendRight report, you provide information about the organization that submits the certified address record set to New Zealand Post. Save or print the report, and include the report with the address records that you submit to New Zealand Post.

Use the **Reports** view to enter the information.

The following table describes the information that you enter:

| Field               | Description   |
|---------------------|---|
| Customer Name       | The name of the organization that submits the address record set.   |
| Customer NZP Number | The New Zealand Post account number of the organization that submits the address record set.<br>If a mailhouse submits the records on behalf of the organization, enter the mailhouse transport identification (TPID) number.             |
| Customer Database   | The name of the file that contains the address record set.<br>The Address Validator transformation creates the report in the location that you specify on the Content Management Service. Use the Administrator tool to set the location. |
| Customer Address    | The address of the organization that submits the address record set.  |

## RELATED TOPICS:

- [“Defining a Certification Report” on page 117](#)

## SERP Report Fields

When you configure a SERP report, you provide information about the organization that submits the certified address record set to Canada Post. Save or print the report, and include the report with the address records that you submit to Canada Post.

Use the **Reports** view to enter the information.

The following table describes the information that you enter:

| Field                  | Description  |
|------------------------|--|
| Report File Name       | Name and location of the report that address validation creates. By default, the Address Validator creates the report in the <code>bin</code> directory of the Data Integration Service machine.<br><br>To write the report file to another location on the Data Integration Service machine, enter the file path and file name. You can enter a fully qualified path or a relative path. The relative path uses the <code>bin</code> directory as a root directory.<br><br>The directory that you specify must exist before you run the address validation mapping. |
| Customer CPC Number    | Customer number issued by the Canada Post Corporation to the organization that performs the address validation.  |
| Customer Name/ Address | Name and address of the organization that performs the address validation.   |

## RELATED TOPICS:

- [“Defining a Certification Report” on page 117](#)

# Configuring an Address Validator Transformation

Use an Address Validator transformation to validate and improve your postal address data quality.

The Address Validator transformation reads address reference data. Verify that the Developer tool can access the address reference data files you need.

1. Open the transformation.
2. Click the **General Settings** view and configure the general properties.
3. Click the **Templates** view to add input and output ports.
4. Click the **Reports** view to generate reports for postal service address certification.
5. Click the **Advanced** view to configure advanced address validation properties.
6. Connect the input and output ports.

**Note:** Connect input ports that you do not want the Address Transformation to validate to the **Passthrough** input port group.

# Adding Ports to the Address Validator Transformation

Use the **Templates** view to add ports to the Address Validator transformation.

1. Click the **Templates** view.
2. Expand a template.
  - Choose the **Basic Model** template to add common address fields.
  - Choose the **Advanced Model** template to add specialized address fields.
3. Expand the input port group that corresponds to the format of your input data. The input port groups are **Discrete**, **Multiline**, and **Hybrid**.
4. Select input ports.  
**Tip:** Click the **CTRL** key to select multiple ports.
5. Right-click the ports and select **Add port to transformation**.
6. Expand the output port group that contains the fields you require.
7. Right-click the ports and select **Add port to transformation**.
8. To add passthrough ports for columns you do not want to validate, click the **Ports** tab, select the **Passthrough** input port group, and click **New**.

## Creating User-Defined Templates

Create templates to group the address ports that you plan to reuse.

You create custom templates by selecting ports from the Basic and Advanced templates. You can select the custom templates when you create subsequent Address Validator transformations.

**Note:** Templates are not repository objects. Templates reside on the machine you use to create them.

1. Select the **Templates** view.
2. Click **New**.
3. Type a name for the template.
4. Expand the **Basic Model** or **Advanced Model** template and select the ports you require.
5. Click **OK**.

## Defining Address Validator Models

Address Validator models define the default input and output ports for Address Validator transformations.

Address Validator transformations do not contain default input and output ports. However, you can define a model to specify the input and output ports that Address Validator transformations use.

**Note:** Models are not repository objects. Models reside on the machine you use to create them.



To define an Address Validator model, you perform the following steps:

1. Select the **Templates** view.
2. Expand the **Basic Model** or **Advanced Model** template and select the ports you require.
3. Select **Create default AV model using selected ports**.
4. To reset the model and remove all ports, select **Clear default AV model**.

## Defining a Certification Report

When you define a certification report in the Address Validator transformation, you configure options on the **General Settings** and **Reports** views.

1. On the **General Settings** view, set the **Mode** option to *Certified*.
2. On the **Reports** view, select the type of reports to generate. You can select the following types of report:

| Option           | Description  |
|------------------|--|
| AMAS Report      | Contains information that Australia Post requires to process record set.       |
| CASS Report      | Contains information that the USPS requires to process the record set.         |
| SendRight Report | Contains information that New Zealand Post requires to process the record set. |
| SERP Report      | Contains information that Canada Post requires to process the record set.      |

3. For each report type that you select, enter the report details.

Submit the report file to the mail carrier with the list of address records that you validated with the Address Validator transformation.

### RELATED TOPICS:

- [“AMAS Report Fields” on page 113](#)
- [“CASS Report Fields” on page 113](#)
- [“SendRight Report” on page 114](#)
- [“SERP Report Fields” on page 115](#)

## CHAPTER 5

# Aggregator Transformation

This chapter includes the following topics:

- [Aggregator Transformation Overview, 118](#)
- [Aggregator Transformations in Dynamic Mappings, 119](#)
- [Developing an Aggregator Transformation, 119](#)
- [Aggregator Transformation Ports, 119](#)
- [Aggregate Expressions, 120](#)
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- [Creating a Reusable Aggregator Transformation, 127](#)
- [Creating a Non-Reusable Aggregator Transformation, 128](#)
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## Aggregator Transformation Overview

Configure an Aggregator transformation to perform aggregate calculations, such as averages and sums, against groups of data. You can use an Aggregator transformation to remove duplicate rows. The Aggregator transformation is an active transformation.

The Aggregator transformation is different from the Expression transformation because you can configure the Aggregator transformation to perform calculations on groups of data. An Expression transformation returns a result on a row by row basis.

For example, you can calculate the average salary for employees in each department of a organization. Configure a group by department number. Configure an expression to calculate the average salary and to return the result for each unique department number.

Use the transformation language to create aggregate expressions.

The Data Integration Service performs aggregate calculations as it reads data and stores the data in an aggregate cache. You can sort the input data to increase performance. The Data Integration Service does not create the cache if you sort the input data.

# Aggregator Transformations in Dynamic Mappings

You can use an Aggregator transformation in a dynamic mapping. You can configure dynamic ports in the transformation and reference the generated ports.

You can perform the following tasks to configure an Aggregator transformation in a dynamic mapping:

## **Reference a dynamic port or a generated port as a Group By column.**

You can include dynamic ports or generated ports as Group By columns. If you specify a dynamic port as a Group By column, you are specifying that all generated ports in the dynamic port are Group By columns. For this reason, you cannot specify a generated port as a Group By column if you specified the parent dynamic port as a Group By column. If you reference a generated port, and the generated port does not exist at run time, the mapping fails. You can parameterize the Group By columns to indicate which columns to group at run time.

## **Reference a generated port in the aggregate expression.**

You can include a generated port in the aggregate expression. If the port does not exist at run time, the mapping fails. You cannot reference a dynamic port in the aggregate expression.

## **Create the aggregate expression in an output port.**

You cannot create an aggregate expression in a generated port or a dynamic port. The aggregate expression cannot be a dynamic expression.

## **Parameterize values in the aggregate expression.**

You can include parameters in the aggregate expression. However, You cannot use an expression parameter or a port parameter in the aggregate expression.

# Developing an Aggregator Transformation

When you create an Aggregator transformation, define the expression to run against each row. Define a group by port list to return results by.

To create an Aggregator transformation, perform the following steps:

1. Define the transformation and create the ports.
2. Configure an aggregate expression on a variable or output port.
3. Define a group of ports to return aggregate results by.

# Aggregator Transformation Ports

An Aggregator transformation has multiple port types that you can use to configure groups and to aggregate expressions.

An Aggregator transformation Ports view has the following fields:

## **Name**

Name of the port.

**Type**

The port data type.

**Precision**

Length of the field.

**Scale**

The number of positions to the right of the decimal for numeric data.

**Input**

Indicates that data is from an upstream transformation.

**Output**

Indicates that the port returns the value of an expression. The expression can include non-aggregate expressions and conditional clauses. You can create multiple aggregate output ports.

**Pass-Through**

Indicates that the port is an input-output port that returns the data unchanged.

**Variable**

Indicates that the port can store values or calculations to use in an expression. Variable ports cannot be input or output ports. They pass data within the transformation only.

**Expression**

The expression to aggregate the rows or groups of rows.

**Default value**

The default value for a port with invalid or null values.

**Input Rules**

A set of rules that filter the ports to include or exclude in the transformation based on port names or data type. Configure input rules when you define dynamic ports.

## Aggregate Expressions

Configure aggregate expressions in the variable ports or the output ports of an Aggregator transformation. You cannot enter an expression if the port is an input port, a pass-through port, or a dynamic port.

An aggregate expression can include conditional clauses and functions that are not aggregate functions. The aggregate function can also include an aggregate function nested within another aggregate function, such as:

```
MAX( COUNT( ITEM ) )
```

The aggregate expression result varies based on the group by ports in the transformation. For example, the following aggregate expression finds the total quantity of items sold:

```
SUM( QUANTITY )
```

However, if you use the same expression, and you group by the ITEM port, the Data Integration Service returns the total quantity by item.

You can create an aggregate expression in any output port and use multiple aggregate ports in a transformation.

## Aggregate Functions

Configure aggregate functions within an Aggregator transformation. You can nest one aggregate function within another aggregate function.

The transformation language includes the following aggregate functions:

- AVG
- COUNT
- FIRST
- LAST
- MAX
- MEDIAN
- MIN
- PERCENTILE
- STDDEV
- SUM
- VARIANCE

You must use these functions in an expression within an Aggregator transformation.

## Nested Aggregate Functions

You can include multiple single-level or multiple nested functions in different output ports in an Aggregator transformation.

You cannot include both single-level and nested functions in an Aggregator transformation. Therefore, if an Aggregator transformation contains a single-level function in any output port, you cannot use a nested function in any other port in that transformation. When you include single-level and nested functions in the same Aggregator transformation, the Developer tool marks the mapping or mapplet invalid. If you need to create both single-level and nested functions, create separate Aggregator transformations.

## Conditional Clauses in Aggregate Expressions

Use conditional clauses in the aggregate expression to reduce the number of rows used in the aggregation. The conditional clause can be any clause that evaluates to TRUE or FALSE.

For example, use the following expression to calculate the total commissions of employees who exceeded their quarterly quota:

```
SUM( COMMISSION, COMMISSION > QUOTA )
```

## Group By Ports

You can define groups of rows to aggregate instead of running an aggregation across all the input data. For example, you can calculate the total company sales or you can find the total sales grouped by region.

To define a group for the aggregate expression, select the appropriate input, input/output, output, and variable ports in the Aggregator transformation. You can select multiple group by ports to create a new group

for each unique combination. The Data Integration Service then performs the defined aggregation for each group.

When you group values, the Data Integration Service produces one row for each group. If you do not group values, the Data Integration Service returns one row for all input rows. The Data Integration Service returns the last row of each group with the result of the aggregation. You can specify to return a specific row. For example, if you use the FIRST aggregator function, the Data Integration Service returns the first row.

When you select multiple group by ports in the Aggregator transformation, the Data Integration Service uses a port order to determine the order by which it groups. The group order can affect the results. Order the group by ports to ensure the appropriate grouping. You can change the port order after you select the ports in the group/

For example, you might create an output port called Price\_Out. The expression for Price\_Out is SUM (Qty \* Price). You define Store\_ID and Item as the group by ports. The transformation returns the total price for each item by store.

The input rows might contain the following data:

| Store_ID | Item    | Qty | Price |
|----------|---------|-----|-------|
| 101      | battery | 3   | 2.99  |
| 101      | battery | 1   | 3.19  |
| 101      | battery | 2   | 2.59  |
| 101      | AAA     | 2   | 2.45  |
| 201      | battery | 1   | 1.99  |
| 201      | battery | 4   | 1.59  |
| 301      | battery | 1   | 2.45  |

The Data Integration Service performs the aggregate calculation on the following unique groups:

| Store_Id | Item    |
|----------|---------|
| 101      | battery |
| 101      | AAA     |
| 201      | battery |
| 301      | battery |

The Data Integration Service returns the Store\_ID, Item, Qty, and Price from the last row with the sum of (Price \* Qty) for each item by store :

| Store_ID | Item    | Qty | Price | Price_Out |
|----------|---------|-----|-------|-----------|
| 101      | battery | 2   | 2.59  | 17.34     |
| 101      | AAA     | 2   | 2.45  | 4.90      |
| 201      | battery | 4   | 1.59  | 8.35      |
| 301      | battery | 1   | 2.45  | 2.45      |

## Configure Group By Ports

Define the group by ports on the **Group By** tab of the transformation **Properties** view.

The following image shows the Group By tab:

**Group By**

**Group By**

Specify by: Value ▼

Ports:

|          |
|----------|
| Store_ID |
| Item     |
|          |
|          |
|          |
|          |
|          |
|          |
|          |

Add

Choose...

Delete

Move Up

Move Down

The Group By tab contains the following options:

#### Specify by

Select **Value** or **Parameter**. Select **Value** to use port names. Choose **Parameter** to use a port list parameter.

#### Add

Accepts a port name that you type in manually. You must type a valid port name before you click **Add**.

#### Choose

Click **Choose** to select ports to add to the group. The Developer tool provides a list of ports from the transformation to choose from.

#### Move Up and Move Down

You can change the order of the ports in the group. Select the port name and then click one of the move buttons to move it up or down in the sort order.

## Group By Parameters

You can configure a port list parameter that contains one or more ports to include in the group. Create a port list parameter by selecting ports from a list of the ports in the transformation.

The following image shows the **Group By** tab when you use a parameter to identify the ports in the group:

**Item\_Cost** ✕

### Group By

**Group By**

Specify by: Parameter ▼ Type: Port List

Parameter:  New... Browse...

Description:

Default Value: Store\_ID,Item

You can browse for a port list parameter or click **New** to create a port list parameter. If you choose to create a port list parameter, you can select the ports from a list of the ports in the transformation.

## Default Values of Group By Ports

The Data Integration Service does not create a group when a group by port contains null values. You can define a default value for each port in the group to replace any null input value. Then, the Data Integration Service can include the rows in the aggregation totals.

## Non-Aggregate Expressions

Use non-aggregate expressions in group by ports to modify or replace groups.

For example, if you want to replace 'AAA battery' before grouping, you can create a group by output port, named CORRECTED\_ITEM, using the following expression:

```
IIF( ITEM = 'AAA battery', battery, ITEM )
```

## Aggregator Caches

When you run a mapping that uses an Aggregator transformation, the Data Integration Service creates an index cache and data cache in memory to run the transformation. If the Data Integration Service requires more space than available in the memory cache, it stores overflow data in cache files.

The Data Integration Service creates the following caches for the Aggregator transformation:

- Index cache that stores group values as configured in the group by ports.
- Data cache that stores calculations based on the group by ports.

The Data Integration Service does not use cache memory to run an Aggregator transformation with sorted ports. You do not need to configure cache memory for Aggregator transformations that use sorted ports.



# Sorted Input for an Aggregator Transformation

You can increase Aggregator transformation performance with the sorted input option.

When you use sorted input, the Data Integration Service assumes all data is sorted by group and it performs aggregate calculations as it reads rows for a group. When required, the Data Integration Service stores group information in memory. To use the Sorted Input option, you must pass sorted data to the Aggregator transformation.

When you do not use sorted input, the Data Integration Service performs aggregate calculations as it reads. Because the data is not sorted, the Data Integration Service stores data for each group until it reads the entire source to ensure that all aggregate calculations are accurate.

For example, one Aggregator transformation has the STORE\_ID and ITEM group by ports, with the sorted input option selected. When you pass the following data through the Aggregator, the Data Integration Service performs an aggregation for the three rows in the 101/battery group when it finds the group 201/battery:

| STORE_ID | ITEM      | QTY | PRICE |
|----------|-----------|-----|-------|
| 101      | 'battery' | 3   | 2.99  |
| 101      | 'battery' | 1   | 3.19  |
| 101      | 'battery' | 2   | 2.59  |
| 201      | 'battery' | 4   | 1.59  |
| 201      | 'battery' | 1   | 1.99  |

If you use sorted input and do not presort data correctly, the Data Integration Service fails the mapping run.

## Sorted Input Conditions

Certain conditions might prevent you from using sorted input.

You cannot use sorted input if either of the following conditions are true:

- The aggregate expression contains nested aggregate functions.
- Source data is data driven.

When either of these conditions are true, the Data Integration Service processes the transformation as if you do not use sorted input.

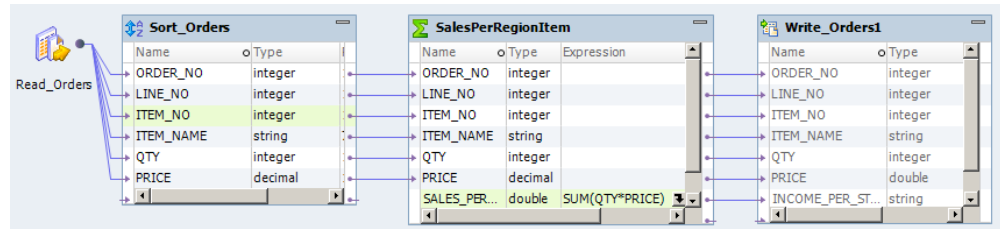
## Sorting Data in an Aggregator Transformation

To use sorted input, you pass sorted data through an Aggregator transformation.

You must sort data by the Aggregator group by ports in the order they appear in the Aggregator transformation.

For relational and flat file input, use the Sorter transformation to sort data in the mapping before passing it to the Aggregator transformation. You can place the Sorter transformation anywhere in the mapping before the Aggregator if no transformation changes the order of the sorted data. Group by columns in the Aggregator transformation must be in the same order as they appear in the Sorter transformation.

The following mapping shows a Sorter transformation configured to sort the source data in ascending order by ITEM\_NO:



The Sorter transformation sorts the data as follows:

| ITEM_NO | ITEM_NAME | QTY | PRICE |
|---------|-----------|-----|-------|
| 345     | Soup      | 4   | 2.95  |
| 345     | Soup      | 1   | 2.95  |
| 345     | Soup      | 2   | 3.25  |
| 546     | Cereal    | 1   | 4.49  |
| 546     | Cereal    | 2   | 5.25  |

With sorted input, the Aggregator transformation returns the following results:

| ITEM_NAME | QTY | PRICE | INCOME_PER_ITEM |
|-----------|-----|-------|-----------------|
| Cereal    | 2   | 5.25  | 14.99           |
| Soup      | 2   | 3.25  | 21.25           |

## Aggregator Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Aggregator transformation.

Configure the following advanced properties for an Aggregator transformation:

### Cache Directory

Directory where the Data Integration Service creates the index cache files and data cache files. Verify that the directory exists and contains enough disk space for the cache files.

Enter multiple directories separated by semicolons to increase performance during cache partitioning. Cache partitioning creates a separate cache for each partition that processes the transformation.

Default is the CacheDir system parameter. You can configure another system parameter or user-defined parameter for this property.

### Data Cache Size

Amount of memory that the Data Integration Service allocates to the data cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate

the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.

#### Index Cache Size

Amount of memory that the Data Integration Service allocates to the index cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.

#### Sorted Input

Indicates that input data is presorted by groups. Select this option only if the mapping passes sorted data to the Aggregator transformation.

#### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

#### RELATED TOPICS:

- [“Cache Size” on page 68](#)

## Creating a Reusable Aggregator Transformation

Create a reusable Aggregator transformation to use in multiple mappings or mapplets.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.  
The **New** dialog box appears.
3. Select the Aggregator transformation.
4. Click **Next**.
5. Enter a name for the transformation.
6. Click **Finish**.  
The transformation appears in the editor.
7. Click the **New** button to add a port to the transformation.
8. Edit the port to set the name, datatype, and precision.
9. Determine the type of each port: input, output, passthrough, or variable.
10. Click the Expression field to configure aggregate expressions for output ports. You can select ports and parameters to define the aggregate expression.
11. Click the **Advanced** view and edit the transformation properties.

# Creating a Non-Reusable Aggregator Transformation

Create a non-reusable Aggregator transformation in a mapping or mapplet.

1. In a mapping or mapplet, drag an Aggregator transformation from the Transformation palette to the editor.  
The transformation appears in the editor.
2. In the **Properties** view, edit the transformation name and the description.
3. On the **Ports** tab, click the **New** button to add ports to the transformation.
4. Edit the ports to set the name, datatype, and precision.
5. Determine the type of each port: input, output, passthrough, or variable.
6. Configure aggregate expressions for output ports.
7. In the **Advanced** view, edit transformation properties.

## Tips for Aggregator Transformations

You can use tips to use Aggregator transformations more effectively.

### **Use sorted input to decrease the use of aggregate caches.**

Sorted input reduces the amount of data cached during mapping run and improves performance. Use this option with the Sorter transformation to pass sorted data to the Aggregator transformation.

### **Limit connected input/output or output ports.**

Limit the number of connected input/output or output ports to reduce the amount of data the Aggregator transformation stores in the data cache.

### **Filter the data before aggregating it.**

If you use a Filter transformation in the mapping, place the transformation before the Aggregator transformation to reduce unnecessary aggregation.

### **The Aggregator transformation might not provide sorted output.**

To sort output from an Aggregator transformation, use a Sorter transformation.

## Troubleshooting Aggregator Transformations

You can troubleshoot Aggregator transformations.

### **I selected sorted input but the mapping takes the same amount of time as before.**

You cannot use sorted input if either of the following conditions are true:

- The aggregate expression contains nested aggregate functions.
- Source data is data driven.

When either of these conditions are true, the Data Integration Service processes the transformation as if you do not use sorted input.

**A mapping with an Aggregator transformation causes slow performance.**

The Data Integration Service may be paging to disk. You can increase performance by increasing the index and data cache sizes in the transformation properties.

## CHAPTER 6

# Association Transformation

This chapter includes the following topics:

- [Association Transformation Overview, 130](#)
- [Memory Allocation, 131](#)
- [Association Transformation Advanced Properties, 132](#)

## Association Transformation Overview

The Association transformation processes output data from a Match transformation. It creates links between duplicate records that are assigned to different match clusters, so that these records can be associated together in data consolidation and master data management operations.

The Association transformation generates an **AssociationID** value for each row in a group of associated records and writes the ID values to an output port.

The Consolidation transformation reads the output from the Association transformation. Use a Consolidation transformation to create a master record based on records with common association ID values.

The Association transformation accepts string and numerical data values on input ports. If you add an input port of another data type, the transformation converts the port data values to strings.

The AssociationID output port writes integer data. The transformation can write string data on an AssociationID port if the transformation was configured in an earlier version of Informatica Data Quality.

### Example: Associating Match Transformation Outputs

The following table contains three records that could identify the same individual:

| ID | Name         | Address           | City       | State | ZIP        | SSN         |
|----|--------------|-------------------|------------|-------|------------|-------------|
| 1  | David Jones  | 100 Admiral Ave.  | New York   | NY    | 10547      | 987-65-4321 |
| 2  | Dennis Jones | 1000 Alberta Ave. | New Jersey | NY    | -          | 987-65-4321 |
| 3  | D. Jones     | Admiral Ave.      | New York   | NY    | 10547-1521 | -           |

A duplicate analysis operation defined in a Match transformation does not identify all three records as duplicates of each other, for the following reasons:

- If you define a duplicate search on name and address data, records 1 and 3 are identified as duplicates but record 2 is omitted.

- If you define a duplicate search on name and Social Security number data, records 1 and 2 are identified as duplicates but record 3 is omitted.
- If you define a duplicate search on all three attributes (name, address, and Social Security number), the Match transformation may identify none of the records as matches.

The Association transformation links data from different match clusters, so that records that share a cluster ID are given a common AssociationID value. In this example, all three records are given the same AssociationID, as shown in the following table:

| ID | Name         | Address           | City       | State | Zip        | SSN         | Name and Address Cluster ID | Name and SSN Cluster ID | Association ID |
|----|--------------|-------------------|------------|-------|------------|-------------|-----------------------------|-------------------------|----------------|
| 1  | David Jones  | 100 Admiral Ave.  | New York   | NY    | 10547      | 987-65-4320 | 1                           | 1                       | 1              |
| 2  | Dennis Jones | 1000 Alberta Ave. | New Jersey | NY    | -          | 987-65-4320 | 2                           | 1                       | 1              |
| 3  | D. Jones     | Alberta Ave.      | New York   | NY    | 10547-1521 | -           | 1                           | 2                       | 1              |

You can consolidate the duplicate record data in the Consolidation transformation.

## Memory Allocation

You can set the minimum amount of cache memory that the Association transformation uses. The default setting is 400,000 bytes.

Set the value in the **Cache File Size** property on the **Advanced** tab.

The default value represents the minimum amount of memory that the transformation uses. The Association transformation tries to obtain a multiple of the default value, depending on the number of ports you associate on. The transformation uses this formula to obtain cache memory:

$(\text{Number of association ports} + 1) \times \text{default cache memory}$

For example, if you configure seven association ports, the transformation attempts to allocate 3.2 million bytes, or 3.05 MB, to cache memory.

If you change the default setting, the transformation does not try to obtain additional memory.

**Note:** If you enter a cache memory value that is lower than 65536, the Association transformation reads the value in megabytes.

# Association Transformation Advanced Properties

The Association transformation contains advanced properties that determine the cache memory behavior and the tracing level.

You can configure the following advanced properties:

## Cache File Directory

Specifies the directory to which the Data Integration Service writes temporary data for the current transformation. The Data Integration Service writes temporary files to the directory when the volume of input data is greater than the available system memory. The Data Integration Service deletes the temporary files after the mapping runs.

You can enter a directory path on the property, or you can use a parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory. The default value is the CacheDir system parameter.

## Cache File Size

Determines the amount of system memory that the Data Integration Service uses to sort the input data on the transformation. The default value is 400,000 bytes. You can use a parameter to specify the cache file size.

Before it sorts the data, the Data Integration Service allocates the amount of memory that you specify. If the sort operation generates a greater amount of data, the Data Integration Service writes the excess data to the cache file directory. If the sort operation requires more memory than the system memory and the file storage can provide, the mapping fails.

**Note:** If you enter a value of 65536 or higher, the transformation reads the value in bytes. If you enter a lower value, the transformation reads the value in megabytes.

## Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.



## CHAPTER 7

# Bad Record Exception Transformation

This chapter includes the following topics:

- [Bad Record Exception Transformation Overview, 133](#)
- [Bad Record Exception Output Record Types, 134](#)
- [Bad Record Exception Management Process Flow, 135](#)
- [Bad Record Exception Mappings, 135](#)
- [Bad Record Exception Ports , 137](#)
- [Bad Record Exception Configuration View, 139](#)
- [Bad Record Exception Issue Assignment , 141](#)
- [Exception Transformation Advanced Properties, 142](#)
- [Configuring a Bad Record Exception Transformation, 142](#)
- [Bad Record Exception Mapping Example, 143](#)

## Bad Record Exception Transformation Overview

The Bad Record Exception transformation is an active transformation that reads the output of a data quality process and identifies records that require manual review. The Bad Record Exception transformation is a multiple-group transformation.

Configure a Bad Record Exception transformation to analyze the output of a process that identifies data quality issues in records. A record that has a data quality issue that needs further review is an exception.

The Bad Record Exception transformation receives input from another transformation or from a data object in another mapping. The input to the Bad Record transformation must contain one or more quality issue ports that receive text descriptions of data quality problems. The input to the Bad Record Exception transformation can also contain a numeric record score that the transformation can use to determine the data quality of each record. Set an upper and lower score threshold in the Exception transformation to classify records as good and bad quality based on the record score. The Bad Record Exception transformation writes exceptions and associated quality issue text to a Bad Records table.

For example, an organization needs to validate customer addresses before sending out some mail to the customers. A developer creates a mapping that validates customer city, state, and ZIP code against reference tables with a Labeler transformation. The Labeler transformation validates the fields and adds a record score to each row based on the results. The Labeler transformation also adds text that describes the quality issues for each record that has an error. The Labeler transformation adds quality issue text such as

city not valid, or ZIP code blank to each exception. The Bad Record Exception transformation writes customer records that need manual review to the Bad Records table. Data analysts review and correct the bad records in the Analyst tool.

## Bad Record Exception Output Record Types

The Bad Record Exception examines input record scores to determine record quality. It returns records to different output groups

The Exception transformation identifies the following types of records based on each record score:

### Good records

Records with scores greater than or equal to the upper threshold. Good records are valid and do not require review. For example, if configure the upper threshold as 90, any record with a 90 or higher does not need review.

### Bad records

Records with scores less than the upper threshold and scores greater than or equal to the lower threshold. Bad records are the exceptions that you need to review in the Analyst tool. For example, when the lower threshold is 40, any record with a score from 40 to 90 needs manual review.

### Rejected records

Records with scores less than the lower threshold. Rejected records are not valid. By default, the Exception transformation drops rejected records from the data flow. For this example, any record with a score 40 or less is a rejected record.

**Note:** If the quality issues fields are NULL, the record is not an exception. When any quality issue contains text or it contains an empty string, the record is an exception. Verify that a quality issue port contains null values when a field has no error. If the quality issue ports contain blanks instead of null values then the Exception transformation flags every record as an exception. When a user needs to correct the issues in the Analyst tool, the user cannot filter the exceptions by data quality issue.

When a record has a score less than zero or greater than 100, the row is not valid. The Data Integration Service logs an error message that the row is not valid and it skips processing the record.

If you do not connect a record score as input to the Exception transformation, the transformation writes all records that contain quality issues to the bad records table.

When you include the Bad Record Exception transformation in a Mapping task, you can configure a Human task in the same workflow to include a manual review of the exceptions. The Human task starts when a Mapping task ends in the workflow. The Human task requires users to access the Analyst tool to resolve the quality issues. A user can update the data and change the quality status of each record in the bad records table.

# Bad Record Exception Management Process Flow

The Exception transformation receives record scores from data quality transformations and creates tables that contain records with different levels of data quality. You must configure the data quality transformations to find quality issues and provide a record score for each row.

You can configure the data quality transformations in a single mapping, or you can create mappings for different stages of the data quality process.

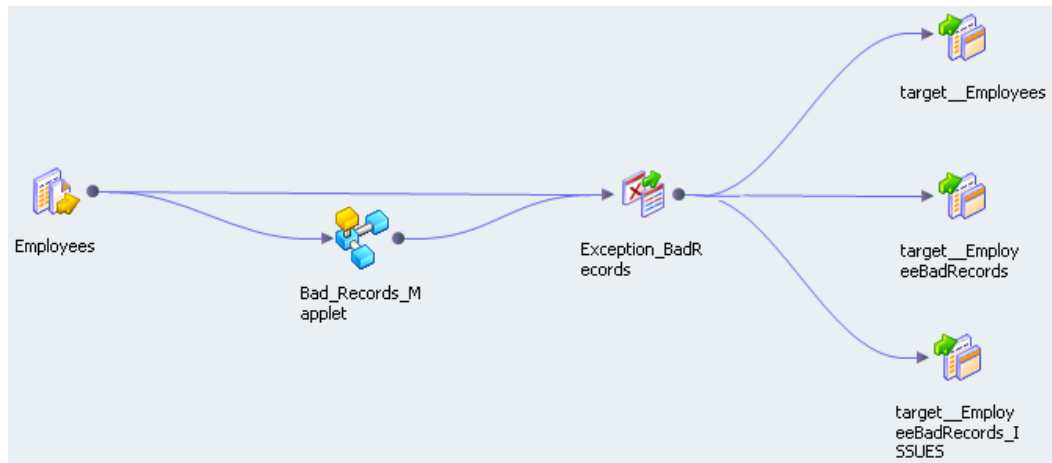
Complete the following bad record exception management tasks:

1. In the Developer tool, define transformations that generate score values for source data based on data quality issues that you define. Define transformations that return text to describe the quality of the source data. For example, you can configure a Labeler transformation to check source data against reference tables and then write a descriptive label for each comparison. You can define an IF/THEN rule in a Decision transformation to examine a data field. You can define multiple transformations and maplets that perform different data quality operations.
2. Configure an Exception transformation to analyze the record scores that it receives from the data quality operations. Configure the transformation to write records to database tables based on score values in the records. You can create separate tables for good records, bad records, quality issues, and rejected records.
3. Assign a quality issue port to each input port that might contain bad data.
4. Optionally, configure target data objects for good and bad records. Connect the Exception transformation output ports to the target data objects in the mapping.
5. Create the target data object for bad records. Choose to generate a bad records table and add it to the mapping. When you generate a bad records table, the Developer tool also generates a quality issues table. Add the quality issues table to the mapping.
6. Add the mapping to a workflow.
7. Configure a Human task to assign manual review of bad records to users. Users can review and update the bad records in the Analyst tool.

## Bad Record Exception Mappings

When you create a mapping that identifies bad record exceptions, you configure the mapping to write records to one or more database targets based on the quality of the data in the records.

The following figure shows an example Bad Record Exception mapping:



The mapping contains the following objects:

#### Data source

An Employees data source that contains the records to analyze for data quality.

#### Maplet

The Bad\_Records\_Maplet contains transformations that check for and add quality issues and record scores to source records. Rules are transformations that analyze the data and find the quality issues. For example, you can include a Labeler transformation to compare input data to reference tables. Depending on the results, you can configure the Labeler transformation to return quality issues as additional columns in the rows. You can configure a Decision transformation that uses IF, THEN, ELSE statements to examine the data and apply quality issues and record scores to the input data.

#### Exception transformation

The Exception transformation determines which records to write to the data targets including the bad records table and the issues table.

#### Good record table

The Exception transformation writes all good-quality records to the target\_Employees table.

#### Bad Record table

The Exception transformation writes all bad-quality records to the target\_EmployeeBadRecords table. Bad records require manual review.

#### Issues table

The Exception transformation writes quality issues to the target\_EmployeeBadRecords\_ISSUES table. When you view the bad records in the Analyst tool, the user interface links the quality issues to the bad records.

Optionally, the Exception transformation can write rejected records to a rejected records table. You must choose to create a separate output group for rejected records on the **Configuration** view of the transformation.

## Bad Record Exception Quality Issues

Quality issues are text strings that describe the type of data quality problem that caused a low record score. The Bad Record Exception transformation receives quality issues associated with each source row that

contains a low record score. You can configure different types of transformations that determine quality issues and record scores.

For example, you might create a Decision transformation that examines the phone number. The Decision transformation generates the record score and the quality issues for phone number.

The following decision strategy identifies phone numbers of incorrect length in a Decision transformation:

```
IF LENGTH(Phone_Number) > 10 THEN
  Score:=50
  Phone_Quality_Issue:='Phone num too long'
ELSEIF LENGTH(Phone_Number) < 10 THEN
  Score:=50
  Phone_Quality_Issue:=' Phone num too short'
ELSE
  Score:=90
ENDIF
```

When you configure the Exception transformation, you must associate Phone\_Quality\_Issue with the Phone\_Number port. The ports are from different input groups.

The Exception transformation reads the scores generated by the Decision transformation and assigns records with a score of "50" to the bad records group of output ports. It writes the Phone\_Quality\_Issue to the Issues group of output ports.

## Human Tasks

When you configure a workflow that contains an Exception transformation, you include the mapping in a Mapping task. You add a Human task to the same workflow. The Human task requires one or more users to correct the exception records in the Analyst tool.

The Mapping task identifies the records in the source data that contain unresolved data quality issues. Data analysts use the Analyst tool to resolve the issues and to update the data quality status of each record.

When you configure a Human task, you create one or more task instances and one or more task steps. A task instance represents the data set that a user must work on. A task step represents the type of work that a user performs on the records in his or her task instance. You can create multiple task instances so that different users work on different parts of the data in the Analyst tool.

A user can update the status of the bad records in the Analyst tool in one of the following ways:

- If a record is valid, the user updates the table metadata to confirm the record for persistent storage in the database.
- If a record is not valid, the user updates the table metadata to remove the record from the database at a later stage in the workflow.
- If the record status is not confirmed, the user updates the table metadata so that the record returns to the workflow for further processing in a Mapping task.

For more information about Human tasks, see the *Informatica Developer Workflow Guide*.

## Bad Record Exception Ports

Configure the input and output ports on the **Ports** tab of the Bad Record Exception transformation.

The Bad Record Exception transformation contains groups of input and output ports.

The following figure shows the **Ports** tab:

| Ports               |                     |         |            |       |                                     |                                     |         |             |
|---------------------|---------------------|---------|------------|-------|-------------------------------------|-------------------------------------|---------|-------------|
|                     | Name                | Type    | Precisi... | Scale | Input                               | Output                              | Default | Description |
| Inputs              |                     |         |            |       |                                     |                                     |         |             |
| Data (3)            |                     |         |            |       |                                     |                                     |         |             |
| 1                   | EmployeeID          | decimal | 30         | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 2                   | Employee_Name       | decimal | 30         | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 3                   | Phone_Number        | string  | 10         | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| Quality Issues (3)  |                     |         |            |       |                                     |                                     |         |             |
| 1                   | EmployeeID_Quality  | decimal | 30         | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 2                   | Name_Quality_Issue  | decimal | 30         | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 3                   | Phone_Quality_Issue | decimal | 30         | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| Control (1)         |                     |         |            |       |                                     |                                     |         |             |
| 1                   | Score               | double  | 15         | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| Outputs             |                     |         |            |       |                                     |                                     |         |             |
| Standard Output (4) |                     |         |            |       |                                     |                                     |         |             |
| 1                   | Score               | double  | 15         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 2                   | EmployeeID          | decimal | 30         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 3                   | Employee_Name       | decimal | 30         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 4                   | Phone_Number        | string  | 10         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| Bad Records (6)     |                     |         |            |       |                                     |                                     |         |             |
| 1                   | Workflow_ID         | string  | 64         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 2                   | Row_Identifier      | bigint  | 19         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 3                   | Record_Status       | string  | 20         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 4                   | EmployeeID          | decimal | 30         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 5                   | Employee_Name       | decimal | 30         | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |

## Bad Record Exception Transformation Input Ports

A Bad Record Exception transformation has separate input groups for the data, the quality issues, and the record score.

The Bad Record Exception transformation has the following input groups:

### Data

The source data fields.

### Quality Issues

Contains ports that describe record quality problems. Quality issue ports contain strings such as "Excess\_Characters" or "Bad\_Data\_Format." You can have multiple quality issues in each record. The transformation does not associate ports in the Quality Issues group to source data fields until you assign the issues to data ports in the **Issue Assignment** view.

### Control

The record score. The Exception transformation analyzes the record score to determine if input rows are exceptions. If you do not connect the Score port, the Exception transformation identifies a row as an exception if a Quality Issues port contains data.

## Bad Record Exception Transformation Output

A Bad Record Exception transformation has multiple output groups.

The Bad Record Exception transformation has the following output groups:

### Standard Output

The good quality records that you do not need to examine for data quality issues.

Each record in the Standard Output group contains a Score port that represents the data quality of the record.

## Bad Records

The exceptions that you need to examine for data quality issues.

Each record in the Bad Records group contains a workflow ID, a row identifier, and a record status port.

## Issues

The quality issues for records in the Bad Records group. The quality issues are metadata elements that the Analyst tool displays when you review the bad records.

Each record in the Issues group contains a workflow ID and a row identifier port that identifies which bad record row that the issues belong to.

## Rejected Records

Optional group that contains records that you might remove from the database. Each record in the Rejected Records group contains a low record score in the Score port.

## Bad Record Exception Configuration View

The **Configuration** view specifies the upper and lower thresholds that the transformation uses to identify good records and bad records. The **Configuration** view also identifies the target tables for the records with scores that are above or below the thresholds.

The following figure shows the Exception transformation **Configuration** view:

[illegible]

You can configure the following properties in the **Configuration** view:

### Lower Threshold

The lower limit for the bad record score range. The transformation identifies records with scores that are below the lower threshold as rejected records.

### Upper Threshold

The upper limit for the bad record score range. The transformation identifies records with scores that are greater than or equal to the upper threshold as good records.

### Data Routing Options

The types of output records. In the default configuration, the transformation writes good records to the Standard Output and writes bad records to the Bad Records table. By default, the transformation does not write the rejected records to a database table.

### Standard Output

The types of record that the transformation writes to the standard output ports. Default is Good Records.

### Bad Record Table

The types of record that the transformation writes to the bad record output ports. Default is Bad Records.

### Create separate output group for rejected records

Creates a separate output group for the rejected records. The option is clear by default.

### Generate bad records table

Creates a database table to contain the bad record data. When you select the option, the Exception transformation creates the database table, adds a data object to the Model repository, and adds an instance of the object to the mapping canvas. You can generate the bad records table for an Exception transformation instance in a mapping. When you generate the bad records table, the Developer tool also creates an issues table to store descriptive metadata about the records.

**Note:** The Developer tool adds a 12-character suffix to each column name in the bad record tables. If you use an Oracle database, the source column name can contain no more than 18 characters.

## Generating the Bad Records Table and the Issues Table

When you add the transformation to a mapping, you can generate the Bad Records table and the Issues table. The Developer tool adds the tables to the Model repository.

1. Click **Generate bad records table** to generate the table.  
The **Create Relational Data Object** dialog box appears.
2. Browse the database connections. Select a connection to the database to contain the table.
3. Enter a name for the Bad Records table. The Developer tool applies the name that you enter to the Bad Records table and to the Issues table.

The Developer tool appends the following string to the Issues table name:

`_ISSUE`

If you connect to an Oracle database, the Bad Records table name must contain no more than 24 characters.

4. Enter a name for the Bad Records data object in the Model repository.
5. Click **Finish**.

The Developer tool adds the tables to the mapping canvas and to the Model repository.



# Bad Record Exception Issue Assignment

You must assign ports and priorities to data quality issues.

The following figure shows the **Issue Assignment** view:

| Issue Assignment                              |               |          |
|---|---------------|----------|
| Assign ports and priorities to quality issues |               |          |
| Quality Issue                                 | Input         | Issue... |
| EmployeeID_Quality_Issue                      | EmployeeID    | 1        |
| Name_Quality_Issue                            | Employee_Name | 1        |
| Phone_Quality_Issue                           |               | 1        |

The **Issue Assignment** view contains the following fields:

## Quality Issue

Each quality issue port that you defined in the Quality Issues input group appears in the **Quality Issue** column.

## Input

The **Input** column contains the data ports that you assign to quality issues in the **Issue Assignment** view. Associate an input port with each quality issue port. Each input port that contains bad quality data must have at least one corresponding quality issue port that indicates a type of issue. You might select the Phone\_Number port for the Phone\_Quality\_Issue, for example. You can assign a port to more than one quality issue.

## Issue Priority

Issue priorities determine which quality issues are the most important when you assign the same input port to multiple quality issues. If more than one quality issue occurs for an input field, the Data Integration Service applies the highest priority quality issue. If more than one quality issue exists for an input port and the issues have the same priority, the Data Integration Service applies the topmost quality issue in the list. Enter a priority from 1 to 99, where 1 represents the highest priority.

Define issue priorities to filter the records in the Analyst tool.

## Assigning Ports to Quality Issues

Assign a port to associate with each quality issue. The Developer tool creates ports in the Issues output group for each association that you add in the **Issue Assignment** view.

1. For each quality issue, click the **Input** field to display a list of input ports.
2. Select an input port to associate with the quality issue.  
You can choose the same port for more than one issue.
3. Click the **Issue** column and select a priority for the quality issue.

# Exception Transformation Advanced Properties

Configure properties that determine how the Data Integration Service processes data for the Exception transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

## Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

# Configuring a Bad Record Exception Transformation

When you configure a Bad Record Exception transformation, configure the input ports and the quality issues that can occur in each port. Define the upper and lower thresholds for determining data quality. Configure where to write the exceptions and the reject records.

1. Create a reusable or a nonreusable Bad Record Exception transformation.
  - To create a reusable transformation, select **File > New > Transformation** and select a Bad Record Exception transformation.
  - To create a nonreusable transformation, open a mapping and add an Exception transformation to the mapping canvas. Select a Bad Record Exception transformation from the wizard.
2. Click **Next**, or click **Finish**.

If you click **Next**, you can update the default threshold values and the data routing options before you create the transformation.
3. Configure the input ports.
  - If you create a reusable transformation, select the **Ports** tab, and add ports for the data you want to connect to the transformation.
  - If you create a nonreusable transformation, add other objects to the mapping canvas and drag input ports to the transformation.
4. Select the **Configuration** view.
5. Configure the upper and lower score thresholds.
6. In the **Data Routing Options** section, configure the standard output and exception table properties to set where the transformation writes each type of record.

Configure where to write the Good Records, Bad Records, and Rejected Records. You can write them to standard output or to the Bad Records table.
7. Open the **Issue Assignment** view. Assign data quality issues to the data ports.

Assign a priority to each issue. If a port contains values with multiple issues, the transformation displays the top priority issue.
8. Select the option to generate a bad records table. Enter the database connection and table name information. The table must come from the default schema.

- When you generate a bad records table, you generate a table for the records and an additional table for the data quality issues that relate to the records. The transformation creates a database object in the Model repository.
9. Connect the transformation output ports to one or more data targets. Connect the output ports to the data objects that correspond to the output options you set on the **Configuration** view.
- If you create a reusable transformation, add the transformation to a mapping and connect the output ports.
  - If you create a nonreusable transformation, the transformation connects the ports to the bad record table. You connect output ports to any other data target.

## Bad Record Exception Mapping Example

An organization conducts a data project to review new customer data. The organization needs to verify that customer contact data is valid. The following example shows how to define a Bad Record Exception transformation that receives records from a maplet that does a data quality analysis of customer records.

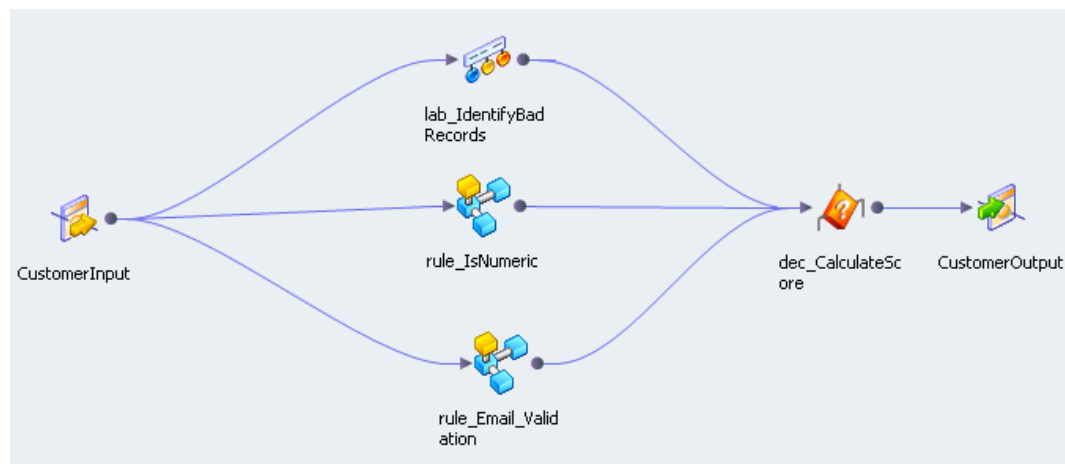
Create a maplet with data quality transformations that evaluate the format and the accuracy of the customer data. The maplet includes transformations that generate a record score based on the results of the data quality analysis. The transformations also define the quality issues for the data based on the results of the analysis.

### Bad Record Exception Maplet

Create a maplet that contains data quality transformations to check the values of certain fields. The transformations check reference tables and content sets to determine if the fields in the records are valid. The transformations apply a record score to each record based on the results. The Exception transformation receives the records from the maplet and routes each record to the appropriate output based on the record score.

The maplet consists of Labeler transformations, Decision transformations, and Expression transformations.

The following figure shows the objects in the maplet:



The mapplet performs the following tasks:

- A Labeler transformation verifies the locality, the state, the country code, the zip code, and the postal code data that it receives in the input ports. The transformation contains a strategy for each port. The strategies compares the source data to reference tables and identifies values that are not valid.
- An Expression transformation mapplet verifies that the phone number is numeric and verifies that the number contains 10 digits.
- A Labeler transformation and an Expression transformation mapplet verifies that the email address is valid. The Expression transformation verifies the structure of the email string. The Labeler transformation checks the IP address against a reference table of international IP address suffixes.
- A Decision transformation receives the output from the transformation and the mapplets. It calculates an overall record score for the customer contact record.

Create a bad record exception mapping that includes the mapplet. The bad record exception mapping includes an Exception transformation that writes the exceptions to a bad records database table. A data analyst researches and updates exception records in the bad record table with the Analyst tool.

## Bad Record Exception Example Input Groups

The Exception transformation has three input groups. The transformation has a Data group that receives the source data. It has the Quality Issues group, which receives data quality issues found by data quality transformations. It also has a Control group that contains the record score for the row.

The following figure shows the input groups in the Exception transformation:

|    | Name                      | Type    | Precision | Scale | Input                               | Output                   |
|----|---------------------------|---------|-----------|-------|-------------------------------------|--------------------------|
|    | <b>Inputs</b>             |         |           |       |                                     |                          |
|    | <b>Data (11)</b>          |         |           |       |                                     |                          |
| 1  | CUST_ID                   | decimal | 20        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2  | COMPANY                   | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3  | CONTACT                   | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4  | TITLE                     | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5  | ADDR1                     | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 6  | ADDR2                     | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7  | ADDR3                     | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 8  | ADDR4                     | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 9  | COUNTRY                   | string  | 20        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 10 | PHONE                     | string  | 50        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 11 | EMAIL                     | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|    | <b>Quality Issues (7)</b> |         |           |       |                                     |                          |
| 1  | CompanyStatus             | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2  | LocalityStatus            | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 3  | ProvinceStatus            | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4  | CountryStatus             | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5  | ZipStatus                 | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 6  | PhoneStatus               | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 7  | EmailStatus               | string  | 30        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|    | <b>Control (1)</b>        |         |           |       |                                     |                          |
| 1  | Score                     | double  | 15        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

## Bad Record Exception Example Configuration

Define the upper and lower thresholds on the **Configuration** view. Identify where the transformation writes good records, bad records, and rejected records.

Accept the default configuration for routing the good records, bad records, and issues.

The following figure shows the Exception transformation **Configuration** view:

[illegible]

The following table describes the configuration settings:

| Option           | Setting          |
|------------------|------------------|
| Lower threshold  | 10               |
| Upper threshold  | 90               |
| Good records     | Standard output  |
| Bad Records      | Bad record table |
| Rejected Records | -                |

Click **Generate bad records** tables to create the Bad Records and Issues tables.

## Bad Record Exception Example Mapping Output

Add a Write transformation to the mapping and connect the standard output ports to the data object. The mapping also contains the bad record database object and the issues database object you created on the **Configuration** view.

### Bad Records Table

The Bad Records table contains the exceptions with record scores between the lower and upper thresholds.

The following figure shows the bad records that the Exception transformation returns:

Name: [excc\\_BadRecords.Bad\\_Output\\_DI](#)

|    | Workflow_ID  | Row_Identifier | Record_Status | CUST_ID | COMPANY         | CONTACT          | TITLE            | ADDR1            | ADDR2       |
|----|--------------|----------------|---------------|---------|-----------------|------------------|------------------|------------------|-------------|
| 1  | DummyWor ... | 0              | INVALID       | 7121657 | WAITROSE        | MRS LACI WINI... | DIRECTOR OF IS   | 380-394 N END... | FULHAM      |
| 2  | DummyWor ... | 1              | INVALID       | 7121649 | WAITROSE        | MR NICHOLAS...   | SENIOR PROJE...  | EATON CNTR C...  | EATON       |
| 3  | DummyWor ... | 2              | INVALID       | 7121647 | VARSHEE SUPE... | MRS REUVEN C...  | MANAGER          | 834 LONDON RD    | THORNTON HE |
| 4  | DummyWor ... | 3              | INVALID       | 1002138 | VICTORY SUPE... | MR RAY ARIAS     | COMPUTER SPE...  | 22 FITCHBURG...  | AYER        |
| 5  | DummyWor ... | 4              | INVALID       | 1002137 | VICTORY SUPE... | MR NEVILLE DE... | SR PROJ MANA...  | 21 TIMPANY BLV   | GARDNER     |
| 6  | DummyWor ... | 5              | INVALID       | 1002109 | USDA FOREST...  | MR MICHEAL F...  | COMPUTER SPE...  | 1621 N KENT S... | ROSSLYN     |
| 7  | DummyWor ... | 6              | INVALID       | 1002026 | US ARMY CORP... | MR ROBERT EV...  | PROGRAMMER...    | 20 MASS AVE NW   | WASHINGTON  |
| 8  | DummyWor ... | 7              | INVALID       | 1002062 | US NAVY         | MR JOHN WELCH    | COMPUTER SPEC    | DATA PROCESS...  | OAK HARBOUR |
| 9  | DummyWor ... | 8              | INVALID       | 1062004 | TRICOR INDUS... | MR MICHAEL G...  | V.P.             | 8181 PROFESSI... | LANDOVER    |
| 10 | DummyWor ... | 9              | INVALID       | 1001921 | THE CORNER S... | MR DENIS LEE     | MANAGER (\$\$... | 102 MID STR S... | REDHILL     |
| 11 | DummyWor ... | 10             | INVALID       | 7121217 | THE CORNER S... | MRS TESSI SAN... | PROGRAMMER       | 192 BATTERSE...  | BATTERSEA   |

The Bad Records table includes all of the fields in the source record. A bad record also includes the following fields:

#### Workflow\_ID

The name of the workflow that included the Exception transformation. The workflow contains the Exception transformation Mapping task and the Human task to review the issues. The Workflow\_ID contains DummyWorkflowID if the Exception transformation is not in a workflow .

#### Row\_Identifier

A unique number that identifies each row.

#### Record\_Status

A record status for the Analyst tool. Each record in the Bad Records table receives an *Invalid* status. You can maintain the record status when you update records in the Analyst tool.

### Issues Table

The Issues table contains one row for each row in the Bad Records table. Each row contains the issues that the data quality analysis found for the source record.

The following figure shows the columns in the Issues table:

**Output**

Name: [excc\\_BadRecords.Issues\\_DI](#)

|    | Workflow_ID  | Row_Identifier | COMPANY | DQAPRIORITY_... | ADDR2            | DQAPRIORITY_... | ADDR3            | DQAPRIORITY_... | COUNTRY | DQ... |
|----|--------------|----------------|---------|-----------------|------------------|-----------------|------------------|-----------------|---------|-------|
| 1  | DummyWor ... | 0              |         | 1               | invalid_locality | 2               |                  | 3               |         | 3     |
| 2  | DummyWor ... | 1              |         | 1               | invalid_locality | 2               | invalid_province | 3               |         | 3     |
| 3  | DummyWor ... | 2              |         | 1               | invalid_locality | 2               |                  | 3               |         | 3     |
| 4  | DummyWor ... | 3              |         | 1               |                  | 2               |                  | 3               |         | 3     |
| 5  | DummyWor ... | 4              |         | 1               |                  | 2               |                  | 3               |         | 3     |
| 6  | DummyWor ... | 5              |         | 1               | invalid_locality | 2               |                  | 3               |         | 3     |
| 7  | DummyWor ... | 6              |         | 1               |                  | 2               |                  | 3               |         | 3     |
| 8  | DummyWor ... | 7              |         | 1               | invalid_locality | 2               |                  | 3               |         | 3     |
| 9  | DummyWor ... | 8              |         | 1               | invalid_locality | 2               |                  | 3               |         | 3     |
| 10 | DummyWor ... | 9              |         | 1               |                  | 2               |                  | 3               |         | 3     |
| 11 | DummyWor ... | 10             |         | 1               | invalid_locality | 2               |                  | 3               |         | 3     |

The Issues table contains the following columns:

### Workflow\_ID

Identifies the workflow that created the record. The workflow contains the Exception transformation Mapping task and the Human task to review the issue.

### Row\_Identifier

Identifies the record row in the database table. The row identifier identifies which row in the Bad Records table corresponds to the row in the Issues table.

### Issue Field Name

The field name is the name of the field that might quality issues. When the field contains an error the column value is the quality issue text. In the figure above, the ADDR2 field name contains the `invalid_locality` quality issue.

### DQAPriority

The issue priority. When multiple issues occur for the same field, the issue with the highest priority appears in the Issue Field Name.

## Good Records Table

Each record in the Good Records table has a record score greater than the upper threshold. In this example, the upper threshold is 90.

The following figure shows the good records that the Exception transformation returns:

| Output   |       |         |                  |                 |                       |                  |            |          |
|--|-------|---------|------------------|-----------------|-----------------------|------------------|------------|----------|
| Name: <a href="#">exc_BadRecords.Output_DI</a> |       |         |                  |                 |                       |                  |            |          |
|  | Score | CUST_ID | COMPANY          | CONTACT         | TITLE                 | ADDR1            | ADDR2      | ADDR3    |
| 1  | 100   | 7121669 | YEOVALE STOR...  | MRS OPPORTU...  | OWNER/CONSULTANT      | 1 MARGROVE T...  | BARNSTAPLE | DEVON    |
| 2  | 100   | 7121667 | WHARFEDALE...    | MRS PRAGER      | GENERAL MANAGER       | 458 SOUTHCOA...  | HULL       | NORTH HI |
| 3  | 100   | 1002195 | WORLDSPAN        | MR CHRISTOPH... | SENIOR ANALYST        | N8J1-1 300 GA... | ATLANTA    | GA       |
| 4  | 100   | 1002187 | WINN DIXIE ST... | MS CORINA GA... | VICE PRESIDENT        | 1805 WAYNE M...  | GOLDSBORO  | NC       |
| 5  | 100   | 1002181 | WINN DIXIE ST... | MR JENS GONY... | COMPUTER OPERATOR     | 506 W GANNO...   | ZEBULON    | NC       |
| 6  | 100   | 1002183 | WINN DIXIE ST... | MS MERCIE VA... | MANAGER OF DBA        | 5715 GUNN HWY    | TAMPA      | FL       |
| 7  | 100   | 1000029 | WINN DIXIE ST... | MR LYLE HICK... | MGR, DBA              | 3123 HWY 28 E    | PINEVILLE  | LA       |
| 8  | 100   | 1002178 | WINN DIXIE ST... | MR HUSSEIN D... | AUTOMATED SYSTEMS MGR | 2080 S FRONTA... | VICKSBURG  | MS       |
| 9  | 100   | 1002177 | WINN DIXIE ST... | MR REUVEN RH... | CHIEF DBA             | 695 S SEMORA...  | ORLANDO    | FL       |
| 10   | 100   | 1002180 | WINN DIXIE ST... | MS GOLDI WEI... | MGR COORD             | 11957 S APOPK... | ORLANDO    | FL       |

The Good Records table records contain the record score and the source data fields.

## CHAPTER 8

# Case Converter Transformation

This chapter includes the following topics:

- [Case Converter Transformation Overview, 148](#)
- [Case Strategy Properties, 148](#)
- [Configuring a Case Converter Strategy, 149](#)
- [Case Converter Transformation Advanced Properties, 149](#)

## Case Converter Transformation Overview

The Case Converter transformation is a passive transformation that creates data uniformity by standardizing the case of strings in input data.

To improve data quality, use the Case Converter transformation to format data to similar character formats. You can select predefined case conversion types, such as uppercase, lowercase, toggle case, title case, and sentence case.

You can also use reference tables to control case conversion. Use reference tables to change the case of input strings to the values from the reference table "Valid" column. You can use reference tables when the case conversion type is **Title Case** or **Sentence case**.

Within a Case Converter transformation, you can create multiple case conversion strategies. Each strategy uses a single conversion type. The Case Converter transformation provides a wizard that you use to create strategies.

## Case Strategy Properties

You can configure properties for case conversion strategies.

On the **Strategies** view, you can configure the following case conversion properties:

### Conversion Type

Defines the case conversion method that a strategy uses. You can apply the following case conversion types:

- **Uppercase**. Converts all letters to uppercase.
- **Sentence Case**. Capitalizes the first letter of the field data string.



- **Toggle Case.** Converts lowercase letters to uppercase and uppercase letters to lowercase.
- **Title Case.** Capitalizes the first letter in each substring.
- **Lowercase.** Converts all letters to lowercase.

The default case conversion method is uppercase.

#### Leave Uppercase Words Unchanged

Overrides the chosen capitalization for uppercase strings.

#### Delimiters

Defines how capitalization functions for title case conversion. For example, choose a dash as a delimiter to transform "smith-jones" to "Smith-Jones." The default delimiter is the space character.

#### Reference Table

Applies the capitalization format specified by a reference table. Applies only if the case conversion option is **Title Case** or **Sentence case**. Click **New** to add a reference table to the strategy.

**Note:** If a reference table match occurs at the start of a token, the next character in the token changes to uppercase. For example, if the input string is mcdonald and the reference table has an entry for Mc, the output string is McDonald.

## Configuring a Case Converter Strategy

To change the case of input strings, configure the settings in the **Strategies** view of a Case Converter transformation.

1. Select the **Strategies** view.
2. Click **New**.  
The **New Strategy** wizard opens.
3. Optionally, edit the strategy name and description.
4. Click the **Inputs** and **Outputs** fields to select ports for the strategy.
5. Configure the strategy properties. The default conversion strategy is **Uppercase**.
6. Click **Next**.
7. Optionally, add reference tables to customize the case options for input data that matches reference table entries. Reference table case customization only applies to title case and sentence case strategies.
8. Click **Finish**.

## Case Converter Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Case Converter transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

**Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 9

# Classifier Transformation

This chapter includes the following topics:

- [Classifier Transformation Overview, 151](#)
- [Classifier Models, 151](#)
- [Classifier Algorithms, 152](#)
- [Classifier Transformation Options, 152](#)
- [Classifier Strategies, 153](#)
- [Classifier Transformation Advanced Properties, 153](#)
- [Configuring a Classifier Strategy, 153](#)
- [Classifier Analysis Example, 154](#)

## Classifier Transformation Overview

The Classifier transformation is a passive transformation that analyzes input fields and identifies the type of information in each field. Use a Classifier transformation when input fields contain multiple text values.

When you configure the Classifier transformation, you select a classifier model and a classifier algorithm. A classifier model is a type of reference data object. A classifier algorithm is a set of rules that calculates the number of similar words in a string and the relative positions of the words. The transformation compares the algorithm analysis with the content of the classifier model. The transformation returns the model classification that identifies the dominant type of information in the string.

The Classifier transformation can analyze strings of significant length. For example, you can use the transformation to classify the contents of email messages, social media messages, and document text. You pass the contents of each document or message to a field in a data source column, and you connect the column to a Classifier transformation. In each case, you prepare the data source so that each field contains the complete contents of a document or string you want to analyze.

## Classifier Models

The Classifier transformation uses a reference data object called a classifier model to analyze input data. You select the classifier model when you configure a Classifier transformation. The transformation compares

a column of input data with the classifier model data and returns a label that describes the type of information in each input field.

A classifier model contains reference data rows and label values. The rows represent the input data on the port that you might connect to the Classifier transformation. The label values describe the types of information that the data rows contain. When you configure a classifier model, you assign a label to each reference data row in the model.

To link the reference data rows to the labels in a classifier model, you compile the model. The compilation process generates a series of logical associations between the data rows and the label values. When you run a mapping that reads the model, the Data Integration Service applies the model logic to the Classifier transformation input data. The Data Integration Service returns the labels that most accurately describe the information in each input data field.

You create a classifier model in the Developer tool. The Model repository stores the classifier model object. The Developer tool writes the data rows, the labels, and the compilation data to a file in the Informatica directory structure.

## Classifier Algorithms

When you add a classifier model to a transformation strategy, you also select a classifier algorithm. The algorithm determines how the transformation compares the classifier model data to the input data.

You can select the **Naive Bayes** algorithm or the **Maximum entropy** algorithm.

Consider the following factors when you select an algorithm:

- The Maximum entropy algorithm performs a more thorough analysis than the Naive Bayes algorithm.
- A mapping that uses the Naive Bayes algorithm runs faster than a mapping that uses the Maximum entropy algorithm on the same data.
- Select the Maximum entropy algorithm with the classifier model that Informatica includes in the Core Accelerator.

## Classifier Transformation Options

The Classifier transformation displays configurable options on a series of tabs or views in the Developer tool.

When you open a reusable transformation, the options appear on a series of tabs in the transformation editor. When you open a nonreusable transformation in a mapping, the options appear on a series of views in the mapping editor. Select the mapping properties tab to see the views on a nonreusable transformation.

You can select the following views:

### General

View and update the transformation name and description.

### Ports

View the input and output ports on the transformation.

**Note:** In a reusable Classifier transformation, the General and Ports views are combined in the **Overview** tab.

### Strategies

Add, remove, or edit a strategy.

### Dependencies

View the input and output ports on each strategy.

### Advanced

Set the level of detail that the transformation writes to log files.

## Classifier Strategies

A strategy is a set of data analysis operations that a transformation performs on input data. You create at least one strategy in the Classifier transformation. A Classifier strategy reads a single input port.

You define one or more operations in a strategy. A classifier operation identifies a classifier model and classifier algorithm to apply to the input port data. Each operation writes to a different output port. Create multiple operations in a strategy when you want to analyze an input port in different ways.

**Note:** When you want to identify the languages used in source data, select the Maximum entropy algorithm in the classifier operation.

## Classifier Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Classifier transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Configuring a Classifier Strategy

You configure a strategy to identify the types of information in the data. Each strategy analyzes an input port.

In a nonreusable transformation, connect input ports to the transformation before you configure the strategy.

1. Open the transformation and select the **Strategies** view.
2. Click **New Strategy**.  
The strategy creation wizard opens.
3. Enter a name and optional description for the strategy.
4. Select an input port from the Inputs field.

5. Verify that the input port precision value is high enough to read all fields on the input port. The port truncates the input data when it reaches the precision limit.
6. Select or clear the option to add score data to the strategy output.
7. Click **Next**.
8. Confirm the type of classifier operation, and click **Next**.
9. Select a classifier algorithm. You can select the following algorithms:
  - Naive Bayes
  - Maximum entropy

**Note:** To identify the language used in the source data, select the maximum entropy algorithm.
10. Verify the output port.

The transformation creates a single output port for each operation in a strategy. You can edit the port name and precision.
11. Select a classifier model.

The wizard lists the classifier model objects in the Model repository.
12. Click **Next** to add another operation to the strategy. Otherwise, click **Finish**.

## Classifier Analysis Example

You are a data steward at a software company that released a new smartphone application. The company wants to understand the public response to the application and the media coverage it receives. The company asks you and your team to analyze social media comments about the application.

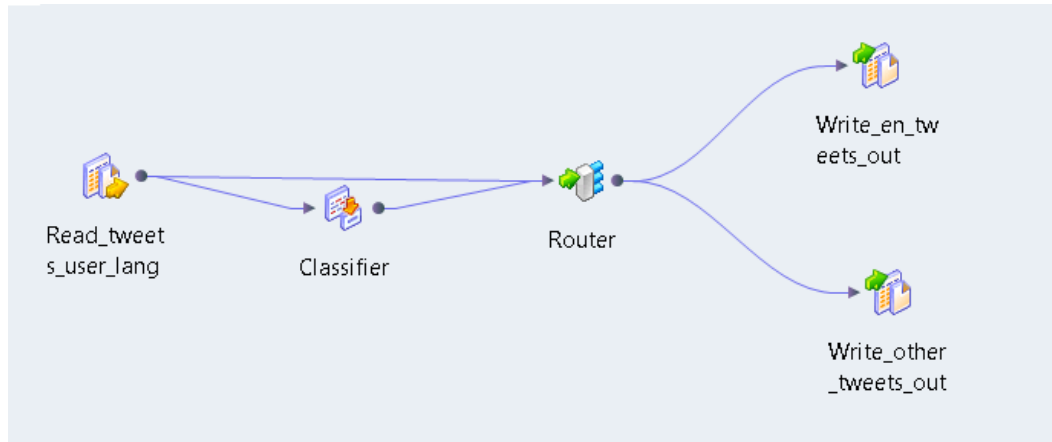
You decide to capture data from twitter feeds that discuss smartphones. You use the twitter application programming interface to filter the twitter data stream. You create a data source that contains the twitter data you want to analyze.

Because the twitter feeds contain messages in multiple languages, you must identify the language used in each message. You decide to use a Classifier transformation to analyze the languages. You create a mapping that identifies the languages in the source data and writes the twitter messages to English and non-English data targets.

## Create the Classifier Mapping

You create a mapping that reads a data source, classifies the languages in the data, and writes the data to targets based on the languages they contain.

The following image shows the mapping in the Developer tool:



The mapping you create contains the following objects:

| Object Name            | Description   |
|------------------------|---|
| Read_tweet_user_lang   | Data source.<br>Contains the twitter messages   |
| Classifier             | Classifier transformation.<br>Identifies the languages used in the twitter messages.                                  |
| Router                 | Router transformation.<br>Routes the twitter messages to data target objects according to the languages they contain. |
| Write_en_tweets_out    | Data target.<br>Contains twitter messages in English.   |
| Write_other_tweets_out | Data target.<br>Contains non-English-language twitter messages.   |

## Input Data Sample

The following data fragment shows a sample of the twitter data that you analyze in the mapping:

### Twitter Message

```
RT @GanaphoneS3: Faltan 10 minutos para la gran rifa de un iPhone 5...
RT @Clarified: How to Downgrade Your iPhone 4 From iOS 6.x to iOS 5.x (Mac)...
RT @jerseyjazz: The razor was the iPhone of the early 2000s
RT @KrissiDevine: Apple Pie that I made for Thanksgiving. http://t.com/s9ImzFxO
RT @sophieHz: Dan yang punya 2 kupon undian. Masuk dalam kotak undian yang berhadiah Samsung
RT @IsabelFreitas: o galaxy tem isso isso isso e a bateria Ã melhor que do iPhone
RT @PremiusIpad: Faltan 15 minutos para la gran rifa de un iPhone 5...
RT @payyton3: I want apple cider
RT @wiesteronder: Retweet als je iets van Apple, Nike, Adidas of microsoft hebt!
```

## Data Source Configuration

The data source contains a single port. Each row on the port contains a single twitter message.

The following table describes the configuration of the data source:

| Port Name | Port Type | Precision |
|-----------|-----------|-----------|
| text      | n/a       | 200       |

## Classifier Transformation Configuration

The Classifier transformation uses a single input port and output port. The transformation input port reads the text field from the data source. The output port contains the language identified for each twitter message in the text field. The Classifier transformation uses ISO country codes to identify the language.

The following table describes the configuration of the Classifier transformation:

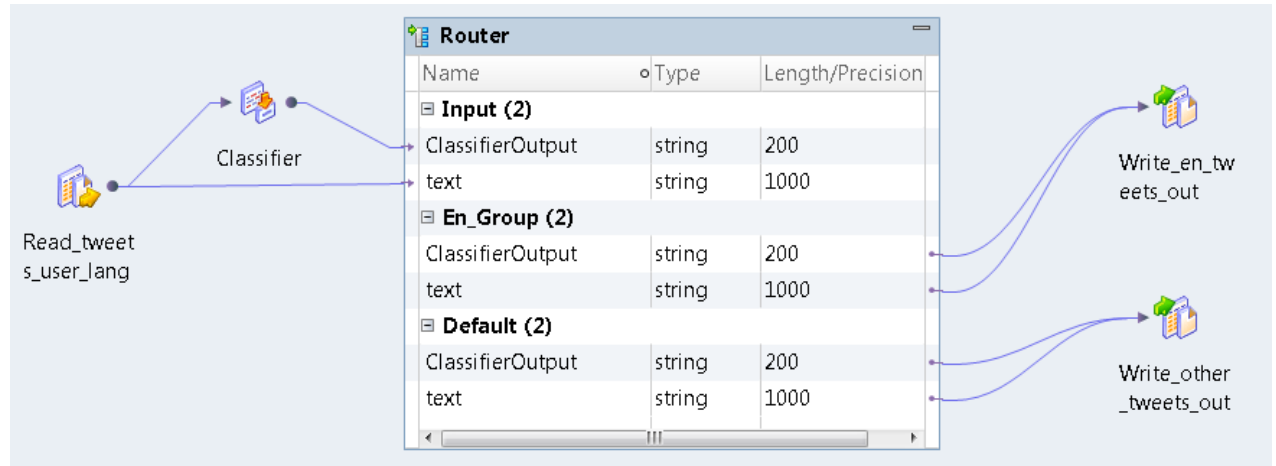
| Port Name         | Port Type | Precision | Strategy    |
|-------------------|-----------|-----------|-------------|
| text_input        | Input     | 200       | Classifier1 |
| Classifier_Output | Output    | 2         | Classifier1 |



## Router Transformation Configuration

The Router transformation uses two input ports. It reads the twitter messages from the data source and the ISO country codes from the Classifier transformation. The Router transformation routes the data on the input ports to different output ports based on a condition that you specify.

The following image shows the Router transformation port groups and port connections:



The following table describes the configuration of the Router transformation:

| Port Name         | Port Type | Port Group | Precision |
|-------------------|-----------|------------|-----------|
| Classifier_Output | Input     | Input      | 2         |
| text              | Input     | Input      | 200       |
| Classifier_Output | Input     | Default    | 2         |
| text              | Input     | Default    | 200       |
| Classifier_Output | Input     | En_Group   | 2         |
| text              | Input     | En_Group   | 200       |

You configure the transformation to create data streams for English-language messages and for messages in other languages. To create a data stream, add an output port group to the transformation. Use the **Groups** options on the transformation to add the port group.

To determine how the transformation routes data to each data stream, you define a condition on a port group. The condition identifies a port and specifies a possible value on the port. When the transformation finds an input port value that matches the condition, it routes the input data to the port group that applies the condition.

Define the following condition on the En\_Group:

```
ClassifierOutput='en'
```

**Note:** The Router transformation reads data from two objects in the mapping. The transformation can combine the data in each output group because it does not alter the row sequence defined in the data objects.

## Data Target Configuration

The mapping contains a data target for English-language twitter messages and a target for messages in other languages. You connect the ports from a Router transformation output group to a data target.

The following table describes the configuration of the data targets:

| Port Name         | Port Type | Precision |
|-------------------|-----------|-----------|
| text              | n/a       | 200       |
| Classifier_Output | n/a       | 2         |

## Classifier Mapping Outcome

When you run the mapping, the Classifier transformation identifies the language of each twitter message. The Router transformation writes the message text to data targets based on the language classifications.

The following data fragment shows a sample of the English-language target data:

| ISO Country Code | Twitter Message   |
|------------------|---|
| en               | RT @Clarified: How to Downgrade Your iPhone 4 From iOS 6.x to iOS 5.x (Mac)...                                      |
| en               | RT @jerseyjazz: The razor was the iPhone of the early 2000s   |
| en               | RT @KrissiDevine: Apple Pie that I made for Thanksgiving. <a href="http://t.com/s9ImzFxO">http://t.com/s9ImzFxO</a> |
| en               | RT @payyton3: I want apple cider  |

The following data fragment shows a sample of the target data identified for other languages:

| ISO Country Code | Twitter Message  |
|------------------|--|
| es               | RT @GanaphoneS3: Faltan 10 minutos para la gran rifa de un iPhone 5...   |
| id               | RT @sophieHz: Dan yang punya 2 kupon undian. Masuk dalam kotak undian yang berhadiah Samsung Champ.                                      |
| pt               | RT @IsabelFreitas: o galaxy tem isso isso isso e a bateria ã melhor que do iPhone  |
| es               | RT @PremiusIpad: Faltan 15 minutos para la gran rifa de un iPhone 5...   |
| nl               | RT @wiesteronder: Retweet als je iets van Apple, Nike, Adidas of microsoft hebt! <a href="http://t.co/Je6Ts00H">http://t.co/Je6Ts00H</a> |

## CHAPTER 10

# Comparison Transformation

This chapter includes the following topics:

- [Comparison Transformation Overview, 159](#)
- [Field Matching Strategies, 159](#)
- [Identity Matching Strategies, 162](#)
- [Configuring a Comparison Strategy, 162](#)
- [Comparison Transformation Advanced Properties, 163](#)

## Comparison Transformation Overview

The Comparison transformation is a passive transformation that evaluates the similarity between pairs of input strings and calculates the degree of similarity for each pair as a numerical score.

When you configure the transformation, you select a pair of input columns and assign a matching strategy to them.

The Comparison transformation outputs match scores in a range from 0 to 1, where 1 indicates a perfect match.

**Note:** The strategies available in the Comparison transformation are also available in the Match transformation. Use the Comparison transformation to define match comparison operations that you will add to a matching maplet. You can add multiple Comparison transformations to the maplet. Use the Match transformation to define match comparisons in a single transformation. You can embed a matching maplet in a Match transformation.

## Field Matching Strategies

The Comparison transformation includes predefined field matching strategies that compare pairs of input data fields.

## Bigram

Use the Bigram algorithm to compare long text strings, such as postal addresses entered in a single field.

The Bigram algorithm calculates a match score for two data strings based on the occurrence of consecutive characters in both strings. The algorithm looks for pairs of consecutive characters that are common to both strings. It divides the number of pairs that match in both strings by the total number of character pairs.

### Bigram Example

Consider the following strings:

- larder
- lerder

These strings yield the following Bigram groups:

```
l a, a r, r d, d e, e r
l e, e r, r d, d e, e r
```

Note that the second occurrence of the string "e r" within the string "lerder" is not matched, as there is no corresponding second occurrence of "e r" in the string "larder".

To calculate the Bigram match score, the transformation divides the number of matching pairs (6) by the total number of pairs in both strings (10). In this example, the strings are 60% similar and the match score is 0.60.

## Hamming Distance

Use the Hamming Distance algorithm when the position of the data characters is a critical factor, for example in numeric or code fields such as telephone numbers, ZIP Codes, or product codes.

The Hamming Distance algorithm calculates a match score for two data strings by computing the number of positions in which characters differ between the data strings. For strings of different length, each additional character in the longest string is counted as a difference between the strings.

### Hamming Distance Example

Consider the following strings:

- Morlow
- Marlowes

The highlighted characters indicate the positions that the Hamming algorithm identifies as different.

To calculate the Hamming match score, the transformation divides the number of matching characters (5) by the length of the longest string (8). In this example, the strings are 62.5% similar and the match score is 0.625.

## Edit Distance

Use the Edit Distance algorithm to compare words or short text strings, such as names.

The Edit Distance algorithm calculates the minimum "cost" of transforming one string to another by inserting, deleting, or replacing characters.

### Edit Distance Example

Consider the following strings:

- Levenston

- Levenshtein

The highlighted characters indicate the operations required to transform one string into the other.

The Edit Distance algorithm divides the number of unchanged characters (8) by the length of the longest string (11). In this example, the strings are 72.7% similar and the match score is 0.727.

## Jaro Distance

Use the Jaro Distance algorithm to compare two strings when the similarity of the initial characters in the strings is a priority.

The Jaro Distance match score reflects the degree of similarity between the first four characters of both strings and the number of identified character transpositions. The transformation weights the importance of the match between the first four characters by using the value that you enter in the Penalty property.

### Jaro Distance Properties

When you configure a Jaro Distance algorithm, you can configure the following properties:

#### Penalty

Determines the match score penalty if the first four characters in two compared strings are not identical. The transformation subtracts the full penalty value for a first-character mismatch. The transformation subtracts fractions of the penalty based on the position of the other mismatched characters. The default penalty value is 0.20.

#### Case Sensitive

Determines whether the Jaro Distance algorithm considers character case when it compares characters.

### Jaro Distance Example

Consider the following strings:

- 391859
- 813995

If you use the default Penalty value of 0.20 to analyze these strings, the Jaro Distance algorithm returns a match score of 0.513. This match score indicates that the strings are 51.3% similar.

## Reverse Hamming Distance

Use the Reverse Hamming Distance algorithm to calculate the percentage of character positions that differ between two strings, reading from right to left.

The Hamming Distance algorithm calculates a match score for two data strings by computing the number of positions in which characters differ between the data strings. For strings of different length, the algorithm counts each additional character in the longest string as a difference between the strings.

### Reverse Hamming Distance Example

Consider the following strings, which use right-to-left alignment to mimic the Reverse Hamming algorithm:

- 1-999-9999
- 011-01-999-9991

The highlighted characters indicate the positions that the Reverse Hamming Distance algorithm identifies as different.

To calculate the Reverse Hamming match score, the transformation divides the number of matching characters (9) by the length of the longest string (15). In this example, the match score is 0.6, indicating that the strings are 60% similar.

## Identity Matching Strategies

The Comparison transformation includes predefined identity matching strategies that you can use to find matches for individuals, addresses, or corporate entities.

The following table describes the match operation that each identity matching strategy performs:

| Identity Matching Strategy | Match Operation   |
|----------------------------|---|
| Address                    | Identifies an address match.  |
| Contact                    | Identifies a contact within an organization at a single location.     |
| Corp Entity                | Identifies an organization by its legal corporate name.               |
| Division                   | Identifies an organization at an address.                             |
| Family                     | Identifies a family by a family name and address or telephone number. |
| Fields                     | Identifies custom fields that you select.                             |
| Household                  | Identifies members of the same family at the same residence.          |
| Individual                 | Identifies an individual by name and either ID or date of birth.      |
| Organization               | Identifies an organization by name.                                   |
| Person Name                | Identifies a person by name.  |
| Resident                   | Identifies a person at an address.                                    |
| Wide Contact               | Identifies a contact within an organization regardless of location.   |
| Wide Household             | Identifies members of the same family at regardless of location.      |

**Note:** Identity matching strategies read reference data files called **populations**. Contact your Informatica Administrator user for information about population data files installed on your system.

## Configuring a Comparison Strategy

To configure a comparison strategy, edit the settings in the **Strategies** view of a Comparison transformation.

1. Select the **Strategies** view.
2. Select a comparison strategy from the **Strategies** section.

3. In the **Fields** section, double-click a cell in the **Available Fields** column to select an input.

**Note:** You must select an input for each row that displays a bolded input name in the **Input Fields** column.

## Comparison Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Comparison transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 11

# Consolidation Transformation

This chapter includes the following topics:

- [Consolidation Transformation Overview, 164](#)
- [Consolidation Mappings, 165](#)
- [Consolidation Transformation Ports, 165](#)
- [Consolidation Transformation Views, 165](#)
- [Simple Strategies, 168](#)
- [Row-Based Strategies, 169](#)
- [Advanced Strategies, 170](#)
- [Simple Consolidation Functions, 170](#)
- [Row-Based Consolidation Functions, 174](#)
- [Consolidation Mapping Example, 178](#)
- [Configuring a Consolidation Transformation, 179](#)

## Consolidation Transformation Overview

The Consolidation transformation is an active transformation that analyzes groups of related records and creates a consolidated record for each group. Use the Consolidation transformation to consolidate record groups generated by transformations such as the Key Generator, Match, and Association transformations.

The Consolidation transformation generates consolidated records by applying strategies to groups of related records. The transformation contains an output port that indicates which record is the consolidated record. You can choose to limit the transformation output to include only consolidated records.

For example, you can consolidate groups of duplicate employee records that the Match transformation generates. The Consolidation transformation can create a consolidated record that contains merged data from all records in the group.

You can configure the Consolidation transformation to use different types of strategies based on your consolidation requirements. Use simple strategies to create a consolidated record from multiple records. When you use simple strategies, you specify a strategy for each port. Use a row-based strategy to analyze rows in the record group and create a consolidated record with the values from one of the rows. Use an advanced strategy to create a consolidated record by applying an expression that you create.



# Consolidation Mappings

To consolidate records, create a mapping that creates groups of related records. Add a Consolidation transformation to a mapping, and configure the transformation to consolidate each record group into a single master record.

Connect a Consolidation transformation to other transformations according to the business objectives and the data requirements. To consolidate matched records, you can connect the Consolidation transformation to a Match transformation. To consolidate records as part of exception record management, connect the Consolidation transformation to an Exception transformation. If you use a Key Generator transformation to group records, you can connect a Consolidation transformation directly to the Key Generator transformation. The Consolidation transformation creates a consolidated record for each group that the Key Generator transformation creates.

## Mapping Output in Native and Hadoop Environments

When you run a consolidation mapping in a native environment and in a Hadoop environment, the Consolidation transformation can generate different results. Because the mapping runs on multiple nodes in Hadoop, the input records can enter the Consolidation transformation in a different order than in the native environment. As a result, the transformation can generate different sets of survivor records in each environment for the same input data set. The transformation calculations and the consolidated results are accurate for the input row order in each case.

To generate the same survivor records in native and Hadoop environments, configure the Consolidation transformation to sort the records in the following order:

- First, sort the records on the Group By port.
- Then, sort the records in the order in which the input ports appear in the transformation.

# Consolidation Transformation Ports

The Developer tool creates an output port for each input port that you add. You cannot manually add output ports to the transformation. The Consolidation transformation also includes an **IsSurvivor** output port that indicates the consolidated records.

One of the input ports that you add to the Consolidation transformation must contain group keys. The Consolidation transformation requires group key information because consolidation strategies process record groups rather than entire datasets.

When you add an input port, the Developer tool creates an output port name by adding the suffix "1" to the input port name. The transformation also includes the **IsSurvivor** output port, which indicates whether a record is the consolidated record. For consolidated records, the Consolidation transformation writes the string "Y" to the **IsSurvivor** port. For input records, the Consolidation transformation writes the string "N" to the **IsSurvivor** port.

# Consolidation Transformation Views

The Consolidation transformation contains views for ports, strategies, and advanced properties.

## Consolidation Transformation Strategies View

The **Strategies** view contains properties for simple, row-based, and advanced strategies.

The following list describes the types of consolidation strategies:

### Simple Strategy

A simple strategy analyzes all the values of a port in a record group and selects one value. You specify a simple strategy for each port. The Consolidation transformation uses the port values selected by all simple strategies to create a consolidated record. Examples of simple strategies include the most frequent value in a port, the longest value in a port, or the most frequent non-blank value in a port.

### Row-Based Strategy

A row-based strategy analyzes rows in the record group and selects one row. The Consolidation transformation uses the port values from that row to create a consolidated record. Examples of row-based strategies include the highest character count, the lowest number of blank fields, or the highest count of the most frequent fields.

### Advanced Strategy

An advanced strategy analyzes a record group using strategies that you define. You build advanced strategies by using consolidation functions in an expression. The Consolidation transformation creates a consolidated record based on the output of the expression. The expression that you create can also use all of the functions available in the Decision transformation.

## Consolidation Transformation Advanced Properties

The Consolidation transformation contains advanced properties that determine the sort behavior, the output mode, the cache memory behavior, and the tracing level.

You can configure the following advanced properties:

### Sort

Determines whether the transformation sorts the input rows on the **Group By** port data. The property is enabled by default.

Select the property if the input rows are not presorted.

### Case Sensitive Sort

Determines whether the sort operation is case-sensitive. The property is enabled by default.

### Output Mode

Determines whether the transformation writes all records as output or writes the consolidated records as output. The default value is All.

### Cache File Directory

Specifies the directory to which the Data Integration Service writes temporary data for the current transformation. The Data Integration Service writes temporary files to the directory when the volume of input data is greater than the available system memory. The Data Integration Service deletes the temporary files after the mapping runs.

You can enter a directory path on the property, or you can use a parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory. The default value is the CacheDir system parameter.

### Cache File Size

Determines the amount of system memory that the Data Integration Service uses to sort the input data on the transformation. The default value is 400,000 bytes. You can use a parameter to specify the cache file size.

Before it sorts the data, the Data Integration Service allocates the amount of memory that you specify. If the sort operation generates a greater amount of data, the Data Integration Service writes the excess data to the cache file directory. If the sort operation requires more memory than the system memory and the file storage can provide, the mapping fails.

**Note:** If you enter a value of 65536 or higher, the transformation reads the value in bytes. If you enter a lower value, the transformation reads the value in megabytes.

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Cache File Size

The cache file size property determines the amount of system memory that the Data Integration Service assigns to the Consolidation transformation for sort operations. Configure the property with a value that is less than or equal to the amount of RAM on the Data Integration Service host machine.

For best performance, specify a cache file size of at least 16 MB.

Before it begins a sort operation, the Data Integration Service allocates the memory that the cache file size property specifies. The Data Integration Service passes all input data into the Consolidation transformation before it performs a sort operation.

If the volume of input data is greater than the cache file size, the Data Integration Service writes data to the cache file directory. When it writes data to the cache file directory, the Data Integration Service consumes disk space that represents at least twice the input data volume.

Use the following formula to determine the size of incoming data:

$$[\text{number\_of\_input\_rows} * (\text{Sum}(\text{column\_size}) + 16)]$$

The following table lists the possible data types and the column size values to apply in cache file data calculations:

| Data Type  | Column Size                                       |
|--|---|
| Binary   | Precision + 8.<br>Round to nearest multiple of 8. |
| Date/Time  | 29  |
| Decimal, high precision off (all precision)      | 16  |
| Decimal, high precision on (precision <=18)      | 24  |
| Decimal, high precision on (precision >18, <=28) | 32  |
| Decimal, high precision on (precision >28)       | 16  |
| Decimal, high precision on (negative scale)      | 16  |

| Data Type    | Column Size  |
|--------------|--|
| Double       | 16   |
| Real         | 16   |
| Integer      | 16   |
| String, Text | Unicode mode: 2*(precision + 5)<br>ASCII mode: precision + 9 |

## Simple Strategies

A simple strategy analyzes a port in a record group and returns one value. You specify a simple strategy for each port. The Consolidation transformation uses the port values selected by all simple strategies to create a consolidated record.

When you configure a strategy in the **Strategies** view of the transformation, the strategy displays the following text as the consolidation method:

*Use default.*

The default strategy is "Highest row ID."

You can choose from the following simple strategies:

### Average

Analyzes a port in the record group and returns the average of all values.

For String and Date/time datatypes, the strategy returns the most frequently occurring value.

### Longest

Analyzes a port in the record group and returns the value with the highest character count. If the highest character count is shared by two or more values, the strategy returns the first qualifying value.

### Maximum

Analyzes a port in the record group and returns the highest value.

For the String datatype, the strategy returns the longest string. For the Date/time datatype, the strategy returns the most recent date.

### Minimum

Analyzes a port in the record group and returns the lowest value.

For the String datatype, the strategy returns the shortest string. For the Date/time datatype, the strategy returns the earliest date.

### Most frequent

Analyzes a port in the record group and returns the most frequently occurring value, including blank or null values. If the highest number of occurrences is shared by two or more values, the strategy returns the first qualifying value.

**Most frequent non-blank**

Analyzes a port in the record group and returns the most frequently occurring value, excluding blank or null values. If the highest number of non-blank occurrences is shared by two or more values, the strategy returns the first qualifying value.

**Shortest**

Analyzes a port in the record group and returns the value with the lowest character count. If the lowest character count is shared by two or more values, the strategy returns the first qualifying value.

**Highest row ID**

Analyzes a port in the record group and returns the value with the highest row ID.

## Row-Based Strategies

A row-based strategy analyzes rows in the record group and selects one row. The Consolidation transformation uses the port values from that row to create a consolidated record. The default strategy is "most data."

Choose one of the following row-based strategies:

**Most data**

Selects the row with the highest character count. If the highest character count is shared by two or more rows, the strategy returns the last qualifying value.

**Most filled**

Selects the row with the highest number of non-blank columns. If the highest number of non-blank columns is shared by two or more rows, the strategy returns the last qualifying value.

**Modal exact**

Selects the row with the highest count of the most frequent non-blank values. For example, consider a row that has three ports that contain the most frequent values in the record group. The count of the most frequent values for that row is "3."

If the highest count of the most frequent non-blank values is shared by two or more rows, the strategy returns the last qualifying value.

### Row-Based Strategy Example

The following table displays a sample record group. The last column describes the reasons why specific row-based strategies select different rows in this record group.

| Product ID | First Name  | Last Name | ZIP Code | Strategy Selection  |
|------------|-------------|-----------|----------|---|
| 2106       | Bartholomew |           | 28516    | The Most Data strategy selects this row because the row contains more characters than the other rows.             |
| 2236       | Bart        | Smith     | 28579    | The Most Filled strategy selects this row because the row has more non-blank columns than the other rows.         |
| 2236       | <Blank>     | Smith     | 28516    | The Modal Exact strategy selects this row because the row contains the highest count of the most frequent values. |

# Advanced Strategies

You can use advanced strategies to create consolidation strategies from predefined functions. You can use consolidation functions and other Informatica functions.

You can create expressions that contain simple consolidation functions or row-based consolidation functions. You use the simple consolidation functions to build a consolidated record based on port values in the record group. You use the row-based consolidation functions to select a row from the record group.

Consolidation expressions must populate all of the output ports in the Consolidation transformation. If consolidation expressions do not use all output ports, the transformation causes mappings to fail.

You can use a simple or row-based strategy as a template for an advanced strategy. Configure a simple or row-based strategy and then select Advanced. The Consolidation transformation generates an expression with functions that perform the strategy. You can add more functions to implement additional requirements.

## Simple Consolidation Functions

Simple consolidation functions select a value from all the port values in a record group. When you use a simple consolidation function, you provide the function with a port and the group by port.

### CONSOL\_AVG

Analyzes a port in the record group and returns the average of all values.

#### Syntax

```
CONSOL_AVG(string, group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

#### Return Value

The average of all values in a port.

For String and Date/time datatypes, the function returns the most frequently occurring value.

#### Example

The following expression uses the `CONSOL_AVG` function to find the average value of the SalesTotal input port:

```
SalesTotal1:= CONSOL_AVG(SalesTotal, GroupKey)
```

In this expression, the `CONSOL_AVG` function uses the GroupKey port to identify a record group. Within that record group, the function analyzes the SalesTotal port and returns the average value. The expression writes the average value to the SalesTotal1 output port.

## CONSOL\_LONGEST

Analyzes a port in the record group and returns the value with the highest character count.

### Syntax

```
CONSOL_LONGEST(string, group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

The port value with the highest character count.

If the highest character count is shared by two or more values, the strategy returns the first qualifying value.

### Example

The following expression uses the `CONSOL_LONGEST` function to analyze the `FirstName` input port and find the value with the highest character count:

```
FirstName1:= CONSOL_LONGEST(FirstName, GroupKey)
```

In this expression, the `CONSOL_LONGEST` function uses the `GroupKey` port to identify a record group. Within that record group, the function analyzes the `FirstName` port and returns the longest value. The expression writes this value to the `FirstName1` output port.

## CONSOL\_MAX

Analyzes a port in the record group and returns the highest value.

### Syntax

```
CONSOL_MAX(string, group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

The highest port value.

For the String datatype, the function returns the longest string. For the Date/time datatype, the function returns the most recent date.

## Example

The following expression uses the `CONSOL_MAX` function to analyze the `SalesTotal` input port and find the highest value:

```
SalesTotal1:= CONSOL_MAX(SalesTotal, GroupKey)
```

In this expression, the `CONSOL_MAX` function uses the `GroupKey` port to identify a record group. Within that record group, the function analyzes the `SalesTotal` port and returns the highest value. The expression writes this value to the `SalesTotal1` output port.

## CONSOL\_MIN

Analyzes a port in the record group and returns the lowest value.

### Syntax

```
CONSOL_MIN(string, group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

The lowest port value.

For the String datatype, the function returns the shortest string. For the Date/time datatype, the function returns the earliest date.

## Example

The following expression uses the `CONSOL_MIN` function to analyze the `SalesTotal` input port and find the lowest value:

```
SalesTotal1:= CONSOL_MIN(SalesTotal, GroupKey)
```

In this expression, the `CONSOL_MIN` function uses the `GroupKey` port to identify a record group. Within that record group, the function analyzes the `SalesTotal` port and returns the lowest value. The expression writes this value to the `SalesTotal1` output port.

## CONSOL\_MOSTFREQ

Analyzes a port in the record group and returns the most frequently occurring value, including blank or null values.

### Syntax

```
CONSOL_MOSTFREQ(string, group by)
```



The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

The most frequently occurring value, including blank or null values.

If the highest number of occurrences is shared by two or more values, the strategy returns the first qualifying value.

### Example

The following expression uses the `CONSOL_MOSTFREQ` function to analyze the Company input port and find the most frequently occurring value:

```
Company1:= CONSOL_MOSTFREQ(Company, GroupKey)
```

In this expression, the `CONSOL_MOSTFREQ` function uses the GroupKey port to identify a record group. Within that record group, the function analyzes the Company port and returns the most frequently occurring value. The expression writes this value to the Company1 output port.

## CONSOL\_MOSTFREQ\_NB

Analyzes a port in the record group and returns the most frequently occurring value, excluding blank or null values.

### Syntax

```
CONSOL_MOSTFREQ_NB(string, group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

The most frequently occurring value, excluding blank or null values.

If the highest number of occurrences is shared by two or more values, the strategy returns the first qualifying value.

### Example

The following expression uses the `CONSOL_MOSTFREQ_NB` function to analyze the Company input port and find the most frequently occurring value:

```
Company1:= CONSOL_MOSTFREQ_NB(Company, GroupKey)
```

In this expression, the `CONSOL_MOSTFREQ_NB` function uses the GroupKey port to identify a record group. Within that record group, the function analyzes the Company port and returns the most frequently occurring value. The expression writes this value to the Company1 output port.

## CONSOL\_SHORTEST

Analyzes a port in the record group and returns the value with the lowest character count.

### Syntax

```
CONSOL_SHORTEST(string, group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

The port value with the lowest character count.

If the lowest character count is shared by two or more values, the strategy returns the first qualifying value.

### Example

The following expression uses the `CONSOL_SHORTEST` function to analyze the `FirstName` input port and find the value with the lowest character count:

```
FirstName1:= CONSOL_SHORTEST(FirstName, GroupKey)
```

In this expression, the `CONSOL_SHORTEST` function uses the `GroupKey` port to identify a record group. Within that record group, the function analyzes the `FirstName` port and returns the shortest value. The expression writes this value to the `FirstName1` output port.

## Row-Based Consolidation Functions

Use row-based consolidation functions to select a record in a record group. You must use row-based consolidation functions within `IF-THEN-ELSE` statements.

## CONSOL\_GETROWFIELD

Reads the row identified by a row-based consolidation function and returns the value for the port you specify. You use a numeric argument to specify a port.

You must use the `CONSOL_GETROWFIELD` function in conjunction with one of the following row-based consolidation functions:

- `CONSOL_MODEXACT`
- `CONSOL_MOSTDATA`
- `CONSOL_MOSTFILLED`

For each input port in a row-based consolidation function, you must use one instance of the `CONSOL_GETROWFIELD` function .

### Syntax

```
CONSOL_GETROWFIELD(value)
```

The following table describes the arguments for this command:

| Argument     | Required/Optional | Description  |
|--------------|-------------------|--|
| <i>value</i> | Required          | Number that indicates an input port in the row-based consolidation function. Use "0" to specify the leftmost port in the function. Use subsequent numbers to indicate other ports. |

### Return Value

The value of the port you specify. The function reads this value from a row identified by a row-based consolidation function.

### Example

The following expression uses the `CONSOL_GETROWFIELD` function in conjunction with the `CONSOL_MOSTDATA` function:

```
IF (CONSOL_MOSTDATA(First_Name, Last_Name, GroupKey, GroupKey))
THEN
  First_Name1 := CONSOL_GETROWFIELD(0)
  Last_Name1 := CONSOL_GETROWFIELD(1)
  GroupKey1 := CONSOL_GETROWFIELD(2)
ELSE
  First_Name1 := First_Name
  Last_Name1 := Last_Name
  GroupKey1 := GroupKey
ENDIF
```

In this expression, the `CONSOL_MOSTDATA` function analyzes rows in a record group and identifies a single row. The `CONSOL_GETROWFIELD` functions use consecutive numbers to read the port values for that row and write the values to the output ports.

## CONSOL\_MODELEXACT

Identifies the row with the highest count of the most frequent values.

For example, consider a row that has three ports that contain the most frequent values in the record group. The count of the most frequent values for that row is "3."

You must use this function in conjunction with the `CONSOL_GETROWFIELD` function. The `CONSOL_GETROWFIELD` returns the values from the row that the `CONSOL_MODELEXACT` function identifies.

### Syntax

```
CONSOL_MODELEXACT(string1, [string2, ..., stringN],
  group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

TRUE for the row that scores the highest count of the most frequent fields, FALSE for all other rows.

## Example

The following expression uses the `CONSOL_MODELEXACT` function to find the row that contains the highest count of the most frequent fields:

```
IF (CONSOL_MODELEXACT(First_Name,Last_Name,GroupKey,GroupKey))
THEN
First_Name1 := CONSOL_GETROWFIELD(0)
Last_Name1 := CONSOL_GETROWFIELD(1)
GroupKey1 := CONSOL_GETROWFIELD(2)
ELSE
First_Name1 := First_Name
Last_Name1 := Last_Name
GroupKey1 := GroupKey
ENDIF
```

In this expression, the `CONSOL_MODELEXACT` function analyzes rows in a record group and identifies a single row. The `CONSOL_GETROWFIELD` functions use consecutive numbers to read the port values for that row and write the values to the output ports.

## CONSOL\_MOSTDATA

Identifies the row that contains the most characters across all ports

You must use this function in conjunction with the `CONSOL_GETROWFIELD` function. The `CONSOL_GETROWFIELD` returns the values from the row that the `CONSOL_MOSTDATA` function identifies.

### Syntax

```
CONSOL_MOSTDATA(string1, [string2, ..., stringN,]
group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

TRUE for the row that contains the most characters across all ports, FALSE for all other rows.

## Example

The following expression uses the `CONSOL_MOSTDATA` function to find the row that contains the most characters:

```
IF (CONSOL_MOSTDATA(First_Name,Last_Name,GroupKey,GroupKey))
THEN
First_Name1 := CONSOL_GETROWFIELD(0)
Last_Name1 := CONSOL_GETROWFIELD(1)
GroupKey1 := CONSOL_GETROWFIELD(2)
ELSE
First_Name1 := First_Name
Last_Name1 := Last_Name
GroupKey1 := GroupKey
ENDIF
```

In this expression, the `CONSOL_MOSTDATA` function analyzes rows in a record group and identifies a single row. The `CONSOL_GETROWFIELD` functions use consecutive numbers to read the port values for that row and write the values to the output ports.

## CONSOL\_MOSTFILLED

Identifies the row that contains the highest number of non-blank fields.

You must use this function in conjunction with the `CONSOL_GETROWFIELD` function. The `CONSOL_GETROWFIELD` returns the values from the row that the `CONSOL_MOSTFILLED` function identifies.

### Syntax

```
CONSOL_MOSTFILLED(string1, [string2, ..., stringN],  
group by)
```

The following table describes the arguments for this command:

| Argument        | Required/Optional | Description  |
|-----------------|-------------------|--|
| <i>string</i>   | Required          | Input port name.   |
| <i>group by</i> | Required          | Name of the input port that contains the group identifier. |

### Return Value

TRUE for the row that contains the highest number of non-blank fields, FALSE for all other rows.

### Example

The following expression uses the `CONSOL_MOSTFILLED` function to find the row that contains the most characters:

```
IF (CONSOL_MOSTFILLED(First_Name,Last_Name,GroupKey,GroupKey))  
THEN  
  First_Name1 := CONSOL_GETROWFIELD(0)  
  Last_Name1 := CONSOL_GETROWFIELD(1)  
  GroupKey1 := CONSOL_GETROWFIELD(2)  
ELSE  
  First_Name1 := First_Name  
  Last_Name1 := Last_Name  
  GroupKey1 := GroupKey  
ENDIF
```

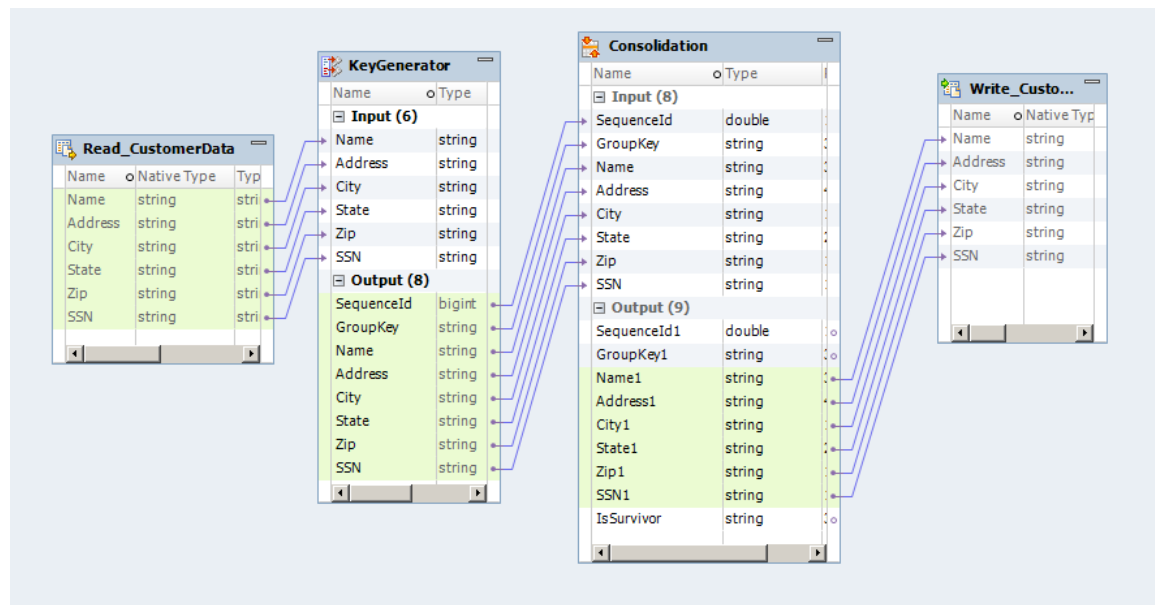
In this expression, the `CONSOL_MOSTFILLED` function analyzes rows in a record group and identifies a single row. The `CONSOL_GETROWFIELD` functions use consecutive numbers to read the port values for that row and write the values to the output ports.

# Consolidation Mapping Example

Your organization needs to consolidate duplicate customer records. To consolidate the customer records, you group the data with a Key Generator transformation and use the Consolidation transformation to consolidate the records.

You create a mapping with a data source containing customer records, a Key Generator transformation, a Consolidation transformation, and a data target. The mapping groups customer records, consolidates the groups, and writes a single consolidated record.

The following figure shows the mapping:



## Input Data

The input data that you want to analyze contains customer information.

The following table contains the input data for this example:

| Name         | Address            | City     | State | Zip        | SSN         |
|--------------|--------------------|----------|-------|------------|-------------|
| Dennis Jones | 100 All Saints Ave | New York | NY    | 10547      | 987-65-4320 |
| Dennis Jones | 1000 Alberta Rd    | New York | NY    | 10547      | 987-65-4320 |
| D Jones      | 100 All Saints Ave | New York | NY    | 10547-1521 |             |

## Key Generator Transformation

Use the Key Generator transformation to group the input data based on the ZIP code port.

The transformation returns the following data:

| SequenceId | GroupKey | Name         | Address            | City     | State | ZIP Code   | SSN         |
|------------|----------|--------------|--------------------|----------|-------|------------|-------------|
| 1          | 10547    | Dennis Jones | 100 All Saints Ave | New York | NY    | 10547      | 987-65-4320 |
| 2          | 10547    | Dennis Jones | 1000 Alberta Rd    | New York | NY    | 10547      |             |
| 3          | 10547    | D Jones      | 100 All Saints Ave | New York | NY    | 10547-1521 | 987-65-4320 |

## Consolidation Transformation

Use the Consolidation transformation to generate the consolidated record.

Configure the Consolidation transformation to use the row-based strategy type. Select the Modal Exact strategy to choose the row with the highest count of the most frequent values. The Modal Exact strategy uses the values from that row to generate a consolidated record. The consolidated record is the record with the "Y" value in the IsSurvivor port.

The transformation returns the following data:

| GroupKey | Name         | Address            | City     | State | ZIP        | Code | SSN         | IsSurvivor |
|----------|--------------|--------------------|----------|-------|------------|------|-------------|------------|
| 10547    | Dennis Jones | 100 All Saints Ave | New York | NY    | 10547      |      | 987-65-4320 | N          |
| 10547    | Dennis Jones | 1000 Alberta Rd    | New York | NY    | 10547      |      |             | N          |
| 10547    | D Jones      | 100 All Saints Ave | New York | NY    | 10547-1521 |      | 987-65-4320 | N          |
| 10547    | D Jones      | 100 All Saints Ave | New York | NY    | 10547-1521 |      | 987-65-4320 | Y          |

## Consolidation Mapping Output

Configure the Consolidation transformation so that the mapping output contains only consolidated records.

In this example, you are reasonably confident that the most frequent values selected by the Modal Exact strategy are the correct port values. To write only consolidated records to the mapping target, you select the **Advanced** view and set the output mode to "Survivor Only."

When you run the mapping, the mapping output only contains consolidated records.

## Configuring a Consolidation Transformation

When you configure the Consolidation transformation, you choose strategy types, choose strategies or write expressions, select a grouping port, and configure advanced options.

1. Select the **Consolidation** view.
2. Choose a strategy type.
3. Configure the strategy.
  - For the simple strategy type, select a strategy for each port.
  - For the row-based strategy type, select a strategy.
  - For the advanced strategy type, create an expression that uses consolidation functions.
4. In the Group By field, select the port that contains the group identifier.
5. Enable sorting on the **Advanced** view if the input data is not sorted.
6. Configure the output to contain consolidated records or all records.

## CHAPTER 12

# Data Masking Transformation

This chapter includes the following topics:

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- [Masking Techniques, 180](#)
- [Masking Rules, 191](#)
- [Special Mask Formats, 195](#)
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- [Data Masking Transformation Configuration, 200](#)
- [Data Masking Transformation Runtime Properties, 202](#)
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## Data Masking Transformation Overview

The Data Masking transformation changes sensitive production data to realistic test data for non-production environments. The Data Masking transformation modifies source data based on masking techniques that you configure for each column.

Create masked data for software development, testing, training, and data mining. You can maintain data relationships in the masked data and maintain referential integrity between database tables.

The Data Masking transformation provides masking rules based on the source datatype and masking technique that you configure for a column. For strings, you can restrict which characters in a string to replace. You can restrict which characters to apply in a mask. For numbers and dates, you can provide a range of numbers for the masked data. You can configure a range that is a fixed or percentage variance from the original number. The Data Integration Service replaces characters based on the locale that you configure for the transformation.

## Masking Techniques

The masking technique is the type of data masking to apply to the selected column.

You can select one of the following masking techniques for an input column:



**Random**

Produces random, non-repeatable results for the same source data and masking rules. You can mask date, numeric, and string datatypes. Random masking does not require a seed value. The results of random masking are non-deterministic.

**Expression**

Applies an expression to a source column to create or mask data. You can mask all datatypes.

**Key**

Replaces source data with repeatable values. The Data Masking transformation produces deterministic results for the same source data, masking rules, and seed value. You can mask date, numeric, and string datatypes.

**Substitution**

Replaces a column of data with similar but unrelated data from a dictionary. You can mask the string datatype.

**Dependent**

Replaces the values of one source column based on the values of another source column. You can mask the string datatype.

**Tokenization**

Replaces source data with data generated based on customized masking criteria. The Data Masking transformation applies rules specified in a customized algorithm. You can mask the string datatype.

**Special Mask Formats**

Credit card number, email address, IP address, phone number, SSN, SIN, or URL. The Data Masking transformation applies built-in rules to intelligently mask these common types of sensitive data.

**No Masking**

The Data Masking transformation does not change the source data.

Default is No Masking.

## Random Masking

Random masking generates random nondeterministic masked data. The Data Masking transformation returns different values when the same source value occurs in different rows. You can define masking rules that affect the format of data that the Data Masking transformation returns. Mask numeric, string, and date values with random masking.

### Masking String Values

Configure random masking to generate random output for string columns. To configure limitations for each character in the output string, configure a mask format. Configure filter characters to define which source characters to mask and the characters to mask them with.

You can apply the following masking rules for a string port:

**Range**

Configure the minimum and maximum string length. The Data Masking transformation returns a string of random characters between the minimum and maximum string length.

### Mask Format

Define the type of character to substitute for each character in the input data. You can limit each character to an alphabetic, numeric, or alphanumeric character type.

### Source String Characters

Define the characters in the source string that you want to mask. For example, mask the number sign (#) character whenever it occurs in the input data. The Data Masking transformation masks all the input characters when Source String Characters is blank.

### Result String Replacement Characters

Substitute the characters in the target string with the characters you define in Result String Characters. For example, enter the following characters to configure each mask to contain uppercase alphabetic characters A - Z:

ABCDEFGHIJKLMNOPQRSTUVWXYZ

## Masking Numeric Values

When you mask numeric data, you can configure a range of output values for a column. The Data Masking transformation returns a value between the minimum and maximum values of the range depending on port precision. To define the range, configure the minimum and maximum ranges or configure a blurring range based on a variance from the original source value.

You can configure the following masking parameters for numeric data:

### Range

Define a range of output values. The Data Masking transformation returns numeric data between the minimum and maximum values.

### Blurring Range

Define a range of output values that are within a fixed variance or a percentage variance of the source data. The Data Masking transformation returns numeric data that is close to the value of the source data. You can configure a range and a blurring range.

## Masking Date Values

To mask date values with random masking, either configure a range of output dates or choose a variance. When you configure a variance, choose a part of the date to blur. Choose the year, month, day, hour, minute, or second. The Data Masking transformation returns a date that is within the range you configure.

You can configure the following masking rules when you mask a datetime value:

### Range

Sets the minimum and maximum values to return for the selected datetime value.

### Blurring

Masks a date based on a variance that you apply to a unit of the date. The Data Masking transformation returns a date that is within the variance. You can blur the year, month, day, hour, minute, or second. Choose a low and high variance to apply.

## Expression Masking

Expression masking applies an expression to a port to change the data or create new data. When you configure expression masking, create an expression in the Expression Editor. Select input and output ports, functions, variables, and operators to build expressions.

You can concatenate data from multiple ports to create a value for another port. For example, you need to create a login name. The source has first name and last name columns. Mask the first and last name from lookup files. In the Data Masking transformation, create another port called Login. For the Login port, configure an expression to concatenate the first letter of the first name with the last name:

```
SUBSTR (FIRSTNM, 1, 1) || LASTNM
```

Select functions, ports, variables, and operators from the point-and-click interface to minimize errors when you build expressions.

The Expression Editor displays the output ports which are not configured for expression masking. You cannot use the output from an expression as input to another expression. If you manually add the output port name to the expression, you might get unexpected results.

When you create an expression, verify that the expression returns a value that matches the port datatype. The Data Masking transformation returns zero if the data type of the expression port is numeric and the data type of the expression is not the same. The Data Masking transformation returns null values if the data type of the expression port is a string and the data type of the expression is not the same.

## Repeatable Expression Masking

Configure repeatable expression masking when a source column occurs in more than one table and you need to mask the column from each table with the same value.

When you configure repeatable expression masking, the Data Masking transformation saves the results of an expression in a storage table. If the column occurs in another source table, the Data Masking transformation returns the masked value from the storage table instead of from the expression.

## Dictionary Name

When you configure repeatable expression masking you must enter a dictionary name. The dictionary name is a key that allows multiple Data Masking transformations to generate the same masked values from the same source values. Define the same dictionary name in each Data Masking transformation. The dictionary name can be any text.

## Storage Table

The storage table contains the results of repeatable expression masking between sessions. A storage table row contains the source column and a masked value pair. The storage table for expression masking is a separate table from the storage table for substitution masking.

Each time the Data Masking transformation masks a value with a repeatable expression, it searches the storage table by dictionary name, locale, column name and input value. If it finds a row in the storage table, it returns the masked value from the storage table. If the Data Masking transformation does not find a row, it generates a masked value from the expression for the column.

You need to encrypt storage tables for expression masking when you have unencrypted data in the storage and use the same dictionary name as key.

## Encrypting Storage Tables for Expression Masking

You can use transformation language encoding functions to encrypt storage tables. You need to encrypt storage tables when you have enabled storage encryption.

1. Create a mapping with the IDM\_EXPRESSION\_STORAGE storage table as source.
2. Create a Data Masking transformation.
3. Apply the expression masking technique on the masked value ports.
4. Use the following expression on the MASKEDVALUE port:  
`Enc_Base64(AES_Encrypt(MASKEDVALUE, Key))`
5. Link the ports to the target.

## Example

For example, an Employees table contains the following columns:

```
FirstName
LastName
LoginID
```

In the Data Masking transformation, mask LoginID with an expression that combines FirstName and LastName. Configure the expression mask to be repeatable. Enter a dictionary name as a key for repeatable masking.

The Computer\_Users table contains a LoginID, but no FirstName or LastName columns:

```
Dept
LoginID
Password
```

To mask the LoginID in Computer\_Users with the same LoginID as Employees, configure expression masking for the LoginID column. Enable repeatable masking and enter the same dictionary name that you defined for the LoginID Employees table. The Integration Service retrieves the LoginID values from the storage table.

Create a default expression to use when the Integration Service cannot find a row in the storage table for LoginID. The Computer\_Users table does not have the FirstName or LastName columns, so the expression creates a less meaningful LoginID.

## Storage Table Scripts

Informatica provides scripts that you can run to create the storage table. The scripts are in the following location:

```
<PowerCenter installation directory>\client\bin\Extensions\DataMasking
```

The directory contains a script for Sybase, Microsoft SQL Server, IBM DB2, and Oracle databases. Each script is named <Expression\_<database type>.

## Rules and Guidelines for Expression Masking

Use the following rules and guidelines for expression masking:

- You cannot use the output from an expression as input to another expression. If you manually add the output port name to the expression, you might get unexpected results.
- Use the point-and-click method to build expressions. Select functions, ports, variables, and operators from the point-and-click interface to minimize errors when you build expressions.
- If the Data Masking transformation is configured for repeatable masking, and the storage table does not exist, the Integration Service substitutes the source data with default values.

## Key Masking

A column configured for key masking returns deterministic masked data each time the source value and seed value are the same. The Data Masking transformation returns unique values for the column.

When you configure a column for key masking, the Data Masking transformation creates a seed value for the column. You can change the seed value to produce repeatable data between different Data Masking transformations. For example, configure key masking to enforce referential integrity. Use the same seed value to mask a primary key in a table and the foreign key value in another table.

You can define masking rules that affect the format of data that the Data Masking transformation returns. Mask string and numeric values with key masking.

### Masking String Values

You can configure key masking in order to generate repeatable output for strings. Configure a mask format to define limitations for each character in the output string. Configure source string characters that define which source characters to mask. Configure result string replacement characters to limit the masked data to certain characters.

You can configure the following masking rules for key masking strings:

#### Seed

Apply a seed value to generate deterministic masked data for a column. You can enter a number between 1 and 1,000.

#### Mask Format

Define the type of character to substitute for each character in the input data. You can limit each character to an alphabetic, numeric, or alphanumeric character type.

#### Source String Characters

Define the characters in the source string that you want to mask. For example, mask the number sign (#) character whenever it occurs in the input data. The Data Masking transformation masks all the input characters when Source String Characters is blank. The Data Masking transformation does not always return unique data if the number of source string characters is less than the number of result string characters.

#### Result String Characters

Substitute the characters in the target string with the characters you define in Result String Characters. For example, enter the following characters to configure each mask to contain all uppercase alphabetic characters:

ABCDEFGHIJKLMNOPQRSTUVWXYZ

### Masking Numeric Values

Configure key masking for numeric source data to generate deterministic output. When you configure a column for numeric key masking, you assign a random seed value to the column. When the Data Masking transformation masks the source data, it applies a masking algorithm that requires the seed.

You can change the seed value for a column to produce repeatable results if the same source value occurs in a different column. For example, you want to maintain a primary-foreign key relationship between two tables. In each Data Masking transformation, enter the same seed value for the primary-key column as the seed value for the foreign-key column. The Data Masking transformation produces deterministic results for the same numeric values. The referential integrity is maintained between the tables.

## Masking Datetime Values

When you can configure key masking for datetime values, the Data Masking transformation requires a random number as a seed. You can change the seed to match the seed value for another column in order to return repeatable datetime values between the columns.

The Data Masking transformation can mask dates between 1753 and 2400 with key masking. If the source year is in a leap year, the Data Masking transformation returns a year that is also a leap year. If the source month contains 31 days, the Data Masking transformation returns a month that has 31 days. If the source month is February, the Data Masking transformation returns February.

The Data Masking transformation always generates valid dates.

## Substitution Masking

Substitution masking replaces a column of data with similar but unrelated data. Use substitution masking to replace production data with realistic test data. When you configure substitution masking, define the dictionary that contains the substitute values.

The Data Masking transformation performs a lookup on the dictionary that you configure. The Data Masking transformation replaces source data with data from the dictionary. Dictionary files can contain string data, datetime values, integers, and floating point numbers. Enter datetime values in the following format:

`mm/dd/yyyy`

You can substitute data with repeatable or non-repeatable values. When you choose repeatable values, the Data Masking transformation produces deterministic results for the same source data and seed value. You must configure a seed value to substitute data with deterministic results. The Integration Service maintains a storage table of source and masked values for repeatable masking.

You can substitute more than one column of data with masked values from the same dictionary row. Configure substitution masking for one input column. Configure dependent data masking for the other columns that receive masked data from the same dictionary row.

## Dictionaries

A dictionary is a reference table that contains the substitute data and a serial number for each row in the table. Create a reference table for substitution masking from a flat file or relational table that you import into the Model repository.

The Data Masking transformation generates a number to retrieve a dictionary row by the serial number. The Data Masking transformation generates a hash key for repeatable substitution masking or a random number for non-repeatable masking. You can configure an additional lookup condition if you configure repeatable substitution masking.

You can configure a dictionary to mask more than one port in the Data Masking transformation.

When the Data Masking transformation retrieves substitution data from a dictionary, the transformation does not check if the substitute data value is the same as the original value. For example, the Data Masking transformation might substitute the name John with the same name (John) from a dictionary file.

The following example shows a dictionary table that contains first name and gender:

| SNO | GENDER | FIRSTNAME |
|-----|--------|-----------|
| 1   | M      | Adam      |
| 2   | M      | Adeel     |
| 3   | M      | Adil      |
| 4   | F      | Alice     |
| 5   | F      | Alison    |

In this dictionary, the first field in the row is the serial number, and the second field is gender. The Integration Service always looks up a dictionary record by serial number. You can add gender as a lookup condition if you configure repeatable masking. The Integration Service retrieves a row from the dictionary using a hash key, and it finds a row with a gender that matches the gender in the source data.

Use the following rules and guidelines when you create a reference table:

- Each record in the table must have a serial number.
- The serial numbers are sequential integers starting at one. The serial numbers cannot have a missing number in the sequence.
- The serial number column can be anywhere in a table row. It can have any label.

If you use a flat file table to create the reference table, use the following rules and guidelines:

- The first row of the flat file table must have column labels to identify the fields in each record. The fields are separated by commas. If the first row does not contain column labels, the Integration Service takes the values of the fields in the first row as column names.
- If you create a flat file table on Windows and copy it to a UNIX machine, verify that the file format is correct for UNIX. For example, Windows and UNIX use different characters for the end of line marker.

## Storage Tables

The Data Masking transformation maintains storage tables for repeatable substitution between sessions. A storage table row contains the source column and a masked value pair. Each time the Data Masking transformation masks a value with a repeatable substitute value, it searches the storage table by dictionary name, locale, column name, input value, and seed. If it finds a row, it returns the masked value from the storage table. If the Data Masking transformation does not find a row, it retrieves a row from the dictionary with a hash key.

The dictionary name format in the storage table is different for a flat file dictionary and a relational dictionary. A flat file dictionary name is identified by the file name. The relational dictionary name has the following syntax:

```
<Connection object>_<dictionary table name>
```

Informatica provides scripts that you can run to create a relational storage table. The scripts are in the following location:

```
<PowerCenter Client installation directory>\client\bin\Extensions\DataMasking
```

The directory contains a script for Sybase, Microsoft SQL Server, IBM DB2, and Oracle databases. Each script is named Substitution\_<database type>. You can create a table in a different database if you configure the SQL statements and the primary key constraints.

You need to encrypt storage tables for substitution masking when you have unencrypted data in the storage and use the same seed value and dictionary to encrypt the same columns.

## Encrypting Storage Tables for Substitution Masking

You can use transformation language encoding functions to encrypt storage tables. You need to encrypt storage tables when you have enabled storage encryption.

1. Create a mapping with the IDM\_SUBSTITUTION\_STORAGE storage table as source.
2. Create a Data Masking transformation.
3. Apply the substitution masking technique on the input value and the masked value ports.
4. Use the following expression on the INPUTVALUE port:

```
Enc_Base64(AES_Encrypt(INPUTVALUE, Key))
```

5. Use the following expression on the MASKEDVALUE port:

```
Enc_Base64(AES_Encrypt(MASKEDVALUE, Key))
```

6. Link the ports to the target.

## Substitution Masking Properties

You can configure the following masking rules for substitution masking:

- **Repeatable Output.** Returns deterministic results between sessions. The Data Masking transformation stores masked values in the storage table.
- **Seed Value.** Apply a seed value to generate deterministic masked data for a column. Enter a number between 1 and 1,000.
- **Unique Output.** Force the Data Masking transformation to create unique output values for unique input values. No two input values are masked to the same output value. The dictionary must have enough unique rows to enable unique output.  
When you disable unique output, the Data Masking transformation might not mask input values to unique output values. The dictionary might contain fewer rows.
- **Unique Port.** The port used to identify unique records for substitution masking. For example, you want to mask first names in a table called Customer. If you select the table column that contains the first names as the unique port, the data masking transformation replaces duplicate first names with the same masked value. If you select the Customer\_ID column as the unique port, the data masking transformation replaces each first name with a unique value.
- **Dictionary Information.** Configure the reference table that contains the substitute data values. Click **Select Source** to select a reference table.
  - **Dictionary Name.** Displays the name of the reference table that you select.
  - **Output Column.** Choose the column to return to the Data Masking transformation.
- **Lookup condition.** Configure a lookup condition to further qualify what dictionary row to use for substitution masking. The lookup condition is similar to the WHERE clause in an SQL query. When you configure a lookup condition you compare the value of a column in the source with a column in the dictionary.  
For example, you want to mask the first name. The source data and the dictionary have a first name column and a gender column. You can add a condition that each female first name is replaced with a female name from the dictionary. The lookup condition compares gender in the source to gender in the dictionary.
  - **Input port.** Source data column to use in the lookup.



- **Dictionary column.** Dictionary column to compare the input port to.

## Rules and Guidelines for Substitution Masking

Use the following rules and guidelines for substitution masking:

- If a storage table does not exist for a unique repeatable substitution mask, the session fails.
- If the dictionary contains no rows, the Data Masking transformation returns an error message.
- When the Data Masking transformation finds an input value with the locale, dictionary, and seed in the storage table, it retrieves the masked value, even if the row is no longer in the dictionary.
- If you delete a connection object or modify the dictionary, truncate the storage table. Otherwise, you might get unexpected results.
- If the number of values in the dictionary is less than the number of unique values in the source data, the Data Masking Transformation cannot mask the data with unique repeatable values. The Data Masking transformation returns an error message.

## Dependent Masking

Dependent masking substitutes multiple columns of source data with data from the same dictionary row.

When the Data Masking transformation performs substitution masking for multiple columns, the masked data might contain unrealistic combinations of fields. You can configure dependent masking in order to substitute data for multiple input columns from the same dictionary row. The masked data receives valid combinations such as, "New York, New York" or "Chicago, Illinois."

When you configure dependent masking, you first configure an input column for substitution masking. Configure other input columns to be dependent on that substitution column. For example, you choose the ZIP code column for substitution masking and choose city and state columns to be dependent on the ZIP code column. Dependent masking ensures that the substituted city and state values are valid for the substituted ZIP code value.

**Note:** You cannot configure a column for dependent masking without first configuring a column for substitution masking.

Configure the following masking rules when you configure a column for dependent masking:

### Dependent column

The name of the input column that you configured for substitution masking. The Data Masking transformation retrieves substitute data from a dictionary using the masking rules for that column. The column you configure for substitution masking becomes the key column for retrieving masked data from the dictionary.

### Output column

The name of the dictionary column that contains the value for the column you are configuring with dependent masking.

## Dependent Masking Example

A data masking dictionary might contain address rows with the following values:

| SNO | STREET             | CITY       | STATE | ZIP   | COUNTRY |
|-----|--------------------|------------|-------|-------|---------|
| 1   | 32 Apple Lane      | Chicago    | IL    | 61523 | US      |
| 2   | 776 Ash Street     | Dallas     | TX    | 75240 | US      |
| 3   | 2229 Big Square    | Atleeville | TN    | 38057 | US      |
| 4   | 6698 Cowboy Street | Houston    | TX    | 77001 | US      |

You need to mask source data with valid combinations of the city, state, and ZIP code from the Address dictionary.

Configure the ZIP port for substitution masking. Enter the following masking rules for the ZIP port:

| Rule                 | Value   |
|----------------------|---------|
| Dictionary Name      | Address |
| Serial Number Column | SNO     |
| Output Column        | ZIP     |

Configure the City port for dependent masking. Enter the following masking rules for the City port:

| Rule             | Value |
|------------------|-------|
| Dependent Column | ZIP   |
| Output Column    | City  |

Configure the State port for dependent masking. Enter the following masking rules for the State port:

| Rule             | Value |
|------------------|-------|
| Dependent Column | ZIP   |
| Output Column    | State |

When the Data Masking transformation masks the ZIP code, it returns the correct city and state for the ZIP code from the dictionary row.

## Tokenization Masking

Use the tokenization masking technique to mask source string data based on criteria that you specify in an algorithm. For example, you can create an algorithm that contains a fake email address to replace field entries in the source data.

You can configure the format of the masked data using Tokenization masking. You must assign a tokenizer name to the masking algorithm before you can use it. The tokenizer name references the masking algorithm (JAR) used. Specify the tokenizer name when you apply the tokenization masking technique.

### Configuring Tokenization Masking

Perform the following tasks before you use the tokenization masking technique:

1. Browse to the `tokenprovider` directory in the path: `<Informatica_home>\services\shared`.
2. Open the following XML file: `com.informatica.products.ilm.tx-tokenizerprovider.xml`.
3. Add the tokenizer name and the fully qualified name of the class file for each tokenizer you want to use. Implement the tokenizer class within the `com.informatica.products.ilm.tx-tokenprovider-<Build-Number>.jar` class in the `tokenprovider` directory. For each tokenizer, enter the information in the XML file as in the following example:

```
<TokenizerProvider>
<Tokenizer Name="CCTokenizer"
ClassName="com.informatica.tokenprovider.CCTokenizer"/>
</TokenizerProvider>
```

Where:

- Tokenizer Name is the user-defined name in quotes.
- ClassName is the user-defined name for the CLASSNAME attribute. Implement this from within `com.informatica.products.ilm.tx-tokenprovider-<Build-Number>.jar`.

After configuration, you can use the Tokenization masking technique. Enter the tokenizer name to specify the algorithm to use when you create a mapping.

## Masking Rules

Masking rules are the options that you configure after you choose the masking technique.

When you choose the random or key masking technique, you can configure the mask format, the source string characters, and the result string characters. You can configure range or blurring with random masking.

The following table describes the masking rules that you can configure for each masking technique:

| Masking Rule             | Description  | Masking Technique | Source Datatype |
|--------------------------|--|-------------------|-----------------|
| Mask Format              | Mask that limits each character in an output string to alphabetic, numeric, or alphanumeric character. | Random and Key    | String          |
| Source String Characters | Set of source characters to mask or to exclude from masking.   | Random and Key    | String          |

| Masking Rule                         | Description   | Masking Technique | Source Datatype                |
|--------------------------------------|---|-------------------|--------------------------------|
| Result String Replacement Characters | A set of characters to include or exclude in a mask.  | Random and Key    | String                         |
| Range                                | <p>A range of output values.</p> <ul style="list-style-type: none"> <li>- Numeric. The Data Masking transformation returns numeric data between the minimum and maximum values.</li> <li>- String. Returns a string of random characters between the minimum and maximum string length.</li> <li>- Date/Time. Returns a date and time within the minimum and maximum datetime.</li> </ul> | Random            | Numeric<br>String<br>Date/Time |
| Blurring                             | Range of output values with a fixed or percent variance from the source data. The Data Masking transformation returns data that is close to the value of the source data. Datetime columns require a fixed variance. columns require a fixed variance.  | Random            | Numeric<br>Date/Time           |

## Mask Format

Configure a mask format to limit each character in the output column to an alphabetic, numeric, or alphanumeric character. Use the following characters to define a mask format:

A, D, N, X, +, R

**Note:** The mask format contains uppercase characters. When you enter a lowercase mask character, the Data Masking transformation converts the character to uppercase.

The following table describes mask format characters:

| Character | Description   |
|-----------|---|
| A         | Alphabetical characters. For example, ASCII characters a to z and A to Z.   |
| D         | Digits 0 to 9. The data masking transformation returns an "X" for characters other than digits 0 to 9.  |
| N         | Alphanumeric characters. For example, ASCII characters a to z, A to Z, and 0-9.   |
| X         | Any character. For example, alphanumeric or symbol.   |
| +         | No masking.   |
| R         | Remaining characters. R specifies that the remaining characters in the string can be any character type. R must appear as the last character of the mask. |

For example, a department name has the following format:

nnn-<department\_name>

You can configure a mask to force the first three characters to be numeric, the department name to be alphabetic, and the dash to remain in the output. Configure the following mask format:

DDD+AAAAAAAAAAAAAAAA

The Data Masking transformation replaces the first three characters with numeric characters. It does not replace the fourth character. The Data Masking transformation replaces the remaining characters with alphabetical characters.

If you do not define a mask format, the Data Masking transformation replaces each source character with any character. If the mask format is longer than the input string, the Data Masking transformation ignores the extra characters in the mask format. If the mask format is shorter than the source string, the Data Masking transformation masks the remaining characters with format R.

**Note:** You cannot configure a mask format with the range option.

## Source String Characters

Source string characters are source characters that you choose to mask or not mask. The position of the characters in the source string does not matter. The source characters are case sensitive.

You can configure any number of characters. When Characters is blank, the Data Masking transformation replaces all the source characters in the column.

Select one of the following options for source string characters:

### Mask Only

The Data Masking transformation masks characters in the source that you configure as source string characters. For example, if you enter the characters A, B, and c, the Data Masking transformation replaces A, B, or c with a different character when the character occurs in source data. A source character that is not an A, B, or c does not change. The mask is case sensitive.

### Mask All Except

Masks all characters except the source string characters that occur in the source string. For example, if you enter the filter source character “-” and select Mask All Except, the Data Masking transformation does not replace the “-” character when it occurs in the source data. The rest of the source characters change.

## Source String Example

A source file has a column named Dependents. The Dependents column contains more than one name separated by commas. You need to mask the Dependents column and keep the comma in the test data to delimit the names.

For the Dependents column, select Source String Characters. Choose Don't Mask and enter “,” as the source character to skip. Do not enter quotes.

The Data Masking transformation replaces all the characters in the source string except for the comma.

## Result String Replacement Characters

Result string replacement characters are characters you choose as substitute characters in the masked data. When you configure result string replacement characters, the Data Masking transformation replaces characters in the source string with the result string replacement characters. To avoid generating the same output for different input values, configure a wide range of substitute characters, or mask only a few source characters. The position of each character in the string does not matter.

Select one of the following options for result string replacement characters:

### Use Only

Mask the source with only the characters you define as result string replacement characters. For example, if you enter the characters A, B, and c, the Data Masking transformation replaces every character in the source column with an A, B, or c. The word “horse” might be replaced with “BAcBA.”

### Use All Except

Mask the source with any characters except the characters you define as result string replacement characters. For example, if you enter A, B, and c result string replacement characters, the masked data never has the characters A, B, or c.

## Result String Replacement Characters Example

To replace all commas in the Dependents column with semicolons, complete the following tasks:

1. Configure the comma as a source string character and select Mask Only.  
The Data Masking transformation masks only the comma when it occurs in the Dependents column.
2. Configure the semicolon as a result string replacement character and select Use Only.  
The Data Masking transformation replaces each comma in the Dependents column with a semicolon.

## Range

Define a range for numeric, date, or string data. When you define a range for numeric or date values the Data Masking transformation masks the source data with a value between the minimum and maximum values. When you configure a range for a string, you configure a range of string lengths.

### String Range

When you configure random string masking, the Data Masking transformation generates strings that vary in length from the length of the source string. Optionally, you can configure a minimum and maximum string width. The values you enter as the maximum or minimum width must be positive integers. Each width must be less than or equal to the port precision.

### Numeric Range

Set the minimum and maximum values for a numeric column. The maximum value must be less than or equal to the port precision. The default range is from one to the port precision length.

### Date Range

Set minimum and maximum values for a datetime value. The minimum and maximum fields contain the default minimum and maximum dates. The default datetime format is MM/DD/YYYY HH24:MI:SS. The maximum datetime must be later than the minimum datetime.

## Blurring

Blurring creates an output value within a fixed or percent variance from the source data value. Configure blurring to return a random value that is close to the original value. You can blur numeric and date values.

## Blurring Numeric Values

Select a fixed or percent variance to blur a numeric source value. The low blurring value is a variance below the source value. The high blurring value is a variance above the source value. The low and high values must be greater than or equal to zero. When the Data Masking transformation returns masked data, the numeric data is within the range that you define.

The following table describes the masking results for blurring range values when the input source value is 66:

| Blurring Type | Low | High | Result            |
|---------------|-----|------|-------------------|
| Fixed         | 0   | 10   | Between 66 and 76 |
| Fixed         | 10  | 0    | Between 56 and 66 |
| Fixed         | 10  | 10   | Between 56 and 76 |
| Percent       | 0   | 50   | Between 66 and 99 |
| Percent       | 50  | 0    | Between 33 and 66 |
| Percent       | 50  | 50   | Between 33 and 99 |

## Blurring Date Values

Mask a date as a variance of the source date by configuring blurring. Select a unit of the date to apply the variance to. You can select the year, month, day, or hour. Enter the low and high bounds to define a variance above and below the unit in the source date. The Data Masking transformation applies the variance and returns a date that is within the variance.

For example, to restrict the masked date to a date within two years of the source date, select year as the unit. Enter two as the low and high bound. If a source date is 02/02/2006, the Data Masking transformation returns a date between 02/02/2004 and 02/02/2008.

By default, the blur unit is year.

# Special Mask Formats

Special mask formats are masks that you can apply to common types of data. With a special mask format, the Data Masking transformation returns a masked value that has a realistic format, but is not a valid value.

For example, when you mask an SSN, the Data Masking transformation returns an SSN that is the correct format but is not valid. You can configure repeatable masking for Social Security numbers.

Configure special masks for the following types of data:

- Social Security numbers
- Credit card numbers
- Phone numbers
- URL addresses
- Email addresses

- IP Addresses
- Social Insurance Numbers

When the source data format or datatype is invalid for a mask, the Data Integration Service applies a default mask to the data. The Integration Service applies masked values from the default value file. You can edit the default value file to change the default values.

## Credit Card Number Masking

The Data Masking transformation generates a logically valid credit card number when it masks a valid credit card number. The length of the source credit card number must be between 13 to 19 digits. The input credit card number must have a valid checksum based on credit card industry rules.

The source credit card number can contain numbers, spaces, and hyphens. If the credit card has incorrect characters, or is the wrong length, the Integration Service writes an error to the session log. The Integration Service applies a default credit card number mask when the source data is invalid.

The Data Masking transformation does not mask the six digit Bank Identification Number (BIN). For example, the Data Masking transformation might mask the credit card number 4539 1596 8210 2773 as 4539 1516 0556 7067. The Data Masking transformation creates a masked number that has a valid checksum.

## Email Address Masking

Use the Data Masking transformation to mask the email address that contains string value. The Data Masking transformation can mask an email address with random ASCII characters or replace the email address with a realistic email address.

You can apply the following types of masking with email address:

### **Standard email masking**

The Data Masking transformation returns random ASCII characters when it masks an email address. For example, the Data Masking transformation can mask Georgesmith@yahoo.com as KtrlupQAPyk@vdSKh.BIC. Default is standard.

### **Advanced email masking**

The Data Masking transformation masks the email address with another realistic email address derived from the transformation output ports or dictionary columns.

## Advanced Email Masking

With the advanced email masking type, you can mask the email address with another realistic email address. The Data Masking transformation creates the email address from the dictionary columns or from the transformation output ports.

You can create the local part in the email address from mapping output ports. Or you can create the local part in the email address from relational table or flat file columns.

The Data Masking transformation can create the domain name for the email address from a constant value or from a random value in the domain dictionary.

You can create an advanced email masking based on the following options:

### **Email Address Based on Dependent Ports**

You can create an email address based on the Data Masking transformation output ports. Select the transformation output ports for the first name and the last name column. The Data Masking



transformation masks the first name, the last name, or both names based on the values you specify for the first and last name length.

#### **Email Address Based on a Dictionary**

You can create an email address based on the columns from a dictionary. Select a reference table as the source for the dictionary.

Select the dictionary columns for the first name and the last name. The Data Masking transformation masks the first name, the last name, or both names based on the values you specify for the first and last name length.

## **Configuration Parameters for an Advanced Email Address Masking Type**

Specify configuration parameters when you configure advanced email address masking.

You can specify the following configuration parameters:

#### **Delimiter**

You can select a delimiter, such as a dot, hyphen, or underscore, to separate the first name and last name in the email address. If you do not want to separate the first name and last name in the email address, leave the delimiter as blank.

#### **FirstName Column**

Select a Data Masking transformation output port or a dictionary column to mask the first name in the email address.

#### **LastName Column**

Select a Data Masking transformation output port or a dictionary column to mask the last name in the email address.

#### **Length for the FirstName or LastName columns**

Restricts the character length to mask for the first name and the last name columns. For example, the input data is Timothy for the first name and Smith for the last name. Select 5 as the length of the first name column. Select 1 as the length of the last name column with a dot as the delimiter. The Data Masking transformation generates the following email address:

```
timot.s@<domain_name>
```

#### **DomainName**

You can use a constant value, such as gmail.com, for the domain name. Or, you can specify another dictionary file that contains a list of domain names. The domain dictionary can be a flat file or a relational table.

## **IP Address Masking**

The Data Masking transformation masks an IP address as another IP address by splitting it into four numbers, separated by a period. The first number is the network. The Data Masking transformation masks the network number within the network range.

The Data Masking transformation masks a Class A IP address as a Class A IP Address and a 10.x.x.x address as a 10.x.x.x address. The Data Masking transformation does not mask the class and private network address. For example, the Data Masking transformation can mask 11.12.23.34 as 75.32.42.52. and 10.23.24.32 as 10.61.74.84.

**Note:** When you mask many IP addresses, the Data Masking transformation can return nonunique values because it does not mask the class or private network of the IP addresses.

## Phone Number Masking

The Data Masking transformation masks a phone number without changing the format of the original phone number. For example, the Data Masking transformation can mask the phone number (408)382 0658 as (607)256 3106.

The source data can contain numbers, spaces, hyphens, and parentheses. The Integration Service does not mask alphabetic or special characters.

The Data Masking transformation can mask string, integer, and bigint data.

## Social Security Number Masking

The Data Masking transformation generates a Social Security number that is not valid based on the latest High Group List from the Social Security Administration. The High Group List contains valid numbers that the Social Security Administration has issued.

The default High Group List is a text file in the following location:

```
<Installation Directory>\infa_shared\SrcFiles\highgroup.txt
```

To use the High Group List file in workflows, copy the text file to the source directory that you configure for the Data Integration Service.

The Data Masking transformation generates SSN numbers that are not on the High Group List. The Social Security Administration updates the High Group List every month. Download the latest version of the list from the following location:

```
http://www.socialsecurity.gov/employer/ssns/highgroup.txt
```

### Social Security Number Format

The Data Masking transformation accepts any SSN format that contains nine digits. The digits can be delimited by any set of characters. For example, the Data Masking transformation accepts the following format: +=54-\*9944\$#789-, \* () ''.

### Area Code Requirement

The Data Masking transformation returns a Social Security Number that is not valid with the same format as the source. The first three digits of the SSN define the area code. The Data Masking transformation does not mask the area code. It masks the group number and serial number. The source SSN must contain a valid area code. The Data Masking transformation locates the area code on the High Group List and determines a range of unused numbers that it can apply as masked data. If the SSN is not valid, the Data Masking transformation does not mask the source data.

### Repeatable Social Security Number Masking

The Data Masking transformation returns deterministic Social Security numbers with repeatable masking. The Data Masking transformation cannot return all unique Social Security numbers because it cannot return valid Social Security numbers that the Social Security Administration has issued.

## URL Address Masking

The Data Masking transformation parses a URL by searching for the '://' string and parsing the substring to the right of it. The source URL must contain the '://' string. The source URL can contain numbers and alphabetic characters.

The Data Masking transformation does not mask the protocol of the URL. For example, if the URL is `http://www.yahoo.com`, the Data Masking transformation can return `http://MgLaHjCa.VsD/`. The Data Masking transformation can generate a URL that is not valid.

**Note:** The Data Masking transformation always returns ASCII characters for a URL.

## Social Insurance Number Masking

The Data Masking transformation masks a Social Insurance number that is nine digits. The digits can be delimited by any set of characters.

If the number contains no delimiters, the masked number contains no delimiters. Otherwise the masked number has the following format:

`xxx-xxx-xxx`

### Repeatable SIN Numbers

You can configure the Data Masking transformation to return repeatable SIN values. When you configure a port for repeatable SIN masking, the Data Masking transformation returns deterministic masked data each time the source SIN value and seed value are the same.

To return repeatable SIN numbers, enable **Repeatable Values** and enter a seed number. The Data Masking transformation returns unique values for each SIN.

### SIN Start Digit

You can define the first digit of the masked SIN.

Enable **Start Digit** and enter the digit. The Data Masking transformation creates masked SIN numbers that start with the number that you enter.

## Default Value File

When the source data format or datatype is invalid for a mask, the Data Integration Service applies a default mask to the data. The Integration Service applies masked values from the default value file. You can edit the default value file to change the default values.

The default value file is an XML file in the following location:

```
<Installation Directory>\infa_shared\SrcFiles\defaultValue.xml
```

To use the default value file in workflows, copy the default value file to the source directory that you configure for the Data Integration Service.

The defaultValue.xml file contains the following name-value pairs:

```
<?xml version="1.0" standalone="yes" ?>
<defaultValue
  default_char = "X"
  default_digit = "9"
  default_date = "11/11/1111 00:00:00"
```

```
default_email = "abc@xyz.com"
default_ip = "99.99.9.999"
default_url = "http://www.xyz.com"
default_phone = "999 999 999 9999"
default_ssn = "999-99-9999"
default_cc = "9999 9999 9999 9999"
default_sin = "999-999-999"
default_seed = "500"/>
```

#### RELATED TOPICS:

- [“Configure the Data Integration Service” on page 200](#)

## Data Masking Transformation Configuration

Use the following steps to configure a Data Masking transformation.

1. Configure execution options for the Data Integration Service.
2. Create the transformation.
3. Define the input ports.
4. Configure masking rules for each port that you want to change.
5. Preview the data to verify the results.

### Configure the Data Integration Service

You can configure execution options for the Data Integration Service in Informatica Administrator (the Administrator tool).

Configure execution options to set the following default directories:

- Home directory. Contains the source directory and the cache directory.
- Source directory. Contains source files for workflows. For example, the source directory can contain the `highgrp.txt` and `defaultvalue.xml` files.
- Cache directory. Contains cache files for substitution masking.

To set values for the execution options, open the Administrator tool, and select the Data Integration Service in the **Domain Navigator**. Click the **Properties** view, and then click **Edit** in the **Execution Options** section.

#### RELATED TOPICS:

- [“Default Value File” on page 199](#)

### Creating a Data Masking Transformation

Create a Data Masking transformation in the Developer tool.

Before you create the Data Masking transformation, create the source. Import a flat file or relational database table as a physical data object.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.

The **New** dialog box appears.

3. Select the Data Masking transformation.
4. Click **Next**.
5. Enter a name for the transformation.
6. Click **Finish**.

The transformation appears in the editor.

## Defining the Ports

Add Data Masking input ports on the **Overview** view. When you create an input port, the Developer tool creates a corresponding output port by default. The output port has the same name as the input port.

1. On the **Overview** view, click **New** to add a port.
2. Configure the datatype, precision, and scale for the column.  
You must configure the column datatype before you define masking rules for the column.
3. To configure data masking for the port, click the arrow in the masking type column of the **Overview** view.

## Configuring Data Masking for Each Port

Select a masking technique and the corresponding masking rules for a port on the Data Masking dialog box. The Data Masking dialog box appears when you click the data masking column on the **Ports** tab.

1. Enable **Apply Masking** in order to configure masking for the selected port.  
The Developer tool displays a list of masking techniques that you can use based on the datatype of the port you are masking.
2. Select a masking technique from the list.  
The Developer tool displays different masking rules based on the masking technique that you choose. Some of the special mask formats have no masking rules to configure.
3. Configure the masking rules.
4. Click **OK** to apply the data masking configuration for the port.

When you define data masking for a port, the Developer tool creates an output port called **out-<port name>**. The **<port name>** is the same name as the input port. The Data Masking transformation returns the masked data in the **out-<port name>** port.

## Previewing the Masked Data

You can compare the masked data to the original data when you view the Data Masking transformation results in the **Data Viewer**.

1. After you configure the Data Masking transformation ports and masking rules, create a mapping that includes the physical data object source and the Data Masking transformation.
2. Connect the source to the Data Masking transformation.
3. Verify that the source has data in a shared location that the Data Integration Service can access.
4. Click the Data Masking transformation to select it in the mapping.
5. Click **Data Viewer** and click **Run**.

The Developer tool displays data for all the Data Masking transformation output ports. The ports that have the **output** prefix contain the masked data. You can compare the masked data to the original data in the **Data Viewer** view.

# Data Masking Transformation Runtime Properties

You can configure Data Masking transformation runtime properties to increase performance.

Configure the following runtime properties:

## **Cache Size**

The size of the dictionary cache in main memory. Increase the memory size in order to improve performance. Minimum recommended size is 32 MB for 100,000 records. Default is 8 MB.

## **Cache Directory**

The location of the dictionary cache. You must have write permissions for the directory. Default is CacheDir.

## **Shared Storage Table**

Enables sharing of the storage table between Data Masking transformation instances. Enable Shared Storage Table when two Data Masking transformation instances use the same dictionary column for the database connection, seed value, and locale. You can also enable the shared storage table when two ports in the same Data Masking transformation use the same dictionary column for the connection, seed, and locale. Disable the shared storage table when Data Masking transformations or ports do not share the dictionary column. Default is disabled.

## **Storage Commit Interval**

The number of rows to commit at a time to the storage table. Increase the value to increase performance. Configure the commit interval when you do not configure the shared storage table. Default is 100,000.

## **Encrypt Storage**

Encrypts storage tables, such as IDM\_SUBSTITUTION\_STORAGE and IDM\_EXPRESSION\_STORAGE. Verify that you have encrypted data in storage tables before you enable the encrypt storage property. Clear this option if you do not want to encrypt the storage tables. Default is disabled.

## **Storage Encryption Key**

The Data Masking transformation encrypts the storage based on the storage encryption key. Use the same encryption key for each session run of the same Data Masking transformation instance.

## **Substitution Dictionary Owner Name**

Name of the substitution dictionary table owner when you select the substitution masking type. If the database user specified in the database connection is not the owner of the substitution dictionary table in a session, you need to specify the table owner.

## **Storage Owner Name**

Name of the table owner for IDM\_SUBSTITUTION\_STORAGE or IDM\_EXPRESSION\_STORAGE when you select repeatable expression or unique repeatable substitution masking type.

# Data Masking Example

A developer needs to create test data for customer applications. The data must contain realistic customer data that other developers can access in the company development environment.

The developer creates a data service that returns masked customer data such as the the customer ID, credit card number, and income. The mapping includes a Data Masking transformation that transforms the customer data.

The following figure shows the mapping:



The mapping has the following transformations:

- Read\_Customer\_Data. Contains customer credit card and income information.
- Customer\_Data\_Masking transformation. Masks all columns except FirstName and LastName. The Data Masking transformation passes the masked columns to the target.
- Customer\_TestData. Output transformation that receives the masked customer data.

## Read\_Customer Data

The customer data contains the following columns:

| Column     | Datatype              |
|------------|-----------------------|
| CustomerID | Integer               |
| LastName   | String                |
| FirstName  | String                |
| CreditCard | String                |
| Income     | Integer               |
| Join_Date  | Datetime (MM/DD/YYYY) |

The following table shows sample customer data:

| CustomerID | LastName | FirstName | CreditCard          | Income | JoinDate   |
|------------|----------|-----------|---------------------|--------|------------|
| 0095       | Bergeron | Barbara   | 4539-1686-3069-3957 | 12000  | 12/31/1999 |
| 0102       | Brosseau | Derrick   | 5545-4091-5232-8948 | 4000   | 03/03/2011 |
| 0105       | Anderson | Lauren    | 1234-5678-9012-3456 | 5000   | 04/03/2009 |
| 0106       | Boonstra | Pauline   | 4217-9981-5613-6588 | 2000   | 07/07/2007 |
| 0107       | Chan     | Brian     | 4533-3156-8865-3156 | 4500   | 06/18/1995 |

## Customer Data Masking Transformation

The Data Masking transformation masks all columns in the customer row except first and last name.

The Data Masking transformation performs the following types of masking:

- Key masking
- Random masking

- Credit card masking

The following table shows the masking rules for each port in the Data Masking transformation:

| Input Port | Masking Type | Masking Rules  | Description   |
|------------|--------------|--|---|
| CustomerID | Key          | The seed is 934.<br>The customer ID does not have any mask format.<br>Result string replacement characters are 1234567890. | The CustomerID mask is deterministic.<br>The masked customer ID contains numbers.                           |
| LastName   | No Masking   | -  | -   |
| FirstName  | No Masking   | -  | -   |
| CreditCard | CreditCard   | -  | The Data Masking transformation masks the credit card number with another number that has a valid checksum. |
| Income     | Random       | Blurring<br>Percent<br>Low bound=1<br>High bound=10  | The masked income is within ten percent of the source income.   |
| JoinDate   | Random       | Blurring<br>Unit=Year<br>Low Bound =5<br>HighBound=5   | The masked date is within 5 years of the original date.   |

## Customer Test Data Results

The Customer\_TestData transformation receives realistic customer data from the Data Masking transformation.

The Customer\_TestData target receives the following data:

| out-CustomerID | out-LastName | outFirstName | out-CreditCard      | out-Income | out-JoinDate |
|----------------|--------------|--------------|---------------------|------------|--------------|
| 3954           | Bergeron     | Barbara      | 4539-1625-5074-4106 | 11500      | 03/22/2001   |
| 3962           | Brosseau     | Derrick      | 5545-4042-8767-5974 | 4300       | 04/17/2007   |
| 3964           | Anderson     | Lauren       | 1234-5687-2487-9053 | 5433       | 09/13/2006   |
| 3965           | Boonstra     | Pauline      | 4217-9935-7437-4879 | 1820       | 02/03/2010   |
| 3966           | Chan         | Brian        | 4533-3143-4061-8001 | 4811       | 10/30/2000   |

The income is within ten percent of the original income. The join date is within five years of the original date.

## Data Masking Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Data Masking transformation.

You can configure tracing levels for logs.



Configure the following property on the **Advanced** tab:

**Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 13

# Data Processor Transformation

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## Data Processor Transformation Overview

The Data Processor transformation processes unstructured and semi-structured file formats in a mapping. Configure the transformation to process messaging formats, HTML pages, XML, JSON, and PDF documents. You can also convert structured formats such as ACORD, HIPAA, HL7, EDI-X12, EDIFACT, AFP, and SWIFT.

A mapping uses a Data Processor transformation to change documents from one format to another. The Data Processor transformation processes files of any format in a mapping. When you create a Data Processor transformation, you define components that convert the data.

A Data Processor transformation can contain multiple components to process data. Each component might contain other components.

For example, you might receive customer invoices in Microsoft Word files. You configure a Data Processor transformation to parse the data from each word file. Extract the customer data to a Customer table. Extract order information to an Orders table.

When you create a Data Processor transformation, you define an XMap, Script, or Library. An XMap converts an input hierarchical file into an output hierarchical file of another structure. A Library converts an industry messaging type into an XML document with a hierarchy structure or from XML to an industry standard format. A Script can parse source documents to hierarchical format, convert hierarchical format to other file formats, or map a hierarchical document to another hierarchical format.

Define Scripts in the Data Processor transformation IntelliScript editor. You can define the following types of Scripts:

- **Parser.** Converts source documents to XML. The output of a Parser is always XML. The input can have any format, such as text, HTML, Word, PDF, or HL7.
- **Serializer.** Converts an XML file to an output document of any format. The output of a Serializer can be any format, such as a text document, an HTML document, or a PDF.
- **Mapper.** Converts an XML source document to another XML structure or schema. You can convert the same XML documents as in an XMap.
- **Transformer.** Modifies the data in any format. Adds, removes, converts, or changes text. Use Transformers with a Parser, Mapper, or Serializer. You can also run a Transformer as stand-alone component.
- **Streamer.** Splits large input documents, such as multi-gigabyte data streams, into segments. The Streamer processes documents that have multiple messages or records in them, such as HIPAA or EDI files.

For more information, see the *Data Transformation User Guide*.

## Data Processor Transformation Views

The Data Processor transformation has multiple views that you access when you configure the transformation and run it in the Developer tool.

Some of the Data Processor transformation views do not appear in the Developer tool by default. To change the views for the transformation, click **Window > Show View > Other > Informatica**. Select the views you want to see.

The Data Processor transformation has the following fixed views:

### **Overview view**

Configure ports and define the startup component.

### **References view**

Add or remove schemas from the transformation.

### **Settings view**

Configure transformation settings for encoding, output control, and XML generation.

### **Objects view**

Add, modify, or delete Script, XMap and Library objects from the transformation.

You can also access the following views for the Data Processor transformation:

### **Data Processor Hex Source view**

Shows an input document in hexadecimal format.

### **Data Processor Events view**

Shows information about events that occur when you run the transformation in the Developer tool.  
Shows initialization, execution, and summary events.

### **Script Help view**

Shows context-sensitive help for the Script editor.

### Data Viewer view

View example input data, run the transformation, and view output results.

## Data Processor Transformation Ports

Define the Data Processor transformation ports on the transformation **Overview** view.

A Data Processor transformation can read input from a file, a buffer, or a streamed buffer from a complex file reader. You can use a flat file reader as a buffer to read an entire file at one time. You can also read an input file from a database.

The output ports that you create depend on whether you want to return a string, complex files, or rows of relational data from the transformation.

### Data Processor Transformation Input Ports

When you create a Data Processor transformation, the Developer tool creates a default input port. When you define an additional input port in a Script startup component, the Developer tool creates an additional input port in the transformation.

The input type determines the type of data that the Data Integration Service passes to the Data Processor transformation. The input type determines whether the input is data or a source file path.

Configure one of the following input types:

#### Buffer

The Data Processor transformation receives rows of source data in the Input port. Use the buffer input type when you configure the transformation to receive data from a flat file or from an Informatica transformation.

#### File

The Data Processor transformation receives the source file path in the Input port. The Data Processor startup component opens the source file. Use the file input type to parse binary files such as Microsoft Excel or Microsoft Word files. You can also use the File input type for large files that might require a lot of system memory to process with a buffer input port.

#### Service Parameter

The Data Processor transformation receives values to apply to variables in the service parameter ports. When you choose the variables to receive input data, the Developer tool creates a service parameter port for each variable.

#### Output\_Filename

When you configure the default output port to return a file name instead of row data, the Developer tool creates an Output\_Filename port. You can pass a file name to the Output\_Filename port from a mapping.

When you define an input port you can define the location of the example input file for the port. An example input file is a small sample of the input file. Reference an example input file when you create Scripts. You also use the example input file when you test the transformation in the **Data Viewer** view. Define the example input file in the **Input Location** field.

## Service Parameter Ports

You can create input ports that receive values for variables. The variables can contain any datatype such as a string, a date, or a number. A variable can also contain a location for a source document. You can reference the variables in a Data Processor component.

When you create an input port for a variable, the Developer tool shows a list of variables that you can choose from.

## Creating Service Parameter Ports

You can create input ports that receive values for variables. You can also remove the ports that you create from variables.

1. Open the Data Processor transformation **Overview** view.
2. Click **Choose**.  
The Developer tool displays a list of variables and indicates which variables already have ports.
3. Select one or more variables.  
The Developer tool creates a buffer input port for each variable that you select. You cannot modify the port.
4. To remove a port that you create from a variable, disable the selection from the variable list. When you disable the selection, the Developer tool removes the input port.

## Data Processor Transformation Output Ports

The Data Processor transformation has one output port by default. If you define additional output ports in a Script, the Developer tool adds the ports to the Data Processor transformation. You can create groups of ports if you configure the transformation to return relational data. You can also create service parameter ports and pass-through ports.

### Default Output Port

The Data Processor transformation has one output port by default. When you create relational output, you can define groups of related output ports instead of the default output port. When you define an additional output port in a Script component, the Developer tool adds an additional output port to the transformation.

Configure one of the following output types for a default output port:

#### Buffer

The Data Processor transformation returns XML through the Output port. Choose the Buffer file type when you parse documents or when you map XML to other XML documents in the Data Processor transformation.

#### File

The Data Integration Service returns an output file name in the Output port for each source instance or row. The Data Processor transformation component writes the output file instead of returning data through the Data Processor transformation output ports.

When you select a File output port, the Developer tool creates an Output\_Filename input port. You can pass a file name into the Output filename port. The Data Processor transformation creates the output file with a name that it receives in this port.

If the output file name is blank, the Data Integration Service returns a row error. When an error occurs, the Data Integration Service writes a null value to the Output port and returns a row error.

Choose the File output type when you transform XML to a binary data file such as a PDF file or a Microsoft Excel file.

## Pass-Through Ports

You can configure pass-through ports to any Data Processor transformation. Pass-through ports are input and output ports that receive input data and return the same data to a mapping without changing it.

You can configure pass-through ports in a Data Processor transformation instance that is in a mapping.

To add a pass-through port, drag a port from another transformation in the mapping. You can also add ports in the **Ports** tab of the **Properties** view. Click **New** to add a pass-through port.

**Note:** When you add pass-through ports to a Data Processor transformation with relational input and hierarchical output, add the ports to the root group of the relational structure.

Data Processor transformations can include pass-through ports with custom data types.

## Startup Component

A startup component defines the component that starts the processing in the Data Processor transformation. Configure the startup component on the **Overview** view.

A Data Processor transformation can contain multiple components to process data. Each component might contain other components. You must identify which component is the entry point for the transformation.

When you configure the startup component in a Data Processor transformation, you can choose an XMap, Library, or a Script component as the startup component. In terms of Scripts, you can select one of the following types of components:

- **Parser.** Converts source documents to XML. The input can have any format, such as text, HTML, Word, PDF, or HL7.
- **Mapper.** Converts an XML source document to another XML structure or schema.
- **Serializer.** Converts an XML file to an output document of any format.
- **Streamer.** Splits large input documents, such as multi-gigabyte data streams, into segments.
- **Transformer.** Modifies the data in any format. Adds, removes, converts, or changes text. Use Transformers with a Parser, Mapper, or Serializer. You can also run a Transformer as stand-alone component.

**Note:** If the startup component is not an XMap or Library, you can also configure the startup component in a Script instead of in the **Overview** view.

## References

You can define transformation references, such as schema or maplet references, by selecting a schema or maplet to serve as a reference. Some Data Processor transformations require a hierarchical schema to define the input or output hierarchy for relevant components in the transformation. To use the schema in the transformation, you define a schema reference for the transformation. You can also use a specialized action

named the RunMapplet action to call a mapplet from a Data Processor transformation. To call a mapplet, you must first define a mapplet reference for the transformation.

You can define transformation references, such as schema or mapplet references, in the transformation **References** view.

### Schema References

The Data Processor transformation references schema objects in the Model repository. The schema objects can exist in the repository before you create the transformation. You can also import schemas from the transformation **References** view.

The schema encoding must match the input encoding for Serializer or Mapper objects. The schema encoding must match the output encoding for Parser or Mapper objects. Configure the working encoding in the transformation **Settings** view.

A schema can reference additional schemas. The Developer tool shows the namespace and prefix for each schema that the Data Processor transformation references. When you reference multiple schemas with empty namespaces the transformation is not valid.

### Mapplet References

You can call a mapplet from a Data Processor transformation with the RunMapplet action. Before you add the RunMapplet action to a Data Processor transformation component, you must first define a reference to the mapplet that you want to call.

## Data Processor Transformation Settings

Configure code pages, XML processing options, and logging settings in the Data Processor transformation **Settings** view.

### Character Encoding

A character encoding is a mapping of the characters from a language or group of languages to hexadecimal code.

When you design a Script, you define the encoding of the input documents and the encoding of the output documents. Define the working encoding to define how the IntelliScript editor displays characters and how the Data Processor transformation processes the characters.

#### Working Encoding

The working encoding is the code page for the data in memory and the code page for the data that appears in the user interface and work files. You must select a working encoding that is compatible with the encoding of the schemas that you reference in the Data Processor transformation.

The following table shows the working encoding settings:

| Setting                                  | Description  |
|--|--|
| Use the Data Processor Default Code Page | Uses the default encoding from the Data Processor transformation.  |
| Other                                    | Select the encoding from the list.   |
| XML Special Characters Encoding          | <p>Determines the representation of XML special characters. You can select <b>None</b> or <b>XML</b>.</p> <ul style="list-style-type: none"><li>- <b>None.</b><br/>Leave as &amp;amp; &amp;lt; &amp;gt; &amp;quot; &amp;apos;<br/>Entity references for XML special characters are interpreted as text. For example, the character &gt; appears as<br/>&amp;gt;<br/>Default is none.</li><li>- <b>XML.</b> Convert to &amp; &lt; &gt; " '<br/>Entity references for XML special characters are interpreted as regular characters. For example, &amp;gt; appears as the following character:<br/>&gt;</li></ul> |

## Input Encoding

The input encoding determines how character data is encoded in input documents. You can configure the encoding for additional input ports in a Script.

The following table describes the encoding settings in the **Input** area:

| Setting                                  | Description   |
|--|---|
| Use Encoding Specified in Input Document | <p>Use the codepage that the source document defines, such as the encoding attribute of an XML document.</p> <p>If the source document does not have an encoding specification, the Data Processor transformation uses the encoding settings from the <b>Settings</b> view.</p> |
| Use Working Encoding                     | Use the same encoding as the working encoding.  |
| Other                                    | Select the input encoding from a drop-down list.  |



| Setting                         | Description   |
|---------------------------------|---|
| XML Special Characters Encoding | <p>Determines the representation of XML special characters. You can select <b>None</b> or <b>XML</b>.</p> <ul style="list-style-type: none"> <li>- <b>None.</b><br/>Leave as &amp; &amp;lt; &amp;gt; &amp;quot; &amp;apos;<br/>Entity references for XML special characters are interpreted as text, for example, the character &gt; appears as<br/>&amp;gt;<br/>Default in None.</li> <li>- <b>XML.</b> Convert to &amp; &lt; &gt; " '<br/>Entity references for XML special characters are interpreted as regular characters. For example, &amp;gt; appears as the following character:<br/>&gt;</li> </ul> |
| Byte Order                      | <p>Describes how multi-byte characters appear in the input document. You can select the following options:</p> <ul style="list-style-type: none"> <li>- Little-endian. The least significant byte appears first. Default.</li> <li>- Big-endian. The most significant byte appears first.</li> <li>- No binary conversion.</li> </ul>   |

## Output Encoding

The output encoding determines how character data is encoded in the main output document.

The following table describes the encoding settings in the **Output** area:

| Setting                         | Description   |
|---------------------------------|---|
| Use Working Encoding            | The output encoding is the same as the working encoding.  |
| Other                           | The user selects the output encoding from the list.   |
| XML Special Characters Encoding | <p>Determines the representation of XML special characters. You can select <b>None</b> or <b>XML</b>.</p> <ul style="list-style-type: none"> <li>- <b>None.</b><br/>Leave as &amp; &amp;lt; &amp;gt; &amp;quot; &amp;apos;<br/>Entity references for XML special characters are interpreted as text, for example, the character &gt; appears as<br/>&amp;gt;<br/>Default.</li> <li>- <b>XML.</b> Convert to &amp; &lt; &gt; " '<br/>Entity references for XML special characters are interpreted as regular characters. For example, &amp;gt; appears as the following character:<br/>&gt;</li> </ul> |
| Same as Input Encoding          | The output encoding is the same as the input encoding.  |
| Byte order                      | <p>Describes how multi-byte characters appear in the input document. You can select the following options:</p> <ul style="list-style-type: none"> <li>- Little-endian. The least significant byte appears first. Default.</li> <li>- Big-endian. The most significant byte appears first.</li> <li>- No binary conversion.</li> </ul>   |

## Rules and Guidelines for Character Encoding

Use the following rules and guidelines when you configure encodings:

- To increase performance, set the working encoding to be the same encoding as the output document.
- Set the input encoding to the same encoding as the input document.
- Set the output encoding to the same encoding as the output document.
- For languages that have multiple-byte characters, set the working encoding to UTF-8. For the input and output encoding, you can use a Unicode encoding such as UTF-8 or a double-byte code page such as Big5 or Shift\_JIS.

## Output Settings

Configure output control settings to control whether the Data Processor transformation creates event logs and saves output documents.

You can control the types of messages that the Data Processor transformation writes to the design-time event log. If you save the parsed input documents with the event logs, you can view the context where the error occurred in the **Event** view.

The following table describes the settings in the **Design-Time Events** area:

| Setting                | Description   |
|------------------------|---|
| Log design-time events | Determines whether to create a design-time event log. By default, the Data Processor transformation logs notifications, warnings, and failures in the design-time event log. You can exclude the following event types: <ul style="list-style-type: none"><li>- Notifications</li><li>- Warnings</li><li>- Failures</li></ul> |
| Save parsed documents  | Determines when the Data Processor transformation saves a parsed input document. You can select the following options: <ul style="list-style-type: none"><li>- Always.</li><li>- Never</li><li>- On failure</li></ul> The default is always.  |

The following table describes the settings in the **Run-Time Events** area:

| Setting             | Description  |
|---------------------|--|
| Log run-time events | Determines whether an event log is created when you run the transformation from a mapping. <ul style="list-style-type: none"><li>- Never.</li><li>- On failure</li></ul> The default is Never. |

The following table describes the settings in the **Output** area:

| Setting                   | Description  |
|---------------------------|--|
| Disable automatic output  | Determines whether the Data Processor transformation writes the output to the standard output file. Disable standard output in the following situations: <ul style="list-style-type: none"><li>- You pass the output of a Parser to the input of another component before the transformation creates an output file.</li><li>- You use a <b>WriteValue</b> action to write data directly to the output from a Script instead of passing data through the output ports.</li></ul> |
| Disable value compression | Determines whether the Data Processor transformation uses value compression to optimize memory use.<br><br>Important: Do not disable value compression except when Informatica Global Customer Support advises you to do disable it.   |

## Processing Settings

The processing settings define how the Data Processor transformation processes an element without a defined datatype. The settings affect Scripts. The settings do not affect elements that an XMap processes.

The following table describes the processing settings that affect XML processing in Scripts:

| Setting             | Description  |
|---------------------|--|
| Treat as xs:string  | The Data Processor transformation treats an element with no type as a string. In the <b>Choose XPath</b> dialog box, the element or attribute appears as a single node.  |
| Treat as xs:anyType | The Data Processor transformation treats an element with no type as anyType. In the <b>Choose XPath</b> dialog box, the element or attribute appears as a tree of nodes. One node is of xs:string type, and all named complex data types appear as tree nodes. |

The following table describes a processing setting that affects Streamer processing:

| Setting    | Description  |
|------------|--|
| Chunk size | This setting defines the amount of data that the Streamer reads each time from an input file stream. The Data Processor transformation applies this setting to a Streamer with a file input. |

The following table describes a processing setting that affects hierarchical to relational transformation processing:

| Setting             | Description  |
|---------------------|--|
| Normalize XML input | This setting determines if the Data Processor transformation normalizes XML input. By default, the transformation performs normalization for XML input. In some cases, you might choose to skip automatic normalization to increase performance. |

## XMap Settings

The XMap setting defines how the Data Processor transformation processes XMap input elements that are not transformed to output elements. The unread elements are passed to a dedicated port named

**XMap\_Unread\_Input\_Values.** The setting takes affect only when the XMap is selected as the start-up component. The setting does not affect elements that the XMap processes.

To pass unread XMap elements to a dedicated port, enable the setting **Write unread elements to an additional output port**.

## XML Output Configuration

The XML generation settings define characteristics of XML output documents.

The following table describes the XML generation settings in the **Schema Title** area:

| Setting                      | Description  |
|------------------------------|--|
| Schema location              | Defines the schemaLocation for the root element of the main output document.                         |
| No namespace schema location | Defines the xsi:noNamespaceSchemaLocation attribute of the root element of the main output document. |

Configure XML Output Mode settings to determine how the Data Processor transformation handles missing elements or attributes in the input XML document. The following table describes the XML generation settings in the **XML Output Mode** area:

| Setting | Description  |
|---------|--|
| As is   | Do not add or remove empty elements. Default is enabled.   |
| Full    | All required and optional elements defined in the output schema are written to the output. Elements that have no content are written as empty elements.  |
| Compact | Removes empty elements from the output.<br>If <b>Add for Elements</b> is enabled, then the Data Processor transformation removes only the optional elements.<br>If <b>Add for Elements</b> is disabled, the Data Processor transformation removes all empty elements. The XML output might not be valid. |

The following table describes the XML generation settings in the **Default Values for Required Nodes** area:

| Setting               | Description   |
|-----------------------|---|
| Add for elements      | When the output schema defines a default value for a required element, the output includes the element with a default value. Default is enabled.  |
| Add for attributes    | When the output schema defines a default value for a required attribute, the output includes the attribute with its default value. Default is enabled.  |
| Validate added values | Determines whether the Data Processor transformation validates empty elements that are added by the Full mode output. Default is disabled.<br>If <b>Validate added values</b> is enabled and the schema does not allow empty elements, the XML output might not be valid. |

The following table describes the XML generation settings in the **Processing Instructions** area:

| Setting                            | Description  |
|------------------------------------|--|
| Add XML processing instructions    | Defines the character encoding and XML version of the output document. Default is selected.  |
| XML version                        | Defines the XML version. The XML version setting has the following options: <ul style="list-style-type: none"><li>- 1.0</li><li>- 1.1</li></ul> Default is 1.0.  |
| Encoding                           | Defines the character encoding that is specified in the processing instruction. The Encoding setting has the following options: <ul style="list-style-type: none"><li>- Same as output encoding. The output encoding in the processing instruction is the same as the output encoding defined in the Data Processor transformation settings.</li><li>- Custom. Defines the output encoding in the processing instruction. The user types the value in the field.</li></ul> |
| Add custom processing instructions | Adds other processing instructions to the output document. Enter the processing instruction exactly as it appears in the output document. Default is Disabled.   |

The following table describes the XML generation settings in the **XML Root** area:

| Setting              | Description   |
|----------------------|---|
| Add XML root element | Adds a root element to the output document. Use this option when the output document contains more than one occurrence of the root element defined in the output schema. Default is Disabled. |
| Root element name    | Defines a name for the root element to add to the output document.  |

## Events

An event is a record of a processing step from a component in the Data Processor transformation. In a Script or Library, each anchor, action, or transformer generates an event. In an XMap, each mapping statement generates an event.

You can view events in the **Data Processor Events** view.

### Event Types

The Data Processor transformation writes events in log files. Each event has an event type that indicates if the event was successful, the event failed, or if the event ran with errors.

A component can generate one or more events. The component can pass or fail depending on whether the events succeed or fail. If one event fails, a component fails.

The following table describes the types of events that the Data Processor transformation generates:

| Event Type       | Description   |
|------------------|---|
| Notification     | Normal operation.   |
| Warning          | The Data Processor transformation ran, but an unexpected condition occurred. For example, the Data Processor transformation wrote data to the same element multiple times. Each time the element is overwritten, the Data Processor transformation generates a warning. |
| Failure          | The Data Processor transformation ran, but a component failed. For example, a required input element was empty.   |
| Optional Failure | The Data Processor transformation ran, but an optional component failed. For example, an optional anchor was missing from the source document.  |
| Fatal Error      | The Data Processor transformation failed because of a serious error. For example, the input document did not exist.   |

## Data Processor Events View

The **Data Processor Events** view displays events when you run a Data Processor transformation from the Developer tool.

The **Data Processor Events** view has a **Navigation** panel and a **Details** panel. The Navigation panel contains a navigation tree. The navigation tree lists the components that the transformation ran in chronological order. Each node has an icon that represents the most serious event below it in the tree. When you select a node in the **Navigation** panel, events appear in the **Details** panel.

The navigation tree contains the following top-level nodes:

- Service Initialization. Describes the files and the variables that the Data Processor transformation initializes.
- Execution. Lists the components that the Script, Library or XMap ran.
- Summary. Displays statistics about the processing.

When you run an XMap, each node name in the navigation panel has a number in square brackets, such as [5]. To identify the statement that generated the events for the node, right-click in the statements grid and select Go to Row Number. Enter the node number.

When you run a Script and double-click an event in the **Navigation** panel or the **Details** panel, the Script editor highlights the Script component that generated the event. The **Input** panel of the **Data Viewer** view highlights the part of the example source document that generated the event.

## Logs

A log contains a record of the Data Processor transformation. The Data Processor transformation writes events to logs.

The Data Processor transformation creates the following types of logs:

### Design-time event log

The design-time event log contains events that occur when you run the Data Processor transformation in the **Data Viewer** view. View the design-time log in the **Events** view.

### Run-time event log

The run-time event log contains events that occur when you run the Data Processor transformation in a mapping. You can view the run-time event log in a text editor or you can drag a run-time event log into the **Events** view of the Data Processor transformation.

### User log

The user log contains events that you configure for components in a Script. The Data Processor transformation writes to the user log when you run it from the **Data Viewer** view and when you run it in a mapping. You can view the user log in a text editor.

## Design-Time Event Log

The design-time event log contains the events that occur when you run the Data Processor transformation from the **Data Viewer** in the Developer tool.

When you run a Data Processor transformation from the **Data Viewer** view, the design-time event log appears in the **Data Processor Events** view. By default, the design-time event log contains notifications, warnings, and failures. In the transformation settings, you can configure the Data Processor transformation to exclude one or more event types from the log.

When you save the input documents with the log, you can click an event in the **Data Processor Events** view to find the location in the input document that generated the event. When you configure the Data Processor transformation settings, you can choose to save the input files for every run or only on failure.

The design-time event log is named `events.cme`. You can find the design-time event log for the last run of the Data Processor transformation in the following directory:

```
C:\<Installation_directory>\clients\DT\CMReports\Init\events.cme
```

The Data Processor transformation overwrites the design-time event log every time you run the transformation in the **Data Viewer**. Rename the design-time event log if you want to view it after a later run of the transformation, or if you want to compare the logs of different runs. When you close the Developer tool, the Developer does not save any files in the

## Run-Time Event Log

The run-time event log records the events that occur when you run the Data Processor transformation in a mapping.

If the Data Processor transformation completes the run with no failures, it does not write an event log. If there are failures in the run, Data Processor transformation runs a second time and writes an event log during the second run. The run-time event log is named `events.cme`.

On a Windows machine, the run-time event log is in the following directory:

```
C:<Installation_Directory>\clients\DT\CMReports\Tmp\
```

On a Linux or UNIX machine, the run-time event log for a root user is in the following directory:

```
/root/<Installation_Directory>/clients/DT/CMReports/Tmp
```

On a Linux or UNIX machine, you can find the run-time event log for a non-root user in the following directory:

```
/home/[UserName]/<Installation_Directory>/DT/CMReports/Tmp
```

Use the configuration editor to change the location of the run-time event log.

## Viewing an Event Log in the Data Processor Events View

Use the **Data Processor Events** view to view a design-time event log or a run-time event log.

Open Windows Explorer, and then browse to the event log file you want to view. Drag the log from the Windows Explorer window to the **Data Processor Events** view. Right-click in the **Data Processor Events** view, and then select **Find** to search the log.

**Note:** To reload the most recent design-time event log, right-click the **Data Processor Events** view, and then select **Reload Project Events**.

## User Log

The user log contains custom messages that you configure about failures of components in a Script.

The Data Processor transformation writes messages to the user log when you run a Script from the **Data Viewer** view and when you run it in a mapping.

When a Script component has the **on\_fail** property, you can configure it to write a message to the user log when it fails. In the Script, set the **on\_fail** property to one of the following values:

- LogInfo
- LogWarning
- LogError

Each run of the Script produces a new user log. The user log file name contains the transformation name with a unique GUID:

```
<Transformation_Name>_<GUID>.log
```

For example, `CalculateValue_Aa93a9d14-a01f-442a-b9cb-c9ba5541b538.log`

On a Windows machine, you can find the user log in the following directory:

```
c:\Users\[UserName]\AppData\Roaming\Informatica\DataTransformation\UserLogs
```

On a Linux or UNIX machine, you can find the user log for the root user in the following directory:

```
/<Installation_Directory>/DataTransformation/UserLogs
```

On a Linux or UNIX machine, you can find the user log for a non-root user in the following directory:

```
home/<Installation_Dirctory>/DataTransformation/UserLogs
```

## Data Processor Transformation Development

Use the New Transformation wizard to auto-generate a Data Processor transformation, or create a blank Data Processor transformation and configure it later. If you create a blank Data Processor transformation, you must select to create a Script, XMap, Library, or Validation Rules object in the transformation. A Script can parse source documents to hierarchical format, convert hierarchical format to other file formats, or map a hierarchical document to another hierarchical format. An XMap converts an input hierarchical file into an output hierarchical file of another structure. A Library converts an industry messaging type into an XML document with a hierarchy structure or from XML to an industry standard format. Choose the schemas that define the input or output hierarchies.

1. Create the transformation in the Developer tool.



2. For a blank Data Processor transformation, perform the following additional steps:
  - a. Add schema references that define the input or output XML hierarchies.
  - b. Create a Script, XMap, Library, or Validation Rules object.
3. Configure the input and output ports.
4. Test the transformation.

## Create the Data Processor Transformation

Create a Data Processor transformation in the Developer tool. If you create a blank Data Processor transformation, you must then create a Script, XMap, Library, or Validation Rules object in the transformation. Alternatively, you can use the New Transformation wizard to auto-generate a Data Processor transformation.

1. In the Developer tool, click **File > New > Transformation**.
2. Select the Data Processor transformation and click **Next**.
3. Enter a name for the transformation and browse for a Model repository location to put the transformation.
4. Select whether to create Data Processor transformation with a wizard or to create a blank Data Processor transformation.
5. If you selected to create a blank Data Processor transformation, click **Finish**.

The Developer tool creates the empty transformation in the repository. The **Overview** view appears in the Developer tool.

6. If you selected to create an Data Processor transformation with a wizard, perform the following steps:
  - a. Click **Next**.
  - b. Select an input format.
  - c. Browse to select a schema, copybook, example file, or specification file if required for certain input formats such as COBOL, JSON, or ASN.1.
  - d. Select an output format.
  - e. Browse to select a schema, copybook, example file, or specification file if required for the output format.
  - f. Click **Finish**. The wizard creates the transformation in the repository.

The transformation might contain a Parser, Serializer, Mapper, or an object with common components. If you selected a schema, copybook, example file, or specification file the wizard also creates a schema in the repository that is equivalent to the hierarchy in the file.

## Select the Schema Objects

Choose the schema objects that define the input or output hierarchies for each XMap or Script component that you plan to create.

You can add schema references on the References view or you can add the schema references when you create Script or XMap objects. A schema object must exist in the Model repository before you can reference it in a Script or XMap.

1. In the Data Processor transformation **References** view, click **Add**.
2. If the schema object exists in the Model repository, browse for and select the schema.
3. If the schema does not exist in the Model repository, click **Create a new schema object** and import a schema object from a hierarchical schema file.

4. Click **Finish** to add the schema reference to the Data Processor transformation.

## Create Objects in a Blank Data Processor Transformation

Create a Script, Library, XMap, or Validation Rules object on the Data Processor transformation **Objects** view. After you create the object, you can open the object from the **Objects** view in order to configure it.

### Creating a Script

Create a Script object and define the type of Script component to create. Optionally, you can define a schema reference and example source file.

1. In the Data Processor transformation **Objects** view, click **New**.
2. Enter a name for the Script and click **Next**.
3. Choose to create a Parser or Serializer. Select **Other** to create a Mapper, Transformer, or Streamer component.
4. Enter a name for the component.
5. If the component is the first component to process data in the transformation, enable **Set as startup component**.
6. Click **Next** if you want to enter a schema reference for this Script. Click **Finish** if you do not want to enter the schema reference.
7. If you choose to create a schema reference, select **Add reference to a Schema Object** and browse for the Schema object in the Model repository. Click **Create a new schema object** to create the Schema object in the Model repository.
8. Click **Next** to enter an example source reference or to enter example text. Click **Finish** if you do not want to define an example source.  
Use a example source to define sample data and to test the Script.
9. If you choose to select an example source, select **File** and browse for the sample file.  
You can also enter sample text in the **Text** area. The Developer tool uses the text to test a Script.
10. Click **Finish**.  
The **Script** view appears in the Developer tool editor.

### Creating an XMap

Create an XMap on the Data Transformation **Objects** view. When you create an XMap, you must have a schema that describes the input and the output hierarchical documents. You select the element in the schema that is the root element for the input hierarchy.

1. In the Data Processor transformation **Objects** view, click **New**.
2. Select XMap and click **Next**.
3. Enter a name for the XMap.
4. If the XMap component is the first component to process data in the transformation, enable **Set as startup component**.  
Click **Next**.
5. If you choose to create a schema reference, select **Add reference to a Schema Object**, and browse for the Schema object in the Model repository.

To import a new Schema object, click **Create a new schema object**.

6. If you have a sample hierarchical file that you can use to test the XMap with, browse for and select the file from the file system.

You can change the sample hierarchical file.

7. Choose the root for the input hierarchy.

In the **Root Element Selection** dialog box, select the element in the schema that is the root element for the input hierarchical file. You can search for an element in the schema. You can use pattern searching. Enter `*<string>` to match any number of characters in the string. Enter `?<character>` to match a single character.

8. Click **Finish**.

The Developer tool creates a view for each XMap that you create. Click the view to configure the mapping.

## Creating a Library

Create a Library object on the Data Transformation **Objects** view. Select the message type, component and name. Optionally, you can define a sample message type source file that you can use to test the Library object.

Before you create a Library in the Data Processor transformation, install the library software package on your computer.

1. In the Data Processor transformation **Objects** view, click **New**.

2. Select Library and click **Next**.

3. Browse to select the message type.

4. Choose to create a Parser or Serializer.

Create a Parser if the Library object input is a message type and the output is XML. Create a Serializer if the Library object input is XML and the output is a message type.

5. If the Library is the first component to process data in the Data Processor transformation, enable **Set as startup component**.

Click **Next**.

6. If you have a sample message type source file that you can use to test the Library with, browse for and select the file from the file system.

You can change the sample file.

7. Click **Finish**.

The Developer tool creates a view for each message type that you create. Click the view to access the mapping.

## Creating Validation Rules

Create a Validation Rules object in the Data Processor transformation **Objects** view.

1. In the Data Processor transformation **Objects** view, click **New**.

2. Select Validation Rules and click **Next**.

3. Enter a name for the Validation Rules.

4. If you have a sample XML file that you can use to test the Validation Rules with, browse for and select the file from the file system.

You can change the sample XML file.

5. Click **Finish**.

The Developer tool creates a Validation Rules object and opens it in the Validation Rules editor.

## Adding an Example Source

Choose the example source to test the Script, XMap, Library, or Validation Rules that you plan to create.

You can add an example source when you create a Script, XMap, Library, or Validation Rules. Once selected, the example source is added to the Model repository. Due to Model repository limitations, the example source file size is limited to 5 MB.

You can change the example source.

## Create the Ports

Configure the input and output ports in the **Overview** view.

When you configure additional input or output ports in a Script, the Developer tool adds additional input ports and additional output ports to the transformation by default. You do not add input ports on the **Overview** view.

1. If you want to return rows of output data instead of XML, enable **Relational Output**.  
When you enable relational output, the Developer tool removes the default output port.
2. Select the input port datatype, port type, precision and scale.
3. If you are not defining relational output ports, define the output port datatype, port type, precision, and scale.
4. If a Script has additional input ports, you can define the location of the example input file for the ports. Click the **Open** button in the **Input Location** field to browse for the file.
5. If you enabled relational output, click **Output Mapping** to create the output ports.
6. On the Ports view, map nodes from the **Hierarchical Output** area to fields in the **Relational Ports** area.

## Testing the Transformation

Test the Data Processor transformation in the **Data Viewer** view.

Before you test the transformation, verify that you defined the startup component. You can define the startup component in a Script or you can select the startup component on the **Overview** tab. You also need to have chosen an example input file to test with.

1. Open the **Data Viewer** view.
2. Click **Run**.  
The Developer tool validates the transformation. If there is no error, the Developer tool shows the example file in the **Input** area. The output results appear in the Output panel.
3. Click **Show Events** to show the **Data Processor Events** view.
4. Double-click an event in the **Data Processor Events** view in order to debug the event in the Script editor.
5. Click **Synchronize with Editor** to change the input file when you are testing multiple components, each with a different example input file.

If you modify the example file contents in the file system, the changes appear in the **Input** area.

# Data Processor Transformation Import and Export

You can export a Data Processor transformation as service and run it from a Data Transformation repository. You can also import a Data Transformation service to the Developer tool. When you import a Data Transformation service, the Developer tool creates a Data Processor transformation from the service.

**Note:** When you import a Data Transformation service to the Model repository, the Developer tool imports the associated schemas to the repository. If you modify the schema in the repository, sometimes the changes do not appear in the transformation schema references. You can close and open the Model repository connection, or close and open the Developer tool to cause the schema changes to appear in the transformation..

## Exporting the Data Processor Transformation as a Service

You can export the Data Processor transformation as a Data Transformation service. Export the service to the file system repository of the machine where you want to run the service. You can run the service with PowerCenter®, user-defined applications, or the Data Transformation CM\_console command.

1. In the **Object Explorer** view, right-click the Data Processor transformation you want to export, and select **Export**.  
The **Export** dialog box appears.
2. Select **Informatica > Export Data Processor Transformation** and click **Next**.  
The **Select** page appears.
3. Click **Next**.  
The **Select Service Name and Destination Folder** page appears.
4. Choose a destination folder:
  - To export the service on the machine that hosts the Developer tool, click **Service Folder**.
  - To deploy the service on another machine, click **Folder**. Browse to the \ServiceDB directory on the machine where you want to deploy the service.
5. Click **Finish**.

## Importing a Data Transformation Service

You can import a Data Transformation service from the file system repository of the machine where you saved the service. Import a Data Transformation service .cmw file to the Model repository to create a Data Processor transformation. The Developer tool imports the transformation, schemas and example data with the .cmw file.

1. Click **File > Import**,  
The **Import** dialog box appears.
2. Select **Informatica Import Data Transformation Service** and click **Next**.  
The **Import Data Transformation Service** page appears.
3. Browse to the service .cmw file that you want to import.  
The Developer tool names the transformation according to the service file name. You can change the name.
4. Browse to a location in the Repository where you want to save the transformation, then click **Finish**.  
The Developer tool imports the transformation, schemas and example data with the .cmw file.

5. To edit the transformation, double-click the transformation in the **Object Explorer** view.

## Exporting a Mapping with a Data Processor Transformation to PowerCenter

When you export a mapping with a Data Processor transformation to PowerCenter, you can export the objects to a local file, and then import the mapping into PowerCenter. Alternatively, you can export the mapping directly into the PowerCenter repository.

1. In the **Object Explorer** view, select the mapping to export. Right-click and select **Export**.

The **Export** dialog box appears.

2. Select **Informatica > PowerCenter**.

3. Click **Next**.

The **Export to PowerCenter** dialog box appears.

4. Select the project.

5. Select the PowerCenter release.

6. Choose the export location, a PowerCenter import XML file or a PowerCenter repository.

7. Specify the export options.

8. Click **Next**.

The Developer tool prompts you to select the objects to export.

9. Select the objects to export and click **Finish**.

The Developer tool exports the objects to the location you selected. If you exported the mapping to a location, the Developer tool also exports the Data Processor transformations in the mapping, as services, to a folder at the location that you specified.

10. If you exported the mapping to a PowerCenter repository, the services are exported to the following directory path: %temp%\DTServiceExport2PC\

The export function creates a separate folder for each service with the following name:

<date><serviceFullName>

If the transformation includes relational mapping, a folder is created for relational to hierarchical mapping, and a separate folder for hierarchical to relational mapping.

11. Copy the folder or folders with Data Processor transformation services from the local location where you exported the files to the PowerCenter ServiceDB folder.
12. If you exported the mapping to a PowerCenter import XML file, import the mapping to PowerCenter. For more information about how to import an object to PowerCenter, see the *PowerCenter 9.6.0 Repository Guide*.

## CHAPTER 14

# Decision Transformation

This chapter includes the following topics:

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- [Decision Transformation Functions, 228](#)
- [Decision Transformation Conditional Statements , 230](#)
- [Decision Transformation Operators, 231](#)
- [Decision Transformation NULL Handling, 232](#)
- [Configuring a Decision Strategy , 232](#)
- [Decision Transformation Advanced Properties, 232](#)

## Decision Transformation Overview

The Decision transformation is a passive transformation that evaluates conditions in input data and creates output based on the results of those conditions.

Configure a Decision transformation to generate different values based on the values found in input fields. For example, if customer revenue is greater than a specific amount, you can add the string "Priority" to the customer name.

You can add multiple decision strategies to the Decision transformation. Each strategy evaluates an `IF-THEN-ELSE` conditional statement. Within this statement, you can use `ELSEIF` conditions or nest additional `IF-THEN-ELSE` statements.

The Decision transformation is similar to the Expression transformation in that it allows you to use conditional statements and functions to test source data. However, the Decision transformation is different from the Expression transformation in the following ways:

- The Decision transformation uses `IF-THEN-ELSE` statements to evaluate conditions. The Expression transformation uses `IIF` statements.
- The Decision transformation contains functions that are not available in the Expression transformation.
- Each decision strategy can generate multiple outputs.

# Decision Transformation Functions

The Decision transformation provides access to predefined functions that you use to define decision strategies.

The Decision transformation expression editor contains a Decision folder. This folder contains functions that are specific to the Decision transformation. The editor also contains other folders that provide access to Expression transformation functions.

When you click a function in the expression editor, the transformation displays the usage and datatypes for the function, in addition to a description of what the function does.

**Note:** Not all Expression transformation functions are compatible with the Decision transformation. The Decision transformation only provides access to compatible Expression transformation functions.

## List of Decision Transformation Functions

- ABS
- ADD\_TO\_DATE
- ASCII
- CEIL
- CHOOSE
- CHR
- CHRCODE
- CONCAT
- CONTAINS
- CONVERT\_BASE
- COS
- COSH
- CRC32
- CUME
- CURDATE
- CURTIME
- DATE\_COMPARE
- DATE\_DIFF
- DATECONVERT
- EXP
- FLOOR
- FV
- GET\_DATE\_PART
- GREATEST
- IN
- INDEXOF
- INITCAP
- INSTR



- IS\_DATE
- IS\_NUMBER
- ISNULL
- LAST\_DAY
- LEAST
- LEFTSTR
- LENGTH
- LN
- LOG
- LOWER
- LPAD
- LTRIM
- MAKE\_DATE\_TIME
- MAX
- MD5
- METAPHONE
- MIN
- MOD
- MONTHCOMPARE
- MOVINGAVG
- MOVINGSUM
- NPER
- PMT
- POWER
- PV
- RAND
- RATE
- REG\_EXTRACT
- REG\_MATCH
- REG\_REPLACE
- REPLACECHR
- REPLACESTR
- REVERSE
- RIGHTSTR
- ROUND
- RPAD
- RTRIM
- SET\_DATE\_PART
- SIGN

- SIN
- SINH
- SOUNDEX
- SQRT
- SUBSTR
- TAN
- TANH
- TIMECOMPARE
- TO\_CHAR
- TO\_DATE
- TO\_FLOAT
- TO\_INTEGER
- TRUNC
- UPPER
- XOR

**Note:** Use a constant value to define the date format in the CURDATE, DATE\_COMPARE, DATECONVERT, and MONTHCOMPARE functions in the Decision transformation.

## Decision Transformation Conditional Statements

The Decision transformation uses IF-THEN-ELSE conditional statements to evaluate input data.

Within these conditional statements, you can use ELSEIF conditions or nest additional IF-THEN-ELSE statements. Decision transformation conditional statements use the following format:

```
// Primary condition
IF <Boolean expression>
THEN <Rule Block>
// Optional - Multiple ELSEIF conditions
ELSEIF <Boolean expression>
THEN <Rule Block>
// Optional ELSE condition
ELSE <Rule Block>
ENDIF
```

You can nest additional conditional statements within a rule block.

# Decision Transformation Operators

Use Decision transformation operators to define decision strategies.

The following table describes the decision transformation operators:

| Operator Type | Operator | Description   |
|---------------|----------|---|
| Assignment    | :=       | Assigns a value to a port.  |
| Boolean       | AND      | Adds a required logical condition. For the parent Boolean expression to be true, all logical conditions linked by this operator must be true.         |
| Boolean       | OR       | Adds a logical condition. For the parent Boolean expression to be true, at least one logical condition linked by this operator must be true.          |
| Boolean       | NOT      | Specifies a negative logical condition. For the parent Boolean expression to be true, the negative condition specified by this operator must be true. |
| Decision      | =        | Tests whether compared items are equal. Use with string or numeric datatypes.   |
| Decision      | <>       | Tests whether compared items are not equal. Use with string or numeric datatypes.   |
| Decision      | <        | Tests whether a value is less than another value. Use with numeric datatypes.   |
| Decision      | <=       | Tests whether a value is less than or equal to another value. Use with numeric datatypes.   |
| Decision      | >        | Tests whether a value is greater than another value. Use with numeric datatypes.  |
| Decision      | >=       | Tests whether a value is greater than or equal to another value. Use with numeric datatypes.  |
| Numerical     | -        | Subtraction   |
| Numerical     | NEG      | Negation  |
| Numerical     | +        | Addition  |
| Numerical     | *        | Multiplication  |
| Numerical     | /        | Division  |
| Numerical     | %        | Modulo. Returns the remainder after dividing one number by another.   |
| String        |          | Concatenates strings.   |

# Decision Transformation NULL Handling

NULL handling determines how the Data Integration Service processes NULL value data in a Decision transformation.

When you enable NULL handling, the Decision transformation retains the original form of NULL input data. The transformation evaluates functions using the NULL input value.

When you disable NULL handling, the Decision transformation assigns a default value to NULL input data. The transformation evaluates functions using the default value. For example, if an integer type input field has a NULL value, the Decision transformation assigns a value of 0 to the input and evaluates functions using an input value of 0.

By default, NULL handling is not enabled in the Decision transformation. You enable NULL handling on the **Strategies** tab. You can enable NULL handling after you configure a strategy for the transformation.

## Configuring a Decision Strategy

To configure a decision strategy, connect source data to the Decision transformation and edit the properties in the transformation views.

1. Open a Decision transformation.
2. Verify that the transformation contains input and output ports.
3. Select the **Decision** view.
4. Click **Add**.
5. Enter a name for the strategy.
6. In the **Expression** area, enter an **IF-THEN-ELSE** conditional statement.
7. To add a function to the expression, browse the functions in the **Functions** tab and double-click a function name.  
**Tip:** To quickly enter a function, type the first letters of the function name and select **CTRL-Space**.
8. To add a port to the expression, browse the ports in the **Ports** tab. Double-click a port name to add it to the expression. Optionally, click **Edit Output Ports** to edit output port settings or add output ports.
9. Optionally, add comment lines by typing `"/"` followed by your comments.
10. Click **Validate** to determine if the decision expression is valid.
11. Click **OK** to save the strategy.
12. Optionally, add additional strategies. Each strategy must use unique output ports. Strategies cannot share output ports.

## Decision Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Decision transformation.

Configure the following advanced properties for a Decision transformation:

**Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

**Partitionable**

The transformation can be processed with multiple threads. Clear this option if you want the Data Integration Service to use one thread to process the transformation. The Data Integration Service can use multiple threads to process the remaining mapping pipeline stages.

You might want to disable partitioning for a Decision transformation when the transformation uses one of the numeric functions CUME, MOVINGSUM, or MOVINGAVG. These functions calculate running totals and averages on a row-by-row basis. A partitioned transformation that uses CUME, MOVINGSUM, or MOVINGAVG functions might not return the same calculated result with each mapping run.

If the transformation does not use CUME, MOVINGSUM, or MOVINGAVG functions, enable partitioning for the transformation to optimize performance.

## CHAPTER 15

# Duplicate Record Exception Transformation

This chapter includes the following topics:

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- [Duplicate Record Exception Process Flow, 235](#)
- [Duplicate Record Exceptions, 235](#)
- [Duplicate Record Exception Configuration View , 236](#)
- [Ports, 237](#)
- [Duplicate Record Exception Transformation Advanced Properties, 240](#)
- [Duplicate Record Exception Mapping Example, 240](#)
- [Creating a Duplicate Record Exception Transformation, 245](#)

## Duplicate Record Exception Transformation Overview

The Duplicate Record Exception transformation is an active transformation that reads the output of a data quality process and identifies duplicate records that require manual review. The Duplicate Record Exception transformation is a multiple-group transformation.

The Duplicate Record Exception transformation receives input from another transformation or from a data object in another mapping. The input to the Exception transformation must contain a numeric match score that the transformation can use to determine if the record is a duplicate. Set an upper and lower match score threshold in the Duplicate Record Exception transformation.

The Duplicate Record Exception transformation performs one of the following actions:

- If the match score is greater than or equal to the upper threshold, the transformation treats the record as a duplicate and writes it to a database target.
- If the match score is less than the upper threshold and greater than the lower threshold the transformation treats the record as a possible duplicate and writes it to a the record to a different target for manual review. If the record belongs to a cluster, the transformation writes all records in the cluster to the target.
- When a cluster has any match score less than the lower threshold, all records in the cluster go to the unique records output group. Clusters of size 1 are routed to the unique group, regardless of match score.

By default, the Exception transformation does not write unique records to a target. You can configure the transformation to return the unique records.

- If any match score in a cluster is not in the range 0 - 100, the Exception transformation ignores all rows in the cluster. The Data Integration Service logs a message that includes the clusterID.

## Duplicate Record Exception Process Flow

The Duplicate Record Exception transformation analyzes the output of other data quality transformations and creates tables that contain records with different levels of data quality.

You can configure data quality transformations in a single mapping, or you can create mappings for different stages in the process.

You can use the Analyst tool to review and update the duplicate records that require manual review.

Use the Developer tool to perform the following tasks:

1. Create a mapping that generates score values for data quality issues.
2. Use a Match transformation in cluster mode to generate score values for duplicate record exceptions.
3. Configure the Duplicate Record Exception transformation to read the Match transformation output. Configure the transformation to write records to database tables based on match score values in the records.
4. Configure target data objects for automatic consolidation records.
5. Click the **Generate duplicate record table** option to create the duplicate record table and add it to the mapping canvas.
6. Add the mapping to a workflow.
7. Configure a Human task to assign manual review of possible duplicate records to users. Users can review and update the records in Analyst tool.

## Duplicate Record Exceptions

You can use a Duplicate Record Exception transformation to identify clusters of duplicate data that needs manual review. The match scores of records in clusters determines the potential duplicates. You can configure upper and lower thresholds for match scores in the transformation. The upper and lower thresholds define the degree of similarity.

A cluster contains related records that a matching operation groups together. The Match transformation creates clusters using the duplicate analysis operation and the identity resolution operation. Each record in a cluster has the same cluster ID. When the lowest match score in a cluster is between the upper and lower thresholds, the Duplicate Record Exception transformation identifies the cluster as a duplicate record exception cluster. The Match transformation adds a cluster ID value column to all the records. Duplicate records receive the same cluster ID.

The lowest record score in a cluster determines the cluster type. A cluster might have 11 records that have a match score of 0.95 and one record with match score of 0.79. If the upper threshold is 0.9 and the lower threshold is 0.8, the Exception transformation writes the records to the unique records table.

# Duplicate Record Exception Configuration View

Define the match score thresholds and configure where the Duplicate Record Exception transformation writes the different types output data.

The following figure shows the properties that you can configure:

---

Manual Review Thresholds

Lower Threshold :

Upper Threshold :

Data Routing Options

| Type  | Standard Output                     | Duplicate Record Table              |
|---|-------------------------------------|-------------------------------------|
| Automatic Consolidation (Above upper threshold) | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Manual Consolidation (Between thresholds)       | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Unique Records (Below lower threshold)          | <input type="checkbox"/>            | <input type="checkbox"/>            |

☐ Create separate output group for unique records

Generate duplicate record table

---

You can configure the following properties:

## Lower Threshold

The lower limit for the duplicate record score range. The transformation processes records with match scores less than this value as unique records. The lower threshold value is a number from 0 to 1.

## Upper Threshold

The upper limit for the duplicate record score range. The transformation processes records with match scores greater than or equal to the upper threshold as duplicate records. The upper threshold value is a number greater than the lower threshold number.

## Automatic Consolidation

Clusters in which all records have match scores greater than the upper threshold. Automatic consolidation clusters do not require review. The records are duplicate. You can use the Consolidation transformation to combine the records. By default, the Duplicate Record Exception transformation writes automatic consolidation clusters to standard output ports.

## Manual Consolidation

Clusters in which all records have match scores greater than or equal to the lower threshold and at least one record has a match score less than the upper threshold. You must perform a manual review of the clusters to determine if they contain duplicate records. By default, the Duplicate Record Exception transformation writes manual consolidation records to the duplicate record table.

## Unique Consolidation

Clusters with a cluster size equal to one or clusters in which any record has a match score less than the lower threshold. Unique record clusters are not duplicates. By default, the Duplicate Record Exception transformation does not write unique records to an output table.

## Standard Output

The types of records that the transformation writes to the standard output ports.

Default is automatic consolidation records.



### Duplicate Record Table

The types of record that the transformation writes to the duplicate record output ports. Default is manual consolidation records.

### Create separate output group for unique records

Creates a separate output group for unique records. If you do not create a separate table for the unique records, you can configure the transformation to write the unique records to one of the other groups. Or, you can skip writing unique records to an output table. Default is disabled.

### Generate duplicate record table

Creates a database object to contain the duplicate record cluster data. When you select this option, the Developer tool creates the database object. The Developer tool adds the object to the Model repository, adds an instance of the object to the mapping canvas, and links the ports to the object.

## Generating a Duplicate Records Table

You can generate a Duplicate Records table from a Duplicate Record Exception transformation instance in a mapping.

1. In the **Configuration** view, click **Generate Duplicate Records table** to generate the table.  
The **Create Relational Data Object** dialog box appears.
2. Browse for and select a connection to the database to contain the table.
3. Enter a name for the Duplicate Records table in the database.
4. Enter a name for the Duplicate Records table object in the Model repository.
5. Click **Finish**.  
The Developer tool adds the new table to the mapping canvas.

## Ports

The Duplicate Record Exception transformation has multiple groups of input and output ports.

The following figure shows an example of the input and output ports:

## Ports

|                     | Name             | Type    | Precision | Scale | Input                               | Output                              | Default | Description |
|---------------------|------------------|---------|-----------|-------|-------------------------------------|-------------------------------------|---------|-------------|
| <b>Inputs</b>       |                  |         |           |       |                                     |                                     |         |             |
| Data (3)            |                  |         |           |       |                                     |                                     |         |             |
| 1                   | Employee         | decimal | 10        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 2                   | Name             | string  | 50        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 3                   | Addr1            | string  | 50        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| Control (3)         |                  |         |           |       |                                     |                                     |         |             |
| 1                   | Score            | double  | 15        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 2                   | Row_Identifier   | string  | 25        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| 3                   | Cluster_ID       | integer | 10        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |         |             |
| <b>Outputs</b>      |                  |         |           |       |                                     |                                     |         |             |
| Standard Output (6) |                  |         |           |       |                                     |                                     |         |             |
| 1                   | Score            | double  | 15        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 2                   | Row_Identifier   | string  | 25        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 3                   | Cluster_ID       | integer | 10        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 4                   | Employee         | decimal | 10        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 5                   | Name             | string  | 50        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 6                   | Addr1            | string  | 50        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| Cluster Data (9)    |                  |         |           |       |                                     |                                     |         |             |
| 1                   | Row_Identifier   | bigint  | 19        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 2                   | Sequential_Cl... | bigint  | 19        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |
| 3                   | Cluster_ID       | integer | 10        | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |         |             |

## Duplicate Record Exception Transformation Input Ports

A Duplicate Record Exception transformation has a Data group and a Control group of input ports.

The **Data** group contains user-defined ports that receive the source data.

The **Control** ports receive metadata that the Match transformation adds to the source data. The following table describes the **Control** ports:

| Port           | Description   |
|----------------|---|
| Score          | Decimal value between 0 and 1. Identifies the degree of similarity with the record that linked the record to the cluster. |
| Row_Identifier | A unique identifier for the record.   |
| Cluster_ID     | The ID of the match cluster to which the record belongs.  |

## Duplicate Record Exception Transformation Output Ports

The Duplicate Record Exception transformation has multiple output groups. By default, the transformation writes duplicate records to the **Standard Output** group. The transformation writes potential matches to the **Cluster Data** group. You can add an output group for unique records.

You can change the record types that the transformation writes to output ports by changing the default settings on the **Configuration** view.

The following table describes the output ports for the **Standard Output** group:

| Port               | Description  |
|--------------------|--|
| Score              | Decimal value between 0 and 1. Identifies the degree of similarity between the record and another record in a cluster. |
| Row_Identifier     | A unique identifier for the record.  |
| Cluster_ID         | ID of the cluster that the Match transformation assigned the record to.  |
| User-defined ports | The source data fields.  |

The following table describes the output ports in the **Cluster Data** group:

| Port                  | Description  |
|-----------------------|--|
| Row_Identifier        | The unique identifier for the record.  |
| Sequential_Cluster_ID | Identifies the cluster in a Human task. A workflow uses the sequential cluster ID to assign a cluster to an instance of a Human task.                                |
| Cluster_ID            | Identifies the cluster that the record belongs to. The Match transformation assigns a cluster ID to all records.   |
| Score                 | Decimal value from 0 to 1. Identifies the degree of similarity with the record that linked the record to the cluster.  |
| Is_Master             | String value that indicates if the record is the preferred record in the cluster. By default, the first row in the cluster is the preferred record. Value is Y or N. |
| Workflow_ID           | ID that identifies the workflow for the record in a task. When you run the mapping outside of a workflow, the workflow ID is DummyWorkflowID.                        |
| User-defined ports    | The source data ports.   |

## Creating Ports

Add each input port to the Data group. When you add the input port, the Developer tool adds an output port with the same name to the Standard Output group, the Cluster Data group, and the Unique Records group.

1. Select the Data input group.  
The group is highlighted.
2. Click **New (Insert)**.  
The Developer tool adds a field to the Data group, the Standard Output group, the Cluster Data group, and the Unique Records group.
3. Change the name of the field as required.  
The Developer tool changes the field name in the other groups.
4. Enter the rest of the ports that you need to add for the data source.

# Duplicate Record Exception Transformation Advanced Properties

The Duplicate Record Exception transformation contains advanced properties that determine the sort behavior, the cache memory behavior, and the tracing level.

You can configure the following advanced properties:

## Sort

Determines whether the transformation sorts the input rows on the **Cluster ID** port data. The property is enabled by default.

Select the property if the input rows are not presorted.

## Cache File Directory

Specifies the directory to which the Data Integration Service writes temporary data for the current transformation. The Data Integration Service writes temporary files to the directory when the volume of input data is greater than the available system memory. The Data Integration Service deletes the temporary files after the mapping runs.

You can enter a directory path on the property, or you can use a parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory. The default value is the CacheDir system parameter.

## Cache File Size

Determines the amount of system memory that the Data Integration Service uses to sort the input data on the transformation. The default value is 400,000 bytes.

Before it sorts the data, the Data Integration Service allocates the amount of memory that you specify. If the sort operation generates a greater amount of data, the Data Integration Service writes the excess data to the cache file directory. If the sort operation requires more memory than the system memory and the file storage can provide, the mapping fails.

**Note:** If you enter a value of 65536 or higher, the transformation reads the value in bytes. If you enter a lower value, the transformation reads the value in megabytes.

## Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

# Duplicate Record Exception Mapping Example

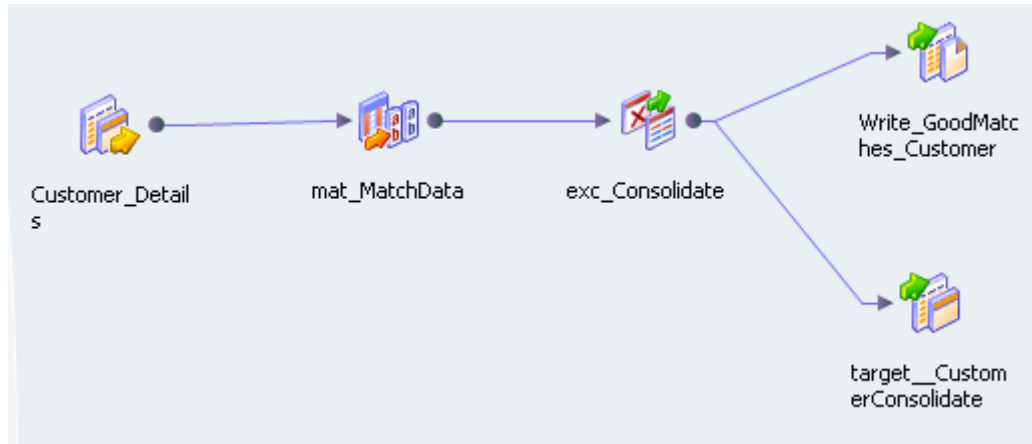
An organization runs a data project to review customer data. The organization determines that the customer data contains multiple duplicate records. The organization needs to manually review some of the records that might be duplicates.

You create a data quality mapping to identify the duplicate customer records. The mapping includes the Match transformation. The Duplicate Record Exception transformation receives the results from the Match transformation. The Duplicate Record Exception transformation writes each record cluster with an uncertain status to a database table. A data analyst reviews the data in the Analyst tool and determines which records are duplicate records.

## Duplicate Record Exception Mapping

Configure a Duplicate Record Exception mapping that examines customer records and finds duplicate records.

The following figure shows the Duplicate Record Exception mapping:



The mapping contains the following objects:

### **Customer\_Details**

The data source that might contain duplicate records.

### **mat\_MatchData**

A Match transformation that examines the customer data to determine if records match. The Match transformation creates a numeric score that represents the degree of similarity between two column values. An algorithm calculates a match score as a decimal value in the range 0 through 1. An algorithm assigns a score of one when two column values are identical.

### **exc\_Consolidate**

A Duplicate Record Exception transformation that determines which records are possible duplicate customers, known duplicate customers, or unique customer records.

### **Write\_GoodMatches\_Customer table**

Table that receives all the records that do not need manual review. The Duplicate Record Exception transformation writes duplicate records and unique records to this table.

### **Target\_CustomerConsolidate table**

The Exception transformation writes the possible duplicate records to the Target\_CustomerConsolidate table. Records in this table require manual review in the Analyst tool.

## Match Transformation




The Match transformation receives the customer data and performs an identity match.

Configure the Match transformation for the Clusters-Match All output type. The Match transformation returns matching records in clusters. Each record in a cluster must match at least one other record in the cluster with a score greater than or equal to the match threshold. The match threshold is .75.

Select the Division matching strategy on the Match transformation **Strategies** tab. The Division strategy is a predefined matching strategy that identifies an organization based on the address fields. On the Match

transformation **Strategies** tab, choose the input ports to examine in a match. Configure the strategy weight as .5.

The following figure shows the Division strategy configuration for the Match transformation:

|   |                         |                                 |        |   |  |   |
|---|-------------------------|---------------------------------|--------|---|--|---|
| <div>General</div> <div>Ports</div> <div>Match Type</div> <div>Strategies</div> <div>Match Output</div> <div>Advanced</div> | Define match strategies |                                 |        |   |  |    |
|   | Match Strategy          | Custom Name                     | Weight | Match Fields  |  | Properties  |
|   | Division                | <div><div></div>Division1</div> | 0.5    | ADDR1_1,ADDR1_2,COMPANY_1,COMPANY_2,ADDR2_1,ADDR2_2,ADDR4_1,ADDR4_2 |  | Population: usa, Match Level: TYPICAL   |
|   |                         |                                 |        |   |  |   |
|   |                         |                                 |        |   |  |   |
|   |                         |                                 |        |   |  |   |

The Match transformation adds cluster information to each output record. The transformation also adds a unique RowID to each record.

## Duplicate Record Exception Input Groups

The Duplicate Record Exception transformation has two input groups. The transformation has a Data group that receives the customer data. The transformation has the Control group that contains the match score for the row, the row identifier, and the cluster ID.

The following figure shows the input groups in the Exception transformation:

|               | Name           | Type    | Precision | Scale | Input                               | Output                   | Default | Description |
|---------------|----------------|---------|-----------|-------|-------------------------------------|--------------------------|---------|-------------|
| <b>Inputs</b> |                |         |           |       |                                     |                          |         |             |
| Data (11)     |                |         |           |       |                                     |                          |         |             |
| 1             | CUST_ID        | decimal | 20        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 2             | COMPANY        | string  | 200       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 3             | CONTACT        | string  | 200       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 4             | TITLE          | string  | 200       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 5             | ADDR1          | string  | 200       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 6             | ADDR2          | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 7             | ADDR3          | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 8             | ADDR4          | string  | 50        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 9             | COUNTRY        | string  | 50        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 10            | PHONE          | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 11            | EMAIL          | string  | 100       | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| Control (3)   |                |         |           |       |                                     |                          |         |             |
| 1             | Score          | double  | 15        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 2             | Row_Identifier | string  | 25        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |
| 3             | Cluster_ID     | integer | 10        | 0     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |         |             |

The Data group contains the customer data. The customer data includes a customer ID, contact, title, and address fields. The Control group is the additional metadata that the Match transformation added for each customer record. The Control group contains the match score, the rowID, and the cluster ID.

## Duplicate Record Exception Example Configuration View

Define the upper and lower thresholds on the **Configuration** view. Identify where the transformation writes the duplicate customer records, the possible duplicate records, and the unique customer records.

The following figure shows the Duplicate Record Exception transformation **Configuration** view:

Manual Review Thresholds

Lower Threshold : 0.80

Upper Threshold : 0.95

Data Routing Options

| Type                          | Standard Output                     | Duplicate Record Table              |
|-------------------------------|-------------------------------------|-------------------------------------|
| Automatic Consolidation (...) | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Manual Consolidation (Be ...) | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |
| Unique Records (Below lo...)  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
|                               |                                     |                                     |
|                               |                                     |                                     |
|                               |                                     |                                     |
|                               |                                     |                                     |
|                               |                                     |                                     |
|                               |                                     |                                     |
|                               |                                     |                                     |
|                               |                                     |                                     |

☐ Create separate output group for unique records

Generate duplicate record table

The following table describes the configuration settings:

| Option                  | Setting                |
|-------------------------|------------------------|
| Lower threshold         | .80                    |
| Upper threshold         | .95                    |
| Automatic Consolidation | Standard Output table  |
| Manual Consolidation    | Duplicate Record table |
| Unique Records          | Standard Output table  |

Click **Generate duplicate record table** to create the duplicate record table. Do not create a separate table for the unique records. The transformation writes the unique records to the Standard Output table.

## Standard Output Table Records

The Write\_GoodMatches\_Customer target table receive rows from the Standard Output group. The table receives unique records and it receives records that are duplicates. These records do not require manual review.

The following figure shows the Standard Output records that the Exception transformation returns:

Output

Name: [jexc\\_Consolidate\\_Good\\_Records](#)

|    | Score             | Row_Identifier | Cluster_ID | CUST_ID | COMPANY         | CONTACT              | TITLE            | ADDR1            | ADDR2           | ADDR3          |
|----|-------------------|----------------|------------|---------|-----------------|----------------------|------------------|------------------|-----------------|----------------|
| 1  | 1                 | 1 - 1001590    | 1          | 1001590 | SHOP'N SAVE     | MR DANIEL COWLEY     | SR COMPUTER...   | 1755 WABASH...   | SPRINGFIELD     | <null>         |
| 2  | 1                 | 1 - 1001599    | 2          | 1001599 | SHOP'N SAVE     | MS VERENE TEKAUTZ    | NETWORK SYS...   | 45 GRAVOIS BL... | FENTON          | MO             |
| 3  | 1                 | 1 - 1001604    | 3          | 1001604 | SHOP'N SAVE     | MR REUBEN HENDRICKS  | GENERAL MAN...   | 800 CARLYLE A... | BELEVILLE       | IL             |
| 4  | 1                 | 1 - 1001622    | 4          | 1001622 | SHOPRITE        | MS JACKY DAGENHART   | INFO SYSTEMS...  | 60 BEAVER BR...  | LINCOLN PARK    | NJ             |
| 5  | 1                 | 1 - 7121564    | 5          | 7121564 | SPAR            | MR BRADLY THOMAS     | COMP SPEC        | FORE STR         | ST DENNIS       | CORNWALL       |
| 6  | 0.850000000000... | 1 - 7121565    | 5          | 7121565 | SPAR            | MS PEARL GARRISON    | SURVEYING TE...  | FORE STR         | ST AUSTELL      | BUGLE, CORN... |
| 7  | 0.840000000000... | 1 - 7121567    | 5          | 7121567 | SPAR            | MR EARL WILLIS       | TECHNICIAN (C... | FORE STREET,...  | BUNGLE          | CORNWALL       |
| 8  | 0.779999999999... | 1 - 7121597    | 5          | 7121597 | SPAR            | MRS JERRY FIGURES    | LEAD SYS ANAL... | 6 FORE STR       | BUDLEIGH SAL... | DEVON          |
| 9  | 0.77              | 1 - 7121590    | 5          | 7121590 | SPAR            | MRS MINNA HASE       | SR RESEARCH...   | 42 FORE STR      | NEWTON ABBOT    | BOVEY TRACEY.  |
| 10 | 1                 | 1 - 7121570    | 6          | 7121570 | SPAR            | MR GERMAYNE HANKS    | SENIOR PROJE...  | 1 2 CHRISTINA... | TOTNESS         | DEVON          |
| 11 | 1                 | 1 - 7121571    | 7          | 7121571 | SPAR            | MRS CHERIE ALBERSON  | CONTROLLER       | 1 N STR          | ASHBURTON       | DEVON          |
| 12 | 0.96              | 1 - 7121608    | 7          | 7121608 | SPAR            | MRS CHERIE ALBERSON  | CONTROLLER       | N STR            | ASHBURTON       | DEVON          |
| 13 | 1                 | 1 - 1001658    | 9          | 1001658 | SPARTAN STOR... | MS MARTHA CHASSE     | PROJECT MANA...  | 5161 W MAIN S... | KALAMAZOO       | MI             |
| 14 | 1                 | 1 - 1001660    | 10         | 1001660 | SPARTAN STOR... | MR DESMOND WINTERS   | OWNER / CON...   | 1824 PORTAGE...  | KALAMAZOO       | MI             |
| 15 | 1                 | 1 - 1001659    | 10         | 1001659 | SPARTAN STOR... | MR DESMOND GRINDLEY  | SYSTEMS ANAL...  | 1824 PORTAGE...  | KALAMAZOO       | MI             |
| 16 | 1                 | 1 - 1001691    | 11         | 1001691 | SPARTAN STOR... | MS SUZY TRAPANI      | MGR ENG. SAL...  | 2545 W CADILA... | FARWELL         | MI             |
| 17 | 1                 | 1 - 1001664    | 12         | 1001664 | SPARTAN STOR... | MR HARDEN DALTON     | OWNER / CON...   | 438 LINCOLN A... | IONIA           | MI             |
| 18 | 1                 | 1 - 1001694    | 13         | 1001694 | SPARTAN STOR... | MR REAMONN PELZER    | CHIEF DBA        | 24445 DRAKE RD   | FARMINGTON...   | MI             |
| 19 | 1                 | 1 - 1001729    | 14         | 1001729 | SUN MART        | MS ZELDA DECHICK     | MIS MANAGER      | 1100 13TH AVE E  | WEST FARGO      | ND             |
| 20 | 1                 | 1 - 1001724    | 15         | 1001724 | SUN MART        | MS MINERVA BAKER     | COMPUTER SPE...  | 1921 W A STR     | NORTH PLATTE    | NE             |
| 21 | 1                 | 1 - 1001732    | 16         | 1001732 | SUPER FRESH     | MS MARGA JANOWSKI    | PRESIDENT        | 2105 PHILADEL... | CLAYMONT        | DE             |
| 22 | 1                 | 1 - 1001736    | 17         | 1001736 | SUPER FRESH     | MS BETTY EASTIP      | ASSISTANT        | 2465 S BROAD...  | HAMILTON TO...  | NJ             |
| 23 | 1                 | 1 - 1001738    | 18         | 1001738 | SUPER FRESH     | MS MINICA HOCH       | MGR COORD        | 4330 48TH STR... | WASHINGTON      | DC             |
| 24 | 1                 | 1 - 1001758    | 19         | 1001758 | SUPER STOP &... | MR ANCLIN SAMSON     | AUTOMATED S...   | 150 NEW PK AVE   | HARTFORD        | CT             |
| 25 | 1                 | 1 - 1001767    | 20         | 1001767 | SUPERPETZ       | MR EZARRAS DELAHANTY | LEAD PROGRA...   | 250 SHOUP MIL... | DAYTON          | OH             |
| 26 | 1                 | 1 - 1001796    | 21         | 1001796 | SUPERPETZ       | MR RUSTICUS WHITACRE | DATABASE AD...   | 1275 W PATRIC... | FREDERICK       | MD             |
| 27 | 1                 | 1 - 1001798    | 22         | 1001798 | SUPERPETZ       | MS TIMMIE NICE       | NETWORK SYS...   | 2420 EASTERN...  | YORK            | PA             |

The record contains the following fields:

#### Score

Match score that indicates the degree of similarity between a record and another record in the cluster. Records with a match score of one are duplicate records that do not need review. A cluster in which any record has a match score below the lower threshold is not a duplicate cluster.

#### Row\_Identifier

A row number that uniquely identifies each row in the table. For this example, the row identifier contains the customer ID.

#### Cluster ID

A unique identifier for a cluster. Each record in a cluster receives the same cluster ID. The first four records in the sample output data are unique. Each record has a unique cluster ID. Rows five to nine belong to cluster five. Each record in this cluster is a duplicate record because of similarities in the address fields.

#### Source Data Fields

The Standard Output table group also receives all the source data fields.

## Cluster Output

The Target\_CustomerConsolidate table receives records from the Cluster Output group. The Cluster Output group returns records that might be duplicate records. The records in the Target\_CustomerConsolidate table need manual review in the Analyst tool.

The following image shows some of the records and the fields in the Target\_CustomerConsolidate table:



| Output  |            |            |                   |                   |           |           |                 |                    |                      |                          |                          |
|---|------------|------------|-------------------|-------------------|-----------|-----------|-----------------|--------------------|----------------------|--------------------------|--------------------------|
| Name: <a href="#">lexc Consolidate_Cluster Data</a> |            |            |                   |                   |           |           |                 |                    |                      |                          |                          |
| Row   | Sequential | Cluster_ID | Score             | Is_Master         | Workflow  | CUST_ID   | COMPANY         | CONTACT            | TITLE                | ADDR1                    | ADDR2                    |
| 1   | 0          | 8          | 1                 | Y                 | DummyW... | 7121580   | SPAR            | MR MICHAEL AVELINO | CONTROLLER           | 219 VIRGEN BELLA FLOR... | LEPE                     |
| 2   | 1          | 8          | 1                 | N                 | DummyW... | 7121580   | SPAR            | MR MICHAEL AVELINO | CONTROLLER           | 219 VIRGEN BELLA FLOR... | LEPE                     |
| 3   | 2          | 8          | 0.81              | N                 | DummyW... | 7121585   | SPAR            | MR ROBERT ADAMS    | MANAGER OF DBA       | 3 VIRGEN BELLA FDL       | LEPE                     |
| 4   | 3          | 26         | 1                 | Y                 | DummyW... | 1001921   | THE CORNER SHOP | MR DENIS LEE       | MANAGER (\$\$ OF DBA | 102 MID STR S NUTFIELD   | REDHILL                  |
| 5   | 4          | 26         | 1                 | N                 | DummyW... | 1001921   | THE CORNER SHOP | MR DENIS LEE       | MANAGER (\$\$ OF DBA | 102 MID STR S NUTFIELD   | REDHILL                  |
| 6   | 5          | 26         | 0.88              | N                 | DummyW... | 7121633   | THE CORNER SHOP | MR BRADLY WYATT    | MGR, DBA             | 102 MID STR S NUTFIELD   | REDHILL                  |
| 7   | 6          | 26         | 0.81              | N                 | DummyW... | 7121634   | THE CORNER SHOP | MR BRADLY LOPEZ    | OWNER/CONSULTANT     | 971 MID STR S NUTFIELD   | REDHILL                  |
| 8   | 7          | 2          | 1                 | Y                 | DummyW... | 1001922   | TOPS MARKETS    | MS SARAD SACKRIDER | PRESIDENT            | 22777 ROCKSIDE RD        | BEDFORD                  |
| 9   | 8          | 2          | 1                 | N                 | DummyW... | 1001922   | TOPS MARKETS    | MS SARAD SACKRIDER | PRESIDENT            | 22777 ROCKSIDE RD        | BEDFORD                  |
| 10  | 9          | 2          | 0.860000000000... | N                 | DummyW... | 7121640   | TOPS MARKETS    | MS SARAH ALLEN     | INDUSTRIAL ENGINEER  | 77 ROCKSIDE RD           | BEDFORD                  |
| 11  | 10         | 3          | 81                | 1                 | Y         | DummyW... | 1777777         | WILLIAM WRIGLEY... | MR JUAN WISNIEWSKI   | <null>                   | C. MIS 410 N MICHIGAN... |
| 12  | 11         | 3          | 81                | 1                 | N         | DummyW... | 1777777         | WILLIAM WRIGLEY... | MR JUAN WISNIEWSKI   | <null>                   | C. MIS 410 N MICHIGAN... |
| 13  | 12         | 3          | 81                | 0.93              | N         | DummyW... | 1002174         | WILLIAM WRIGLEY... | MR JUAN WISNIEWSKI   | LEAD PROGRAMMER A...     | CORPORATE MIS 410 N M... |
| 14  | 13         | 3          | 81                | 0.93              | N         | DummyW... | 1002153         | WILLIAM WRIGLEY... | MR JOHN WISNIEWSKI   | MGR COORD                | CORPORATE MIS 410 N M... |
| 15  | 14         | 3          | 81                | 1                 | N         | DummyW... | 1002211         | WILLIAM WRIGLEY... | MR JON WISNIEWSKI    | MGR COORD                | C. MIS 410 N MICHIGAN... |
| 16  | 15         | 3          | 81                | 0.93              | N         | DummyW... | 1002210         | WILLIAM WRIGLEY... | MR JOHNNY WISNIEWSKI | BUSINESS ANALYST         | CORPORATE MIS 410 N M... |
| 17  | 16         | 3          | 81                | 0.93              | N         | DummyW... | 1002142         | WILLIAM WRIGLEY... | MR JOHN WISNIEWSKI   | MGR COORD                | CORPORATE MIS 410 N M... |
| 18  | 17         | 4          | 106               | 1                 | Y         | DummyW... | 1000051         | A&P                | MS SARA ONEAL        | BUSINESS MANAGER         | 120 MAIN RD              |
| 19  | 18         | 4          | 106               | 1                 | N         | DummyW... | 1000051         | A&P                | MS SARA ONEAL        | BUSINESS MANAGER         | 120 MAIN RD              |
| 20  | 19         | 4          | 106               | 0.850000000000... | N         | DummyW... | 1000089         | A&P                | MR BOBBY SMYTHE      | PARTNER                  | 120 N MAYNE              |
| 21  | 20         | 4          | 106               | 0.99              | N         | DummyW... | 1000096         | A&P                | MS JENNY BEASLEY     | LEAD SYSTEM ANALYST      | 120 N MAIN RD            |
| 22  | 21         | 5          | 135               | 1                 | Y         | DummyW... | 1001628         | SIMS DELTEC INC    | MR KEN YOUNGQUIST    | CONTROLLER               | 1265 GRAY FOX STR        |
| 23  | 22         | 5          | 135               | 1                 | N         | DummyW... | 1001628         | SIMS DELTEC INC    | MR KEN YOUNGQUIST    | CONTROLLER               | 1265 GRAY FOX STR        |

The record contains the following fields:

#### Row\_Identifier

A number that uniquely identifies each row in the table.

#### Sequential Cluster ID

A sequential identifier for each cluster to review in a Human task. The Duplicate Record Exception transformation adds the sequential cluster ID to records in the Cluster Data output group.

#### Cluster ID

A unique identifier for a cluster. The Match transformation assigns a cluster ID to all the output records. Duplicate records and possible duplicate records share a cluster ID. A unique record receives a cluster ID, but the record does not share the ID number with any other record.

#### Score

Match score that indicates the degree of similarity between a record and another record in the cluster. Records that require manual review have match scores less than .95 and greater than .80.

#### Is Master

Indicates whether the record is the preferred record in the cluster.

#### WorkflowID

The WorkflowID is DummyWorkflowID because the transformation is not in a workflow.

#### Record Fields

The other fields in the record contain the customer source data.

## Creating a Duplicate Record Exception Transformation

When you configure a Duplicate Record Exception transformation, configure the input ports. Define the upper and lower thresholds for determining matches. Configure where to write the duplicate records and the unique records.

1. Create a reusable or a nonreusable Duplicate Record Exception transformation.

- To create a reusable transformation, select **File > New > Transformation** and select a Duplicate Record Exception transformation.
  - To create a nonreusable transformation, open a mapping and add the transformation to the mapping canvas. Select a Duplicate Record Exception transformation from the wizard.
2. Click **Next**, or click **Finish**.  
If you click **Finish**, you can update the default threshold values and the data routing options before you create the transformation.
  3. In the Configuration view, configure the upper and lower match score thresholds.
  4. In the **Data Routing Options** section, configure the standard output and exception table properties to set where the transformation writes each type of record.  
Optionally, modify where to write the duplicate records, duplicate records to review, and unique records.
  5. Optionally, generate a unique records table. Enter the database connection and table name information for the new table. When you generate a unique records table, the transformation creates a database object in the Model repository.
  6. Configure the input ports. When you add an input port, the Developer tool adds the same port name to the output groups.
    - If you create a reusable transformation, select the **Ports** tab, and add ports for the data you want to connect to the transformation.
    - If you create a nonreusable transformation, add other objects to the mapping canvas and drag input ports to the transformation.
  7. Connect the transformation output ports to one or more data targets. Connect the output ports to the data objects that correspond to the output options you set on the **Configuration** view.
    - If you create a reusable transformation, add the transformation to a mapping and connect the output ports.
    - If you create a nonreusable transformation, the transformation connects the ports to the Cluster Data table. You must connect output ports to the other data targets.

## CHAPTER 16

# Expression Transformation

This chapter includes the following topics:

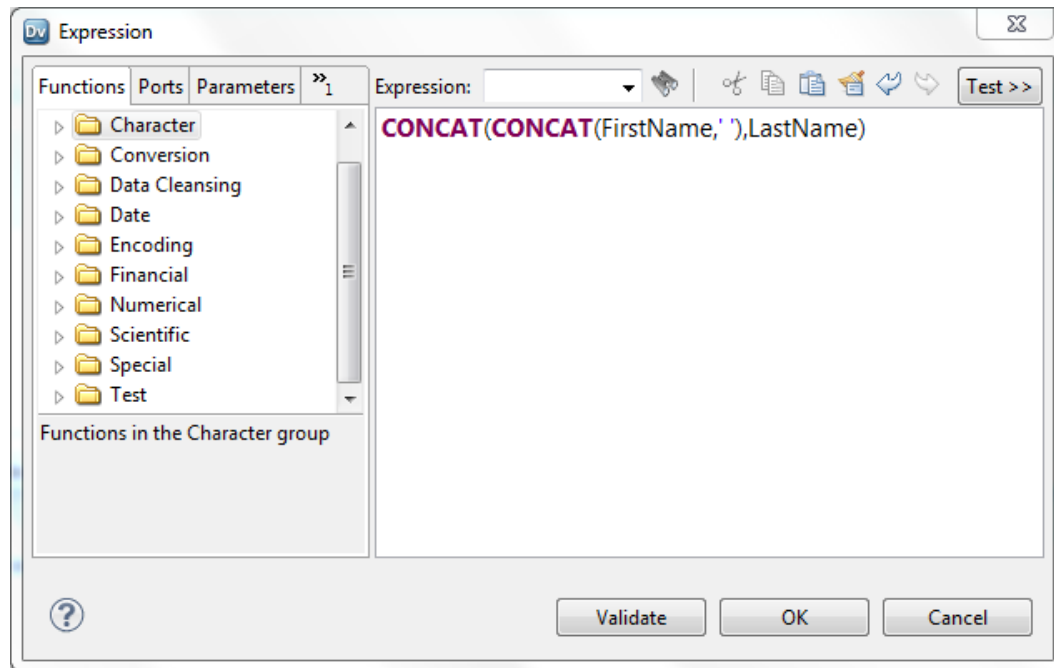
- [Expression Transformation Overview, 247](#)
- [Expression Transformation Ports, 248](#)
- [Test Expressions, 249](#)
- [Port Selectors, 250](#)
- [Dynamic Expressions, 253](#)
- [Expression Transformation Advanced Properties, 257](#)

## Expression Transformation Overview

The Expression transformation is a passive transformation that you can use to perform calculations or to test conditional statements in a row. In non-reusable Expression transformations, you can define a mapping output expression to aggregate when you define mapping outputs.

In a single row, you might need to create an expression to adjust employee salaries, to concatenate first and last names, or to convert strings to numbers.

The following figure shows an expression in an Expression transformation that concatenates the first name, a space, and the last name:



You can enter multiple expressions in an Expression transformation by creating an expression for each output port. For example, you might want to calculate different types of taxes from each employee paycheck, such as the local and the federal income tax. Both tax calculations require the employee salary and a tax rate. Define a separate output port for each calculation. Define a different expression for each output port. You can define pass-through ports for the salary and tax rate because the port values do not change.

## Expression Transformation Ports

An Expression transformation has different port types that you can reference when you define expressions.

An Expression transformation has the following port types:

### Input

Receives data from upstream transformations. If the Expression transformation does not change the port value, you can define a pass-through port instead of an input port.

### Output

Contains the return value of the expression. You enter the expression as a configuration option for the output port. You can also configure a default value for each port.

### Pass-Through

Define a pass-through port to pass the data through the transformation without changing the value. You can reference a pass-through port in a calculation, but you cannot change the data value in the pass-through port.

### Variable

Temporarily stores data to use in expressions. You can store data across multiple rows. You can define an expression to return a value to a variable port.

## Dynamic Port

Receives or returns ports in a dynamic mapping. A dynamic port can receive one or more columns from an upstream transformation and create a generated port for each column. A dynamic output port can return one or more generated ports. You can define input rules to determine which columns a dynamic port receives. A dynamic output port can contain an expression that generates multiple output ports.

## Generated Port

A port that represents a single column within a dynamic port. The generated ports in the Expression transformation might change based on the columns that the Expression transformation receives from an upstream transformation.

# Test Expressions

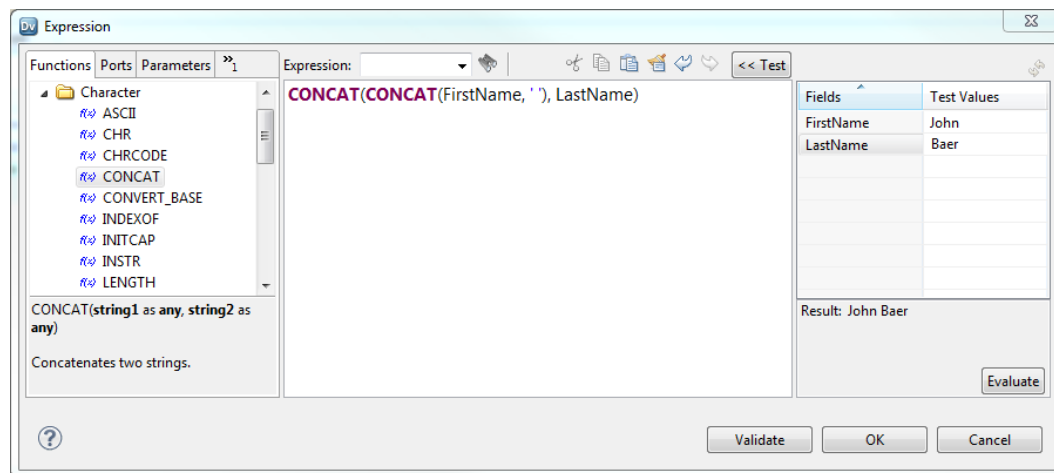
You can test expressions that you configure in the Expression Editor. When you test an expression, you enter sample data and then evaluate the expression.

You can test expressions when you configure expressions in the following ways:

- In an output or variable port in the Expression transformation
- In the Mapping Outputs view of an Expression transformation after adding the transformation to a mapping

For example, after configuring an expression that concatenates the first name, a space, and the last name, you can enter sample data for the ports, and then evaluate the expression to verify the result.

The following image shows the results of an expression that concatenates a sample first name and last name:



## Date Format Strings for Sample Data

When you test an expression that uses a port with the Date/Time or Timestamp with Time Zone data type, you must enter sample data for the port using the required date format string.

To enter sample data for a port with the Date/Time data type, use the format MM/DD/YYYY HH24:MI:SS. When you evaluate the expression, the Expression Editor displays the result using the format that you specify in the expression. If you omit the format string in the expression, the Expression Editor displays the result using the same format MM/DD/YYYY HH24:MI:SS.

To enter sample data for a port with the Timestamp with Time Zone data type, use the format MM/DD/YYYY HH24:MI:SS TZR. When you evaluate the expression, the Expression Editor displays the result using the format YYYY-MM-DD HH24:MI:SS.NS TZR.

## Testing an Expression

Test an expression in the Expression Editor to evaluate the expression and verify the result.

1. Open the Expression Editor in one of the following ways:
  - In an Expression transformation, click the **Open** button (🔗) in the **Expression** column for an output port or a variable port.
  - Select an Expression transformation included in a mapping. In the **Mapping Outputs** view, click the **Open** button (🔗) in the **Expression** column for an output.

2. Configure the expression.

3. Click **Test >>** to open the testing panel.

4. Enter sample data for each field in the **Test Values** column.

You can enter test values for each port or parameter included in the expression.

5. Click **Evaluate**.

The expression result displays at the bottom of the testing panel.

## Port Selectors

When a transformation has generated ports, you need to configure the transformation to run successfully when the generated ports change. You can use a port selector to determine which ports to use in a dynamic expression, a lookup condition, or a joiner condition.

A port selector is an ordered list of ports that you can reference in an expression. When the generated ports change in a dynamic mapping, the port selector can contain different ports.

For example, the following expression references a generated port in a dynamic mapping:

```
Salary * 12
```

You configure the mapping to use dynamic sources, but the column that contains salary information in each source file has a different name. The column names are `Salary`, `Monthly_Salary`, or `Base_Salary`.

You perform the following tasks to accommodate the different column names:

1. Create a port selector named "Salary\_PortSelector."
2. Create a selection rule to accept any port name with the suffix "Salary."
3. Change the expression to include the port selector name instead of the salary column name. The expression has the following syntax:

```
Salary_PortSelector * 12
```

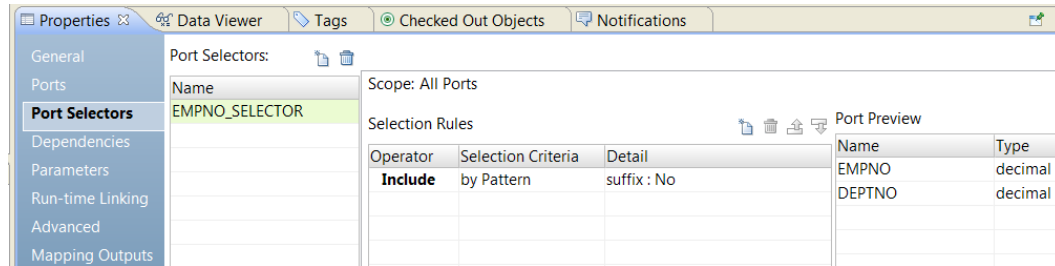
The expression runs successfully with any of the salary port names.

## Port Selector Configuration

When you configure a port selector, you define selection rules to determine which generated ports to include. The selection rules are similar to the input rules that you can configure for dynamic ports.

A port selector can include static or generated ports. Configure a port selector on the **Port Selector** tab.

The following image shows the **Port Selector** tab:



Configure the following properties for a port selector:

### Name

Identifies the port selector. You can create multiple port selectors in a transformation and reference them in expressions.

### Scope

Identifies a group of ports that the port selector applies to. You must choose the scope when you create a port selector for a Joiner or a Lookup transformation. These transformations have multiple input groups. The Joiner transformation has a Master or a Detail scope. The Lookup transformation has an Import or a Lookup scope. The Expression transformation has one input group. The scope is always All Ports.

### Selection Rules

Determines the ports to include in the port selector. When you create the selection rules, the **Port Preview** panel shows the ports that qualify from the current input ports. These ports might change. Configure the selection rules to accommodate ports from different sources.

## Selection Rules

The selection rules associated with a port selector determine the ports to include in the port selector.

When you create the selection rules, the **Port Preview** panel shows the ports that qualify from the current input ports. These ports might change. Configure the selection rules to accommodate ports from different sources.

Create selection rules based on the following criteria:

### Operator

Includes or excludes the ports that selection rules return. Default is include. You must include ports before you can exclude ports.

### Selection Criteria

The type of selection rule you want to create. You can create a rule based on the port type or the column name. To include ports based on the column name, search for specific names or search for a pattern of characters in the name.

## Detail

The values to apply to the selection criteria. If the selection criteria is by column name, configure the string or name to search for. If the selection criteria is by port type, select the port types to include.

The following table describes the selection criteria and how to specify the details for the criteria:

| Selection Criteria | Description   | Detail   |
|--------------------|---|--|
| All                | Includes all ports.   | No details required.   |
| Name               | Filters ports based on the port name.   | Select the port names from a list of values or use a parameter of type Port or Port List.  |
| Type               | Filters ports based on the data type of each port.                              | Select data types from a list.   |
| Pattern            | Filters ports by a string of characters in the name or by a regular expression. | Choose prefix, suffix, or regular expression as the pattern type for the port name. Then, enter a value for the pattern or use a parameter of type String. |

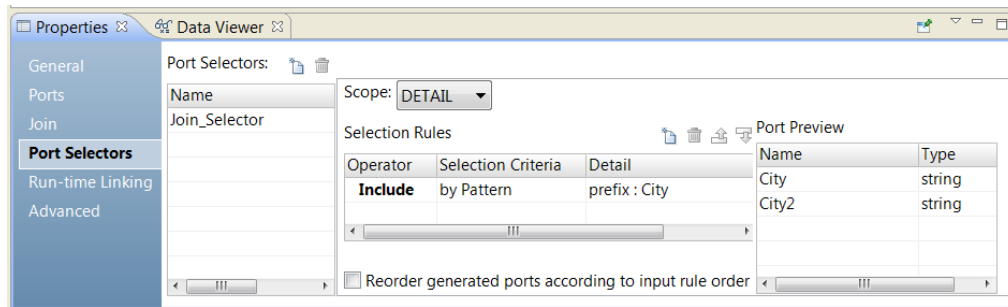
## Creating a Port Selector

Create a port selector to determine which ports to use in a dynamic expression, a lookup condition, or a joiner condition.

1. Click the **Port Selectors** tab.
2. In the **Port Selectors** area, click **New**.  
The Developer tool creates a port selector with a default selection rule that includes all ports.
3. In the **Port Selectors** area, change the port selector name to a unique name.
4. If you are working on the Joiner transformation or the Lookup transformation, choose the scope.  
The available ports change based on the group of ports that you choose.
5. In the **Selection Rules** area, select an **Operator**.
  - Include. Create a rule that includes ports for the port selector. You must include ports before you can exclude ports.
  - Exclude. Create a rule that excludes specific ports from the port selector.
6. Choose the **Selection Criteria**.
  - By Name. Select specific ports by name. You can select the port names from a list of ports in the scope.
  - By Type. Select ports by type. You can select one or more data types.
  - By Pattern. Select ports by a pattern of characters in the port name. You can search with specific characters or you can create a regular expression.

The following image shows the Port Selector tab:





7. Click the **Detail** column.  
The **Input Rule Detail** dialog box appears.
8. Select the values to filter ports by.
  - By Name. Choose to create a port list by value or by a parameter. Click **Choose** to select the ports in the list.
  - By Type. Select one or more data types from a list. The **Port Preview** area shows ports of the types that you select.
  - By Pattern. Choose to search the prefix or suffix of the port name for a specific pattern of characters. Or, choose to create a regular expression to search with. Configure a parameter or configure the pattern to search with.

The **Port Preview** area shows the ports in the port selector as you configure the rules.
9. To reorder the ports in the port selector, select **Reorder generated ports according to the input rule order**.

## Dynamic Expressions

When you configure an expression in a dynamic output port, the expression becomes a dynamic expression. A dynamic expression can generate multiple output ports.

You can reference a port selector or a dynamic port in a dynamic expression. When the port selector or dynamic port contains multiple ports, the dynamic expression runs against each port.

When you configure a dynamic expression, the Developer tool does not validate if the generated ports are valid types for the expression. For example, if you reference a port selector that contains decimal type ports in an expression that requires string types, the expression appears as valid at design time.

### Example

An Expression transformation has the following generated input ports:

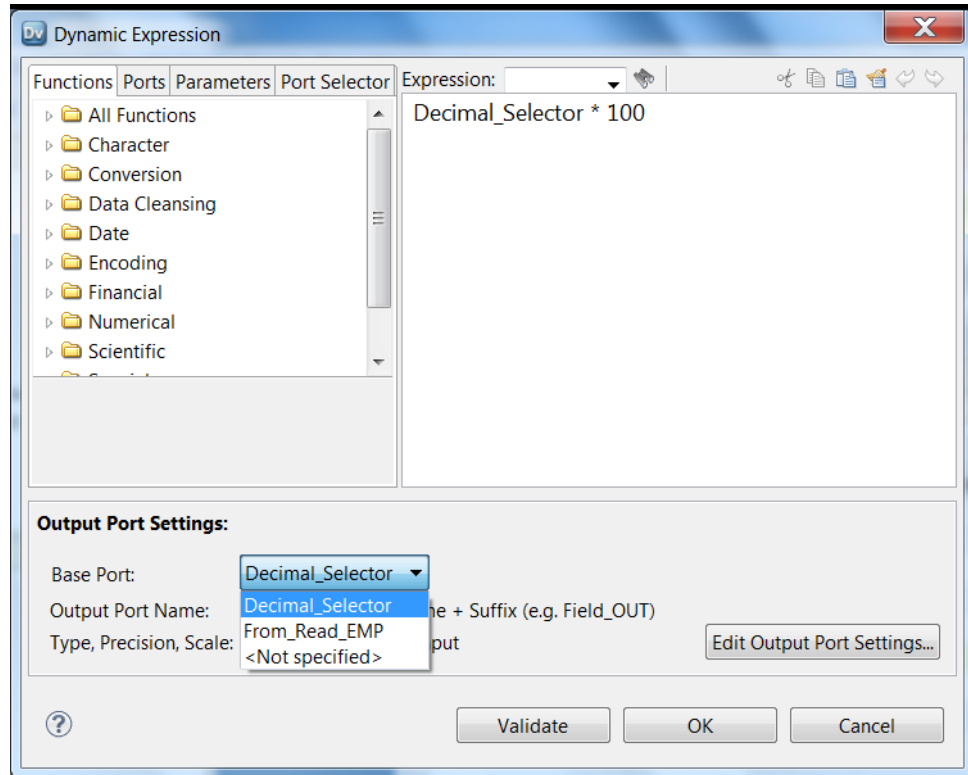
```
EMPNO    Decimal
NAME     String
SALARY   Decimal
DEPTNO   Decimal
```

The transformation contains a dynamic output port called MyDynamicPort. The output port returns the results of a dynamic expression. The dynamic expression multiplies the value of each port in a port selector by 100. The expression runs one time for each port in the port selector. Each instance can return a different result. The Expression transformation generates a separate output port for each result.

The Decimal\_Selector port selector has a selection rule that includes the ports that are of decimal data type:

```
EMPNO    Decimal
SALARY   Decimal
DEPTNO   Decimal
```

The following image shows a dynamic expression that references the Decimal\_Selector port selector:



Edit the output port settings to change output port names and output port properties. You can also choose the base port.

## Output Port Settings

You can indicate which ports you want to use as input to a dynamic expression. Select the ports in the **Base Port** area.

If you select the Decimal\_Selector port selector as the base port, the dynamic expression returns decimal type ports. The dynamic expression does not generate a port for the NAME port because it is a string.

The following image shows the generated ports in the transformation:

| Properties   Data Viewer   Tags   Notifications |         |           |       |                                     |                                     |                          |                        |  |
|---|---------|-----------|-------|-------------------------------------|-------------------------------------|--------------------------|------------------------|--|
| General   |         |           |       |                                     |                                     |                          |                        |  |
| <b>Ports</b>                                    |         |           |       |                                     |                                     |                          |                        |  |
| Port Selectors                                  |         |           |       |                                     |                                     |                          |                        |  |
| Dependencies                                    |         |           |       |                                     |                                     |                          |                        |  |
| Parameters                                      |         |           |       |                                     |                                     |                          |                        |  |
| Run-time Linking                                |         |           |       |                                     |                                     |                          |                        |  |
| Advanced  |         |           |       |                                     |                                     |                          |                        |  |
| Mapping Outputs                                 |         |           |       |                                     |                                     |                          |                        |  |
| Name  | Type    | Precis... | Scale | Input                               | Output                              | Varia...                 | Expression             |  |
| 1 From_Read_EMP                                 | dynamic |           | 0     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | From_Read_EMP          |  |
| 1 EMPNO   | decimal | 3         | 0     |                                     |                                     |                          |                        |  |
| 2 NAME  | string  | 10        | 0     |                                     |                                     |                          |                        |  |
| 3 SALARY  | decimal | 4         | 0     |                                     |                                     |                          |                        |  |
| 4 DEPTNO  | decimal | 4         | 0     |                                     |                                     |                          |                        |  |
| 2 MyDynamicPort                                 | dynamic |           | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Decimal_Selector * 100 |  |
| 1 EMPNO_OUT                                     | decimal | 3         | 0     |                                     |                                     |                          |                        |  |
| 2 SALARY_OUT                                    | decimal | 4         | 0     |                                     |                                     |                          |                        |  |
| 3 DEPTNO_OUT                                    | decimal | 4         | 0     |                                     |                                     |                          |                        |  |

Although the From\_Read\_Emp dynamic port is an input-output port, the transformation returns just the ports in the MyDynamicPort dynamic output port.

You can configure how you want to name the output ports. The default output port name is the input port name and the suffix `_OUT`.

You can change the base port to a port selector.

The following image shows the output port settings in the Expression Editor:

**Output Port Settings:**

Base Port: From\_Read\_EMP

Output Port Name: Primary input port name + Suffix (e.g. Field\_O

Type, Precision, Scale: Inherit from primary input
Edit Output Port Settings...

If you configure the base port as From\_Read\_EMP, you select the dynamic port that contains all the generated input ports. The Data Integration Service runs the dynamic expression against all the ports in From\_Read\_EMP.

The following image shows the generated output ports based on the From\_Read\_Emp input:

| General          |         |           |       |                                     |                                     |                          |                        |  |
|------------------|---------|-----------|-------|-------------------------------------|-------------------------------------|--------------------------|------------------------|--|
| <b>Ports</b>     |         |           |       |                                     |                                     |                          |                        |  |
| Port Selectors   |         |           |       |                                     |                                     |                          |                        |  |
| Dependencies     |         |           |       |                                     |                                     |                          |                        |  |
| Parameters       |         |           |       |                                     |                                     |                          |                        |  |
| Run-time Linking |         |           |       |                                     |                                     |                          |                        |  |
| Advanced         |         |           |       |                                     |                                     |                          |                        |  |
| Mapping Outputs  |         |           |       |                                     |                                     |                          |                        |  |
| Name             | Type    | Precis... | Scale | Input                               | Output                              | Varia...                 | Expression             |  |
| 1 From_Read_EMP  | dynamic |           | 0     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | From_Read_EMP          |  |
| 1 EMPNO          | decimal | 3         | 0     |                                     |                                     |                          |                        |  |
| 2 NAME           | string  | 10        | 0     |                                     |                                     |                          |                        |  |
| 3 SALARY         | decimal | 4         | 0     |                                     |                                     |                          |                        |  |
| 4 DEPTNO         | decimal | 4         | 0     |                                     |                                     |                          |                        |  |
| 2 MyDynamicPort  | dynamic |           | 0     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Decimal_Selector * 100 |  |
| 1 EMPNO_OUT      | decimal | 3         | 0     |                                     |                                     |                          |                        |  |
| 2 NAME_OUT       | string  | 10        | 0     |                                     |                                     |                          |                        |  |
| 3 SALARY_OUT     | decimal | 4         | 0     |                                     |                                     |                          |                        |  |
| 4 DEPTNO_OUT     | decimal | 4         | 0     |                                     |                                     |                          |                        |  |

The generated output ports include an output port called NAME\_OUT, which is a string type.

The Data Integration Service generates output ports for each dynamic expression. If you create a dynamic expression that generates 15 ports and you define another dynamic expression that generates 5 ports, the Data Integration Service generates 20 output ports. Each dynamic output port generates a different group of ports.

## Creating a Dynamic Expression

Create a dynamic expression in an Expression transformation to run the expression one time for each port in a dynamic port or a port selector. The dynamic expression returns the results to a separate generated port for each instance.

1. In the Expression transformation, go to the **Properties** view and click the **Ports** tab.
2. Click **New Dynamic Port**.

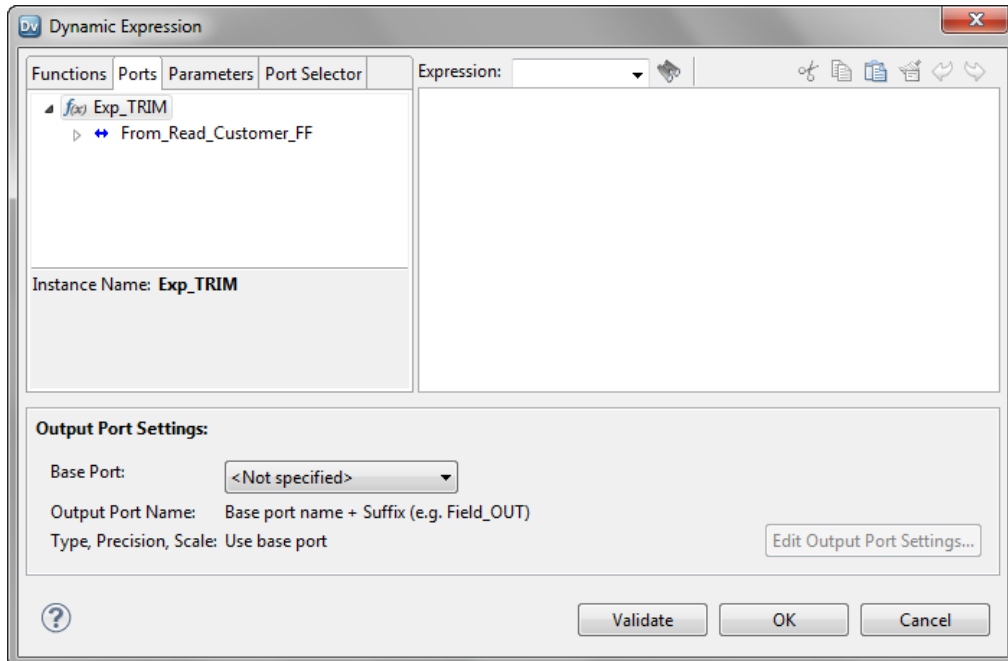
The Developer tool creates a dynamic port with default properties.

3. Rename the dynamic port and disable the input option.

The dynamic port must be an output port.

4. In the **Expression** column for the dynamic output port, click the **Open** button (🔗).

The **Dynamic Expression** dialog box appears:



5. In the Expression editor, enter an expression. The expression can include a port selector or a dynamic port.  
For example, `LTRIM(RTRIM(Dynamic_Customer))`, where `Dynamic_Customer` is a dynamic port.
6. Click **Validate** to validate the expression.
7. Click **OK** to exit the **Validate Expression** dialog box.
8. In the **Output Port Settings** area, select the dynamic output port from the **Base Port** list or choose a port selector that you referenced in the expression.

The Developer tool generates output ports based on what you select.

9. Use the following steps to rename the output ports:
  - a. Click **Edit Output Port Settings**.

The **Output Port Settings** dialog box appears.

The screenshot shows the 'Output Port Settings' dialog box. The 'Base Port' is set to 'From\_Read\_Customer\_FF'. Under 'Output Ports', the 'Name' is 'Base port name + Suffix', the 'Suffix' is '\_OUT', and the 'Preview' is 'Field\_OUT'. In the 'Other Settings' section, 'Use base port' is selected. Below this, there are fields for 'Type' (set to 'any'), 'Precision', and 'Scale'. At the bottom, there are buttons for a help icon (?), 'OK', and 'Cancel'.

- b. In the **Name** list, select one of the options and enter a value for the prefix or suffix. If you selected **Fixed string + Auto-number**, enter the text for output port name. For example, if you enter TRIM for the output port name, the output port names appear as TRIM1, TRIM2, TRIM3.
    - c. Optionally, choose **Specify settings** in the **Other Settings** area to change the type, precision, and scale for the output ports. By default, the output ports use the settings of the base ports.
    - d. Click **OK**.
10. Click **OK** to exit the **Dynamic Expression** editor.

## Expression Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Expression transformation.

Configure the following advanced properties for an Expression transformation:

**Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

**Maintain Row Order**

Maintain the row order of the input data to the transformation. Select this option if the Data Integration Service should not perform any optimization that can change the row order.

When the Data Integration Service performs optimizations, it might lose an order established earlier in the mapping. You can establish order in a mapping with a sorted flat file source, a sorted relational source, or a Sorter transformation. When you configure a transformation to maintain row order, the Data Integration Service considers this configuration when it performs optimizations for the mapping. The Data Integration Service performs optimizations for the transformation if it can maintain the order. The Data Integration Service does not perform optimizations for the transformation if the optimization would change the row order.

## CHAPTER 17

# Filter Transformation

This chapter includes the following topics:

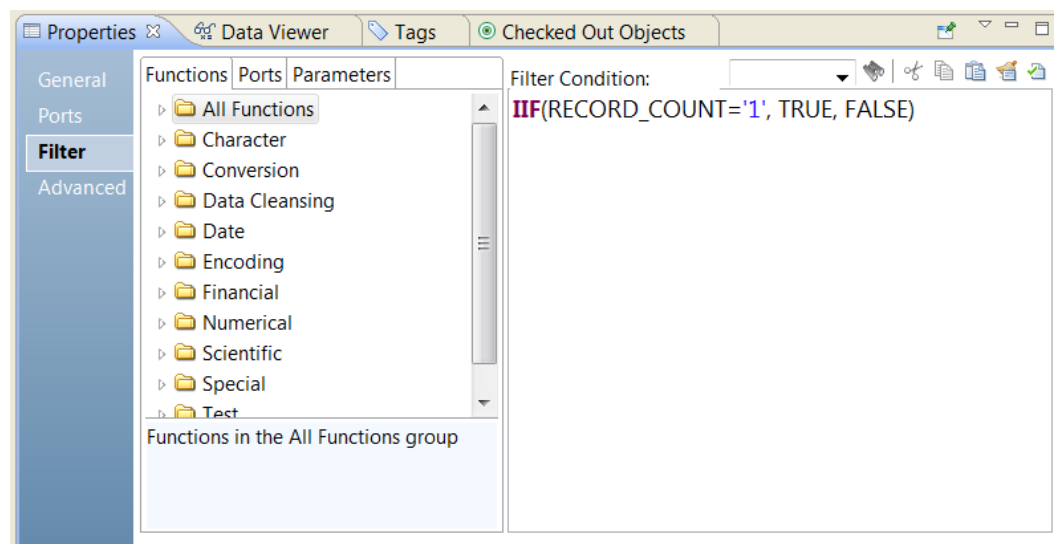
- [Filter Transformation Overview, 259](#)
- [Filter Transformations in Dynamic Mappings, 260](#)
- [Filter Condition, 260](#)
- [Filter Transformation Advanced Properties, 262](#)
- [Filter Transformation Performance Tips, 262](#)

## Filter Transformation Overview

Use the Filter transformation to filter out rows in a mapping. As an active transformation, the Filter transformation may change the number of rows passed through it.

The Filter transformation allows rows that meet the specified filter condition to pass through. It drops rows that do not meet the condition. You can filter data based on one or more conditions.

The following image shows a filter condition in a Filter transformation:



A filter condition returns TRUE or FALSE for each row that the Data Integration Service evaluates, based on whether a row meets the specified condition. For each row that returns TRUE, the Data Integration Services

pass through the transformation. For each row that returns FALSE, the Data Integration Service drops and writes a message to the log.

You cannot concatenate ports from more than one transformation into the Filter transformation. The input ports for the filter must come from a single transformation.

## Filter Transformations in Dynamic Mappings

You can use an Filter transformation in a dynamic mapping. You can configure dynamic ports in the transformation and reference the generated ports in the filter condition.

You can parameterize the complete filter condition. Configure an expression parameter with a default value that contains the entire expression. The Developer tool does not validate a filter condition in a parameter default value.

You can reference a dynamic port in a filter condition. The dynamic port can contain multiple generated ports. The Data Integration Service expands the filter condition to contain each generated port. Each generated port must be a valid type to include in the expression.

You can reference a generated port in a filter condition. However, if the generated port does not exist at run time, the mapping fails.

## Filter Condition

The filter condition is an expression that returns TRUE or FALSE.

Enter conditions in the Expression editor. The filter condition is case sensitive.

You can use any expression that returns a single value as a filter. For example, if you want to filter out rows for employees whose salary is less than or equal to \$30,000, enter the following condition:

```
SALARY > 30000
```

You can specify multiple components of the condition, using the AND and OR logical operators. If you want to filter out employees who make less than \$30,000 and more than \$100,000, enter the following condition:

```
SALARY > 30000 AND SALARY < 100000
```

You can use ports, parameters, dynamic ports, and generated ports in the filter condition. Select the ports and the parameters in the Expression editor.

If you use a dynamic port in the filter condition, the filter condition expands to include all the generated ports in the dynamic port. For example, the dynamic port, MyDynamicPort, contains three decimal ports:

```
Salary  
Bonus  
Stock
```

If you configure the following filter condition:

```
MyDynamicPort > 100
```

The filter condition expands to the following expression:

```
Salary > 100 AND Bonus > 100 AND Stock > 100
```



You can enter a constant for the filter condition. The numeric equivalent of FALSE is zero (0). Any non zero value is the equivalent of TRUE. For example, the transformation contains a port named NUMBER\_OF\_UNITS with a numeric data type. You configure a filter condition to return FALSE if the value of NUMBER\_OF\_UNITS equals zero. Otherwise, the condition returns TRUE.

**Note:** You cannot use a single port selector or dynamic port as a boolean value.

You do not need to specify TRUE or FALSE as values in the expression. TRUE and FALSE are implicit return values from any condition you set. If the filter condition evaluates to NULL, the row is FALSE.

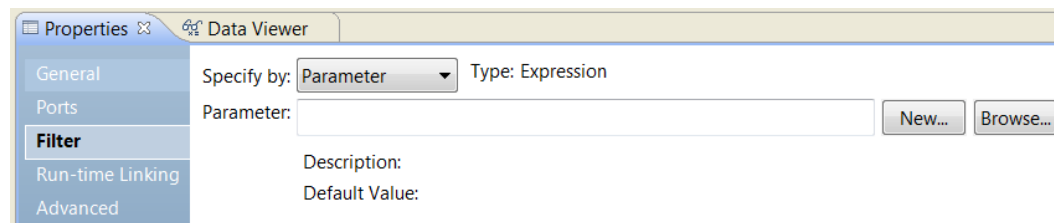
## Parameterize the Filter Condition

You can configure an expression parameter to define the filter condition. An expression parameter contains the entire expression.

You might need to parameterize the filter condition when the Filter transformation is in a dynamic mapping. The filter condition might change based on the generated ports in the transformation at run time.

To use an expression parameter for the filter condition, choose **Specify by Parameter** on the **Filter** tab of the Filter transformation properties.

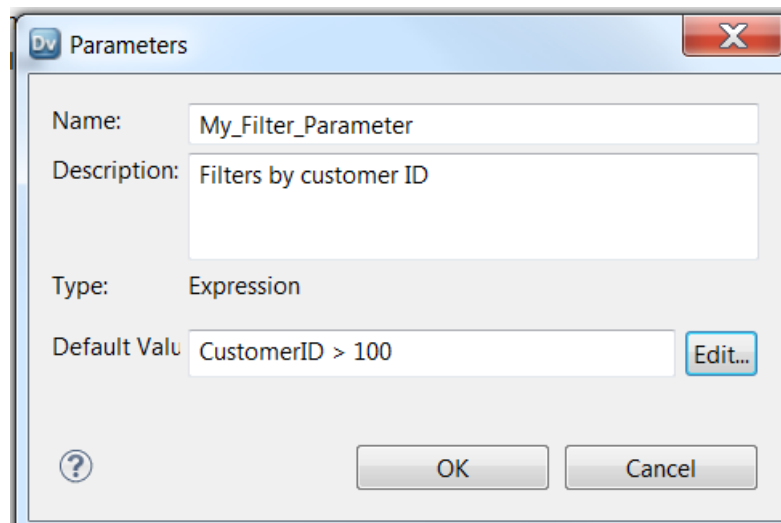
The following image shows the **Filter** tab when you specify the filter condition with a parameter:



You can browse for and select an expression parameter that you already created. Or, you can create an expression parameter.

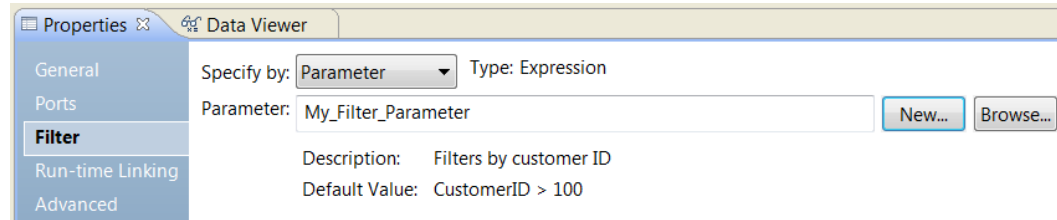
To create an expression parameter, click **New**. Enter a name for the parameter, a description, and the default expression value.

The following image shows where you enter the parameter:



You can enter a default expression on the Parameters dialog box. If you want to use an Expression editor, click Edit. When you use the Expression editor, you can select functions and ports to use in the expression. You can validate the expression.

The following image shows the Filter tab with a parameter for the filter condition:



The expression parameter is a mapping parameter. You can override the parameter in a parameter set or a parameter file at run time.

## Filtering Rows with Null Values

To filter rows containing null values or spaces, use the ISNULL and IS\_SPACES functions to test the value of the port.

For example, if you want to filter out rows that contain NULL value in the FIRST\_NAME port, use the following condition:

```
IIF (ISNULL (FIRST_NAME) , FALSE, TRUE)
```

This condition states that if the FIRST\_NAME port is NULL, the return value is FALSE and the row should be discarded. Otherwise, the row passes through to the next transformation.

## Filter Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Filter transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Filter Transformation Performance Tips

Use tips to increase Filter transformation performance.

### Use the Filter transformation early in the mapping.

Keep the Filter transformation as close as possible to the sources in the mapping. Instead of passing rows that you plan to discard through the mapping, you can filter out unwanted data early in the flow of data from sources to targets.

## CHAPTER 18

# Hierarchical to Relational Transformation

This chapter includes the following topics:

- [Hierarchical to Relational Transformation Overview, 263](#)
- [Example - Hierarchical to Relational Transformation, 263](#)
- [Output Relational Ports and the Overview View, 265](#)
- [Hierarchical to Relational Transformation Ports, 266](#)
- [Schema References, 267](#)
- [Port Configuration, 267](#)
- [Hierarchical to Relational Transformation Development, 267](#)

## Hierarchical to Relational Transformation Overview

The Hierarchical to Relational transformation processes XML or JSON hierarchical input and transforms it into relational output. A Hierarchical to Relational transformation reads hierarchical input from input ports and transforms the data to relational output at the transformation output ports. To transform hierarchical input to relational output, use a schema file to define the hierarchical data.

You can use the Hierarchical to Relational transformation wizard to automatically map the data. You can configure the mapping to the relational output ports on the transformation **Overview** view.

After the wizard generates the transformation, you can pass the data from the relational output ports to another transformation in a mapping.

## Example - Hierarchical to Relational Transformation

The Logistics department of the Harrinder Shipping company must process shipment data. They need to transform inventory and customer data from hierarchical format into relational data that they can store in database tables.

They need to create a mapping that transforms hierarchical data into relational data. The organization inventory system generates shipment inventory data in hierarchical format. The mapping needs to use a

Hierarchical to Relational transformation that inputs shipment data and outputs the details in a usable relational format.

The Shipments input is in hierarchical format. The Shipment element contains sub-elements with customer and inventory data for each shipment:

```

Shipments
  Shipment
    Items
      Item_Name
      Inventory_ID
    Customer
      Customer_Name
      Customer_ID
      Customer_Address

```

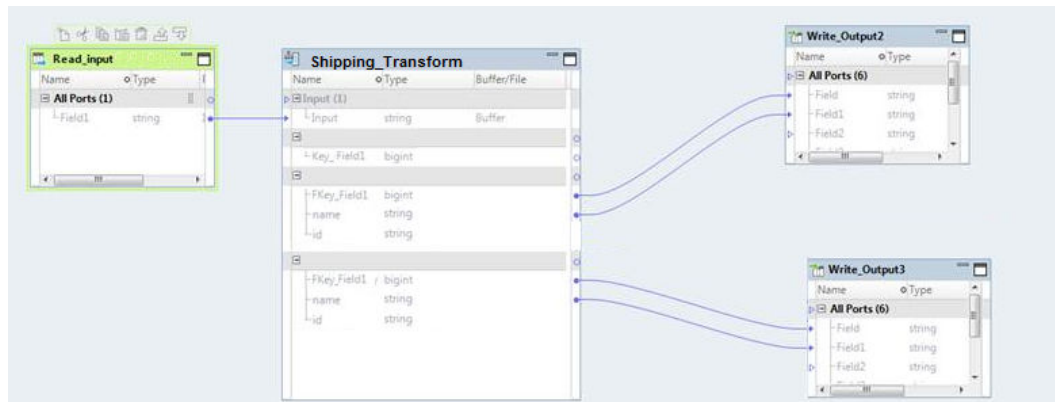
In the relational output, the Customer\_ID element is a primary key in the Customer table, and is a Foreign key in the Shipment table.

| Customer_ID | Customer_Name  | Customer_Address      |
|-------------|----------------|-----------------------|
| 3543766     | Tony Birch     | 6 Moby Drive          |
| 6342562     | Sujita Man     | 22 Dan Street         |
| 6471862     | Dwayne Horace  | 7 Jafendar Boulevard  |
| 7265204     | Carmela Perez  | 23 Dan Street         |
| 4559672     | Delilah Soraya | 28 Jafendar Boulevard |

| Shipment_ID | Inventory_Item | Customer_ID |
|-------------|----------------|-------------|
| 9173327437  | 908274         | 7265204     |
| 9174562342  | 553439         | 7265204     |
| 8484526471  | 546584         | 3543766     |
| 7023847265  | 908274         | 3543766     |
| 9174596725  | 553439         | 3543766     |

The following image shows the mapping in this example:



The mapping contains the following objects:

#### **Read\_input**

The source that contains the path to the file with hierarchical data. Reads billing data from an XML file.

#### **Shipping\_Transform**

A Hierarchical to Relational transformation that transforms XML input into relational output.

#### **Write\_Output2**

A target that stores part of the transformed data, the Customer table, in relational format.

#### **Write\_Output3**

A second target that stores another part of the transformed data, the Shipment table, in relational format.

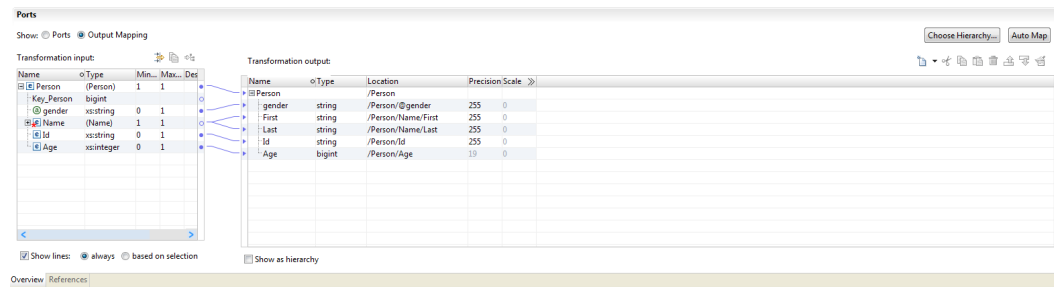
The mapping uses the **Read\_input** flat file to input the target path for the hierarchical input. The mapping processes and transforms the data with the **Shipping\_Transform** transformation. Then the mapping stores the output in the two output targets.

## Output Relational Ports and the Overview View

To convert hierarchical data to relational output in the Hierarchical to Relational transformation, the wizard generates links between hierarchical nodes to relational ports. Use the **Overview** view to view the links between relational ports to hierarchical ports. You can also create groups of output ports by linking nodes from the hierarchical output to groups of ports.

To view the mapping for relational groups, use the **Overview** view. Select **Output Mapping**. The **Ports** panel appears in the **Overview** view.

The following image shows the **Ports** panel:



The **Transformation input** area, which shows the hierarchical schema, is to the left. The **Transformation output** area, which shows the relational output ports, is to the right.

You can define relational output ports in the **Transformation output** area and link nodes from the schema to the ports. You can also drag the pointer from a node in the schema to an empty field in the **Transformation output** area to create a port. When you drag a node from the output schema to a port, the Developer tool shows a link between them.

## Hierarchical to Relational Transformation Ports

The Hierarchical to Relational transformation ports are defined on the transformation **Overview** view.

A Hierarchical to Relational transformation can read input from a file or buffer. The output ports return relational data from the transformation.

When you create an Hierarchical to Relational transformation, the Developer tool creates a default input port. The input type determines the type of data that the Data Integration Service passes to the Hierarchical to Relational transformation. The input type determines whether the input is data or a source file path.

Configure one of the following input types:

### Buffer

The Hierarchical to Relational transformation receives rows of source data in the Input port. Use the buffer input type when you configure the transformation to receive data from an Informatica transformation.

### File

The Hierarchical to Relational transformation receives the source file path in the Input port. The Hierarchical to Relational transformation opens the source file. You can also use the File input type for large files that might require a lot of system memory to process with a buffer input port.

When you create the transformation with the New Transformation wizard you can define an example input file. An example input file is a small sample of the input file. Reference an example input file when you create an Hierarchical to Relational. You also use the example input file when you test the transformation in the **Data Viewer** view.

The transformation contains one or more groups of ports that return relational data.

# Schema References

A Hierarchical to Relational transformation requires a hierarchical schema to define the input hierarchy in the transformation. To use the schema in the transformation, you define a schema reference.

You can define transformation schema references in the transformation **References** view.

The Hierarchical to Relational transformation references schema objects in the Model repository. The schema objects can exist in the repository before you create the transformation. You can also import schemas from the transformation **References** view.

A schema can reference additional schemas. The **References** view shows the namespace and prefix for each schema that the Hierarchical to Relational transformation references. When you reference multiple schemas with empty namespaces the transformation is not valid.

## Port Configuration

On the **Ports** panel, the transformation shows the mapping between the hierarchical schema nodes to the relational ports. The transformation uses a schema to define the hierarchical input. If the schema has more than one element that can be a root element, choose a node to be the root element.

The wizard generates links between hierarchical schema nodes and relational ports. If you want to change the generated links, you can use the **Ports** panel to add, delete, or edit links. You can link nodes to ports and create a port.

When you link nodes to the **Transformation output** area, the Developer tool updates the location field with the location of the node in the hierarchy. If you manually create ports, you must map a node to the port. Update the **Location** column and select a node from the list.

When you link a multiple-occurring node to a group that contains the parent element, you can configure the number of child element occurrences to include. Or, you can replace the parent group with the multiple-occurring child group in the transformation output.

To create a group, link a node to an empty column in the **Transformation output** area. If you link a multiple-occurring child node to an empty input or output column, the Developer tool asks you to relate the group to other output groups. When you select a group, the Developer tool creates keys to relate the groups.

Configure related groups of output ports in the **Transformation output** area. When the Developer tool prompts you to relate output groups, it adds the keys to the groups. You can also manually add ports to represent keys.

## Hierarchical to Relational Transformation Development

Use the New Transformation wizard to auto-generate a Hierarchical to Relational transformation. Choose a schema or hierarchical sample file to define the input hierarchy.

1. Create the transformation in the Developer tool.
2. Configure the input port and mapping.

3. Test the transformation.

## Creating the Hierarchical to Relational Transformation

1. In the Developer tool, click **File > New > Transformation**.
2. Select the Hierarchical to Relational transformation and click **Next**.
3. Enter a name for the transformation and browse for a Model repository location to put the transformation and click **Next**.
4. To select a schema, select one of the following methods:
  - To use a schema from the Model repository to define the input hierarchy, near the **Schema Object** field, browse to select the schema file from the repository.
  - To import a schema file, click **Create a new schema object**. In the **New schema object** window, you can browse to and select a schema file, or you can select to create a schema from a sample hierarchical file.
5. Choose the root for the output hierarchy. In the **Hierarchy root** dialog box, select the element in the schema that is the root element for the output hierarchical file. To help select the root object, you can add a sample hierarchical file. To add a sample file, near the **Sample File** field, browse for and select the file from the file system.
6. Click **Finish**.

The wizard creates the transformation in the repository.

## Configuring the Ports and Mapping

Configure the input and output ports in the **Overview** view.

1. Select the input port datatype, port type, precision and scale.
2. To view the mapping, in the **Overview** view **Ports** area, select **Output Mapping**.
3. Expand the trees in the **Ports** grid. To the left, the **Transformation input** panel shows the expected hierarchical input, and to the right, the **Transformation output** panel shows the relational output.
4. To define a node as a root, click **Choose Hierarchy**.

The Developer tool displays only the nodes from the root level and below the root level in the **Transformation input** area.
5. To view lines that connect the ports with the hierarchical nodes, click **Show Lines**. Select to view all the connection lines or just the lines for selected ports.
6. To add an input group or port to the **Transformation output** area, use one of the following methods:
  - Drag a simple or complex element in the **Transformation input** area to an empty column in the **Transformation output** area. If the node is a group node, the Developer tool adds a relational group without ports.
  - To add a relational group, select a row and right-click to select **New > Group**.
  - To add a relational port, right-click to select **New > Field**.
7. To clear the hierarchical node settings for locations of ports, use one of the following methods:
  - Select one or more nodes in the **Transformation input** area, right-click and select **Clear**.
  - Select one or more lines that connect the relational ports to the hierarchical nodes, right-click and select **Delete**.



8. To display the output ports in a hierarchy, click **Show As Hierarchy**. Each child group appears underneath the parent group.

## Testing the Transformation

Test the Hierarchical to Relational transformation in the **Data Viewer** view.

Before you test the transformation, verify that you defined the file input location. You define the input location on the DIS machine in the Input Location column of the **Ports** panel in the **Overview** view.

1. Open the **Data Viewer** view.
2. Click **Run**.

The Developer tool validates the transformation. If there is no error, the Developer tool shows the hierarchical file content in the **Output** panel.

## CHAPTER 19

# Java Transformation

This chapter includes the following topics:

- [Java Transformation Overview, 270](#)
- [Designing a Java Transformation, 272](#)
- [Java Transformation Ports, 273](#)
- [Java Transformation Advanced Properties, 274](#)
- [Developing Java Code, 276](#)
- [Java Transformation Java Properties, 280](#)
- [Filter Optimization with the Java Transformation, 282](#)
- [Creating a Java Transformation, 285](#)
- [Compiling a Java Transformation, 286](#)
- [Troubleshooting a Java Transformation, 287](#)

## Java Transformation Overview

Use the Java transformation to extend Developer tool functionality.

The Java transformation provides a simple native programming interface to define transformation functionality with the Java programming language. You can use the Java transformation to define simple or moderately complex transformation functionality without advanced knowledge of the Java programming language or an external Java development environment. The Java transformation is an active or passive transformation.

The Developer tool uses the Java Development Kit (JDK) to compile the Java code and generate byte code for the transformation. The Developer tool stores the byte code in the Model repository.

The Data Integration Service uses the Java Runtime Environment (JRE) to run generated byte code at run time. When the Data Integration Service runs a mapping with a Java transformation, the Data Integration Service uses the JRE to run the byte code and process input rows and generate output rows.

Create Java transformations by writing Java code snippets that define transformation logic. Define transformation behavior for a Java transformation based on the following events:

- The transformation receives an input row.
- The transformation processed all input rows.

## Reusable and Non-Reusable Java Transformations

You can create a reusable or non-reusable Java transformation.

Reusable transformations can exist in multiple mappings. Non-reusable transformations exist within a single mapping.

The views in the editor where you define properties and create Java code differ based on whether you are creating a reusable or non-reusable Java transformation.

## Active and Passive Java Transformations

When you create a Java transformation, you define its type as active or passive.

After you set the transformation type, you cannot change it.

A Java transformation runs the Java code that you define on the **On Input** tab one time for each row of input data.

A Java transformation handles output rows based on the transformation type as follows:

- A passive Java transformation generates one output row for each input row in the transformation after processing each input row.
- An active Java transformation generates multiple output rows for each input row in the transformation.

Use the `generateRow` method to generate each output row. For example, if the transformation contains two input ports that represent a start date and an end date, you can use the `generateRow` method to generate an output row for each date between the start date and the end date.

## Datatype Conversion

A Java transformation converts Developer tool datatypes to Java datatypes, based on the Java transformation port type.

When a Java transformation reads input rows, it converts input port datatypes to Java datatypes.

When a Java transformation writes output rows, it converts Java datatypes to output port datatypes.

For example, the following processing occurs for an input port with the integer datatype in a Java transformation:

1. The Java transformation converts the integer datatype of the input port to the Java primitive `int` datatype.
2. In the transformation, the transformation treats the value of the input port as the Java primitive `int` datatype.
3. When the transformation generates the output row, it converts the Java primitive `int` datatype to the integer datatype.

The following table shows how the Java transformation maps Developer tool datatypes to Java primitive and complex datatypes:

| Developer Tool Datatype | Java Datatype |
|-------------------------|---------------|
| bigint                  | long          |
| binary                  | byte[]        |

| Developer Tool Datatype | Java Datatype  |
|-------------------------|--|
| date/time               | With nanoseconds processing enabled, BigDecimal with nanosecond precision<br>With nanoseconds processing disabled, long with millisecond precision (the number of milliseconds since January 1, 1970 00:00:00.000 GMT) |
| decimal                 | With high precision processing disabled, double with precision 15<br>With high precision processing enabled, BigDecimal  |
| double                  | double   |
| integer                 | int  |
| string                  | String   |
| text                    | String   |

In Java, the String, byte[], and BigDecimal datatypes are complex datatypes, and the double, int, and long datatypes are primitive datatypes.

**Note:** The Java transformation sets null values in primitive datatypes to zero. You can use the isNull and the setNull API methods on the **On Input** tab to set null values in the input port to null values in the output port. For an example, see [“setNull” on page 297](#).

## Designing a Java Transformation

When you design a Java transformation, you must consider factors, such as the type of transformation that you want to create.

When you design a Java transformation, consider the following questions:

- Do you need to create an active or passive Java transformation?  
A passive Java transformation generates one output row for each input row in the transformation.  
An active Java transformation generates multiple output rows for each input row in the transformation.
- Do you need to define any functions in the Java transformation? If so, which expressions do you want to include in each function?  
For example, you can define a function that invokes an expression to look up the values of input or output ports or to look up the values of Java transformation variables.
- Do you want to create a reusable or non-reusable Java transformation?  
A reusable transformation can exist in multiple mappings.  
A non-reusable transformation can exist within a single mapping.

# Java Transformation Ports

A Java transformation can have input and output ports.

To create and edit ports for a non-reusable Java transformation, use the **Ports** tab in the editor. To create and edit ports for a reusable Java transformation, use the **Overview** view in the editor.

You can specify default values for ports. After you add ports to a transformation, you can use the port names as variables in Java code snippets.

## Creating Ports

When you create a Java transformation, it includes one input group and one output group.

When you create a port, the Developer tool adds it below the currently selected row or group.

## Setting Default Port Values

You can define default values for ports in a Java transformation.

The Java transformation initializes port variables with the default port value based on the datatype of the port.

### Input and Output Ports

The Java transformation initializes the value of unconnected input ports or output ports that do not have an assigned value in the Java code snippets.

Java transformation initializes ports based on the following port datatypes:

#### Simple

If you define a default value for the port that is not equal to null, the transformation initializes the value of the port variable to the default value. Otherwise, it initializes the value of the port variable to 0.

#### Complex

If you define a default value for the port, the transformation creates a new String or byte[] object, and initializes the object to the default value. Otherwise, the transformation initializes the port variable to null.

**Note:** If you access an input port variable with a null value in the Java code, a NullPointerException occurs.

You can enable an input port as a partition key and a sort key, and you can assign a sort direction. The Data Integration Service ensures that the data is partitioned and sorts the output in each partition by the sort key and sort direction. The Partition Key and Sort Key are valid when the transformation scope is set to All Input.

Use the following properties for partitioning and sorting data:

#### Partition Key

Input port that determines the partition in which a particular row of data is stored. When you select Partition key and Sort key, the Data Integration Service generates a sorted output.

#### Sort Key

Input port that determines the sort criteria within each partition.

#### Direction

Ascending or descending order. Default is ascending.

# Java Transformation Advanced Properties

The Java transformation includes advanced properties for both the transformation code and the transformation.

When you use the transformation in a mapping, you can override the transformation properties.

You can define the following advanced properties for the Java transformation on the **Advanced** tab:

## Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Partitionable

The transformation can be processed with multiple threads. Clear this option if you want the Data Integration Service to use one thread to process the transformation. The Data Integration Service can use multiple threads to process the remaining mapping pipeline stages.

Disable partitioning for a Java transformation when the Java code requires that the transformation be processed with one thread.

## Enable high precision

Processes a decimal data type port with a precision greater than 15 and less than or equal to 38 as a Java BigDecimal data type port.

Disable high precision to process a decimal data type port with a precision greater than 15 and less than or equal to 38 as a Java Double data type port.

The following table shows how a Java transformation treats a value in a decimal data type input port based on whether you have enabled or disabled the high precision option:

| Example   | High Precision Processing Enabled               | High Precision Processing Disabled  |
|---|---|---|
| A decimal type input port receives a value of 40012030304957666903. | The Java transformation leaves the value as is. | The Java transformation converts the value to the following value:<br><br>4.00120303049577 x 10 <sup>19</sup> |

## Use nanoseconds in Date/Time

Converts date/time datatype ports to Java BigDecimal datatype ports with nanosecond precision.

Disable nanosecond processing so that the generated Java code converts date/time datatype ports to Java Long datatype ports with millisecond precision.

## Classpath

Sets the classpath for jar or class file directories that are associated with non-standard Java packages that you import on the **Imports** tab.

The jar or class file directories must be accessible on the Developer tool client machine for compilation of the Java code.

Based on the operating system, separate classpath entries as follows:

- On UNIX, use a colon to separate classpath entries.
- On Windows, use a semicolon to separate classpath entries.

For example, if you import the Java converter package on the **Imports** tab and you define the package in `converter.jar`, you must add the location of the `converter.jar` file to the classpath before you compile the Java code for the Java transformation.

**Note:** You do not need to set the classpath for built-in Java packages. For example, because `java.io` is a built-in Java package, you do not need to set the classpath for `java.io`.

#### Is Active

The transformation can generate more than one output row for each input row.

You cannot change this property after you create the Java transformation. If you need to change this property, create a new Java transformation.

#### Transformation Scope

Defines the method that the Data Integration Service uses to apply the transformation logic to incoming data. You can choose one of the following values:

- **Row.** Applies the transformation logic to one row of data at a time. Choose Row when the results of the procedure depend on a single row of data.
- **Transaction.** Applies the transformation logic to all rows in a transaction. Choose Transaction when the results of the procedure depend on all rows in the same transaction, but not on rows in other transactions. When you choose Transaction, you must connect all input groups to the same transaction control point.
- **All Input.** Applies the transformation logic to all incoming data. When you choose All Input, the Data Integration Service drops transaction boundaries. Choose All Input when the results of the procedure depend on all rows of data in the source.

**Note:** The Transformation Scope property is valid only in a Hive environment.

#### Stateless

Maintain the row order of the input data to the transformation. Select this option if the Data Integration Service should not perform any optimization that can change the row order.

When the Data Integration Service performs optimizations, it might lose an order established earlier in the mapping. You can establish order in a mapping with a sorted flat file source, a sorted relational source, or a Sorter transformation. When you configure a transformation to maintain row order, the Data Integration Service considers this configuration when it performs optimizations for the mapping. The Data Integration Service performs optimizations for the transformation if it can maintain the order. The Data Integration Service does not perform optimizations for the transformation if the optimization would change the row order.

## Configuring the Classpath for the Developer Tool Client

You can add jar files or class file directories to the Developer tool client classpath.

To set the classpath for the machine where the Developer tool client runs, complete one of the following tasks:

- Configure the CLASSPATH environment variable. Set the CLASSPATH environment variable on the Developer tool client machine. This applies to all Java processes run on the machine.
- For a non-reusable Java transformation, configure the classpath in the Java transformation advanced properties. This applies to mappings that include this Java transformation. The Developer tool client includes files within the classpath when it compiles the Java code.

To add jar or class file directories to the classpath in a Java transformation, complete the following steps:

1. On the **Advanced** tab, click the down arrow icon in the **Value** column next to **Classpath**.  
The **Edit Classpath** dialog box appears.
2. To add a classpath, complete the following steps:
  - a. Click **Add**.  
The **Save As** window appears.
  - b. In the **Save As** window, navigate to the directory where the jar file is located.
  - c. Click **OK**.  
The classpath appears in the **Edit Classpath** dialog box.
3. To remove a jar file or class file directory, select the jar or class file directory and click **Remove**.  
The directory disappears from the list of directories.

## Configuring the Classpath for the Data Integration Service

You can add jar or class file directories that are required at run time to the classpath on the Data Integration Service node.

Place the jar files that are required during runtime in the following directory on the Data Integration Service node:

```
$INFA_HOME/services/shared/jars
```

The jar files in this location are loaded dynamically. Any class files that are required by individual mappings at run time are found and loaded from this directory.

**Note:** The Java transformation adds any jar files in this directory to the mapping-level classpath.

## Developing Java Code

Use the code entry tabs in the **Java** view to write and compile Java code that defines transformation behavior for specific transformation events.

You can develop code snippets on the code entry tabs in any order. You can view, but not edit, the full Java code on the **Full Code** tab.

After you develop code snippets, you can compile the code snippets or the full Java code and view the results of the compilation in the **Results** window in the **Compilation** properties in the **Java** view.

Each code entry tab contains components that you use to write, view, and compile Java code:



## Code properties

Provides controls that let you view and enter Java code, including Java transformation API methods. The following table describes the controls that are available in **Code** properties:

| Control              | Description   |
|----------------------|---|
| Navigator            | <p>Shows input ports, output ports, and callable Java transformation API methods.</p> <p>Click an item in the navigator to display a description of the item.</p> <p>Double-click an item to add it to the <b>Java code</b> window. Alternatively, you can drag an item from the navigator into the <b>Java code</b> window.</p> <p>The navigator is available on the following code entry tabs:</p> <ul style="list-style-type: none"><li>- <b>Helpers</b></li><li>- <b>On Input</b></li><li>- <b>At End</b></li></ul>   |
| Java code window     | <p>Enables you to view or enter Java code for the transformation. The <b>Java code</b> window displays Java code by using the basic Java syntax highlighting.</p> <p><b>Note:</b> On the <b>Full Code</b> tab, you can view but not edit the full class code for the Java transformation.</p> <p>The <b>Java code</b> window is available on the following code entry tabs:</p> <ul style="list-style-type: none"><li>- <b>Imports</b></li><li>- <b>Helpers</b></li><li>- <b>On Input</b></li><li>- <b>At End</b></li><li>- <b>Functions</b></li><li>- <b>Optimizer Interfaces</b></li><li>- <b>Full Code</b></li></ul> |
| New Function command | <p>Opens the <b>Define Function</b> dialog box that you use to define functions that invoke Java expressions.</p> <p>The <b>Function</b> command is available on the <b>Functions</b> tab.</p>  |
| Editing toolbar      | <p>Enables you to click tool icons, such as cut, copy, and paste, to edit Java code.</p> <p>The editing toolbar is available on the following code entry tabs:</p> <ul style="list-style-type: none"><li>- <b>Imports</b></li><li>- <b>Helpers</b></li><li>- <b>On Input</b></li><li>- <b>At End</b></li><li>- <b>Functions</b></li><li>- <b>Optimizer Interfaces</b></li></ul>   |

### Compilation properties

Provides controls to compile and debug Java code. The following table describes the controls in the **Compilation** properties:

| Control                | Description   |
|------------------------|---|
| <b>Compile</b> command | Compiles the Java code for the transformation.  |
| <b>Results</b> window  | <p>Displays the compilation results for the Java transformation class and enables you to find the source of errors in the code.</p> <p>To find an error in the code, right-click an error message in the <b>Results</b> window and select to view the error in the snippet code or in the full code.</p> <p>You can also double-click an error message in the <b>Results</b> window to find its source.</p> |

## Creating Java Code Snippets

To create Java code snippets to define transformation behavior, use the **Java Code** window on the code entry tabs.

1. Click the appropriate code entry tab.

The following table describes the tasks that you can complete on the code entry tabs in the **Java** view:

| Tab              | Description   |
|------------------|---|
| <b>Imports</b>   | Imports third-party, built-in, and custom Java packages for an active or passive Java transformation. After you import packages, you can use them on the other code entry tabs.   |
| <b>Helpers</b>   | Declares user-defined variables and methods for the Java transformation class in an active or passive Java transformation. After you declare variables and methods, you can use them in any other code entry tab except the <b>Imports</b> tab.   |
| <b>On Input</b>  | <p>Defines how an active or passive Java transformation behaves when it receives an input row. The Java code that you define on this tab runs one time for each input row.</p> <p>On this tab, you can also access and use input and output port data, variables, and Java transformation API methods.</p>  |
| <b>At End</b>    | <p>Defines how an active or passive Java transformation behaves after it processes all input data.</p> <p>On this tab, you can also set output data for active transformations, and call Java transformation API methods.</p>   |
| <b>Functions</b> | <p>Defines functions that invoke expressions in a Java transformation with the Java programming language. For example, you can define a function that invokes an expression that looks up the values of input or output ports or looks up the values of Java transformation variables.</p> <p>On the <b>Functions</b> tab, you can manually define functions or click <b>New Function</b> to invoke the <b>Define Function</b> dialog box, which enables you to easily define a function.</p> |

| Tab                         | Description  |
|-----------------------------|--|
| <b>Optimizer Interfaces</b> | Defines early selection or push-into filter optimization. Select the optimization method in the navigator. Update the code snippets to enable the optimization. Define the input ports and associated output ports to push filter logic through. |
| <b>Full Code</b>            | Read-only. On this tab, you can view and compile the full class code for the Java transformation.  |

2. To access input or output column variables in the snippet, expand the **Input** or **Output** list in the navigator and double-click the name of the port.
3. To call a Java transformation API in the snippet, expand the **Callable APIs** list in the navigator and double-click the name of the method. If necessary, configure the appropriate input values for the method.
4. Write appropriate Java code, based on the code entry tab type.  
View the full class code for the Java transformation in the **Java code** window on the **Full Code** tab.

## Importing Java Packages

On the **Imports** tab, you can import Java packages for active or passive Java transformations.

You can import third-party, built-in, or custom Java packages. After you import Java packages, you can use the imported packages on the other code entry tabs.

**Note:** On the **Imports** tab, you cannot declare or use static variables, instance variables, or user methods.

In the Developer tool, when you export or import metadata that contains a Java transformation, the jar or class files that contain the third-party or custom packages required by the Java transformation are not included in the export or import.

If you import metadata that contains a Java transformation, you must copy the jar or class files that contain the required third-party or custom packages to the Developer tool client and Data Integration Service node.

For example, to import the Java I/O package, enter the following code on the **Imports** tab:

```
import java.io.*;
```

When you import non-standard Java packages, add the package or class to the classpath in the Java transformation.

## Defining Helper Code

On the **Helpers** tab, you can declare user-defined variables and methods for the Java transformation class in active or passive Java transformations.

After you declare variables and methods on the **Helpers** tab, you can use the variables and methods on any code entry tab except the **Imports** tab.

On the **Helpers** tab, you can declare the following types of code, variables, and methods:

- Static code and static variables.

Within a static block, you can declare static variables and static code. All instances of a reusable Java transformation in a mapping share static code and variables. Static code runs before any other code in a Java transformation.

For example, the following code declares a static variable to store the error threshold for all instances of a Java transformation in a mapping:

```
static int errorThreshold;
```

Use this variable to store the error threshold for the transformation and access it from all instances of the Java transformation in a mapping.

**Note:** You must synchronize static variables in a reusable Java transformation.

- Instance variables.

Multiple instances of a reusable Java transformation in a mapping do not share instance variables.

Declare instance variables with a prefix to avoid conflicts and initialize non-primitive instance variables.

For example, the following code uses a boolean variable to decide whether to generate an output row:

```
// boolean to decide whether to generate an output row
// based on validity of input
private boolean generateRow;
```

- User-defined static or instance methods.

Extends the functionality of the Java transformation. Java methods declared on the **Helpers** tab can use or modify output variables or locally declared instance variables. You cannot access input variables from Java methods on the **Helpers** tab.

For example, use the following code on the **Helpers** tab to declare a function that adds two integers:

```
private int myTXAdd (int num1,int num2)
{
    return num1+num2;
}
```

## Java Transformation Java Properties

Use the code entry tabs in the **Java** view to write and compile Java code that defines transformation behavior for specific transformation events.

The following tabs are code entry tabs:

- **Imports**
- **Helpers**
- **On Input**
- **At End**
- **Functions**
- **Optimizer Interfaces**

View the full class code for the Java transformation on the **Full Code** tab.

### Imports Tab

On the **Imports** tab, you can import third-party, built-in, or custom Java packages for active or passive Java transformations.

To import a Java package, enter the code to import the package in the **Java code** window in the **Code** properties on the **Imports** tab.

For example, you might enter the following code to import the java.io package:

```
import java.io.*;
```

To compile the code that imports Java packages, click **Compile** in the **Compilation** properties on the **Imports** tab. The results of the compilation appear in the **Results** window on the **Imports** tab.

After you import Java packages, you can use them on the other code entry tabs.

## Helpers Tab

On the **Helpers** tab, you can declare user-defined variables and methods for the Java transformation class in an active or passive Java transformation.

To declare user-defined variables and methods, enter the code in the **Java code** window in the **Code** properties on the **Helpers** tab.

To compile the helper code for the Java transformation, click **Compile** in the **Compilation** properties on the **Helpers** tab. The results of the compilation appear in the **Results** window on the **Helpers** tab.

After you declare variables and methods, you can use them in any other code entry tab except the **Imports** tab.

## On Input Tab

On the **On Input** tab, you define how an active or passive Java transformation behaves when it receives an input row. On this tab, you can also access and use input and output port data, variables, and Java transformation API methods.

The Java code that you define on this tab runs one time for each input row.

To define how a Java transformation behaves when it receives an input row, enter the code in the **Java code** window in the **Code** properties on the **On Input** tab.

From the navigator on the **On Input** tab, you can access and define the following variables and API methods:

- Input port and output port variables. Access input and output port data as a variable by using the name of the port as the name of the variable. For example, if "in\_int" is an Integer input port, you can access the data for this port by referring as a variable "in\_int" with the Java primitive datatype int. You do not need to declare input and output ports as variables.

Do not assign a value to an input port variable. If you assign a value to an input variable on the **On Input** tab, you cannot get the input data for the corresponding port in the current row.

- Instance variables and user-defined methods. Use any instance or static variable or user-defined method you declared on the **Helpers** tab.

For example, an active Java transformation has two input ports, BASE\_SALARY and BONUSES, with an integer datatype, and a single output port, TOTAL\_COMP, with an integer datatype. You create a user-defined method on the **Helpers** tab, myTXAdd, that adds two integers and returns the result. Use the following Java code in the **On Input** tab to assign the total values for the input ports to the output port and generate an output row:

```
TOTAL_COMP = myTXAdd (BASE_SALARY, BONUSES);  
generateRow();
```

When the Java transformation receives an input row, it adds the values of the BASE\_SALARY and BONUSES input ports, assigns the value to the TOTAL\_COMP output port, and generates an output row.

- Java transformation API methods. You can call API methods provided by the Java transformation.

To compile the code for the Java transformation, click **Compile** in the **Compilation** properties on the **On Input** tab. The results of the compilation appear in the **Results** window on the **On Input** tab.

## At End Tab

On the **At End** tab, you define how an active or passive Java transformation behaves after it processes all input data. On this tab, you can also set output data for active transformations, and call Java transformation API methods.

To define how a Java transformation behaves after it processes all input data, enter the code in the **Java code** window in the **Code** properties on the **At End** tab.

You can access and define the following variables and API methods on the **At End** tab:

- Output port variables. You can use the names of any output ports that you defined on the **Ports** tab as variables, or set output data for active Java transformations.
- Instance variables and user-defined methods. Use any instance variables or user-defined methods you declared on the **Helpers** tab.
- Java transformation API methods. Call API methods provided by the Java transformation.

For example, use the following Java code to write information to the log when the end of data is reached:

```
logInfo("Number of null rows for partition is: " + partCountNullRows);
```

To compile the code for the Java transformation, click **Compile** in the **Compilation** properties on the **At End** tab. The results of the compilation appear in the **Results** window on the **At End** tab.

## Functions Tab

On the **Functions** tab, you define functions that invoke expressions in a Java transformation with the Java programming language.

For example, you can define a function that invokes an expression that looks up the values of input or output ports or looks up the values of Java transformation variables.

To define a function, you can manually define functions in the **Java code** window in the **Code** properties on the **Functions** tab, or you can click **New Function** to invoke the **Define Function** dialog box, which enables you to easily define a function.

To compile the code, click **Compile** in the **Compilation** properties on the **Functions** tab. The results of the compilation appear in the **Results** window on the **Functions** tab.

## Full Code Tab

On the **Full Code** tab, you can view, but not edit, the full class code for the Java transformation and compile the code.

You can view the full class code in the **Java code** window in the **Code** properties.

To compile the full code for the Java transformation, click **Compile** in the **Compilation** properties on the **Full Code** tab. The results of the compilation appear in the **Results** window on the **Full Code** tab.

# Filter Optimization with the Java Transformation

The Data Integration Service can apply filter optimization to active Java transformations. When you define the Java transformation, you add code for filter optimization on the Java transformation **Optimizer Interfaces** tab.

## Early Selection Optimization with the Java Transformation

You can enable an active or passive Java transformation for early selection optimization if the Java transformation has no side effects. The optimizer passes the filter logic through the Java transformation and modifies the filter condition as required.

To view the code snippets for early selection optimization, choose PredicatePushOptimization in the navigator of the **Optimizer Interfaces** tab.

### allowPredicatePush

Boolean. Enables early selection. Change the function to return a true result and message in order to enable early selection. Default is false, and the function returns a message that optimization is not supported.

```
public ResultAndMessage allowPredicatePush(boolean ignoreOrderOfOp) {
    // To Enable PredicatePushOptimization, this function should return true
    //return new ResultAndMessage(true, "");
    return new ResultAndMessage(false, "Predicate Push Optimization Is Not
Supported");
}
```

### canGenerateOutputFieldEvalError

Boolean. Indicates whether or not the Java transformation can return an output field error, such as a division by zero error. Change the function to return false if the Java transformation does not generate output field errors. When the Java transformation can generate field errors, then the Data Integration Service cannot use early selection optimization.

```
public boolean canGenerateOutputFieldEvalError() {
    // If this Java transformation can never generate an output field evaluation error,
    // return false.
    return true;
}
```

### getInputExpr

Returns an Informatica expression that describes which input values from input fields comprise an output field. The optimizer needs to know which input fields comprise an output field in order to push the filter logic through the transformation.

```
public InfaExpression getInputExpr(TransformationField field,
    TransformationDataInterface group) {
    // This should return an Informatica expression for output fields in terms of input
    fields
    // We will only push predicate that use fields for which input expressions are
    defined.
    // For example, if you have two input fields in0 and in1 and three output fields
    out0, out1, out2
    // out0 is the pass-through of in1, out2 is sum of in1 and in2, and out3 is unknown,
    the code should be:
    //if (field.getName().equals("out0"))
    //    return new InfaExpression("in0", instance);
    //else if (field.getName().equals("out1"))
    //    return new InfaExpression("in0 + in1", instance);
    //else if (field.getName().equals("out2"))
    //    return null;
    return null;
}
```

For example, a mapping contains a filter expression, "out0 > 8". Out0 is the value of the out0 output port in the Java transformation. You can define the value of out0 as the value of the in0 input port + 5. The optimizer can push the following expression "(in0 + 5) > 8" past the Java transformation with early selection optimization. You can return NULL if an output field does not have input field expression. The optimizer does not push filter expressions past output fields with no input expression.

You might include the following code:

```
if (field.getName().equals("out0"))
    return new InfaExpression("in0 + 5", instance);
else if (field.getName().equals("out2"))
    return null;
```

### inputGroupsPushPredicateTo

Returns a list of groups that can receive the filter logic. The Java transformation has one input group. Do not modify this function for the Java transformation.

```
public List<TransformationDataInterface> inputGroupsPushPredicateTo(
    List<TransformationField> fields) {
    // This functions returns a list of input data interfaces to push predicates to.
    // Since JavaTx only has one input data interface, you should not have to modify
    this function
    AbstractTransformation tx = instance.getTransformation();
    List<DataInterface> dis = tx.getDataInterfaces();
    List<TransformationDataInterface> inputDIs = new
    ArrayList<TransformationDataInterface>();
    for (DataInterface di : dis){
        TransformationDataInterface tdi = (TransformationDataInterface) di;
        if (tdi.isInput())
            inputDIs.add(tdi);
    }
    if(inputDIs.size() == 1)
        return inputDIs;
    else
        return null;
}
```

## Push-Into Optimization with the Java Transformation

You can enable an active Java transformation for push-into optimization if it has no side effects and the optimization does not affect the mapping results.

When you configure push-into optimization for the Java transformation, you define a way for the Java transformation to store the filter condition that it receives from the optimizer. Add code that examines the filter condition. If the Java transformation can absorb the filter logic, then the Java transformation passes a true condition back to the optimizer. The optimizer removes the Filter transformation from the optimized mapping.

When you configure the Java transformation you write the code that stores the filter condition as transformation metadata during optimization. You also write the code to retrieve the filter condition at run-time and to drop the rows according to the filter logic.

When you define the Java transformation, you add code for push-into optimization on the Java transformation **Optimizer Interfaces** tab. To access the code snippets for push-into optimization, choose FilterPushdownOptimization in the navigator of the transformation **Optimizer Interfaces** tab.

The Developer tool displays code snippets to enable push-into optimization and to receive the filter condition from the optimizer. Update the code snippets to enable optimization and to save the filter logic as transformation metadata.

### isFilterSupported

Returns true to enable push-into optimization. Returns false to disable push-into optimization.

Change the function to return true in order to enable push-into optimization.

```
public ResultAndMessage isFilterSupported() {
    // To enable filter push-into optimization this function should return true
    // return new ResultAndMessage(true, "");
    return new ResultAndMessage(false, "Filter push-into optimization is not supported");
}
```



## pushFilter

Receives the filter condition from the optimizer.

Add code to examine the filter and determine if the filter logic can be used in the transformation. If the transformation can absorb the filter, then use the following method to store the filter condition as transformation metadata:

```
storeMetadata(String key, String data)
```

The key is an identifier for the metadata. You can define any string as a key. The data is the data you want to store in order to determine which rows to drop at run time. For example, the data might be the filter condition that the Java transformation receives from the optimizer.

```
public ResultAndMessage pushFilter(InfaExpression condition) {  
    // Add code to absorb the filter  
    // If filter is successfully absorbed return new ResultAndMessage(true, ""); and the  
optimizer  
    // will remove the filter from the mapping  
    // If the filter is not absorbed, return new ResultAndMessage(false, msg);  
    return new ResultAndMessage(false, "Filter push-into optimization is not supported");  
}
```

# Creating a Java Transformation

In the Developer tool, you can create a reusable or non-reusable Java transformation.

## Creating a Reusable Java Transformation

Reusable transformations can exist within multiple mappings.

Create a reusable Java transformation in the Developer tool.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.  
The **New** dialog box appears.
3. Select the Java transformation.
4. Click **Next**.
5. Enter a name for the transformation.
6. To create an active transformation, select the **Create as active** option.
7. Click **Finish**.

The transformation appears in the editor.

8. In the **Ports** view, click the **New** button to add a port to the transformation.
9. Edit the port to set the name, datatype, and precision.  
Use port names as variables in Java code snippets.
10. In the **Java** view, use the code entry tabs to write and compile the Java code for the transformation.
11. In the **Java** view, use the **Functions** tab to define functions that invoke expressions.
12. On any code entry tab, double-click error messages in the **Results** window in the **Compilation** properties to locate and fix compilation errors in the Java code for the transformation.

13. In the **Advanced** view, edit the transformation properties.

## Creating a Non-Reusable Java Transformation

Non-reusable transformations exist within a single mapping.

Create a non-reusable Java transformation in the Developer tool.

1. In a mapping or mapplet, drag a Java transformation from the Transformation palette to the editor.
2. In the **New Java Transformation** dialog box, enter a name for the transformation.
3. To create an active transformation, select the **Create as active** option.
4. Click **Finish**.

The transformation appears in the editor.

5. On the **General** tab, edit the transformation name and the description.
6. On the **Ports** tab, click the **New** button to add a port to the transformation.
7. Edit the port to set the name, datatype, and precision.

Use port names as variables in Java code snippets.

8. In the **Java** view, use the code entry tabs to write and compile the Java code for the transformation.
9. In the **Java** view, use the **Functions** tab to define functions that invoke expressions.
10. On any code entry tab, double-click error messages in the **Results** window in the **Compilation** properties to locate and fix compilation errors in the Java code for the transformation.
11. In the **Advanced** view, edit the transformation properties.

## Compiling a Java Transformation

The Developer tool uses the Java compiler to compile the Java code and generate the byte code for the transformation.

The Java compiler compiles the Java code and displays the results of the compilation in the **Results** window in the **Compilation** properties on the code entry tabs. The Java compiler installs with the Developer tool in the `java/bin` directory.

To compile the full code for the Java transformation, click **Compile** in the **Compilation** properties on the **Full Code** tab.

When you create a Java transformation, it contains a Java class that defines the base functionality for a Java transformation. The full code for the Java class contains the template class code for the transformation, plus the Java code you define on the code entry tabs.

When you compile a Java transformation, the Developer tool adds the code from the code entry tabs to the template class for the transformation to generate the full class code for the transformation. The Developer tool then calls the Java compiler to compile the full class code. The Java compiler compiles the transformation and generates the byte code for the transformation.

The results of the compilation display in the **Results** window. Use the results of the compilation to identify and locate Java code errors.

# Troubleshooting a Java Transformation

In the **Results** window in the **Compilation** properties on any code entry tab, you can find and fix Java code errors.

Errors in a Java transformation can occur due to an error in code on a code entry tab or in the full code for the Java transformation class.

To troubleshoot a Java transformation, complete the following high-level steps:

1. Find the source of the error in the Java snippet code or in the full class code for the transformation.
2. Identify the type of error. Use the results of the compilation in the **Results** window and the location of the error to identify the type of error.
3. Fix the Java code on the code entry tab.
4. Compile the transformation again.

## Finding the Source of Compilation Errors

To find the source of compilation errors, use the results of the compilation displayed in the **Results** window in the **Compilation** properties on a code entry tab or the **Full Code** tab.

When you double-click an error message in the **Results** window, the source code that caused the error is highlighted in the **Java code** window on the code entry tab or on the **Full Code** tab.

You can find errors on the **Full Code** tab, but you cannot edit Java code on the **Full Code** tab. To fix errors that you find on the **Full Code** tab, modify the code on the appropriate code entry tab. You might need to use the **Full Code** tab to view errors caused by adding user code to the full class code for the transformation.

## Finding an Error on a Code Entry Tab or the Full Code Tab

You can find compilation errors on a code entry tab or the **Full Code** tab.

1. In the **Results** window in the **Compilation** properties on any code entry tab or the **Full Code** tab, right-click an error message.
2. Click either **Show In > Snippet** or **Show In > Full Code Tab**.

The Developer tool highlights the source of the error on the selected tab.

**Note:** You can view but you cannot correct errors on the **Full Code** tab. To correct errors, you must navigate to the appropriate code entry tab.

## Identifying the Source of Compilation Errors

Compilation errors can appear as a result of errors in the user code.

Errors in the user code might also generate an error in the non-user code for the class. Compilation errors occur in user and non-user code for the Java transformation.

### User Code Errors

Errors can occur in the user code on the code entry tabs. User code errors include standard Java syntax and language errors.

User code errors might also occur when the Developer tool adds the user code from the code entry tabs to the full class code.

For example, a Java transformation has an input port with a name of `int1` and an integer datatype. The full code for the class declares the input port variable with the following code:

```
int int1;
```

However, if you use the same variable name on the **On Input** tab, the Java compiler issues an error for a redeclaration of a variable. To fix the error, rename the variable on the **On Input** tab.

## Non-User Code Errors

User code on the code entry tabs can cause errors in non-user code.

For example, a Java transformation has an input port and an output port, `int1` and `out1`, with integer datatypes. You write the following code in the **On Input** code entry tab to calculate interest for input port `int1` and assign it to the output port `out1`:

```
int interest;
interest = CallInterest(int1); // calculate interest
out1 = int1 + interest;
}
```

When you compile the transformation, the Developer tool adds the code from the **On Input** code entry tab to the full class code for the transformation. When the Java compiler compiles the Java code, the unmatched brace causes a method in the full class code to end prematurely, and the Java compiler issues an error.

## CHAPTER 20

# Java Transformation API Reference

This chapter includes the following topics:

- [Java Transformation API Methods Overview, 289](#)
- [defineJExpression, 290](#)
- [failSession, 291](#)
- [generateRow, 291](#)
- [getInRowType, 292](#)
- [getMetadata, 293](#)
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- [storeMetadata, 298](#)

## Java Transformation API Methods Overview

On the code entry tabs in the **Java** view in the editor, you can add API methods to the Java code to define transformation behavior.

To add an API method to the code, expand the **Callable APIs** list in the navigator on the code entry tab, and then double-click the name of the method that you want to add to the code.

Alternatively, you can drag the method from the navigator into the Java code snippet or manually enter the API method in the Java code snippet.

You can add the following API methods to the Java code in a Java transformation:

### **defineJExpression**

Defines a Java expression.

**failSession**

Throws an exception with an error message and fails the mapping.

**generateRow**

Generates an output row for active Java transformations.

**getInRowType**

Returns the input type of the current row in the transformation.

**incrementErrorCount**

Increments the error count for the mapping.

**invokeJExpression**

Invokes a Java expression that you have defined by using the `defineJExpression` method.

**isNull**

Checks for a null value in an input column.

**logError**

Writes an error message to the log.

**logInfo**

Writes an informational message to the log.

**resetNotification**

If the Data Integration Service machine runs in restart mode, resets variables that you use in the Java code after a mapping run.

**setNull**

Sets the value of an output column in an active or passive Java transformation to null.

## defineJExpression

Defines an expression, including the expression string and input parameters. Arguments for the `defineJExpression` method include an array of `JExprParamMetadata` objects that contains the input parameters and a string value that defines the expression syntax.

Use the following syntax:

```
defineJExpression(  
    String expression,  
    Object[] paramMetadataArray  
);
```

The following table describes the parameters:

| Parameter          | Type  | Datatype | Description   |
|--------------------|-------|----------|---|
| expression         | Input | String   | String that represents the expression.  |
| paramMetadataArray | Input | Object[] | Array of <code>JExprParaMetadata</code> objects that contain the input parameters for the expression. |

You can add the `defineJExpression` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

To use the `defineJExpression` method, you must instantiate an array of `JExprParamMetadata` objects that represent the input parameters for the expression. You set the metadata values for the parameters and pass the array as a parameter to the `defineJExpression` method.

For example, the following Java code creates an expression to look up the value of two strings:

```
JExprParamMetadata params[] = new JExprParamMetadata[2];
params[0] = new JExprParamMetadata(EDatatype.STRING, 20, 0);
params[1] = new JExprParamMetadata(EDatatype.STRING, 20, 0);
defineJExpression(":lkp.mylookup(x1,x2)",params);
```

**Note:** You must number the parameters that you pass to the expression consecutively and start the parameters with the letter x. For example, to pass three parameters to an expression, name the parameters x1, x2, and x3.

## failSession

Throws an exception with an error message and fails the mapping.

Use the following syntax:

```
failSession(String errorMessage);
```

The following table describes the parameter:

| Parameter    | Parameter Type | Datatype | Description           |
|--------------|----------------|----------|-----------------------|
| errorMessage | Input          | String   | Error message string. |

Use the `failSession` method to end the mapping. Do not use the `failSession` method in a try/catch block on a code entry tab.

You can add the `failSession` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

The following Java code shows how to test the `input1` input port for a null value and fail the mapping if it is null:

```
if(isNull("input1")) {
    failSession("Cannot process a null value for port input1.");
}
```

## generateRow

Generates an output row for active Java transformations.

Use the following syntax:

```
generateRow();
```

When you call the `generateRow` method, the Java transformation generates an output row using the current value of the output port variables. If you want to generate multiple rows corresponding to an input row, you can call the `generateRow` method more than once for each input row. If you do not use the `generateRow` method in an active Java transformation, the transformation does not generate output rows.

You can add the `generateRow` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

You can call the `generateRow` method in active transformations only. If you call the `generateRow` method in a passive transformation, the Data Integration Service generates an error.

Use the following Java code to generate one output row, modify the values of the output ports, and generate another output row:

```
// Generate multiple rows.
if(!isNull("input1") && !isNull("input2"))
{
    output1 = input1 + input2;
    output2 = input1 - input2;
}
generateRow();
// Generate another row with modified values.
output1 = output1 * 2;
output2 = output2 * 2;
generateRow();
```

## getInRowType

Returns the input type of the current row in the transformation. The method returns a value of insert, update, delete, or reject.

Use the following syntax:

```
rowType getInRowType();
```

The following table describes the parameter:

| Parameter | Parameter Type | Datatype | Description   |
|-----------|----------------|----------|---|
| rowType   | Output         | String   | Returns the update strategy type, which is one of the following values: <ul style="list-style-type: none"><li>- DELETE</li><li>- INSERT</li><li>- REJECT</li><li>- UPDATE</li></ul> |

You can add the `getInRowType` method to the Java code on the **On Input** code entry tab.

You can use the `getInRowType` method in active transformations configured to set the update strategy. If you call this method in an active transformation that is not configured to set the update strategy, the Data Integration Service generates an error.



## getMetadata

Retrieves Java transformation metadata at runtime. The `getMetadata` method retrieves metadata that you save with the `storeMetadata` method, such as a filter condition that the optimizer passes to the Java transformation in the `pushFilter` function.

Use the following syntax:

```
getMetadata (String key);
```

The following table describes the parameters:

| Parameter | Parameter Type | Datatype | Description  |
|-----------|----------------|----------|--|
| key       | Input          | String   | Identifies the metadata. The <code>getMetadata</code> method uses the key to determine which metadata to retrieve. |

You can add the `getMetadata` method to the Java code on the following code entry tabs:

- Helper
- On Input
- At End
- Optimizer Interfaces
- Functions

You can configure the `getMetadata` method to retrieve filter conditions for push-into optimization. The `getMetadata` method can retrieve each filter condition that you store from the optimizer.

```
// Retrieve a filter condition
String mydata = getMetadata ("FilterKey");
```

## incrementErrorCount

Increments the error count. If the error count reaches the error threshold, the mapping fails.

Use the following syntax:

```
incrementErrorCount(int nErrors);
```

The following table describes the parameter:

| Parameter | Parameter Type | Datatype | Description                                   |
|-----------|----------------|----------|---|
| nErrors   | Input          | Integer  | Number by which to increment the error count. |

You can add the `incrementErrorCount` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

The following Java code shows how to increment the error count if an input port for a transformation has a null value:

```
// Check if input employee id and name is null.
if (isNull ("EMP_ID_INP") || isNull ("EMP_NAME_INP"))
{
    incrementErrorCount(1);
    // if input employee id and/or name is null, don't generate a output row for this
    input row
    generateRow = false;
}
```

## invokeJExpression

Invokes an expression and returns the value for the expression.

Use the following syntax:

```
(datatype)invokeJExpression(
    String expression,
    Object[] paramMetadataArray);
```

Input parameters for the invokeJExpression method are a string value that represents the expression and an array of objects that contain the expression input parameters.

The following table describes the parameters:

| Parameter          | Parameter Type | Datatype | Description  |
|--------------------|----------------|----------|--|
| expression         | Input          | String   | String that represents the expression.                                 |
| paramMetadataArray | Input          | Object[] | Array of objects that contain the input parameters for the expression. |

You can add the invokeJExpression method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

Use the following rules and guidelines when you use the invokeJExpression method:

- Return datatype. The return datatype of the invokeJExpression method is an object. You must cast the return value of the function with the appropriate datatype.

You can return values with Integer, Double, String, and byte[] datatypes.

- Row type. The row type for return values from the invokeJExpression method is INSERT.

To use a different row type for the return value, use the advanced interface.

- Null values. If you pass a null value as a parameter or the return value for the invokeJExpression method is NULL, the value is treated as a null indicator.

For example, if the return value of an expression is NULL and the return datatype is String, a string is returned with a value of null.

- Date datatype. You must convert input parameters with a Date datatype to the String datatype.

To use the string in an expression as a Date datatype, use the to\_date() function to convert the string to a Date datatype.

Also, you must cast the return type of any expression that returns a Date datatype as a String datatype.

The following example concatenates the strings "John" and "Smith" and returns the string, "John Smith":

```
(String)invokeJExpression("concat(x1,x2)", new Object [] { "John ", "Smith" });
```

**Note:** You must number the parameters that you pass to the expression consecutively, and start the parameter with the letter x. For example, to pass three parameters to an expression, name the parameters x1, x2, and x3.

## isNull

Checks the value of an input column for a null value.

Use the following syntax:

```
Boolean isNull(String strColName);
```

The following table describes the parameter:

| Parameters | Parameter Type | Datatype | Description              |
|------------|----------------|----------|--------------------------|
| strColName | Input          | String   | Name of an input column. |

You can add the isNull method to the Java code on the **On Input** code entry tab.

The following Java code shows how to check whether the value of the SALARY input column is null before adding it to the totalSalaries instance variable:

```
// if value of SALARY is not null
if (!isNull("SALARY")) {
    // add to totalSalaries
    TOTAL_SALARIES += SALARY;
}
```

Alternatively, use the following Java code to achieve the same results:

```
// if value of SALARY is not null
String strColName = "SALARY";
if (!isNull(strColName)) {
    // add to totalSalaries
    TOTAL_SALARIES += SALARY;
}
```

## logError

Writes an error message to the log.

Use the following syntax:

```
logError(String msg);
```

The following table describes the parameter:

| Parameter | Parameter Type | Datatype | Description           |
|-----------|----------------|----------|-----------------------|
| msg       | Input          | String   | Error message string. |

You can add the `logError` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

The following Java code shows how to log an error when the input port is null:

```
// check BASE_SALARY
if (isNull("BASE_SALARY")) {
    logError("Cannot process a null salary field.");
}
```

When the code runs, the following message appears in the log:

```
[JTX_1013] [ERROR] Cannot process a null salary field.
```

## logInfo

Writes an informational message to the log.

Use the following syntax:

```
logInfo(String msg);
```

The following table describes the parameter:

| Parameter | Parameter Type | Datatype | Description                 |
|-----------|----------------|----------|-----------------------------|
| msg       | Input          | String   | Information message string. |

You can add the `logInfo` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

The following Java code shows how to write a message to the log after the Java transformation processes a message threshold of 1000 rows:

```
if (numRowsProcessed == messageThreshold) {
    logInfo("Processed " + messageThreshold + " rows.");
}
```

## resetNotification

If the Data Integration Service machine runs in restart mode, resets variables that you use in the Java code after a mapping run.

In restart mode, the Data Integration Service is not deinitialized but is reset after a request so that the Data Integration Service can process the next request.

For a Java transformation, use the `resetNotification` method to reset variables in the Java code after a mapping run.

Use the following syntax:

```
public int resetNotification(IGroup group) {  
    return EStatus.value;  
}
```

The following table describes the parameters:

| Parameter | Parameter Type | Datatype      | Description   |
|-----------|----------------|---------------|---|
| int       | Output         | EStatus.value | Return value, where <i>value</i> is one of the following values: <ul style="list-style-type: none"><li>- SUCCESS. Success.</li><li>- FAILURE. Failure.</li><li>- NOIMPL. Not implemented.</li></ul> |
| group     | Input          | IGroup        | The input group.  |

You can add the `resetNotification` method to the Java code on the code entry tab on the **Helpers** tab.

The `resetNotification` method does not appear in the Callable APIs list.

For example, assuming that the Java code declares a static variable named `out5_static` and initializes it to 1, the following Java code resets the `out5_static` variable to 1 after the next mapping run:

```
public int resetNotification(IGroup group) {  
    out5_static=1;  
    return EStatus.SUCCESS;  
}
```

This method is not required. However, if the Data Integration Service runs in restart mode and the mapping contains a Java transformation that does not implement the `resetNotification` method, the JSDK\_42075 warning message appears in the log.

## setNull

Sets the value of an output column to null in an active or passive Java transformation.

Use the following syntax:

```
setNull(String strColName);
```

The following table describes the parameter:

| Parameter  | Parameter Type | Datatype | Description               |
|------------|----------------|----------|---------------------------|
| strColName | Input          | String   | Name of an output column. |

The `setNull` method sets the value of an output column in an active or passive Java transformation to null. After you set an output column to null, you cannot modify the value until you generate an output row.

You can add the `setNull` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

The following Java code shows how to check the value of an input column and set the corresponding value of an output column to null:

```
// check value of Q3RESULTS input column
if(isNull("Q3RESULTS")) {
    // set the value of output column to null
    setNull("RESULTS");
}
```

Alternatively, you can use the following Java code achieve the same results:

```
// check value of Q3RESULTS input column
String strColName = "Q3RESULTS";
if(isNull(strColName)) {
    // set the value of output column to null
    setNull(strColName);
}
```

## storeMetadata

Stores Java transformation metadata that you can retrieve at runtime with the `getMetadata` method.

Use the following syntax:

```
storeMetadata (String key String data);
```

The following table describes the parameters:

| Parameter | Parameter Type | Datatype | Description   |
|-----------|----------------|----------|---|
| key       | Input          | String   | Identifies the metadata. The <code>storeMetadata</code> method requires a key to identify the metadata. Define the key as any string. |
| data      | Input          | String   | The data that you want to store as Java transformation metadata.  |

You can add the `storeMetadata` method to the Java code to the following code entry tabs:

- Helper
- On Input
- At End
- Optimizer Interfaces
- Functions

You can configure the `storeMetadata` method in an active transformation to accept filter conditions for push-into optimization. The `storeMetadata` method stores a filter condition that the optimizer pushes from the mapping to the Java transformation.

```
// Store a filter condition
storeMetadata ("FilterKey", condition);
```

## CHAPTER 21

# Java Expressions

This chapter includes the following topics:

- [Java Expressions Overview, 299](#)
- [Using the Define Function Dialog Box to Define an Expression, 300](#)
- [Working with the Simple Interface, 302](#)
- [Working with the Advanced Interface, 304](#)
- [JExpression Class API Reference, 308](#)

## Java Expressions Overview

You can invoke expressions in a Java transformation with the Java programming language.

Use expressions to extend the functionality of a Java transformation. For example, you can invoke an expression in a Java transformation to look up the values of input or output ports or look up the values of Java transformation variables.

To invoke expressions in a Java transformation, you generate the Java code or use Java transformation API methods to invoke the expression. You invoke the expression and use the result of the expression on the appropriate code entry tab. You can generate the Java code that invokes an expression or use API methods to write the Java code that invokes the expression.

The following table describes the methods that you can use to create and invoke expressions in a Java transformation:

| Method                            | Description  |
|-----------------------------------|--|
| <b>Define Function</b> dialog box | Enables you to create a function that invokes an expression and generate the code for an expression.   |
| Simple interface                  | Enables you to call a single API method to invoke an expression and get the result of the expression.  |
| Advanced interface                | Enables you to define the expression, invoke the expression, and use the result of the expression.<br>If you are familiar with object-oriented programming and want more control over invoking the expression, use the advanced interface. |

## Expression Function Types

You can create expressions for a Java transformation by using the **Define Function** dialog box or by using the simple or advanced interface.

You can enter expressions that use input or output port variables or variables in the Java code as input parameters.

If you use the **Define Function** dialog box, you can validate the expression before you use it in a Java transformation.

You can invoke the following types of expression functions in a Java transformation:

| Expression Function Type          | Description   |
|-----------------------------------|---|
| Transformation language functions | SQL-like functions designed to handle common expressions.                                   |
| User-defined functions            | Functions that you create in the Developer tool based on transformation language functions. |
| Custom functions                  | Functions that you create with the Custom Function API.                                     |

You can also use unconnected transformations and built-in variables in expressions. For example, you can use an unconnected lookup transformation in an expression.

## Using the Define Function Dialog Box to Define an Expression

When you define a Java expression, you configure the function, create the expression, and generate the code that invokes the expression.

You can define the function and create the expression in the **Define Function** dialog box.

To create an expression function and use the expression in a Java transformation, complete the following high-level tasks:

1. Configure the function that invokes the expression, including the function name, description, and parameters. You use the function parameters when you create the expression.
2. Create the expression syntax and validate the expression.
3. Generate the Java code that invokes the expression.

The Developer places the code on the **Functions** code entry tab.

After you generate the Java code, call the generated function on the appropriate code entry tab to invoke an expression or get a JExpression object, based on whether you use the simple or advanced interface.

**Note:** To validate an expression when you create the expression, you must use the **Define Function** dialog box.



## Step 1. Configure the Function

You configure the function name, description, and input parameters for the Java function that invokes the expression.

Use the following rules and guidelines when you configure the function:

- Use a unique function name that does not conflict with an existing Java function in the transformation or reserved Java keywords.
- You must configure the parameter name, Java datatype, precision, and scale. The input parameters are the values you pass when you call the function in the Java code for the transformation.
- To pass the Date datatype to an expression, use the String datatype for the input parameter.

If an expression returns the Date datatype, you can use the return value as the String datatype in the simple interface and the String or long datatype in the advanced interface.

## Step 2. Create and Validate the Expression

When you create the expression, use the parameters you configured for the function.

You can also use transformation language functions, custom functions, or other user-defined functions in the expression. You can create and validate the expression in the **Define Function** dialog box.

## Step 3. Generate Java Code for the Expression

After you configure the function and function parameters and define and validate the expression, you can generate the Java code that invokes the expression.

The Developer places the generated Java code on the **Functions** code entry tab. Use the generated Java code to call the functions that invoke the expression in the code entry tabs. You can generate the simple or advanced Java code.

After you generate the Java code that invokes an expression, you cannot edit the expression and revalidate it. To modify an expression after you generate the code, you must create the expression again.

## Creating an Expression and Generating Java Code by Using the Define Function Dialog Box

You can create a function that invokes an expression in the **Define Function** dialog box.

Complete the following steps to create a function that invokes an expression:

1. In the Developer, open a Java transformation or create a new Java transformation.
2. On the **Java Code** tab, click **New Function**.  
The **Define Function** dialog box appears.
3. Enter a function name.
4. Optionally, enter a description for the expression.  
Enter up to 2,000 characters.
5. Create the arguments for the function.  
When you create the arguments, configure the argument name, datatype, precision, and scale.
6. On the **Expression** tab, create an expression with the arguments that you created.
7. To validate the expression, click **Validate**.

8. Optionally, enter the expression in the **Expression** box. Then, click **Validate** to validate the expression.
9. To generate Java code by using the advanced interface, select the **Generate Advanced Code** option. Then, click **Generate**.

The Developer generates the function to invoke the expression on the **Functions** code entry tab.

## Java Expression Templates

You can generate Java code for an expression using the simple or advanced Java code for an expression.

The Java code for the expression is generated based on the template for the expression.

The following example shows the template for a Java expression generated for simple Java code:

```
Object function_name (Java datatype x1[,  
                                Java datatype x2 ...] )  
                                throws SDK Exception  
{  
    return (Object)invokeJExpression( String expression,  
                                    new Object [] { x1[, x2, ... ]} );  
}
```

The following example shows the template for a Java expression generated by using the advanced interface:

```
JExpression function_name () throws SDKException  
{  
    JExprParamMetadata params[] = new JExprParamMetadata[number of parameters];  
    params[0] = new JExprParamMetadata (  
        EDataType.STRING, // data type  
        20, // precision  
        0 // scale  
    );  
    ...  
    params[number of parameters - 1] = new JExprParamMetadata (  
        EDataType.STRING, // data type  
        20, // precision  
        0 // scale  
    );  
    ...  
    return defineJExpression(String expression,params);  
}
```

## Working with the Simple Interface

Use the `invokeJExpression` Java API method to invoke an expression in the simple interface.

### invokeJExpression

Invokes an expression and returns the value for the expression.

Use the following syntax:

```
(datatype)invokeJExpression(  
    String expression,  
    Object[] paramMetadataArray);
```

Input parameters for the `invokeJExpression` method are a string value that represents the expression and an array of objects that contain the expression input parameters.

The following table describes the parameters:

| Parameter          | Parameter Type | Datatype | Description  |
|--------------------|----------------|----------|--|
| expression         | Input          | String   | String that represents the expression.                                 |
| paramMetadataArray | Input          | Object[] | Array of objects that contain the input parameters for the expression. |

You can add the `invokeJExpression` method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

Use the following rules and guidelines when you use the `invokeJExpression` method:

- **Return datatype.** The return datatype of the `invokeJExpression` method is an object. You must cast the return value of the function with the appropriate datatype.

You can return values with Integer, Double, String, and byte[] datatypes.

- **Row type.** The row type for return values from the `invokeJExpression` method is INSERT.

To use a different row type for the return value, use the advanced interface.

- **Null values.** If you pass a null value as a parameter or the return value for the `invokeJExpression` method is NULL, the value is treated as a null indicator.

For example, if the return value of an expression is NULL and the return datatype is String, a string is returned with a value of null.

- **Date datatype.** You must convert input parameters with a Date datatype to the String datatype.

To use the string in an expression as a Date datatype, use the `to_date()` function to convert the string to a Date datatype.

Also, you must cast the return type of any expression that returns a Date datatype as a String datatype.

**Note:** You must number the parameters that you pass to the expression consecutively, and start the parameter with the letter x. For example, to pass three parameters to an expression, name the parameters x1, x2, and x3.

## Simple Interface Example

You can define and call expressions that use the `invokeJExpression` API method on the **Helpers** and **On Input** code entry tabs.

The following example shows how to complete a lookup on the NAME and ADDRESS input ports in a Java transformation and assign the return value to the COMPANY\_NAME output port.

Enter the following code on the **On Input** code entry tab:

```
COMPANY_NAME = (String)invokeJExpression(":lkp.my_lookup(X1,X2)", new Object []  
{str1 ,str2} );  
generateRow();
```

# Working with the Advanced Interface

In the advanced interface, you can use object oriented API methods to define, invoke, and get the result of an expression.

The following table describes the classes and API methods that are available in the advanced interface:

| Class or API Method          | Description  |
|------------------------------|--|
| EDatatype class              | Enumerates the datatypes for an expression.  |
| JExprParamMetadata class     | Contains the metadata for each parameter in an expression. Parameter metadata includes datatype, precision, and scale. |
| defineJExpression API method | Defines the expression. Includes expression string and parameters.   |
| invokeJExpression API method | Invokes an expression.   |
| JExpression class            | Contains the methods to create, invoke, get the metadata and get the expression result, and check the return datatype. |

## Invoking an Expression with the Advanced Interface

You can define, invoke, and get the result of an expression by using the advanced interface.

1. On the **Helpers** or **On Input** code entry tab, create an instance of JExprParamMetadata class for each argument for the expression and set the value of the metadata. Optionally, you can instantiate the JExprParamMetadata object in the defineJExpression method.
2. Use the defineJExpression method to get the JExpression object for the expression.
3. On the appropriate code entry tab, invoke the expression with the invokeJExpression method.
4. Check the result of the return value with the isResultNull method.
5. You can get the datatype of the return value or the metadata of the return value with the getResultDataType and getResultMetadata methods.
6. Get the result of the expression by using the appropriate API method. You can use the getInt, getDouble, getStringBuffer, and getBytes methods.

## Rules and Guidelines for Working with the Advanced Interface

When you work with the advanced interfaces, you must be aware of rules and guidelines.

Use the following rules and guidelines:

- If you pass a null value as a parameter or if the result of an expression is null, the value is treated as a null indicator. For example, if the result of an expression is null and the return datatype is String, a string is returned with a value of null. You can check the result of an expression by using the isResultNull method.

- You must convert input parameters with a Date datatype to a String before you can use them in an expression. To use the string in an expression as a Date datatype, use the `to_date()` function to convert the string to a Date datatype.

You can get the result of an expression that returns a Date datatype as a String or long datatype.

To get the result of an expression that returns a Date datatype as a String datatype, use the `getStringBuffer` method. To get the result of an expression that returns a Date datatype as a long datatype, use the `getLong` method.

## EDataType Class

Enumerates the Java datatypes used in expressions. Gets the return datatype of an expression or assign the datatype for a parameter in a `JExprParamMetadata` object. You do not need to instantiate the `EDataType` class.

The following table lists the enumerated values for Java datatypes in expressions:

| Datatype     | Enumerated Value |
|--------------|------------------|
| INT          | 1                |
| DOUBLE       | 2                |
| STRING       | 3                |
| BYTE_ARRAY   | 4                |
| DATE_AS_LONG | 5                |

The following example Java code shows how to use the `EDataType` class to assign a datatype of String to a `JExprParamMetadata` object:

```
JExprParamMetadata params[] = new JExprParamMetadata[2];
params[0] = new JExprParamMetadata (
    EDataType.STRING, // data type
    20, // precision
    0 // scale
);
...
```

## JExprParamMetadata Class

Instantiates an object that represents the parameters for an expression and sets the metadata for the parameters.

You use an array of `JExprParamMetadata` objects as input to the `defineJExpression` method to set the metadata for the input parameters. You can create a instance of the `JExprParamMetadata` object on the **Functions** code entry tab or in `defineJExpression`.

Use the following syntax:

```
JExprParamMetadata paramMetadataArray[] = new JExprParamMetadata[numberOfParameters];
paramMetadataArray[0] = new JExprParamMetadata(datatype, precision, scale);
...
paramMetadataArray[numberOfParameters - 1] = new JExprParamMetadata(datatype, precision,
scale);;
```

The following table describes the arguments:

| Argument  | Argument Type | Argument Datatype | Description                 |
|-----------|---------------|-------------------|-----------------------------|
| datatype  | Input         | EDatatype         | Datatype of the parameter.  |
| precision | Input         | Integer           | Precision of the parameter. |
| scale     | Input         | Integer           | Scale of the parameter.     |

For example, use the following Java code to instantiate an array of two JExprParamMetadata objects with String datatypes, precision of 20, and scale of 0:

```
JExprParamMetadata params[] = new JExprParamMetadata[2];
params[0] = new JExprParamMetadata(EDatatype.STRING, 20, 0);
params[1] = new JExprParamMetadata(EDatatype.STRING, 20, 0);
return defineJExpression(":LKP.LKP_addresslookup(X1,X2)",params);
```

## defineJExpression

Defines an expression, including the expression string and input parameters. Arguments for the defineJExpression method include an array of JExprParamMetadata objects that contains the input parameters and a string value that defines the expression syntax.

Use the following syntax:

```
defineJExpression(
    String expression,
    Object[] paramMetadataArray
);
```

The following table describes the parameters:

| Parameter          | Type  | Datatype | Description   |
|--------------------|-------|----------|---|
| expression         | Input | String   | String that represents the expression.  |
| paramMetadataArray | Input | Object[] | Array of JExprParamMetadata objects that contain the input parameters for the expression. |

You can add the defineJExpression method to the Java code on any code entry tab except the **Imports** and **Functions** tabs.

To use the defineJExpression method, you must instantiate an array of JExprParamMetadata objects that represent the input parameters for the expression. You set the metadata values for the parameters and pass the array as a parameter to the defineJExpression method.

For example, the following Java code creates an expression to look up the value of two strings:

```
JExprParamMetadata params[] = new JExprParamMetadata[2];
params[0] = new JExprParamMetadata(EDatatype.STRING, 20, 0);
params[1] = new JExprParamMetadata(EDatatype.STRING, 20, 0);
defineJExpression(":lkp.mylookup(x1,x2)",params);
```

**Note:** You must number the parameters that you pass to the expression consecutively and start the parameters with the letter x. For example, to pass three parameters to an expression, name the parameters x1, x2, and x3.

## JExpression Class

Contains methods to create and invoke an expression, return the value of an expression, and check the return datatype.

The following table lists the methods in the JExpression class:

| Method Name       | Description   |
|-------------------|---|
| invoke            | Invokes an expression.  |
| getResultDataType | Returns the datatype of the expression result.                    |
| getResultMetadata | Returns the metadata of the expression result.                    |
| isResultNull      | Checks the result value of an expression result.                  |
| getInt            | Returns the value of an expression result as an Integer datatype. |
| getDouble         | Returns the value of an expression result as a Double datatype.   |
| getStringBuffer   | Returns the value of an expression result as a String datatype.   |
| getBytes          | Returns the value of an expression result as a byte[] datatype.   |

## Advanced Interface Example

You can use the advanced interface to create and invoke a lookup expression in a Java transformation.

The following example Java code shows how to create a function that calls an expression and how to invoke the expression to get the return value. This example passes the values for two input ports with a String datatype, NAME and COMPANY, to the function myLookup. The myLookup function uses a lookup expression to look up the value for the ADDRESS output port.

**Note:** This example assumes you have an unconnected lookup transformation in the mapping called LKP\_addresslookup.

Use the following Java code on the **Helpers** tab:

```
JExpression addressLookup() throws SDKException
{
    JExprParamMetadata params[] = new JExprParamMetadata[2];
    params[0] = new JExprParamMetadata (
        EDataType.STRING,      // data type
        50,                    // precision
        0                       // scale
    );
    params[1] = new JExprParamMetadata (
        EDataType.STRING,      // data type
        50,                    // precision
        0                       // scale
    );
    return defineJExpression("LKP.LKP_addresslookup(X1,X2)",params);
}
JExpression lookup = null;
boolean isJExprObjCreated = false;
```

Use the following Java code on the **On Input** tab to invoke the expression and return the value of the ADDRESS port:

```
...
if(!isJExprObjCreated)
```

```

{
    lookup = addressLookup();
    isJExprObjCreated = true;
}
lookup = addressLookup();
lookup.invoke(new Object [] {NAME,COMPANY}, ERowType.INSERT);
EDatatype addressDataType = lookup.getResultDataType();
if (addressDataType == EDatatype.STRING)
{
    ADDRESS = (lookup.getStringBuffer()).toString();
} else {
    logError("Expression result datatype is incorrect.");
}
...

```

## JExpression Class API Reference

The JExpression class contains API methods that let you create and invoke an expression, return the value of an expression, and check the return datatype.

The JExpression class contains the following API methods:

- `getBytes`
- `getDouble`
- `getInt`
- `getLong`
- `getResultDataType`
- `getResultMetadata`
- `getStringBuffer`
- `invoke`
- `isResultNull`

### getBytes

Returns the value of an expression result as a `byte[]` datatype. Gets the result of an expression that encrypts data with the AES\_ENCRYPT function.

Use the following syntax:

```
objectName.getBytes();
```

Use the following example Java code to get the result of an expression that encrypts the binary data using the AES\_ENCRYPT function, where `JExprEncryptData` is a JExpression object:

```
byte[] newBytes = JExprEncryptData.getBytes();
```

### getDouble

Returns the value of an expression result as a `Double` datatype.

Use the following syntax:

```
objectName.getDouble();
```



Use the following example Java code to get the result of an expression that returns a salary value as a double, where JExprSalary is a JExpression object:

```
double salary = JExprSalary.getDouble();
```

## getInt

Returns the value of an expression result as an Integer datatype.

Use the following syntax:

```
objectName.getInt();
```

For example, use the following Java code to get the result of an expression that returns an employee ID number as an integer, where findEmpID is a JExpression object:

```
int empID = findEmpID.getInt();
```

## getLong

Returns the value of an expression result as a Long datatype. Gets the result of an expression that uses a Date datatype.

Use the following syntax:

```
objectName.getLong();
```

Use the following example Java code to get the result of an expression that returns a Date value as a Long datatype, where JExprCurrentDate is a JExpression object:

```
long currDate = JExprCurrentDate.getLong();
```

## getResultDataType

Returns the datatype of an expression result. Returns a value of EDataType.

Use the following syntax:

```
objectName.getResultDataType();
```

Use the following example Java code to invoke an expression and assign the datatype of the result to the variable dataType:

```
myObject.invoke(new Object[] { NAME,COMPANY }, ERowType INSERT);  
EDataType dataType = myObject.getResultDataType();
```

## getResultMetadata

Returns the metadata for an expression result. You can use getResultMetadata to get the precision, scale, and datatype of an expression result. You can assign the metadata of the return value from an expression to a JExprParamMetadata object. Use the getScale, getPrecision, and getDataType object methods to retrieve the result metadata.

Use the following syntax:

```
objectName.getResultMetadata();
```

Use the following example Java code to assign the scale, precision, and datatype of the return value of myObject to variables:

```
JExprParamMetadata myMetadata = myObject.getResultMetadata();  
int scale = myMetadata.getScale();  
int prec = myMetadata.getPrecision();  
int datatype = myMetadata.getDataType();
```

**Note:** The `getDataType` object method returns the integer value of the datatype, as enumerated in `EDataType`.

## getStringBuffer

Returns the value of an expression result as a String datatype.

Use the following syntax:

```
objectName.getStringBuffer();
```

Use the following example Java code to get the result of an expression that returns two concatenated strings, where `JExprConcat` is an `JExpression` object:

```
String result = JExprConcat.getStringBuffer();
```

## invoke

Invokes an expression. Arguments for `invoke` include an object that defines the input parameters and the row type. You must instantiate a `JExpression` object before you can use the `invoke` method. For the row type, use `ERowType.INSERT`, `ERowType.DELETE`, and `ERowType.UPDATE`.

Use the following syntax:

```
objectName.invoke(  
    new Object[] { param1[, ... paramN ]},  
    rowType  
);
```

The following table describes the arguments:

| Argument   | Datatype    | Input/<br>Output | Description   |
|------------|-------------|------------------|---|
| objectName | JExpression | Input            | JExpression object name.  |
| parameters | -           | Input            | Object array that contains the input values for the expression. |

For example, you create a function on the **Functions** code entry tab named `address_lookup()` that returns an `JExpression` object that represents the expression. Use the following code to invoke the expression that uses input ports `NAME` and `COMPANY`:

```
JExpression myObject = address_lookup();  
myObject.invoke(new Object[] { NAME, COMPANY }, ERowType INSERT);
```

## isResultNull

Checks the value of an expression result.

Use the following syntax:

```
objectName.isResultNull();
```

Use the following example Java code to invoke an expression and assign the return value of the expression to the variable `address` if the return value is not null:

```
JExpression myObject = address_lookup();  
myObject.invoke(new Object[] { NAME, COMPANY }, ERowType INSERT);  
if(!myObject.isResultNull()) {  
    String address = myObject.getStringBuffer();  
}
```

## CHAPTER 22

# Joiner Transformation

This chapter includes the following topics:

- [Joiner Transformation Overview, 311](#)
- [Joiner Transformation Advanced Properties, 312](#)
- [Joiner Caches, 313](#)
- [Joiner Transformation Ports, 314](#)
- [Joiner Transformations in Dynamic Mappings, 315](#)
- [Port Selectors in a Joiner Transformation, 315](#)
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- [Join Types, 321](#)
- [Sorted Input for a Joiner Transformation, 324](#)
- [Joining Data from the Same Source, 327](#)
- [Blocking the Source Pipelines, 329](#)
- [Joiner Transformation Performance Tips, 330](#)
- [Rules and Guidelines for a Joiner Transformation, 331](#)

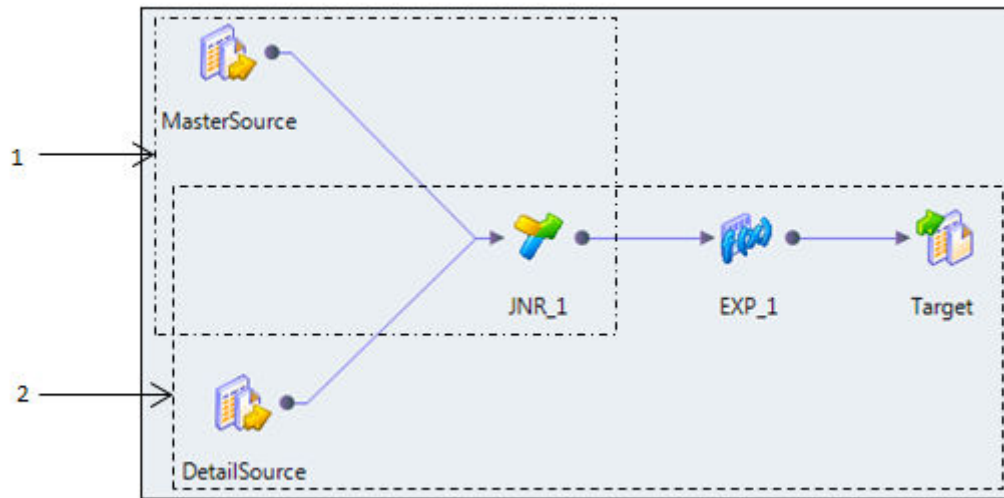
## Joiner Transformation Overview

The Joiner transformation joins source data from two related heterogeneous sources from different locations or from different file systems. You can also join data from the same source. The Joiner transformation is a multiple-group active transformation.

The Joiner transformation joins sources with at least one matching column. The Joiner transformation uses a condition that matches one or more pairs of columns between the two sources.

The two input pipelines include a master pipeline and a detail pipeline or a master and a detail branch. The master pipeline ends at the Joiner transformation, while the detail pipeline continues to the target.

The following figure shows the master and the detail pipelines in a mapping with a Joiner transformation:



1. Master Pipeline
2. Detail Pipeline

To join more than two sources in a mapping, join the output from the Joiner transformation with another source pipeline. Add Joiner transformations to the mapping until you have joined all the source pipelines.

## Joiner Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Joiner Transformation.

Configure the following properties on the **Advanced** tab:

### Joiner Data Cache Size

Amount of memory that the Data Integration Service allocates to the data cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.

### Joiner Index Cache Size

Amount of memory that the Data Integration Service allocates to the index cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.

### Cache Directory

Directory where the Data Integration Service creates the index cache files and data cache files. Verify that the directory exists and contains enough disk space for the cache files.

Enter multiple directories separated by semicolons to increase performance during cache partitioning. Cache partitioning creates a separate cache for each partition that processes the transformation.

Default is the CacheDir system parameter. You can configure another system parameter or user-defined parameter for this property.

**Sorted Input**

Indicates that input data is presorted by groups. Choose Sorted Input to join sorted data. Using sorted input can increase performance.

**Master Sort Order**

Specifies the sort order of the master source data. Choose Ascending if the master source data is in ascending order. If you choose Ascending, also enable sorted input. Default is Auto.

**Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

**RELATED TOPICS:**

- [“Cache Size” on page 68](#)

## Joiner Caches

When you run a mapping that uses a Joiner transformation, the Data Integration Service creates an index cache and data cache in memory to run the transformation. If the Data Integration Service requires more space than available in the memory cache, it stores overflow data in cache files.

When you run a mapping that uses a Joiner transformation, the Data Integration Service reads rows from the master and detail sources concurrently and builds index and data caches based on the master rows. The Data Integration Service performs the join based on the detail source data and the cached master data.

The type of Joiner transformation determines the number of rows that the Data Integration Service stores in the cache.

The following table describes the information that the Data Integration Service stores in the caches for different types of Joiner transformations:

| Joiner Transformation Type          | Index Cache  | Data Cache  |
|-------------------------------------|--|---|
| Unsorted Input                      | Stores all master rows in the join condition with unique index keys.   | Stores all master rows.   |
| Sorted Input with Different Sources | Stores 100 master rows in the join condition with unique index keys.   | Stores master rows that correspond to the rows stored in the index cache. If the master data contains multiple rows with the same key, the Data Integration Service stores more than 100 rows in the data cache.  |
| Sorted Input with the Same Source   | Stores all master or detail rows in the join condition with unique keys. Stores detail rows if the Data Integration Service processes the detail pipeline faster than the master pipeline. Otherwise, stores master rows. The number of rows it stores depends on the processing rates of the master and detail pipelines. If one pipeline processes its rows faster than the other, the Data Integration Service caches all rows that have already been processed. The service keeps the rows cached until the other pipeline finishes processing its rows. | Stores data for the rows stored in the index cache. If the index cache stores keys for the master pipeline, the data cache stores the data for master pipeline. If the index cache stores keys for the detail pipeline, the data cache stores data for detail pipeline. |

## Joiner Transformation Ports

A Joiner transformation has different port types that determine how the Data Integration Service performs the join.

A Joiner transformation has the following port types:

### Master

Ports that link to the master source in the mapping.

### Detail

Ports that link to the detail source in the mapping.

### Dynamic Port

Receives or returns ports in a dynamic mapping. A dynamic port can receive one or more columns from an upstream transformation and create a generated port for each column. A dynamic output port can return one or more generated ports. You can define input rules to determine which columns a dynamic port receives.

You can change a port from a master port to a detail port. You can also change a port from a detail port to a master port. When you change the port type of one port, you change the port type of all ports. Therefore, when you change a master port to a detail port, you change all master ports to detail ports and all detail ports to master ports.

# Joiner Transformations in Dynamic Mappings

You can use a Joiner transformation in a dynamic mapping. You can reference dynamic ports and generated ports in join conditions.

A dynamic mapping is a mapping in which the sources, targets, and transformation logic can change at run time. You can set parameters and rules to change the structure of the data. When you use a Joiner transformation in a dynamic mapping, the structure of the source can change. The input ports and the ports in the join condition change too.

You can perform the following tasks to configure a Joiner transformation in a dynamic mapping:

## **Define dynamic ports.**

Define dynamic ports and generated ports to accommodate the different input columns from a dynamic source. You can include dynamic ports or generated ports in the join condition.

## **Define port selectors.**

Define a port selector that contains the ports to use in the join condition. Configure selection rules that determine the ports to include in the port selector. You can parameterize the port selector to include specific ports at run time.

## **Parameterize the join condition.**

You can parameterize the entire join condition. Configure an expression parameter for each join condition you might need.

For more information about dynamic mappings, see the *Informatica Developer Mapping Guide*.

## Port Selectors in a Joiner Transformation

When the Joiner transformation has generated ports, you need to configure a join condition that is valid when the transformation has different generated ports at run time.

For example, a dynamic mapping includes a Joiner transformation with the following Join condition:

```
CustomerID = CustomerNo
```

CustomerID is a generated port in the Joiner transformation. Since the mapping has a dynamic source, the mapping can run with several different source file formats. The column that contains the customer number has a different name in each source file: CustomerID, CustomerNum, or CustNO.

You can create a port selector in the Joiner transformation to accommodate the different customer column names from the dynamic source. Configure a port selector with a selection rule that includes any port name with the prefix "Cust."

Then, configure the Join condition to include the port selector name instead of the CustomerID column name:

```
Customer_PortSelector = CustomerNo
```

The join condition is valid with any port name that starts with "Cust."

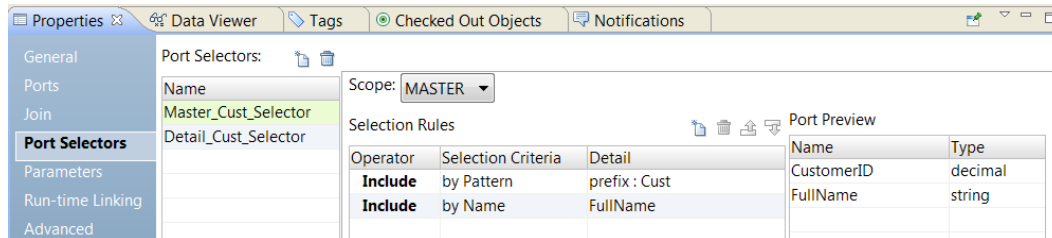
A port selector can have one or more ports in it. The join condition can include multiple ports if the master group and the detail group in the join condition contain the same number of ports.

## Selection Rules

When you configure a port selector, you define selection rules to determine which generated ports to include. The selection rules are similar to the input rules that you can configure for dynamic ports.

A port selector can include ports or generated ports. Configure a port selector on the **Port Selector** tab.

The following image shows the **Port Selector** tab:



Configure the following properties for a port selector:

### Name

Identifies the port selector. You can create multiple port selectors in a transformation and reference them in expressions.

### Scope

Identifies a group of ports that the port selector applies to. Choose a Master or a Detail scope.

### Selection Rules

Determines the ports to include in the port selector. When you create the selection rules, the **Port Preview** panel shows the ports that qualify from the current input ports. These ports might change. Configure the selection rules to accommodate ports from different sources.

You can create selection rules based on the following criteria:

### Operator

Includes or excludes the ports that selection rules return. Default is include. You must include ports before you can exclude ports.

### Selection Criteria

The type of selection rule you want to create. You can create a rule based on the port type or the column name. To include ports based on the column name, search for specific names or search for a pattern of characters in the name.

### Detail

The values to apply to the selection criteria. If the selection criteria is by column name, configure the string or name to search for. If the selection criteria is by port type, select the port types to include.

The following table describes the selection criteria and how to specify the details for the criteria:

| Selection Criteria | Description                           | Detail  |
|--------------------|---------------------------------------|---|
| All                | Includes all ports.                   | No details required.  |
| Name               | Filters ports based on the port name. | Select the port names from a list of values or use a parameter of type Port or Port List. |



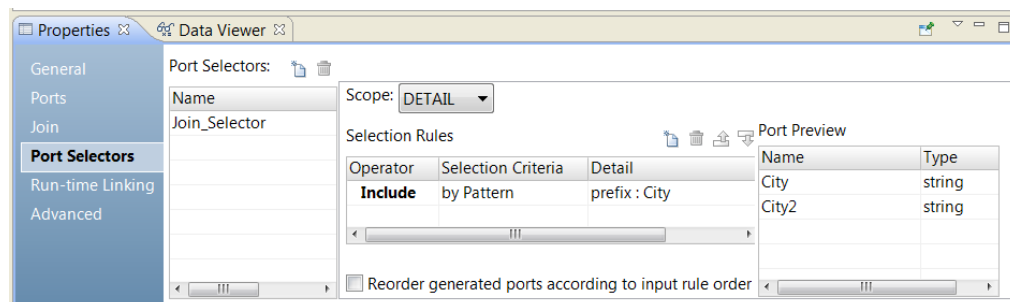
| Selection Criteria | Description   | Detail   |
|--------------------|---|--|
| Type               | Filters ports based on the data type of each port.                              | Select data types from a list.   |
| Pattern            | Filters ports by a string of characters in the name or by a regular expression. | Choose prefix, suffix, or regular expression as the pattern type for the port name. Then, enter a value for the pattern or use a parameter of type String. |

## Creating a Port Selector

Create a port selector to determine which ports to use in a dynamic expression, a lookup condition, or a joiner condition.

1. Click the **Port Selectors** tab.
2. In the **Port Selectors** area, click **New**.  
The Developer tool creates a port selector with a default selection rule that includes all ports.
3. In the **Port Selectors** area, change the port selector name to a unique name.
4. If you are working on the Joiner transformation or the Lookup transformation, choose the scope.  
The available ports change based on the group of ports that you choose.
5. In the **Selection Rules** area, select an **Operator**.
  - Include. Create a rule that includes ports for the port selector. You must include ports before you can exclude ports.
  - Exclude. Create a rule that excludes specific ports from the port selector.
6. Choose the **Selection Criteria**.
  - By Name. Select specific ports by name. You can select the port names from a list of ports in the scope.
  - By Type. Select ports by type. You can select one or more data types.
  - By Pattern. Select ports by a pattern of characters in the port name. You can search with specific characters or you can create a regular expression.

The following image shows the Port Selector tab:



7. Click the **Detail** column.  
The **Input Rule Detail** dialog box appears.
8. Select the values to filter ports by.

- By Name. Choose to create a port list by value or by a parameter. Click **Choose** to select the ports in the list.
- By Type. Select one or more data types from a list. The **Port Preview** area shows ports of the types that you select.
- By Pattern. Choose to search the prefix or suffix of the port name for a specific pattern of characters. Or, choose to create a regular expression to search with. Configure a parameter or configure the pattern to search with.

The **Port Preview** area shows the ports in the port selector as you configure the rules.

9. To reorder the ports in the port selector, select **Reorder generated ports according to the input rule order**.

## Defining a Join Condition

The join condition contains ports from both input sources that the Data Integration Service uses to join two rows.

Depending on the type of join selected, the Data Integration Service either adds the row to the result set or discards the row. The Joiner transformation produces result sets based on the join type, condition, and input data sources.

Before you define a join condition, verify that the master and detail sources are configured for optimal performance. During a mapping run, the Data Integration Service compares each row of the master source against the detail source. To improve performance for an unsorted Joiner transformation, use the source with fewer rows as the master source. To improve performance for a sorted Joiner transformation, use the source with fewer duplicate key values as the master.

Use one or more ports from the input sources of a Joiner transformation in the join condition. Additional ports increase the time necessary to join two sources. The order of the ports in the condition can impact the performance of the Joiner transformation. If you use multiple ports in the join condition, the Data Integration Service compares the ports in the order you specify.

If you join Char and Varchar datatypes, the Data Integration Service counts any spaces that pad Char values as part of the string:

```
Char(40) = "abcd"
Varchar(40) = "abcd"
```

The Char value is "abcd" padded with 36 blank spaces, and the Data Integration Service does not join the two fields because the Char field contains trailing spaces.

**Note:** The Joiner transformation does not match null values. For example, if both EMP\_ID1 and EMP\_ID2 contain a row with a null value, the Data Integration Service does not consider them a match and does not join the two rows. To join rows with null values, replace null input with default values, and then join on the default values.

You can define a simple or advanced condition type. You can also define an expression parameter. An expression parameter is a parameter that contains the join expression. You can change the parameter value at run time with a mapping parameter.

## Simple Condition Type

Define a simple condition type for a sorted or unsorted Joiner transformation.

A simple condition includes one or more conditions that compare the specified master and detail sources. A simple condition must use the following format:

```
<master_port> operator <detail_port>
```

For a sorted Joiner transformation, the condition must use the equality operator.

For an unsorted Joiner transformation, the condition can use any of the following operators: =, !=, >, >=, <, <=.

For example, if two sources with tables called EMPLOYEE\_AGE and EMPLOYEE\_POSITION both contain employee ID numbers, the following condition matches rows with employees listed in both sources:

```
EMP_ID1 = EMP_ID2
```

The Developer tool validates datatypes in a simple condition. Both ports in the condition must have the same datatype. If you need to use two ports in the condition with non-matching datatypes, convert the datatypes so they match.

You can configure a list of join conditions in a simple condition. When you configure multiple join conditions, all the conditions must be true to make the join.

For example, you might configure the following statements in a simple condition:

```
StoreID = StoreNO  
Dept    = Department  
Salary  > Commission
```

If you view the same statements as an Advanced Condition, the join condition appears as the following expression:

```
StoreID = StoreNO AND Dept = Department AND (Salary > Commission)
```

## Advanced Condition Type

Define an advanced condition type for an unsorted Joiner transformation.

An advanced condition can include any expression that evaluates to a Boolean or numeric value. An advanced condition can include any of the following operators: =, !=, >, >=, <, <=.

You can enter a constant for the join condition. The numeric equivalent of FALSE is zero (0). Any non zero value is the equivalent of TRUE. For example, the transformation contains a port named NUMBER\_OF\_UNITS with a numeric data type. You configure a filter condition to return FALSE if the value of NUMBER\_OF\_UNITS equals zero. Otherwise, the condition returns TRUE.

**Note:** You cannot use a single dynamic port or a port selector as a boolean value for a join condition.

To enter an expression in the join condition, choose the Advanced condition type on the **Join** tab. Use the Expression Editor to include ports, parameters, expressions, port selectors, and operators in the condition. You can use generated ports. You can enter a single port in the Expression Editor if the port type is numeric. However, you cannot enter one port selector as an expression.

For example, you want to join sources by matching an employee's full name. The master source includes a FirstName and a LastName port. The detail source includes a FullName port. Define the following condition to concatenate the master ports and match the full name in both sources:

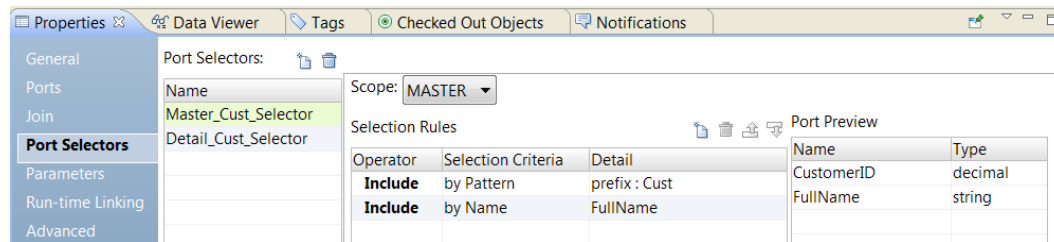
```
CONCAT(FirstName, LastName) = FullName
```

## Port Selectors in Join Conditions

You can include port selectors in a join condition. The join condition must reference a port selector from the master group and a port selector from the detail group.

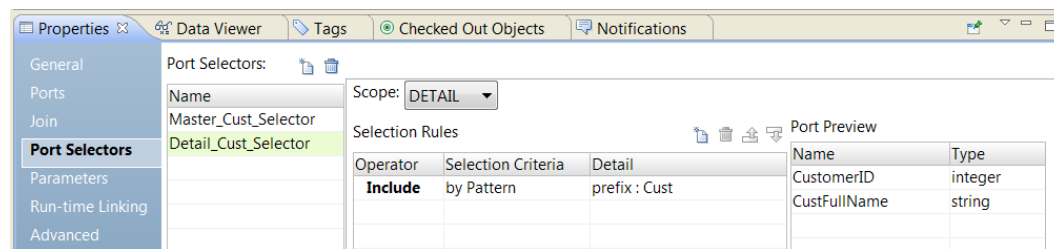
For example, the Joiner transformation has dynamic ports. You might need to compare multiple generated ports in the join condition.

The following image shows the fields in the port selector for the master group:



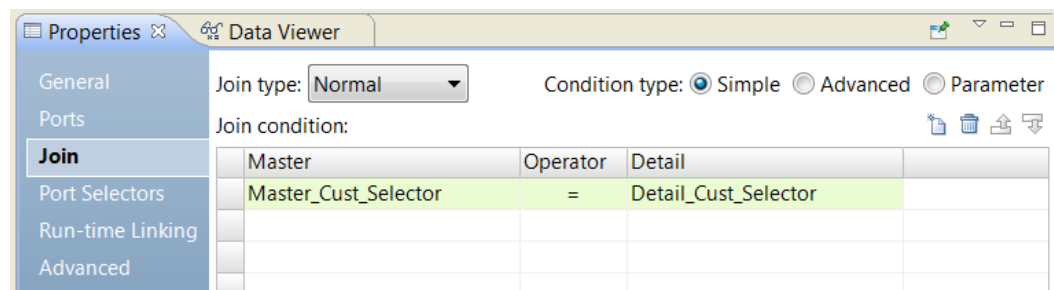
The Master\_Cust\_Selector contains has the CustomerID and FullName ports.

The following image shows the fields in the port selector for the detail group:



The Detail\_Cust\_Selector contains has the CustomerNo and CustFullName ports. These ports have the prefix Cust.

Create the following simple join condition:



The join condition compares each port in the Master\_Cust\_Selector to the Detail\_Cust\_Selector. The join condition is: `CustomerID = CustomerNo AND FullName = CustFullName`.

Each port selector must contain the same number of ports. The ports must be the same type.

**Note:** If you change the scope of a port selector and a simple type join condition is no longer valid, the Developer tool might switch the condition type to advanced. You can switch the join condition type back to a simple type on the **Join** tab.

## Dynamic Ports in Join Conditions

You can reference a dynamic port in a port selector.

A dynamic port can contain one or more generated ports. If the join condition contains dynamic ports, the number of master ports must be the same as the number of detail ports.

For example a dynamic port A has 2 generated ports:

```
CustomerID  
OrderID
```

Dynamic port B also has 2 generated ports:

```
CustomerNo  
OrderNo
```

The following join condition is valid:

DynamicPortA = DynamicPortB

The join condition expands to the following expression:

```
CustomerID = CustomerNo AND OrderID = OrderNo
```

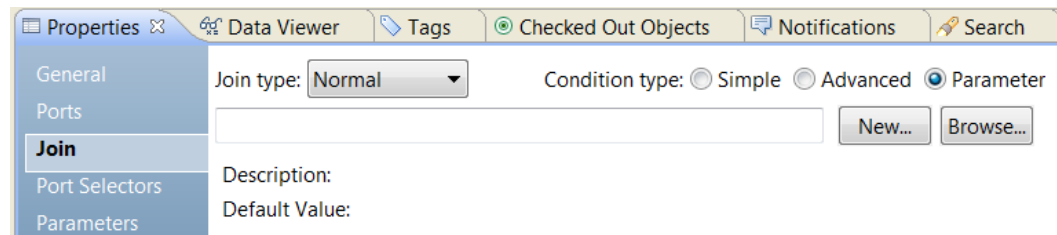
You can reference a port selector and a dynamic port in a join condition if the port selector contains the same number of ports as the dynamic port.

## Expression Parameter

You can define an expression parameter that contains a join condition. You can choose the parameter as the join condition in the Joiner transformation.

To use a parameter for the join condition, select the parameter condition type on the Join tab.

The following image shows where to select the parameter condition type:



You can browse for an existing parameter or you can create a parameter. To create a parameter, click **New** and define the parameter. Create the expression in the expression editor.

**Note:** An expression parameter cannot contain other parameters. If you embed a parameter in an expression parameter, the Data Integration Service issues a runtime validation error.

## Join Types

In a Joiner transformation, the join can originate from different types of sources.

The Joiner transformation supports the following types of join:

- Normal

- Master outer
- Detail outer
- Full outer

**Note:** A normal or master outer join performs faster than a full outer or detail outer join.

If a result set includes fields that do not contain data in either of the sources, the Joiner transformation populates the empty fields with null values. If you know that a field returns NULL and you do not want to insert NULLs in the target, you can set a default value for the corresponding port.

## Normal Join

With a normal join, the Data Integration Service discards all rows of data from the master and detail source that do not match, based on the condition.

For example, you have two sources of data for auto parts called PARTS\_SIZE and PARTS\_COLOR.

The PARTS\_SIZE data source is the master source and contains the following data:

| PART_ID1 | DESCRIPTION | SIZE   |
|----------|-------------|--------|
| 1        | Seat Cover  | Large  |
| 2        | Ash Tray    | Small  |
| 3        | Floor Mat   | Medium |

The PARTS\_COLOR data source is the detail source and contains the following data:

| PART_ID2 | DESCRIPTION | COLOR  |
|----------|-------------|--------|
| 1        | Seat Cover  | Blue   |
| 3        | Floor Mat   | Black  |
| 4        | Fuzzy Dice  | Yellow |

To join the two tables by matching the PART\_IDs in both sources, you set the condition as follows:

```
PART_ID1 = PART_ID2
```

When you join these tables with a normal join, the result set includes the following data:

| PART_ID | DESCRIPTION | SIZE   | COLOR |
|---------|-------------|--------|-------|
| 1       | Seat Cover  | Large  | Blue  |
| 3       | Floor Mat   | Medium | Black |

The following example shows the equivalent SQL statement:

```
SELECT * FROM PARTS_SIZE, PARTS_COLOR WHERE PARTS_SIZE.PART_ID1 = PARTS_COLOR.PART_ID2
```

## Master Outer Join

A master outer join keeps all rows of data from the detail source and the matching rows from the master source. It discards the unmatched rows from the master source.

When you join the sample tables with a master outer join and the same condition, the result set includes the following data:

| PART_ID | DESCRIPTION | SIZE   | COLOR  |
|---------|-------------|--------|--------|
| 1       | Seat Cover  | Large  | Blue   |
| 3       | Floor Mat   | Medium | Black  |
| 4       | Fuzzy Dice  | NULL   | Yellow |

Because no size is specified for the Fuzzy Dice, the Data Integration Service populates the field with a NULL.

The following example shows the equivalent SQL statement:

```
SELECT * FROM PARTS_SIZE RIGHT OUTER JOIN PARTS_COLOR ON (PARTS_COLOR.PART_ID2 = PARTS_SIZE.PART_ID1)
```

## Detail Outer Join

A detail outer join keeps all rows of data from the master source and the matching rows from the detail source. It discards the unmatched rows from the detail source.

When you join the sample tables with a detail outer join and the same condition, the result set includes the following data:

| PART_ID | DESCRIPTION | SIZE   | COLOR |
|---------|-------------|--------|-------|
| 1       | Seat Cover  | Large  | Blue  |
| 2       | Ash Tray    | Small  | NULL  |
| 3       | Floor Mat   | Medium | Black |

Because no color is specified for Ash Tray, the Data Integration Service populates the field with NULL.

The following example shows the equivalent SQL statement:

```
SELECT * FROM PARTS_SIZE LEFT OUTER JOIN PARTS_COLOR ON (PARTS_SIZE.PART_ID1 = PARTS_COLOR.PART_ID2)
```

## Full Outer Join

A full outer join keeps all rows of data from both the master and detail sources.

When you join the sample tables with a full outer join and the same condition, the result set includes the following data:

| PARTED | DESCRIPTION | SIZE   | Color |
|--------|-------------|--------|-------|
| 1      | Seat Cover  | Large  | Blue  |
| 2      | Ash Tray    | Small  | NULL  |
| 3      | Floor Mat   | Medium | Black |

| PARTED | DESCRIPTION | SIZE | Color  |
|--------|-------------|------|--------|
| 4      | Fuzzy Dice  | NULL | Yellow |

Because no color is specified for the Ash Tray and no size is specified for the Fuzzy Dice, the Data Integration Service populates the fields with NULL.

The following example shows the equivalent SQL statement:

```
SELECT * FROM PARTS_SIZE FULL OUTER JOIN PARTS_COLOR ON (PARTS_SIZE.PART_ID1 =
PARTS_COLOR.PART_ID2)
```

## Sorted Input for a Joiner Transformation

You can increase Joiner transformation performance with the sorted input option. You use sorted input when the data is sorted.

When you configure the Joiner transformation to use sorted data, the Data Integration Service increases performance by minimizing disk input and output. You see the greatest performance increase when you work with large data sets.

To configure a mapping to use sorted data, you establish and maintain a sort order in the mapping so the Data Integration Service can use the sorted data when it processes the Joiner transformation. Complete the following steps to configure the mapping:

1. Configure the sort order of the data you want to join.
2. Add transformations that maintain the order of the sorted data.
3. Configure the Joiner transformation to use sorted data and configure the join condition to use the sort origin ports. The sort origin represents the source of the sorted data.

## Configuring the Sort Order

Configure the sort order to ensure that the Data Integration Service passes sorted data to the Joiner transformation.

To configure the sort order, use one of the following methods:

- Use sorted flat files. When the flat files contain sorted data, verify that the order of the sort columns match in each source file.
- Use sorted relational data. Use sorted ports in the relational data object to sort columns from the source database. Configure the order of the sorted ports the same in each relational data object.
- Use a Sorter transformation to sort relational or flat file data. Place a Sorter transformation in the master and detail pipelines. Configure each Sorter transformation to use the same order of the sort key ports and the sort order direction.

If you pass unsorted or incorrectly sorted data to a Joiner transformation configured to use sorted data, the mapping run fails. The Data Integration Service logs the error in the log file.

## Adding Transformations to the Mapping

Add transformations to the mapping that maintain the order of the sorted data in a Joiner transformation.

You can place the Joiner transformation directly after the sort origin to maintain sorted data.



When you add transformations between the sort origin and the Joiner transformation, use the following guidelines to maintain sorted data:

- Do not place any of the following transformations between the sort origin and the Joiner transformation:
  - Rank
  - Union
  - Unsorted Aggregator
  - Maplet that contains one the preceding transformations
- You can place a sorted Aggregator transformation between the sort origin and the Joiner transformation if you use the following guidelines:
  - Configure the Aggregator transformation for sorted input.
  - Use the same ports for the group by columns in the Aggregator transformation as the ports at the sort origin.
  - The group by ports must be in the same order as the ports at the sort origin.
- When you join the result set of a Joiner transformation with another pipeline, verify that the data output from the first Joiner transformation is sorted.

## Rules and Guidelines for Join Conditions

Certain rules and guidelines apply when you create join conditions for a sorted Joiner transformation.

Use the following guidelines when you create join conditions:

- You must define a simple condition type that uses the equality operator.
- If you use a sorted Aggregator transformation between the sort origin and the Joiner transformation, treat the sorted Aggregator transformation as the sort origin when you define the join condition.
- The ports you use in the join condition must match the ports at the sort origin.
- When you configure multiple join conditions, the ports in the first join condition must match the first ports at the sort origin.
- When you configure multiple conditions, the order of the conditions must match the order of the ports at the sort origin, and you must not skip any ports.
- The number of sorted ports in the sort origin can be greater than or equal to the number of ports at the join condition.
- If you join ports with Decimal data types, the precision of each port must belong to the same precision range.

You can use one of the following valid precision ranges:

- Decimal 0-18
- Decimal 19-28
- Decimal 29-38
- Decimal 39 and over

For example, if you define the condition `DecimalA = DecimalB` where `DecimalA` has precision 15 and `DecimalB` has precision 25, the condition is not valid.

## Example of a Join Condition and Sort Order

This example shows a Joiner transformation that join the master and detail pipelines with sorted ports.

You configure Sorter transformations in the master and detail pipelines with the following sorted ports:

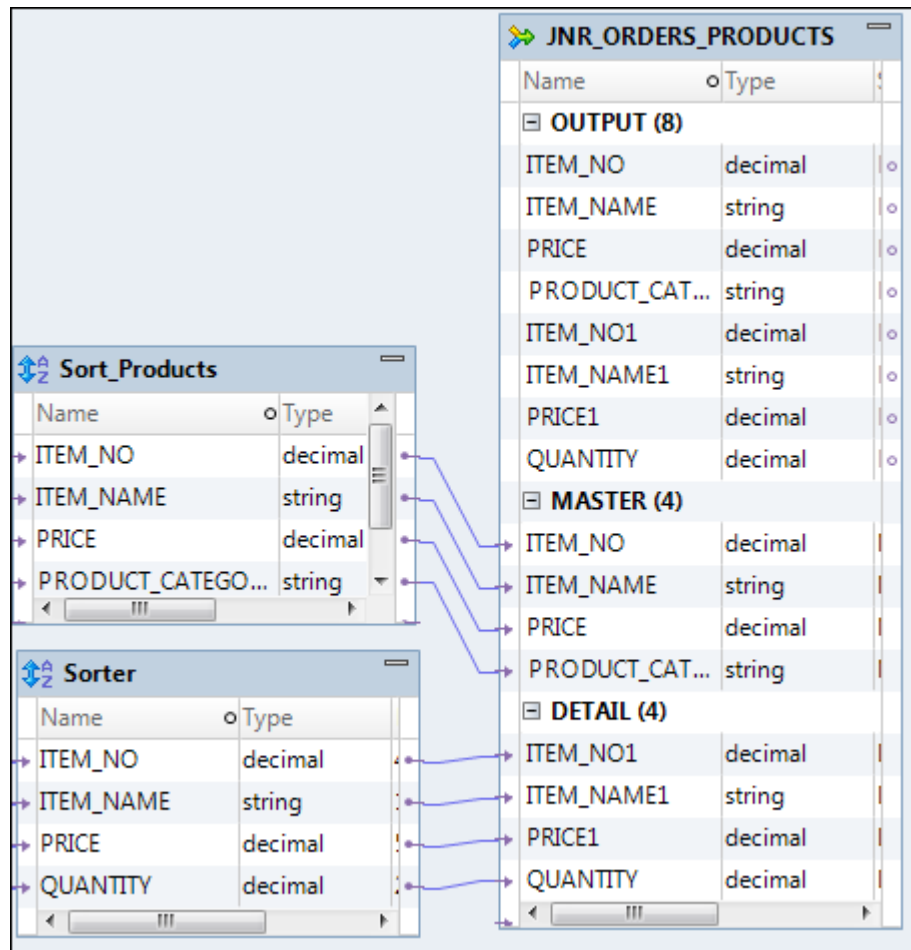
- ITEM\_NO
- ITEM\_NAME
- PRICE

When you configure the join condition, use the following guidelines to maintain sort order:

- You must use ITEM\_NO in the first join condition.
- If you add a second join condition, you must use ITEM\_NAME.
- If you want to use PRICE in a join condition, you must also use ITEM\_NAME in the second join condition.

If you skip ITEM\_NAME and join on ITEM\_NO and PRICE, you lose the sort order and the Data Integration Service fails the mapping run.

The following figure shows a mapping configured to sort and join on the ports ITEM\_NO, ITEM\_NAME, and PRICE:



When you use the Joiner transformation to join the master and detail pipelines, you can configure any one of the following join conditions:

```
ITEM_NO = ITEM_NO
```

or

```
ITEM_NO = ITEM_NO1  
ITEM_NAME = ITEM_NAME1
```

or

```
ITEM_NO = ITEM_NO1  
ITEM_NAME = ITEM_NAME1  
PRICE = PRICE1
```

## Joining Data from the Same Source

You can join data from the same source if you want to perform a calculation on part of the data and join the transformed data with the original data.

When you join data from the same source, you can maintain the original data and transform parts of that data within one mapping. You can join data from the same source in the following ways:

- Join two branches of the same pipeline.
- Join two instances of the same source.

### Joining Two Branches of the Same Pipeline

When you join data from the same source, you can create two branches of the pipeline.

When you branch a pipeline, you must add a transformation between the mapping input and the Joiner transformation in at least one branch of the pipeline. You must join sorted data and configure the Joiner transformation for sorted input.

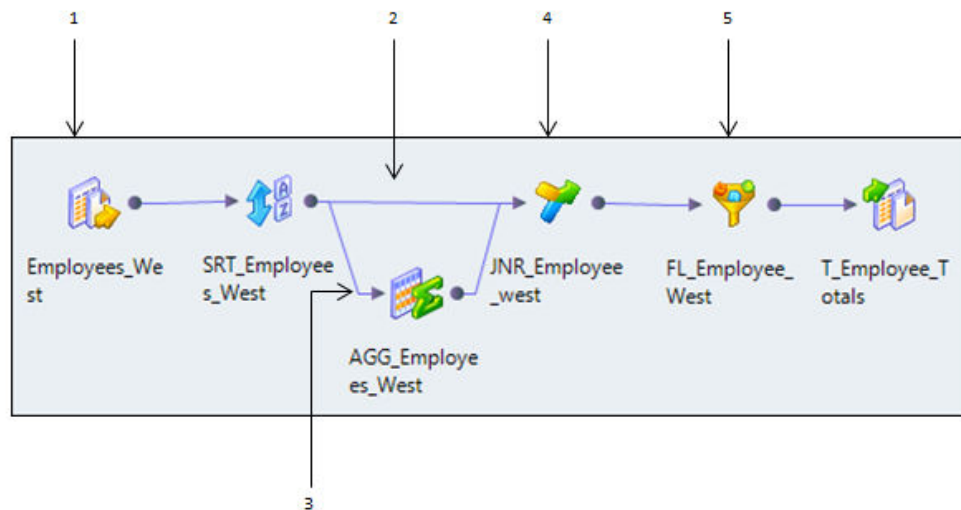
For example, you have a source with the following ports:

- Employee
- Department
- Total Sales

In the target, you want to view the employees who generated sales that were greater than the average sales for their departments. To do this, you create a mapping with the following transformations:

- Sorter transformation. Sorts the data.
- Sorted Aggregator transformation. Averages the sales data and group by department. When you perform this aggregation, you lose the data for individual employees. To maintain employee data, you must pass a branch of the pipeline to the Aggregator transformation and pass a branch with the same data to the Joiner transformation to maintain the original data. When you join both branches of the pipeline, you join the aggregated data with the original data.
- Sorted Joiner transformation. Joins the sorted aggregated data with the original data.

- Filter transformation. Compares the average sales data against sales data for each employee and filter out employees with less than above average sales.



1. Employees\_West Source
2. Pipeline branch 1
3. Pipeline Branch 2
4. Sorted Joiner transformation
5. Filter out employees with less than above average sales

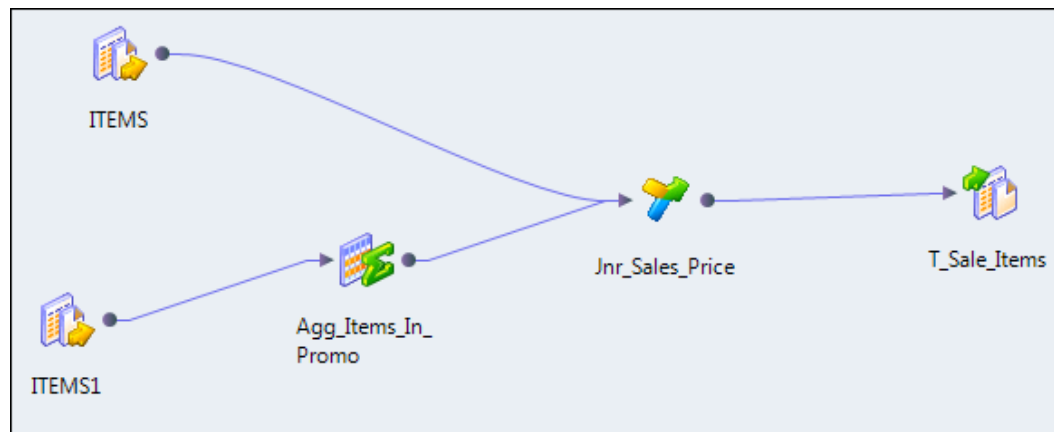
Joining two branches might decrease performance if the Joiner transformation receives data from one branch much later than the other branch. The Joiner transformation caches all the data from the first branch and writes the cache to disk if the cache fills. The Joiner transformation must then read the data from disk when it receives the data from the second branch.

## Joining Two Instances of the Same Source

You can join data from the same source by creating a second instance of the source.

After you create the second source instance, you can join the pipelines from the two source instances. If you want to join unsorted data, you must create two instances of the same source and join the pipelines.

The following figure shows two instances of the same source joined with a Joiner transformation:



When you join two instances of the same source, the Data Integration Service reads the source data for each source instance. Performance can be slower than joining two branches of a pipeline.

## Guidelines for Joining Data from the Same Source

Certain guidelines apply when you decide whether to join branches of a pipeline or join two instances of a source.

Use the following guidelines when you decide whether to join branches of a pipeline or join two instances of a source:

- Join two branches of a pipeline when you have a large source or if you can read the source data only once.
- Join two branches of a pipeline when you use sorted data. If the source data is unsorted and you use a Sorter transformation to sort the data, branch the pipeline after you sort the data.
- Join two instances of a source when you need to add a blocking transformation to the pipeline between the source and the Joiner transformation.
- Join two instances of a source if one pipeline may process slower than the other pipeline.
- Join two instances of a source if you need to join unsorted data.

## Blocking the Source Pipelines

When you run a mapping with a Joiner transformation, the Data Integration Service blocks and unblocks the source data based on the mapping configuration and whether you configure the Joiner transformation for sorted input.

### Unsorted Joiner Transformation

When the Data Integration Service processes an unsorted Joiner transformation, it reads all master rows before it reads the detail rows. The Data Integration Service blocks the detail source while it caches rows from the master source.

After the Data Integration Service reads and caches all master rows, it unblocks the detail source and reads the detail rows. Some mappings with unsorted Joiner transformations violate data flow validation.

### Sorted Joiner Transformation

When the Data Integration Service processes a sorted Joiner transformation, it blocks data based on the mapping configuration. Blocking logic is possible if master and detail input to the Joiner transformation originate from different sources.

The Data Integration Service uses blocking logic to process the Joiner transformation if it can do so without blocking all sources in a target load order group simultaneously. Otherwise, it does not use blocking logic. Instead, it stores more rows in the cache.

When the Data Integration Service can use blocking logic to process the Joiner transformation, it stores fewer rows in the cache, increasing performance.

## Caching Master Rows

When the Data Integration Service processes a Joiner transformation, it reads rows from both sources concurrently and builds the index and data cache based on the master rows.

The Data Integration Service then performs the join based on the detail source data and the cache data. The number of rows the Data Integration Service stores in the cache depends on the source data and whether you configure the Joiner transformation for sorted input.

To increase performance for an unsorted Joiner transformation, use the source with fewer rows as the master source. To increase performance for a sorted Joiner transformation, use the source with fewer duplicate key values as the master.

# Joiner Transformation Performance Tips

Use tips to increase Joiner transformation performance.

Joiner transformations can slow performance because they need additional space at run time to hold intermediary results. You can view Joiner performance counter information to determine whether you need to optimize the Joiner transformations.

Use the following tips to increase performance with the Joiner transformation:

### **Designate the master source as the source with fewer duplicate key values.**

When the Data Integration Service processes a sorted Joiner transformation, it caches rows for one hundred unique keys at a time. If the master source contains many rows with the same key value, the Data Integration Service must cache more rows, which can decrease performance.

### **Designate the master source as the source with fewer rows.**

The Joiner transformation compares each row of the detail source against the master source. The fewer rows in the master, the fewer iterations of the join comparison occur, which speeds the join process.

### **Perform joins in a database when possible.**

Performing a join in a database is faster than performing a join in during the mapping run. The type of database join that you use can affect performance. Normal joins are faster than outer joins and result in fewer rows. Sometimes, you cannot perform the join in the database, such as joining tables from two different databases or flat file systems.

### **Join sorted data when possible.**

Configure the Joiner transformation to use sorted input. The Data Integration Service increases performance by minimizing disk input and disk output. The greatest performance increase occurs when you work with large data sets. For an unsorted Joiner transformation, designate the source with fewer rows as the master source.

### **Optimize the join condition.**

The Data Integration Service attempts to decrease the size of the data set of one join operand by reading the rows from the smaller group, finding the matching rows in the larger group, and then performing the join operation. Decreasing the size of the data set improves mapping performance because the Data Integration Service no longer reads unnecessary rows from the larger group source. The Data Integration Service moves the join condition to the larger group source and reads only the rows that match the smaller group.

**Use the semi-join optimization method.**

Use the semi-join optimization method to improve mapping performance when one input group has many more rows than the other and when the larger group has many rows with no match in the smaller group based on the join condition.

## Rules and Guidelines for a Joiner Transformation

Certain rules and guidelines apply when you use a Joiner transformation.

The Joiner transformation accepts input from most transformations. However, you cannot use a Joiner transformation when either input pipeline contains an Update Strategy transformation.

## CHAPTER 23

# Key Generator Transformation

This chapter includes the following topics:

- [Key Generator Transformation Overview, 332](#)
- [Soundex Strategy, 333](#)
- [String Strategy, 333](#)
- [NYSIIS Strategy, 334](#)
- [Key Generator Output Ports, 334](#)
- [Configuring a Grouping Strategy, 335](#)
- [Key Creation Properties, 335](#)
- [Key Generator Transformation Advanced Properties, 336](#)

## Key Generator Transformation Overview

The Key Generator transformation is an active transformation that organizes records into groups based on data values in a column that you select. Use this transformation to sort records before passing them to the Match transformation.

The Key Generator transformation uses a grouping strategy to create group keys for the column you select. The strategies are String, Soundex, and NYSIIS. Records with common values in the selected field have a common group key value. The Match transformation processes records with common group key values together. This enables faster duplicate analysis in the Match transformation.

The number of comparison operations that the Match transformation must perform grows exponentially with the number of records in the data set. This exponential growth can consume significant amounts of computing resources. By creating group keys, the Key Generator transformation enables the Match transformation to compare records in smaller groups, which reduces processing time.

When you perform field matching, select a column for group key generation that is likely to provide useful groups for your matching needs. For example, a Surname column is likely to provide more meaningful group key data than a Forename column. But do not use the Surname column if you intend to select that column for duplicate analysis in the Match transformation.

The Key Generator transformation can also create a unique ID for each record. Each record that enters the Match transformation must contain a unique ID. Use the Key Generator transformation to create IDs for your data if none exist.



# Soundex Strategy

The Soundex strategy analyzes words and creates group keys from codes that represent word pronunciation.

Soundex codes begin with the first letter in the word and followed by a series of numbers representing successive consonants. Use the Soundex strategy to assign the same code to words that sound similar. Configure the Soundex depth to define the number of alphanumeric characters that the strategy returns.

This strategy focuses on the sound of words instead of spelling, it can group alternate spellings and minor spelling variations. For example, the Soundex codes for `Smyth` and `Smith` are the same.

The Soundex strategy can also group mispronounced words. For example, the Soundex codes for the names `Edmonton` and `Edmonson` are the same.

## Soundex Strategy Properties

Configure the Soundex strategy properties to determine the Soundex settings that the Key Generator transformation uses to create a group key.

The following table describes the Soundex strategy properties:

| Property             | Description  |
|----------------------|--|
| <b>Soundex Depth</b> | Determines the number of alphanumeric characters returned by the Soundex strategy. The default depth is 3. This depth creates a Soundex code consisting of the first letter in the string and two numbers that represent the next two distinct consonant sounds. |

### RELATED TOPICS:

- [“String Strategy Properties” on page 334](#)
- [“Key Creation Properties” on page 335](#)
- [“Configuring a Grouping Strategy” on page 335](#)

# String Strategy

The String strategy creates group keys from substrings in input data.

You can specify the length and location of a substring within the input column. For example, you can configure this strategy to create a key from the first four characters in the input string.

## String Strategy Properties

Configure the String strategy properties to determine the substrings that the Key Generator transformation uses to create a group key.

The following table describes the String strategy properties:

| Property                | Description   |
|-------------------------|---|
| <b>Start from left</b>  | Configures the transformation to read the input field from left to right.   |
| <b>Start from right</b> | Configures the transformation to read the input field from right to left.   |
| <b>Start position</b>   | Specifies the number of characters to skip. For example, if you enter 3 for the <b>Start position</b> , the substring starts at the fourth character in the input field, starting from the side that you specify. |
| <b>Length</b>           | Specifies the length of the string to use as a group key. Enter 0 to use the whole input field.   |

### RELATED TOPICS:

- [“Soundex Strategy Properties” on page 333](#)
- [“Key Creation Properties” on page 335](#)
- [“Configuring a Grouping Strategy” on page 335](#)

## NYSIIS Strategy

The NYSIIS strategy analyzes words and creates group keys from letters that represent word pronunciation.

While the Soundex strategy only considers the first vowel in a string, the NYSIIS strategy analyzes vowels throughout a string. The NYSIIS strategy converts all letters to one of six characters, and converts most vowels to the letter A.

## Key Generator Output Ports

The Key Generator transformation output ports create IDs and group keys that the Match transformation uses to process records.

The following table describes the output ports for the Key Generator transformation:

| Property          | Description   |
|-------------------|---|
| <b>SequenceID</b> | Creates an ID that identifies each record in the source data set.             |
| <b>GroupKey</b>   | Creates the group keys that the Match transformation uses to process records. |

When you create a reusable Key Generator transformation, use the **Overview** view to view the ports. When you add a nonreusable transformation to a mapping, use the **Ports** tab of the **Properties** view to view the ports.

# Configuring a Grouping Strategy

To configure a grouping strategy, edit the properties in the **Strategies** view.

Before you configure a Key Generator strategy, add input ports to the Key Generator transformation.

1. Select the **Strategies** view.
2. Click the **New** button.
3. Select a grouping strategy.
4. Click **OK**.
5. In the **Inputs** column, select an input port.
6. Configure the strategy properties by clicking the selection arrow in the properties field.
7. Configure the key creation properties.

## RELATED TOPICS:

- [“Soundex Strategy Properties” on page 333](#)
- [“String Strategy Properties” on page 334](#)
- [“Key Creation Properties” on page 335](#)

# Key Creation Properties

Configure the key creation properties appropriate for the data you analyze.

The following table describes the key creation properties:

| Property                                   | Description  |
|--|--|
| <b>Sort results</b>                        | Sorts the Key Generator transformation output using the GroupKey field. For field matching operations, you must select this option or verify that you provide the Match transformation with sorted data. Do not select this option for identity matching operations. |
| <b>Generate sequence key automatically</b> | Generates a sequence key field using the order of input data.  |
| <b>Use field as sequence key</b>           | Generates a sequence field for a column that you specify.  |
| <b>Sequence key field</b>                  | Specifies the name of the sequence key field.  |

## RELATED TOPICS:

- [“Soundex Strategy Properties” on page 333](#)
- [“String Strategy Properties” on page 334](#)
- [“Configuring a Grouping Strategy” on page 335](#)

# Key Generator Transformation Advanced Properties

The Key Generator transformation contains advanced properties that determine the cache memory behavior and the tracing level.

You can configure the following advanced properties:

## Cache File Directory

Specifies the directory to which the Data Integration Service writes temporary data for the current transformation. The Data Integration Service writes temporary files to the directory when the volume of input data is greater than the available system memory. The Data Integration Service deletes the temporary files after the mapping runs.

You can enter a directory path on the property, or you can use a parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory. The default value is the CacheDir system parameter.

## Cache File Size

Determines the amount of system memory that the Data Integration Service uses to sort the input data on the transformation. You can use a parameter to specify the cache file size.

Before it sorts the data, the Data Integration Service allocates the amount of memory that you specify. If the sort operation generates a greater amount of data, the Data Integration Service writes the excess data to the cache directory. If the sort operation requires more memory than the system memory and the file storage can provide, the mapping fails.

If you do not specify a cache file size, the transformation applies the maximum memory value on the execution options of the Data Integration Service.

**Note:** If you enter a value of 65536 or higher, the transformation reads the value in bytes. If you enter a lower value, the transformation reads the value in megabytes.

## Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 24

# Labeler Transformation

This chapter includes the following topics:

- [Labeler Transformation Overview, 337](#)
- [When to Use a Labeler Transformation, 338](#)
- [Reference Data Use in the Labeler Transformation, 339](#)
- [Labeler Transformation Strategies, 341](#)
- [Labeler Transformation Ports, 342](#)
- [Character Labeling Properties, 342](#)
- [Token Labeling Properties, 344](#)
- [Configuring a Character Labeling Strategy, 346](#)
- [Configuring a Token Labeling Strategy, 347](#)
- [Labeler Transformation Advanced Properties, 348](#)

## Labeler Transformation Overview

The Labeler transformation is a passive transformation that analyzes input port fields and writes text labels that describe the data in each field.

You use a Labeler transformation when you want to understand the types of information that a port contains. Use a Labeler transformation when you do not know the types of information on a port, or when you want to identify records that do not contain the expected types of information on a port.

A label is a string one or more characters that describes an input string. You configure the Labeler transformation to assign labels to input strings based on the data that each string contain.

When you configure the transformation, you specify the types of character or string to search for, and you specify the label that the transformation writes as output when it finds the associated character or string. You enter the character and string types to search for, and the labels to use, when you configure a labeling operation. Or, you use reference data objects to specify the characters, strings, and labels.

You configure the transformation to perform character labeling or token labeling:

### **Character Labeling**

Writes a label that describes the character structure of the input string, including punctuation and spaces. The transformation writes a single label for each row in a column. For example, the Labeler transformation can label the ZIP Code 10028 as "nnnnn," where "n" stands for a numeric character.

### Token Labeling

Writes a label that describes the type of information in the input string. The transformation writes a label for each token identified in the input data. For example, you can configure the Labeler transformation to label the string "John J. Smith" with the tokens "Word Init Word."

A token is a delimited value in an input string.

When the Labeler finds a character or string that matches a label that you specify, it writes the label name to a new output port.

The Labeler transformation uses reference data to identify characters and tokens. You select the reference data object when you configure an operation in a Labeler strategy.

## When to Use a Labeler Transformation

The Labeler transformation writes a descriptive label for each value on a port.

The following examples describe some of the types of analysis you can perform with a Labeler transformation.

### Find records with contact data

Configure the transformation with a reference table that contains a list of first names. Create a token labeling strategy to label any string that matches a value in the reference table. When you review the output data, any record that contains the label is likely to identify a person.

### Find business records

Configure the transformation with a token set that contains a list of business suffixes, such as Inc, Corp, and Ltd. Create a token labeling strategy to label any string that matches a value in the reference table. When you review the output data, any record that contains the label is likely to identify a business.

**Note:** Use a token set of business suffixes you want to identify any business name. You can use a reference table of business names if you are certain that the table contains all the businesses you want to identify. For example, you can use a reference table that lists the corporations on the New York Stock Exchange.

### Find telephone number data

Configure the transformation with character set that defines the character structure of a telephone number. For example, you can use a character set that recognizes different patterns of punctuation symbols and digits as United States telephone numbers. You can review the data to find records that do not contain the correct digits for a telephone number.

The character labels may use the following characters to analyze the column data:

c=punctuation character n=digit s=space

The following table shows sample telephone number structures:

| Character Structure | Telephone number |
|---------------------|------------------|
| cnnncsnnncnnncnnnnn | (212) 555-1212   |
| nnnnnnnnnn          | 2125551212       |
| cnnncnnncnnnn       | +212-555-1212    |

# Reference Data Use in the Labeler Transformation

Informatica Developer installs with different types of reference data objects that you can use with the Labeler transformation. You can also create reference data objects.

When you add a reference data object to Labeler transformation strategy, the transformation searches the input data on the strategy for values in the reference data object. The transformation replaces any value it finds with a valid value from the reference data object, or with a value that you specify.

The following table describes the types of reference data you can use:

| Reference Data Type  | Description  |
|----------------------|--|
| Character sets       | Identifies different types of characters, such as letters, numbers, and punctuation symbols. Use in character labeling operations.   |
| Probabilistic models | Adds fuzzy match capabilities to token label operations. The transformation can use a probabilistic model to infer the type of information in a string. To enable the fuzzy match capabilities, you compile the probabilistic model in the Developer tool. Use in token labeling operations. |
| Reference tables     | Finds strings that match the entries in a database table. Use in token labeling and character labeling operations.   |
| Regular expressions  | Identifies strings that match conditions that you define. You can use a regular expression to find a string within a larger string. Use in token labeling operations.  |
| Token sets           | Identifies strings based on the types of information they contain. Use in token labeling operations.<br>Informatica installs with token sets different types of token definitions, such as word, telephone number, post code, and product code definitions.                                  |

## Character Sets

A character set contains expressions that identify specific characters and character ranges. You can use character sets in Labeler transformations and in Parser transformations that use token parsing mode.

Character ranges specify a sequential range of character codes. For example, the character range "[A-C]" matches the uppercase characters "A," "B," and "C." This character range does not match the lowercase characters "a," "b," or "c."

Use character sets to identify a specific character or range of characters as part of token parsing or labeling operations. For example, you can label all numerals in a column that contains telephone numbers. After labeling the numbers, you can identify patterns with a Parser transformation and write problematic patterns to separate outputs.

## Probabilistic Models

A probabilistic model identifies tokens by the types of information that they contain and by the positions that they occupy in an input string.

A probabilistic model contains reference data values and label values. The reference data values represent the data on an input port that you connect to the transformation. The label values describe the types of information that the reference data values contain. You assign a label to each reference data value in the model.

To link the reference data values to the labels in a probabilistic model, you compile the model. The compilation process generates a series of logical associations between the data values and the labels. When you run a mapping that reads the model, the Data Integration Service applies the model logic to the transformation input data. The Data Integration Service returns the label that most accurately describes the input data values.

You create a probabilistic model in the Developer tool. The Model repository stores the probabilistic model object. The Developer tool writes the data values, the labels, and the compilation data to a file in the Informatica directory structure.

## Reference Tables

A reference table is a database table that contains at least two columns. One column contains the standard or required version of a data value, and other columns contain alternative versions of the value. When you add a reference table to a transformation, the transformation searches the input port data for values that also appear in the table. You can create tables with any data that is useful to the data project you work on.

## Regular Expressions

In the context of labeling operations, a regular expression is an expression that you can use to identify a specific string in input data. You can use regular expressions in Labeler transformations that use token labeling mode.

Labeler transformations use regular expressions to match an input pattern and create a single label. Regular expressions that have multiple outputs do not generate multiple labels.

## Token Sets

A token set contains expressions that identify specific tokens. You can use token sets in Labeler transformations that use token labeling mode.

Use token sets to identify specific tokens as part of token labeling operations. For example, you can use a token set to label all email addresses that use that use an "AccountName@DomainName" format. After labeling the tokens, you can use the Parser transformation to write email addresses to output ports that you specify.

The Developer tool includes system-defined token sets that you can use to identify a wide range of patterns. Examples of system-defined token sets include:

- Words
- Numbers
- Phone numbers
- Email addresses
- Postal codes



- National identification numbers, such as Social Security Numbers
- Credit card numbers

## Labeler Transformation Strategies

Use labeling strategies to assign labels to input data. To configure a labeling strategy, edit the settings in the **Strategies** view of a Labeler transformation.

When you create a labeling strategy, you add one or more operations. Each operation implements a specific labeling task.

The Labeler transformation provides a wizard that you use to create strategies. When you create a labeling strategy, you choose between character labeling or token labeling mode. You then add operations specific to that labeling mode.

**Important:** You can change the order of operations and strategies. The order of operations within a strategy can change the output of a strategy, because each operation reads the results of the preceding operation.

### Character Labeling Operations

Use character labeling operations to create labels that describe the character patterns in your data.

You can add the following types of operations to a character labeling strategy:

#### **Label Characters using Character Sets**

Label characters using predefined character sets, such as digits or alphabetic characters. You can select Unicode and non-Unicode character sets.

#### **Label Characters using Reference Table**

Label characters with custom labels from a reference table.

### Token Labeling Operations

Use token labeling operations to create labels that describe strings in your data.

The Labeler transformation can identify and label multiple tokens in an input string. For example, you can configure the Labeler transformation to use the US Phone Number and Email Addresses token sets. When the Labeler transformation processes the input string "555-555-1212 someone@somewhere.com," the output string is "USPHONE EMAIL."

You can add the following types of token labeling operations to a labeling strategy:

#### **Label with Reference Table**

Label strings that match reference table entries.

#### **Label Tokens with Token Set**

Label string patterns that match token set data or probabilistic model data.

# Labeler Transformation Ports

You select the input and output ports you need for the labeling operations you configure in the transformation.

Labeler transformations use the following port:

## Input Ports

Reads string input from upstream objects.

## Labeled Output Ports

Writes the labels defined by transformation operations.

## Tokenized Output Ports

Passes input strings that correspond to each label in the output. Select this port if you will add a Parser transformation downstream of the Labeler transformation in a mapplet or mapping, and you will configure the Parser transformation to run in pattern-based parsing mode. The Parser transformation associates the token labeling output with the data on the tokenized output ports.

## Score Output Ports

Select to write the score values generated by probabilistic matching techniques in a token labeling operation.

When you run a token labeling operation that uses a probabilistic model, the operation generates a numerical score for each labeled string. The score represents the degree of similarity between the input string and the patterns defined in the probabilistic model.

# Character Labeling Properties

Configure properties for character labeling operations on the **Strategies** view in the Labeler transformation.

## General Properties

General properties apply to all character labeling operations you define in the strategy. You use the general properties to name the strategy and specify input and output ports.

The following table describes the general properties:

| Property    | Description  |
|-------------|--|
| Name        | Provides a name for the strategy.  |
| Inputs      | Identifies the input ports that the strategy operations can read.          |
| Outputs     | Identifies the output ports that the strategy operations can write to.     |
| Description | Provides a text description of the strategy. This is an optional property. |

## Reference Table Properties

When you define a character labeling strategy, you can add operations to label with character sets and with reference tables. You use the reference table properties to specify how the transformation uses reference tables.

The following table describes the reference table properties:

| Property                          | Description   |
|-----------------------------------|---|
| Name                              | Provides a name for the operation.  |
| Reference Table                   | Specifies reference tables that the transformation uses to label characters.            |
| Label                             | Specifies the replacement text for input characters that match reference table entries. |
| Override other labels in strategy | Determines whether this labeling operation overrides other labeling operations.         |

## Character Set Properties

When you define a character labeling strategy, you can add operations to label with character sets and with reference tables. You use the character set properties to specify how the transformation uses character sets.

The following table describes the character set properties:

| Property                | Description   |
|-------------------------|---|
| Name                    | Provides a name for the operation.  |
| Select Character Sets   | Specifies the character sets that the transformation uses to label strings.<br>You can override the replacement text for input strings that match the character set. Click the selection arrow in the <b>Label</b> column to enter custom replacement text. |
| Filter text             | Uses characters or wildcards you enter to filter the list of character sets.  |
| Add Character Set       | Select to define a custom character set.  |
| Edit                    | Edit the contents of a custom character set.  |
| Import                  | Allows you to create nonreusable copies of character sets that are stored in content sets. Changes to the original character set do not update the copies you store in the Labeler transformation.  |
| Remove                  | Deletes a custom character set.   |
| Specify Execution Order | Sets the order in which the operation applies the token sets to the data. Use the Up and Down arrows to change the order.   |

## Filter Properties

You can specify values to skip during a labeling operation. Use the **Ignore Text** properties to specify values to which labeling operations will not apply.

The following table describes the filter properties:

| Property       | Description   |
|----------------|---|
| Search Term    | Specifies strings that the transformation filters before performing labeling. Use this feature to specify exceptions to your defined labeling strategy. |
| Case Sensitive | Determines whether filtered strings must match the case of the search term.   |
| Uppercase      | Converts filtered strings to uppercase.   |
| Start          | Specifies the character position to start searching for filtered string.  |
| End            | Specifies the character position to stop searching for filtered string.   |

## Token Labeling Properties

Configure properties for token labeling operations on the **Strategies** view in the Labeler transformation.

### General Properties

General properties apply to all token labeling operations you define in the strategy. You use the general properties to name the strategy, specify input and output ports, and specify whether the strategy enables probabilistic matching techniques.

The following table describes the general properties:

| Property                              | Description  |
|---------------------------------------|--|
| Name                                  | Provides a name for the strategy.  |
| Inputs                                | Identifies the output port that the strategy operations can read.  |
| Outputs                               | Identifies the output port that the strategy operations can write to.  |
| Description                           | Describes the strategy. The property is optional.  |
| Use probabilistic matching techniques | Specifies that the strategy can use a probabilistic model to identify token types.   |
| Reverse Enabled                       | Indicates that the strategy reads input data from right to left. This property is disabled for probabilistic matching.   |
| Delimiters                            | Specifies the characters that the transformation uses to evaluate substrings in input data. Default is space.<br>The property is disabled in probabilistic labeling. |

| Property               | Description  |
|------------------------|--|
| Tokenized Output Field | Indicates that the strategy writes multiple labels to an output port. Select this field to create input data for pattern-based parsing in the Parser transformation.                     |
| Score Output Field     | Identifies the field that contains the score values generated in probabilistic matching. Set the score output field when you select the option to use probabilistic matching techniques. |
| Output Delimiter       | Specifies a character to separate data values on the output port. Default is colon.  |

## Token Set Properties

Token set properties apply when you configure a labeling operation to use token sets.

The following table describes the general properties:

| Property                | Description  |
|-------------------------|--|
| Select Token Sets       | Specifies the token sets that the transformation uses to label strings.  |
| Filter text             | Filters the list of token sets or regular expressions. Use text characters and wildcard characters as a filter.  |
| Add Token Set           | Use to define custom token sets.   |
| Add Regular Expression  | Use to define regular expressions that match an input pattern.   |
| Edit                    | Edits the contents of a custom token set or a regular expression.  |
| Import                  | Imports a nonreusable copy of a token set or regular expression from a folder in the Model repository. If you update the source object for the token set or regular expression, the Data Integration Service does not update the nonreusable copy. |
| Remove                  | Removes a custom token set or a regular expression.  |
| Specify Execution Order | Sets the order in which the operation applies the token sets or regular expressions to the data. Use the Up and Down arrows to change the order.   |

## Custom Label Properties

When you configure a token label operation, you can select the **Custom Label** view to create labels for specific search terms.

The following table describes the custom label properties:

| Property       | Description  |
|----------------|--|
| Search Term    | Identifies the string to search for.                                     |
| Case Sensitive | Specifies whether the input data must match the case of the search term. |
| Custom Label   | Identifies the custom label to apply.                                    |

## Probabilistic Matching Properties

When you select the options to use probabilistic matching techniques, you can add a probabilistic model to the labeling operation. You cannot add a probabilistic model to a strategy that uses a token set or reference table.

The following table describes the properties associated with probabilistic matching:

| Property            | Description  |
|---------------------|--|
| Name                | Provides a name for the operation.   |
| Filter Text         | Uses characters or wildcards you enter to filter the list of probabilistic models in the repository. |
| Probabilistic Model | Identifies the probabilistic model to use in the operation.  |

## Reference Table Properties

Reference table properties apply when you configure a labeling operation to use a reference table.

The following table describes the reference table properties:

| Property                          | Description   |
|-----------------------------------|---|
| Name                              | Provides a name for the operation.  |
| Reference Table                   | Specifies the reference table that the operation uses to label tokens.  |
| Label                             | Specifies the text that the operation writes to a new port when an input string matches a reference table entry.  |
| Case Sensitive                    | Determines whether input strings must match the case of reference table entries.  |
| Replace Matches with Valid Values | Replaces labeled strings with the entry from the Valid column in the reference table.   |
| Mode                              | Determines the token labeling method. Select Inclusive to label input strings that match reference table entries. Select Exclusive to label input strings that do not match reference table entries.  |
| Set Priority                      | Determines whether reference table labeling operations takes precedence over token set labeling operations in a strategy. If you set this property, the transformation performs reference table labeling before token set labeling, and the token set analysis cannot overwrite the reference table label analysis. |

## Configuring a Character Labeling Strategy

To configure a labeling strategy, edit the settings in the **Strategies** view of the Labeler transformation.

1. Select the **Strategies** view, and click **New** to create a strategy.  
The **Strategy** wizard opens.
2. Enter a name for the strategy.

3. Click the **Inputs** and **Outputs** fields to define ports for the strategy.
4. Optionally, enter a description of the strategy.
5. Select character labeling mode.
6. Click **Next**.
7. Select the type of character labeling operation you want to configure. You can configure the following operations:
  - Label characters using reference tables.
  - Label characters using character sets.
8. Click **Next**.
9. Configure the operation properties, and click **Next**.
10. Optionally, configure **Ignore Text** properties.
11. Click **Next** to add more operations to the strategy, or click **Finish**.

You can change the order that the transformation processes strategies and operations. In the **Strategies** view, select a strategy or operation and click **Move Up** or **Move Down**.

## Configuring a Token Labeling Strategy

To configure a labeling strategy, edit the settings in the **Strategies** view of the Labeler transformation.

1. Select the **Strategies** view, and click **New** to create a strategy.  
The **Strategy** wizard opens.
2. Enter a name for the strategy.
3. Click the **Inputs** and **Outputs** fields to define ports for the strategy.
4. Optionally, enter a description of the strategy.
5. Select token labeling mode.  
Verify or edit the properties for the mode you select.
6. Click **Next**.
7. Select the type of token labeling operation you want to configure. You can configure the following operations:
  - Label tokens with a token set.
  - Label tokens with a reference table.
  - Label tokens using probabilistic matching.
8. Click **Next**.
9. Configure the operation properties, and click **Next**.  
If you configure the strategy to use probabilistic matching, enter a label to use for tokens identified as residue data.
10. Optionally, configure **Custom Label** properties.
11. Click **Next** to add more operations to the strategy, or click **Finish**.

You can change the order that the transformation processes strategies and operations. In the **Strategies** view, select a strategy or operation and click **Move Up** or **Move Down**.

# Labeler Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Labeler transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

## **Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.



## CHAPTER 25

# Lookup Transformation

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## Lookup Transformation Overview

The Lookup transformation is a passive or active transformation that looks up data in a flat file, logical data object, reference table, or relational table. The Lookup transformation can return one row or multiple rows from a lookup.

Before you create a Lookup transformation, create the lookup source. Import a flat file or relational database table as a physical data object. Or, create a logical data object or reference table to use as a lookup source. When you create a Lookup transformation, the Developer tool adds the columns from the data object or reference table as lookup ports in the transformation. After you create the transformation, configure one or more output ports to return the lookup results. Configure the lookup conditions and configure other lookup properties.

When you run a mapping or preview data, the Integration Service queries the lookup source. The Integration Service queries the lookup source based on the lookup ports in the transformation, the lookup properties, and the lookup condition. The Lookup transformation returns the result of the lookup to the target or another transformation.

You can configure a connected or unconnected Lookup transformation. A connected transformation connects to another transformation in the mapping. An unconnected transformation receives input from a :LKP expression in another transformation. If the Lookup transformation performs a lookup on a logical data object, you must configure a connected Lookup transformation. Connect the Lookup transformation input ports to an upstream transformation or to an upstream source. Connect the output ports to a downstream transformation or to a downstream target.

You can use multiple Lookup transformations in a mapping.

You can perform the following tasks with a Lookup transformation:

- Get a related value. Retrieve a value from the lookup source based on a value in the input data. For example, the input data contains an employee ID. Retrieve the employee name from the lookup source by employee ID.
- Retrieve multiple rows from a lookup source.
- Perform a calculation. Retrieve a value from a lookup table and use the value in a calculation. For example, retrieve a sales tax percentage, calculate a tax, and return the tax to a target.
- Perform an unconnected lookup with a :LKP expression in a transformation that accepts expressions. Filter the results with another expression in the transformation.
- Parameterize the lookup source and the lookup condition to use a Lookup transformation in a dynamic mapping.

## Connected and Unconnected Lookups

You can configure a connected Lookup transformation or an unconnected Lookup transformation. A connected Lookup transformation is a transformation that has input and output ports that you connect to other transformations in a mapping. An unconnected Lookup transformation appears in the mapping, but is not connected to other transformations.

An unconnected Lookup transformation receives input from the result of a :LKP expression in a transformation such as an Expression transformation or Aggregator transformation. The :LKP expression passes arguments to the Lookup transformation and receives a result back from the Lookup transformation. The :LKP expression can pass lookup results to another expression in the Expression or Aggregator transformation to filter results.

The following table lists the differences between connected and unconnected lookups:

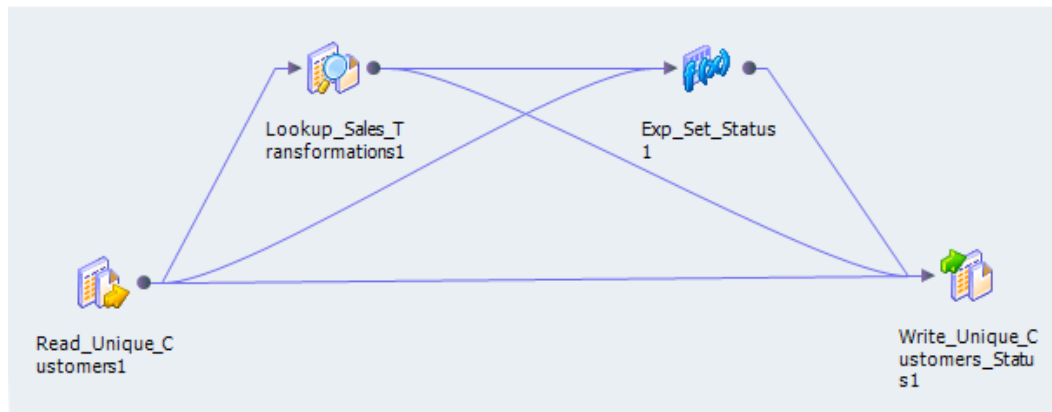
| Connected Lookup  | Unconnected Lookup   |
|---|--|
| Receives input values directly from the pipeline.   | Receives input values from the result of a :LKP expression in another transformation.          |
| Use a dynamic or static cache.  | Use a static cache.  |
| Cache includes the lookup source columns in the lookup condition and the lookup source columns that are output ports. | Cache includes all lookup and output ports in the lookup condition and the lookup/return port. |

| Connected Lookup   | Unconnected Lookup  |
|--|---|
| Returns multiple columns from the same row or insert into the dynamic lookup cache.  | Returns one column from each row to a return port.  |
| If there is no match for the lookup condition, the Integration Service returns the default value for all output ports. If you configure dynamic caching, the Integration Service inserts rows into the cache or leaves it unchanged.   | If there is no match for the lookup condition, the Integration Service returns NULL.  |
| If there is a match for the lookup condition, the Integration Service returns the result of the lookup condition for all lookup/output ports. If you configure dynamic caching, the Integration Service either updates the row the in the cache or leaves the row unchanged. | If a match occurs for the lookup condition, the Integration Service returns the result of the lookup condition to the return port.  |
| Passes multiple output values to another transformation. Link lookup/output ports to another transformation.   | Returns one output value to another transformation. The Lookup transformation return port passes the value to the port that contains the :LKP expression in the other transformation. |
| Supports user-defined default values.  | Does not support user-defined default values.   |

## Connected Lookups

A connected Lookup transformation is a Lookup transformation that is connected to a source or target in a mapping.

The following figure shows a mapping with a connected Lookup transformation:



When you run a mapping that contains a connected Lookup transformation, the Integration Service performs the following steps:

1. The Integration Service passes values from another transformation to input ports in the Lookup transformation.
2. For each input row, the Integration Service queries the lookup source or cache based on the lookup ports and the lookup condition in the transformation.
3. If the transformation is uncached or uses a static cache, the Integration Service returns values from the lookup query.

If the transformation uses a dynamic cache, the Integration Service inserts the row into the cache when it does not find the row in the cache. When the Integration Service finds the row in the cache, it updates the row in the cache or leaves it unchanged. It flags the row as insert, update, or no change.

4. The Integration Service returns data from the query and passes it to the next transformation in the mapping.

If the transformation uses a dynamic cache, you can pass rows to a Filter or Router transformation to filter new rows to the target.

**Note:** This chapter discusses connected Lookup transformations unless otherwise specified.

## Unconnected Lookups

An unconnected Lookup transformation is a Lookup transformation that is not connected to a source or target in the mapping. Call the lookup with a :LKP expression in a transformation that allows expressions.

The syntax for the lookup expression is `:LKP lookup_transformation_name(argument, argument, ...)`

The order in which you list each argument must match the order of the lookup conditions in the Lookup transformation. The Lookup transformation returns the result of the query through the Lookup transformation return port. The transformation that calls the lookup receives the lookup result value in the port that contains the :LKP expression. If the lookup query fails to return a value, the port receives a null value.

When you perform an unconnected lookup, you can perform the same lookup multiple times in a mapping. You can test the results of the lookup in another expression and filter rows based on the results.

When you run a mapping that contains an unconnected Lookup transformation, the Integration Service performs the following steps:

1. An unconnected Lookup transformation receives input values from the result of a :LKP expression in another transformation, such as an Aggregator transformation, Expression transformation, or Update Strategy transformation.
2. The Integration Service queries the lookup source or cache based on the lookup ports and condition in the Lookup transformation.
3. The Integration Service returns a value through the return port of the Lookup transformation.
4. The Integration Service passes the return value to the port that contains the :LKP expression.

## Developing a Lookup Transformation

When you develop a Lookup transformation, you need to consider factors such as the lookup source type and the lookup condition.

Consider the following factors when you develop a Lookup transformation:

- Whether you want to create the transformation from a flat file, logical data object, reference table, or relational data object. Before you create a Lookup transformation, create the lookup source. Import a flat file or relational database table as a physical data object. Or, create a logical data object or reference table to use as a lookup source.
- The output ports for the transformation.
- The lookup conditions in the transformation.
- Whether you want the Integration Service to cache lookup data. The Integration Service can cache data for flat files, reference tables, or relational data objects.

# Lookup Query

The Integration Service queries the lookup based on the ports and properties you configure in the Lookup transformation. The Integration Service runs a default lookup query when the first row enters the Lookup transformation.

If you use a lookup against a relational table, you can override the lookup query. You can use the override to change the ORDER BY clause, add a WHERE clause, or transform the lookup data before it is cached.

If you configure a SQL override and a filter on the lookup query, the Integration Service ignores the filter.

## Default Lookup Query

The default lookup query contains the following statements:

### **SELECT**

The SELECT statement includes all the lookup ports in the mapping. To view the SELECT statement for the lookup query, select the Use Custom Query property.

### **ORDER BY**

The ORDER BY clause orders the columns in the same order they appear in the Lookup transformation. The Integration Service generates the ORDER BY clause. You cannot view this when you generate the default SQL.

## SQL Override for a Lookup Query

You can override the lookup query for a relational lookup. You can change the ORDER BY clause, add a WHERE clause, and transform the lookup data before it is cached.

You can use reserved words and forward slashes in table names and column names.

You can enter a query to override the default lookup query completely. Or, you view and edit the default lookup query. The default lookup query includes the lookup ports, output ports, and the return port.

## SQL Override for an Uncached Lookup

You can define an SQL override for uncached lookups. You can override all of the SQL query including the WHERE clause and ORDER BY clause.

The Developer tool generates a SELECT statement that includes the lookup ports, input/output ports, and the WHERE clause based on the lookup condition. If the Lookup transformation is an unconnected lookup, the SELECT statement includes the lookup ports and the return port.

Each column in the SELECT query uses an alias to define the output column. Do not change the syntax of the column aliases in the SQL statement. If you change the syntax, the query fails. To reference input ports in the WHERE clause, configure parameter binding. The following example includes a WHERE statement that references the Name port:

```
SELECT EMPLOYEE.NAME as NAME, max(EMPLOYEE.ID) as ID from EMPLOYEE WHERE EMPLOYEE.NAME=?  
NAME1?
```

You can use SQL functions in the SQL override. If you add a function to the SQL statement, the return datatype must match the datatype of the column. For example, the datatype of ID matches the return type of the MAX function:

```
SELECT EMPLOYEE.NAME as NAME, MAX(EMPLOYEE.ID) as ID FROM EMPLOYEE
```

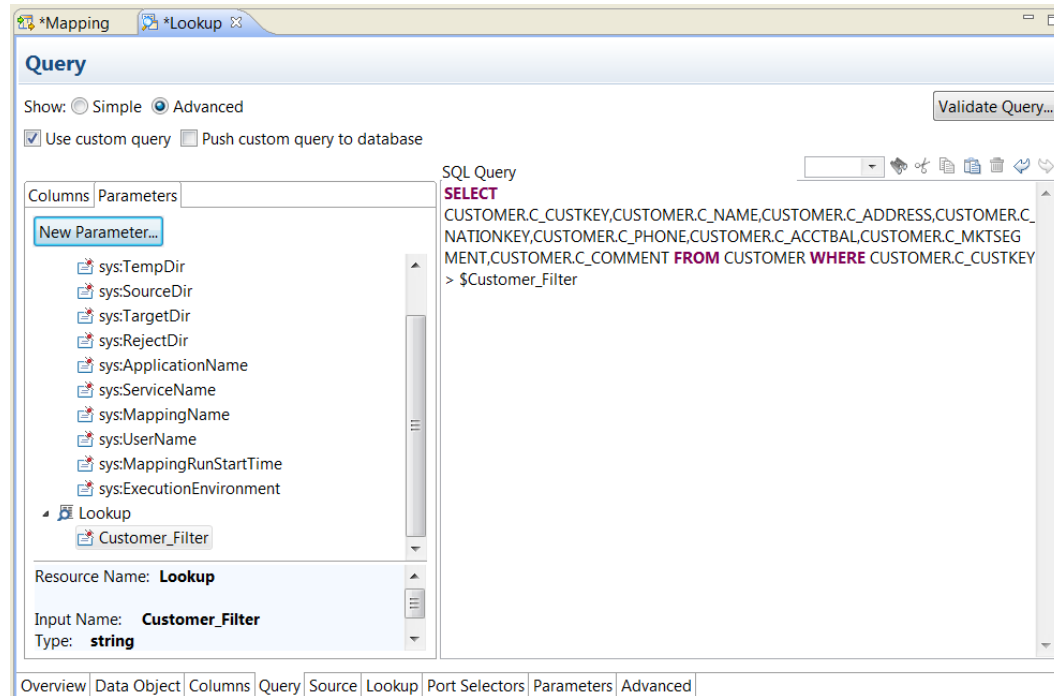
**Note:** You cannot use subqueries in the SQL override for uncached lookups.

## Parameters in an SQL Override Query

You can use system parameters or user-defined parameters in the lookup query of a Lookup transformation. The SQL Editor provides a list of the system parameters and user-defined parameters that you can select from.

You can browse for or you can create user-defined parameters in the **Query** tab of a Lookup transformation. Define a default value for each parameter. You can override a default value by binding a mapplet or mapping parameter to the transformation parameter after you add the Lookup transformation to a mapping.

The following image shows the Lookup transformation Query tab:



## Reserved Words

If any lookup name or column name contains a database reserved word, such as MONTH or YEAR, the mapping fails with database errors when the Integration Service executes SQL against the database.

You can create and maintain a reserved words file, `reswords.txt`, in the Integration Service installation directory. When the Integration Service initializes a mapping, it searches the `reswords.txt` file and places quotes around reserved words, and then executes the SQL against source, target, and lookup databases.

You might need to enable some databases, such as Microsoft SQL Server and Sybase, to use SQL-92 standards regarding quoted identifiers. Use environment SQL to issue the command. For example, with Microsoft SQL Server, use the following command:

```
SET QUOTED_IDENTIFIER ON
```

## Guidelines for Overriding the Lookup Query

Certain rules and guidelines apply when you override a lookup query.

Consider the following guidelines when you override the lookup SQL query:

- You can override the lookup SQL query for relational lookups.

- Add a source lookup filter to filter the rows that are added to the lookup cache. This ensures that the Integration Service inserts rows in the dynamic cache and target table that match the WHERE clause.
- If multiple Lookup transformations share a lookup cache, use the same lookup SQL override for each Lookup transformation.
- If a table name or column name in the lookup query contains a reserved word, enclose the reserved word in quotes.
- To override the lookup query for an uncached lookup, choose to return any value when the Integration Service finds multiple matches.
- You cannot add or delete any columns from the default SQL statement.

## Overriding the Lookup Query

You can override the default lookup SQL query to create a customized query on the lookup source.

1. On the **Properties** view, select the **Query** tab.
2. Select **Advanced**.
3. Select **Use Custom Query**.
4. Edit the lookup query in the SQL Query area.  
You can double-click a table name, a column name, or a parameter to add it to the query.
5. Click **Validate Query** to validate the lookup query.
6. Select **Push Custom Query to Database** to run the lookup query in the database.

## Lookup Source Filter

You can configure a Lookup source filter for a relational Lookup transformation that has caching enabled. Add the lookup source filter to limit the number of lookups that the Integration Service performs on a lookup source table.

When you configure a Lookup source filter, the Integration Service performs lookups based on the results of the filter statement. For example, you might need to retrieve the last name of every employee whose ID is greater than 510.

You configure the following lookup source filter on the EmployeeID column:

```
EmployeeID >= 510
```

EmployeeID is an input port in the Lookup transformation. When the Integration Service reads the source row, it performs a lookup on the cache when the value of EmployeeID is greater than 510. When EmployeeID is less than or equal to 510, the Lookup transformation does not retrieve the last name.

When you add a lookup source filter to the Lookup query for a mapping configured for pushdown optimization, the Integration Service creates a view to represent the SQL override. The Integration Service runs an SQL query against this view to push the transformation logic to the database.

## Filtering Source Rows in a Lookup

You can configure a Lookup source filter for a relational Lookup transformation that has caching enabled. Filter source rows in a lookup to limit the number of lookups that the Integration Service performs on a lookup source table.

1. On the **Properties** view, select the **Query** tab.
2. In the **Filter** option, click **Edit**.
3. In the SQL Editor, select the input ports or enter any Lookup transformation port that you want to filter.
4. Enter a filter condition.

Do not include the keyword WHERE in the filter condition. Enclose string mapping parameters and variables in string identifiers.

5. Click **Validate Query** to validate the syntax of the filter condition.

## Lookup Condition

The Data Integration Service looks up data in the lookup source based on a lookup condition. When you configure a lookup condition in a Lookup transformation, you compare the value of one or more columns in the source data with values in the lookup source or cache.

For example, the source data contains an employee\_number. The lookup source table contains employee\_ID, first\_name, and last\_name. You configure the following lookup condition:

```
employee_ID = employee_number
```

For each employee\_number, the Data Integration Service returns the employee\_ID, last\_name, and first\_name column from the lookup source.

The Data Integration Service can return more than one row from the lookup source. You configure the following lookup condition:

```
employee_ID > employee_number
```

The Data Integration Service returns rows for all employee\_ID numbers greater than the source employee number.

### Null Values in a Data Object Lookup

When an input to the Lookup condition is NULL, a data object Lookup transformation returns a single row with null values for output-only ports, and values from input rows for pass-through ports.

For example, the following lookup condition performs a lookup on a data source that contains one or more rows where the value for employee\_ID is NULL:

```
employee_ID = employee_number
```

In this example, you use a lookup table with the following data:

| EMPLOYEE_ID | LAST_NAME |
|-------------|-----------|
| 1294765     | Hara      |
| 1356356     | Carver    |



| EMPLOYEE_ID | LAST_NAME |
|-------------|-----------|
| 1407207     | NULL      |
| 1570348     | Draper    |
| NULL        | Limonov   |

You compare the following input values from your data source with the lookup table:

```

EMPLOYEE_NUMBER
-----
1294765
1356356
1407207
1648246
NULL

```

In this example, the Lookup condition produces the following results:

```

1294765,Hara
1356356,Carver
1407207,NULL
NULL,NULL
NULL,NULL

```

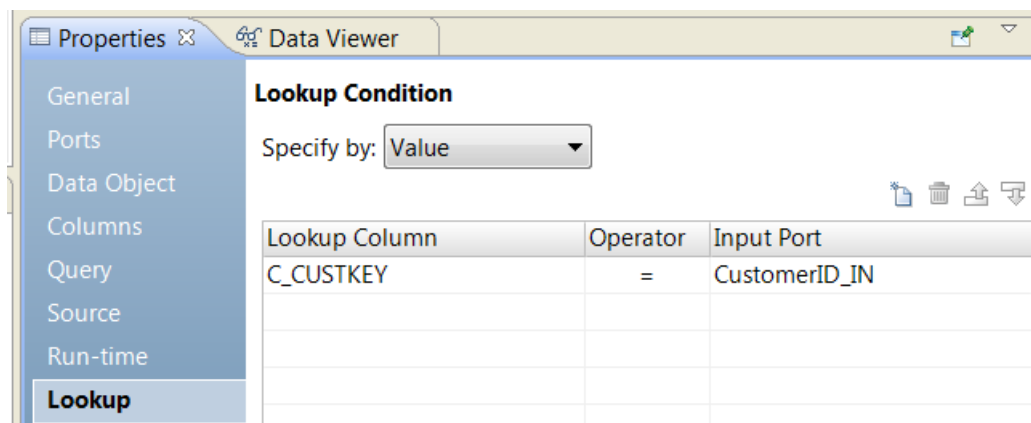
The Lookup condition finds matches between EMPLOYEE\_ID and EMPLOYEE\_NUMBER for the first two rows. For the third row, the lookup source contains a row with a NULL value that does not participate in the lookup condition. It matches the lookup condition, and returns a result with the NULL value for the non-lookup column.

For the fourth and fifth rows, the Lookup condition does not find a match, and returns NULL for both values. For the fifth row, note that the Lookup condition does not find a match again, because NULL does not match anything, including NULL.

## Configure the Lookup Condition

The Lookup condition is an expression that determines which rows to retrieve from the lookup source. Configure the lookup condition on the **Lookup** tab of the **Properties** view.

The following image shows a lookup condition to perform a lookup by customer number:



You can configure the following options on the **Lookup** tab:

**Specify by**

Choose **Value** to select the lookup column and input port names. Select **Parameter** to configure an expression parameter to define the lookup condition.

**Lookup column**

The column in the lookup source to match with a column from the input row. You can include multiple columns in the lookup condition.

**Operator**

The operator that determines the condition to search for between the lookup column and the input port. Operators include =, !=, >, <, >=, <=.

**Input Port**

The input port that contains the value to search for in the lookup source. You can compare more than one input port to ports in the lookup source.

## Rules and Guidelines for Lookup Transformation Conditions

Certain rules and guidelines apply when you enter a condition for a Lookup transformation.

Consider the following rules and guidelines when you enter a condition for a Lookup transformation.

- The datatypes for the columns in a lookup condition must match.
- Use one input port for each lookup port in the lookup condition. You can use the same input port in more than one condition in a transformation.
- If you use a port selector or a dynamic port in a lookup condition, the lookup condition considers all the ports in the expression.
- You can use a dynamic input port or a port selector as the input port of a lookup condition. The number of generated ports in the input port must be equal to the number of ports in the lookup column.
- When processing a Lookup transformation with multiple lookup conditions, the Integration Service returns rows that match all the lookup conditions.
- You can create an expression parameter to parameterize the lookup condition in a nonreusable lookup transformation.
- To increase lookup performance, enter conditions in the following order:
  - Equal to (=)
  - Less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=)
  - Not equal to (!=)
- Use one of the following operators when you create a lookup condition: =, >, <, >=, <=, or !=.
- The Integration Service processes lookup matches differently based on whether you configure the Lookup transformation with a dynamic lookup cache, static lookup cache, or uncached lookup.
- The Integration Service matches null values. For example, the Integration Service considers a lookup port and an input port equal if they both have null values.
- If the columns in a lookup condition are Decimal data types, the precision of each column must belong to the same precision range. Valid precision ranges include:
  - Decimal 0-18
  - Decimal 19-28
  - Decimal 29-38
  - Decimal 39 and over

For example, if you define the condition `DecimalA = DecimalB` where `DecimalA` has precision 15 and `DecimalB` has precision 25, the lookup condition is not valid.

## Lookup Cache

You can increase performance by caching a large lookup source or small lookup tables. When you cache the lookup source, the Integration Service queries the lookup cache instead of querying the lookup source for each input row.

Based on your business requirements, you can create different types of lookup caches. You can create a static or dynamic cache. You can create a persistent or non-persistent cache. You can share a cache among multiple Lookup transformations.

If the Lookup transformation is in a dynamic mapping, you can have a persistent or a nonpersistent cache. When you persist a cache and you change the lookup source with a parameter, the mapping fails. The mapping also fails if you change the control file for a flat file lookup source.

**Note:** You cannot use a dynamic lookup cache or a persisted lookup cache when the Lookup transformation contains a dynamic port or a parameterized lookup source.

## Query Properties

Configure query properties to view or change the lookup query on a relational lookup table. You can apply a filter on the lookup or customize the lookup query.

The following table describes query properties for Lookup transformations that perform relational lookups:

| Property                      | Description   |
|-------------------------------|---|
| Simple                        | Select to view the lookup query and apply a filter on the lookup.   |
| Advanced                      | Select to view the query, customize the query, or run the query in the database that contains the relational lookup table.                          |
| Filter                        | Enter a filter to reduce the number of rows the Integration Service queries. You must select the <b>Simple</b> option to view this option.          |
| Use Custom Query              | Select to override the lookup query. You must select the <b>Advanced</b> option to view this option.  |
| Push Custom Query to Database | Select to run the query in the database that contains the relational lookup table. You must select the <b>Advanced</b> option to view this option.  |
| SQL Query                     | Displays the SQL query used to perform the lookup. You can customize the SQL query. You must select the <b>Advanced</b> option to view this option. |

# Lookup Transformations in Dynamic Mappings

You can use a Lookup transformation in a dynamic mapping. You can configure dynamic ports to receive and return different ports based on the source data. You can parameterize the lookup source and the lookup condition to perform a lookup based on the different ports.

A dynamic mapping is a mapping in which the sources, targets, and transformation logic can change at run time. You can set parameters and rules to change the structure of the data. When you use a Lookup transformation in a dynamic mapping, the input ports of the Lookup transformation might change based on the source data. The structure of the lookup source and the ports in the lookup condition might change.

**Note:** When the Lookup transformation contains a dynamic port or a parameterized lookup source, you cannot persist the lookup cache. You also cannot configure a dynamic cache.

You can perform the following tasks for a Lookup transformation to use the transformation in a dynamic mapping:

## Define dynamic ports

Define dynamic ports and generated ports to accommodate changes to the input columns.

## Parameterize the lookup source

Assign a parameter for the data object that defines the lookup source. You can parameterize the lookup source in a nonreusable Lookup transformation.

## Define port selectors

Define a port selector that specifies the ports to use in the lookup condition. You can parameterize the port selector ports in a nonreusable Lookup transformation.

## Parameterize the lookup condition

Create an expression parameter and define a default value that contains a complete expression.

For more information about dynamic mappings, see the *Informatica Developer Mapping Guide*.

## Define Dynamic Ports

You can define dynamic ports in the Lookup transformation.

You can reference a dynamic port in input column of a lookup condition. If the dynamic port contains multiple generated ports, you can use a port selector for the lookup column element of the lookup condition. The dynamic input port must contain the same number of ports as the port selector in the lookup condition.

If the dynamic port contains one value, you can use a single port in the lookup column element of the lookup condition.

You can reference generated ports in the lookup condition. However, if a source in the dynamic mapping changes, the generated port might not exist. The mapping fails.

# Change the Lookup Source

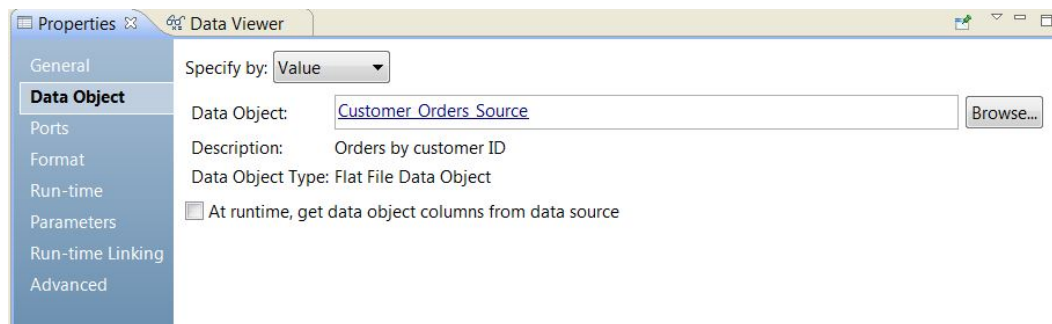
You can change the data object that is the lookup source for a reusable Lookup transformation. You can configure a parameter that determines the data object to use as the lookup source at run time.

When you create a transformation from a physical data object, information about the data object appears on the **Data Object** tab of the transformation properties. You can click the data object name to view the physical data object definition from the Model repository.

You can change the data object for the transformation by browsing for a different physical data object in the Model repository. When you change the data object, the transformation uses the run time properties and the advanced properties of the data object that you select.

You can update the structure of the data object at run time based on changes in the data source. The data source is the physical file or the database table that the data object represents. When you enable the Data Integration Service to get data columns from the data source, the Data Integration Service examines the structure of the data source. The Data Integration Service updates the data object ports in the transformation instance based on the data source. The Data Integration Service does not change the physical data object definition in the Model repository.

The following image shows the **Data Object** tab:



The **Data Object** tab has the following fields:

## Specify by

Choose **Value** to enter a specific data object name. Choose **Parameter** to parameterize the data object.

## Data object

The name of the data object in the Model repository. You can click the **Data Object** link to open the data object definition from the repository. You can also Browse for a different data object in the Model repository.

## Description

The description of the data object in the repository. Read-only.

## Data object type

Describes the type of data object, such as a flat file data object, a relational table object, or a customized data object.

## At run time, get the data object columns from data source

Updates the structure of the data object for the transformation instance at run time. Updates the structure based on the columns from the data file or the table that the data object refers to.

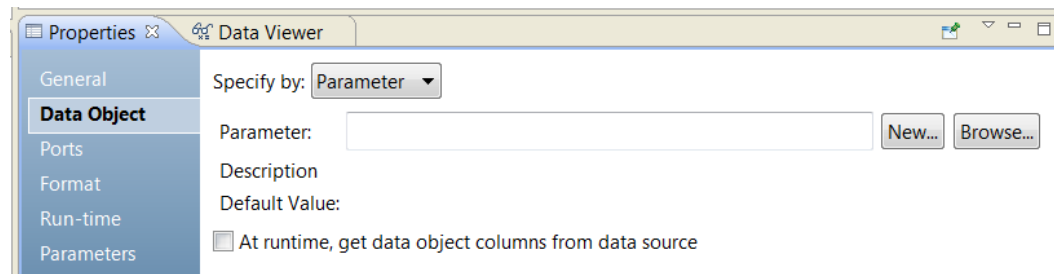
## Parameterize the Lookup Source

You can configure a parameter for the Lookup source in a nonreusable Lookup transformation.

To parameterize a data object, choose **Specify by Parameter** in the **Data Object** tab. The properties in the **Data Object** tab change.

To parameterize the data object, create a resource type parameter or browse for a resource parameter that you already created. The parameter default value is the name of physical data object in the Model repository. When you create a default parameter value, you select a physical data object name from a list of data objects in the repository.

The following image shows the **Data Object** tab when you specify the data object by a parameter:



The **Data Object** tab has the following options by parameter:

### Parameter

The name of a resource parameter that you configured as the data object. Read-only.

### Description

The description of the parameter. Read-only.

### New

Create a resource parameter. Browse for and select a data object in the Model repository for the parameter default value.

### Browse

Browse for a resource parameter and select the parameter.

### Default value

The default value of the resource parameter that you configured for the data object. The default value is a physical data object name and the path to the object in the Model repository. Read-only.

## Port Name Conflicts with the Lookup Port

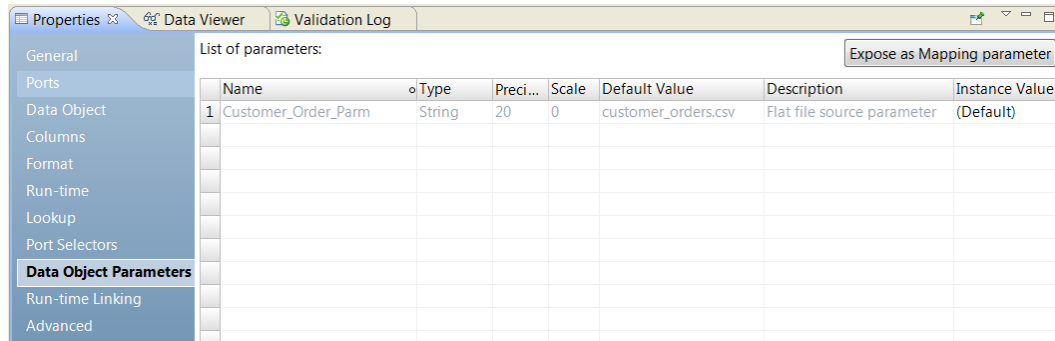
When you parameterize a lookup source, a Lookup transformation input port might have a name conflict with a port in the lookup source.

When a Lookup transformation input port has a name conflict with the lookup port in the lookup source, the Developer tool does not rename either of the ports. The Developer tool displays a validation error. You must change the input port name in the Lookup transformation or remove the port from the transformation.

## Lookup Sources that Contain Parameters

You can create a lookup source from a physical data object that contains parameters. When you add the physical data object to a mapping, the parameters appear on the **Data Object Parameters** tab.

The following image shows the **Data Object Parameters** tab in the Lookup transformation:



The image shows the Customer\_Order\_Parm. Customer\_Order\_Parm is a parameter for the source file name in a flat file data object. To override the source file name in the mapping, bind the Customer\_Order\_Parm to a parameter in the mapping. Click **Expose as Mapping Parameter** to create a duplicate parameter in the mapping.

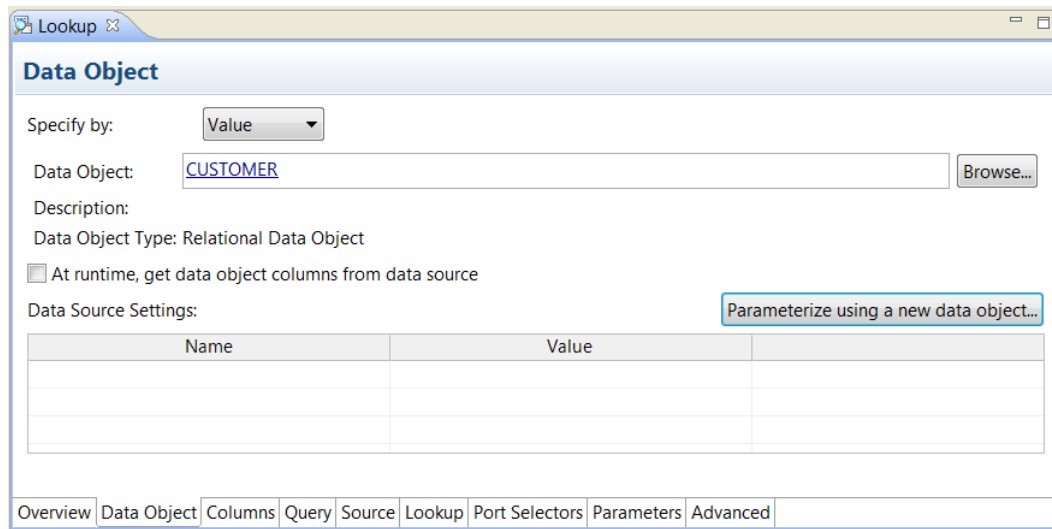
## Configure Parameters in a Duplicate Data Object

You can create a duplicate data object in the repository and parameterize the properties for that physical data object. Define default values for the properties such as the connection, the resource name, the table owner, or the control file name.

You can create a duplicate data object for relational data objects and flat file data objects. You can create a duplicate data object in a reusable Lookup transformation and in a nonreusable Lookup transformation.

Create a duplicate data object in the Lookup transformation **Data Object** tab. You can create a duplicate object if you specify the data object as a value. When you create the duplicate data object, you replace the data object name in the Lookup transformation with the duplicate data object name. The Developer tool creates parameters for the data object properties. The Developer tool prompts you to enter default values for the parameters. The duplicate data object name syntax is: <Original object name>\_Param.

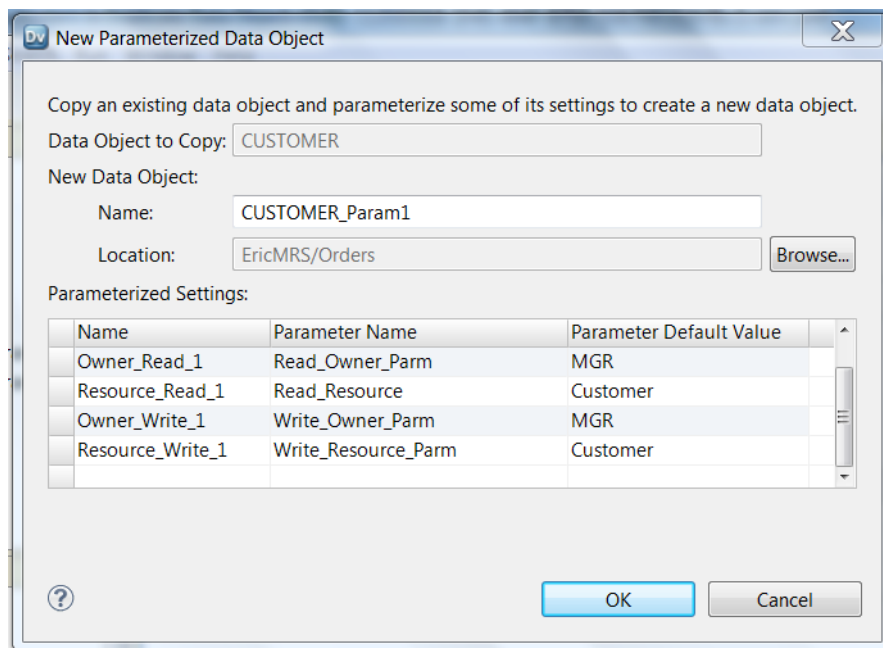
The following image shows the **Parameterize Using New Data Object** button on the **Data Object** tab for relational and flat file data objects:



When you parameterize a data object by creating a duplicate data object, the Developer tool creates set of parameters for the data object. The Developer tool creates different parameters based on whether the data object is a flat file or a relational data object.

When you create the duplicate data object, configure the default parameter values on the **New Parameterized Data Object** dialog box.

The following image shows the **New Parameterized Data Object** for a relational data object:

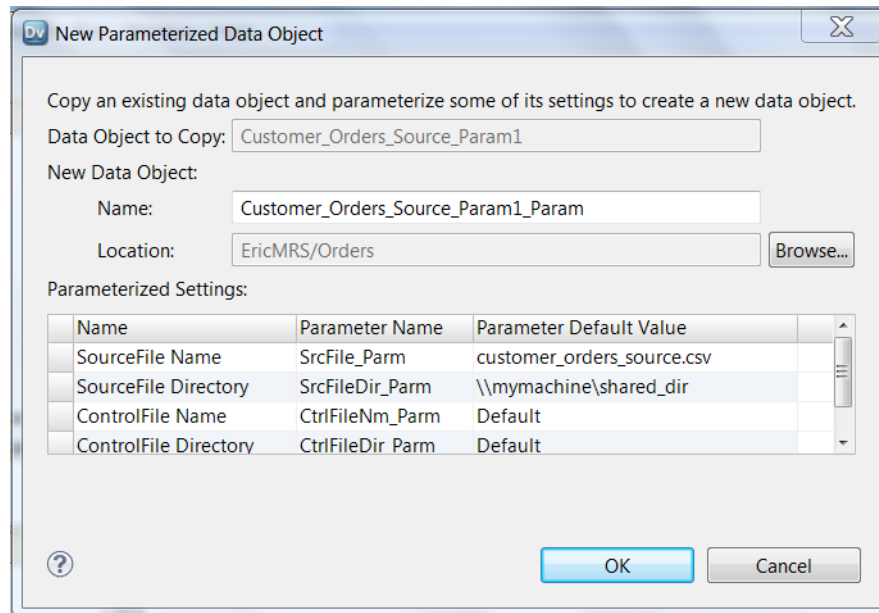


You can change the name of the data object. Enter the parameter default values for the owner and the resource parameters.

If the original data object is parameterized, the Developer tool copies the parameters from the original data object to the duplicate data object. If an original property is not parameterized, the Developer tool creates a parameter for it in the duplicate data object. The Developer tool uses the original property value as the default parameter value in the duplicate data object. When the Developer tool cannot determine an original property value, the Developer tool creates a parameter with a default value based on the parameter type.



The following image show the **New Parameterized Data Object** dialog box for a flat file data object:



Configure default parameter values for the source file and the source file directory. If the flat file has a control file, configure the control file name and directory.

After you configure the default values, the Developer tool creates the duplicate data object. The duplicate data object name appears on the **Data Object** tab of the Lookup transformation. The duplicate data object appears in the **Object Navigator**.

To change the parameter values for the data object after you create it, open the physical data object in the **Object Navigator**. Click the **Parameters** tab.

## Port Selectors

You can create a lookup condition when the Lookup transformation contains generated ports. You can reference a dynamic port or a port selector in a lookup condition. You can also use an expression parameter to parameterize the complete lookup expression.

When the dynamic port contains multiple generated ports, you can define a port selector to filter the generated ports in the lookup condition. The lookup source might change in a dynamic mapping. You can configure a port selector to filter which ports to use for the lookup column. The lookup source port selector must contain the same number of ports as the input columns port selector.

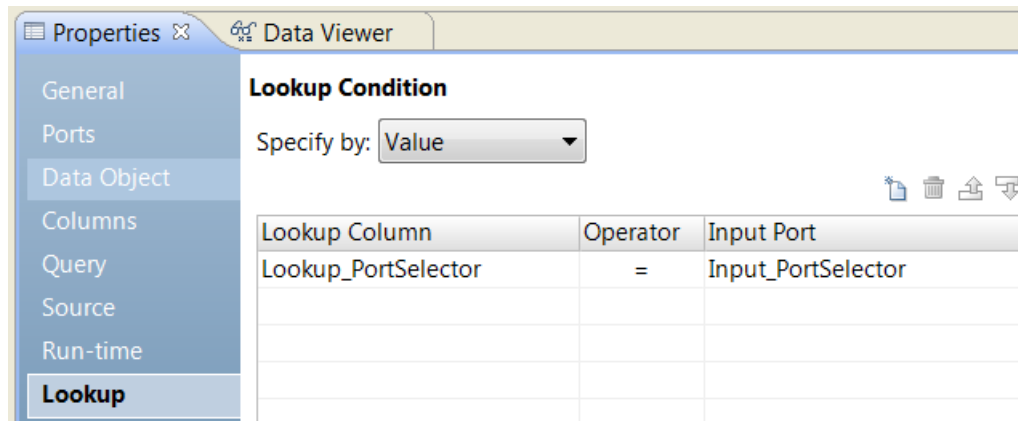
For example, Lookup\_PortSelector contains the following ports:

```
C_CustKey
C_OrderKey
```

Input\_PortSelector contains the following input ports:

```
CustomerID_IN
OrderID_IN
```

The following image shows a lookup condition that contains port selectors:



The lookup condition expands to the following expression:

```
C_CustKey = CustomerID_IN AND C_OrderKey = OrderID_IN
```

When the lookup condition contains multiple ports, you can configure one operator. For example, you can change the operator to greater than (>). The lookup condition expands to the following expression:

```
C_CustKey > CustomerID_IN AND C_OrderKey > OrderID_IN
```

You can create a lookup condition that contains a dynamic port:

```
Lookup_PortSelector = Dynamic_Input_Port
```

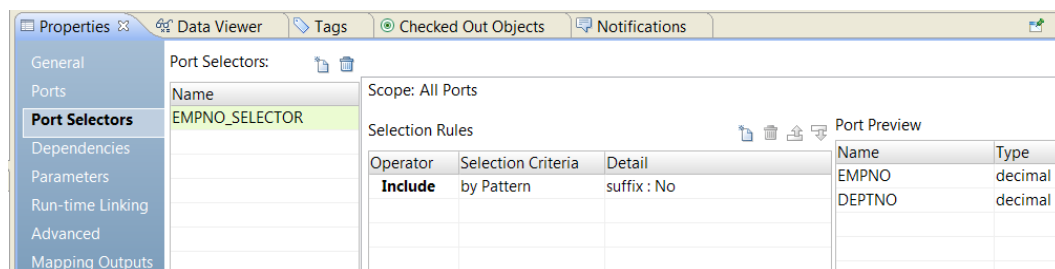
The dynamic port must contain the same number of ports as the port selector.

## Port Selector Configuration

When you configure a port selector, you define selection rules to determine which generated ports to include. The selection rules are similar to the input rules that you can configure for dynamic ports.

A port selector can include static or generated ports. Configure a port selector on the **Port Selector** tab.

The following image shows the **Port Selector** tab:



Configure the following properties for a port selector:

### Name

Identifies the port selector. You can create multiple port selectors in a transformation and reference them in expressions.

### Scope

Identifies a group of ports that the port selector applies to. You must choose the scope when you create a port selector for a Joiner or a Lookup transformation. These transformations have multiple input groups. The Joiner transformation has a Master or a Detail scope. The Lookup transformation has an

Import or a Lookup scope. The Expression transformation has one input group. The scope is always All Ports.

### Selection Rules

Determines the ports to include in the port selector. When you create the selection rules, the **Port Preview** panel shows the ports that qualify from the current input ports. These ports might change. Configure the selection rules to accommodate ports from different sources.

## Selection Rules

The selection rules associated with a port selector determine the ports to include in the port selector.

When you create the selection rules, the **Port Preview** panel shows the ports that qualify from the current input ports. These ports might change. Configure the selection rules to accommodate ports from different sources.

Create selection rules based on the following criteria:

### Operator

Includes or excludes the ports that selection rules return. Default is include. You must include ports before you can exclude ports.

### Selection Criteria

The type of selection rule you want to create. You can create a rule based on the port type or the column name. To include ports based on the column name, search for specific names or search for a pattern of characters in the name.

### Detail

The values to apply to the selection criteria. If the selection criteria is by column name, configure the string or name to search for. If the selection criteria is by port type, select the port types to include.

The following table describes the selection criteria and how to specify the details for the criteria:

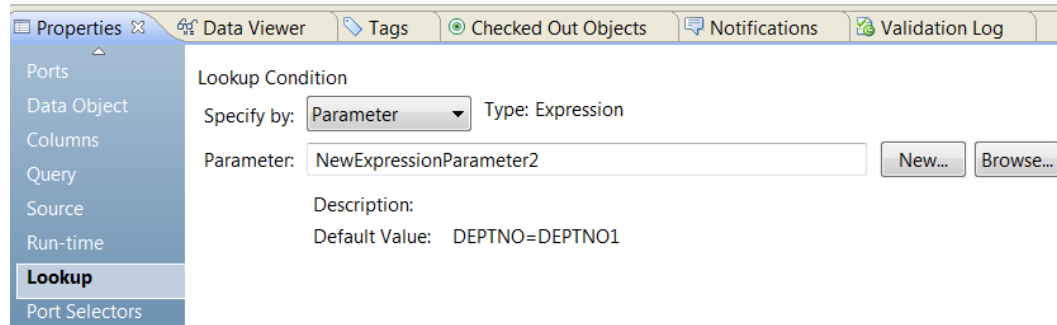
| Selection Criteria | Description   | Detail   |
|--------------------|---|--|
| All                | Includes all ports.   | No details required.   |
| Name               | Filters ports based on the port name.   | Select the port names from a list of values or use a parameter of type Port or Port List.  |
| Type               | Filters ports based on the data type of each port.                              | Select data types from a list.   |
| Pattern            | Filters ports by a string of characters in the name or by a regular expression. | Choose prefix, suffix, or regular expression as the pattern type for the port name. Then, enter a value for the pattern or use a parameter of type String. |

## Parameterize the Lookup Condition

You can configure an expression parameter that defines the lookup condition. An expression parameter contains a complete expression that you create in an expression editor. You can define a mapping parameter to override the expression parameter at run time.

If you specify a lookup condition using a parameter, you can browse for an expression parameter or you can create a parameter.

The following image shows where to configure an expression parameter for the Lookup condition:



To create a parameter, click **New**. Define a name for the parameter and edit the default value. The expression parameter default value is the full expression to define the lookup condition. You can use generated ports, dynamic ports, and port selectors in the expression.

**Note:** When you create the expression, the lookup column is always the first value and the input column is the second value.

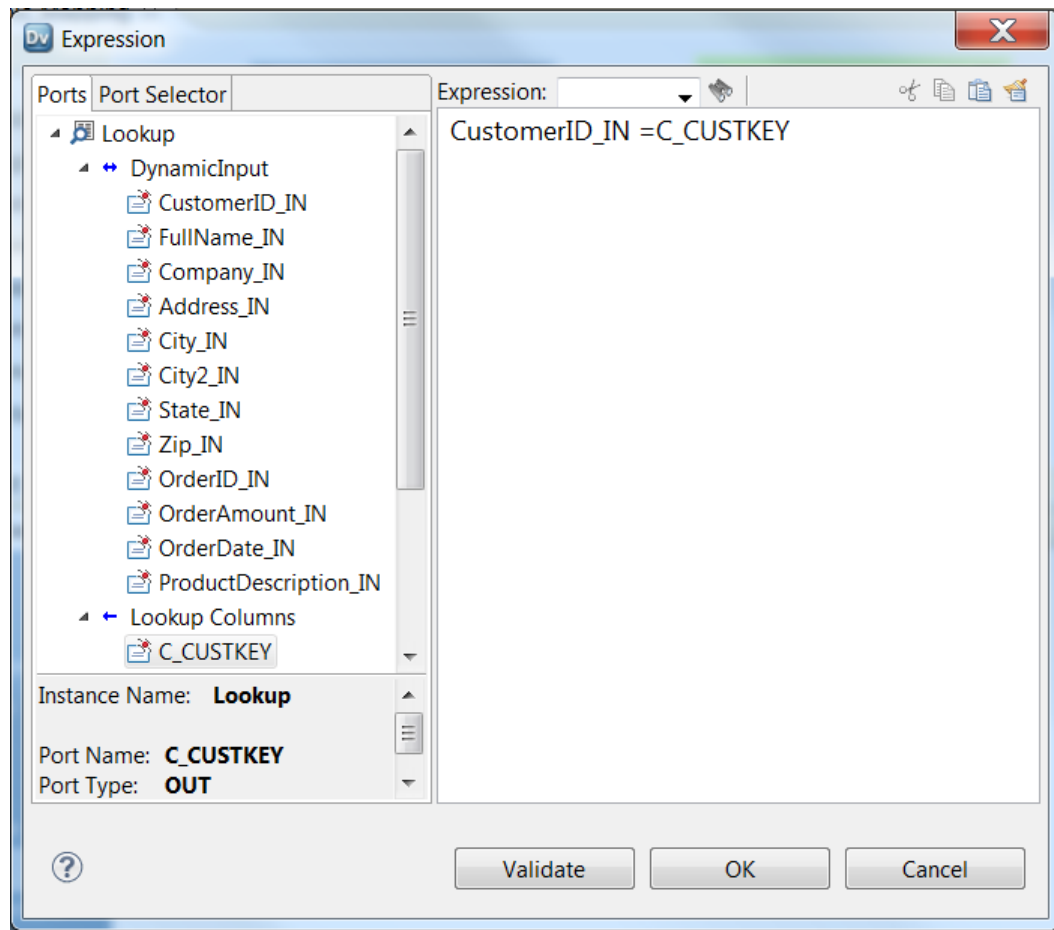
For example, you create the following lookup condition in an expression parameter:

```
CustomerID_IN = C_CUSTKEY
```

CustomerID\_IN is the lookup column.

C\_CUSTKEY is the input column.

The following image shows the lookup expression in the expression editor:



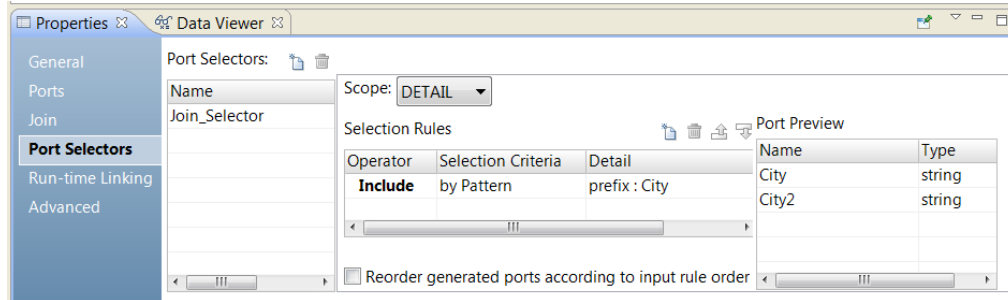
## Creating a Port Selector

Create a port selector to determine which ports to use in a dynamic expression, a lookup condition, or a joiner condition.

1. Click the **Port Selectors** tab.
2. In the **Port Selectors** area, click **New**.  
The Developer tool creates a port selector with a default selection rule that includes all ports.
3. In the **Port Selectors** area, change the port selector name to a unique name.
4. If you are working on the Joiner transformation or the Lookup transformation, choose the scope.  
The available ports change based on the group of ports that you choose.
5. In the **Selection Rules** area, select an **Operator**.
  - Include. Create a rule that includes ports for the port selector. You must include ports before you can exclude ports.
  - Exclude. Create a rule that excludes specific ports from the port selector.
6. Choose the **Selection Criteria**.
  - By Name. Select specific ports by name. You can select the port names from a list of ports in the scope.

- By Type. Select ports by type. You can select one or more data types.
- By Pattern. Select ports by a pattern of characters in the port name. You can search with specific characters or you can create a regular expression.

The following image shows the Port Selector tab:



7. Click the **Detail** column.

The **Input Rule Detail** dialog box appears.

8. Select the values to filter ports by.

- By Name. Choose to create a port list by value or by a parameter. Click **Choose** to select the ports in the list.
- By Type. Select one or more data types from a list. The **Port Preview** area shows ports of the types that you select.
- By Pattern. Choose to search the prefix or suffix of the port name for a specific pattern of characters. Or, choose to create a regular expression to search with. Configure a parameter or configure the pattern to search with.

The **Port Preview** area shows the ports in the port selector as you configure the rules.

9. To reorder the ports in the port selector, select **Reorder generated ports according to the input rule order**.

# Run-time Properties

Set the run-time properties to enable and configure lookup caching. You must add the Lookup transformation to a mapping before you can configure run-time lookup properties.

The following table describes run-time properties for Lookup transformations that perform flat file, reference table, or relational lookups:

| Property                    | Description   |
|-----------------------------|---|
| Lookup Caching Enabled      | <p>Indicates whether the Integration Service caches lookup values.</p> <p>When you enable lookup caching, the Integration Service queries the lookup source once, caches the values, and looks up values in the cache. Caching the lookup values can increase performance on large lookup tables.</p> <p>When you disable caching, each time a row passes into the transformation, the Integration Service issues a select statement to the lookup source for lookup values.</p> <p>The Integration Service always caches flat file lookups.</p>  |
| Lookup Data Cache Size      | <p>Amount of memory that the Data Integration Service allocates to the data cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.</p>  |
| Lookup Index Cache Size     | <p>Amount of memory that the Data Integration Service allocates to the index cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.</p>   |
| Cache File Name Prefix      | <p>Prefix for the cache file. You can specify the cache file name prefix for a persistent lookup cache.</p>   |
| Pre-build Lookup Cache      | <p>Allows the Integration Service to build the lookup cache before the Lookup transformation receives the data. The Integration Service can build multiple lookup cache files at the same time to increase performance.</p> <p>Configure one of the following options:</p> <ul style="list-style-type: none"><li>- Auto. The Integration Service determines the value.</li><li>- Always Allowed. Allows the Integration Service to build the lookup cache before the Lookup transformation receives the data. The Integration Service can build multiple lookup cache files at the same time to increase performance.</li><li>- Always disallowed. The Integration Service cannot build the lookup cache before the Lookup transformation receives the first row.</li></ul> |
| Lookup Cache Directory Name | <p>Directory used to build the lookup cache files when you configure the Lookup transformation to cache the lookup source.</p> <p>Default is the CacheDir system parameter. You can configure another system parameter or user-defined parameter for this property.</p>   |
| Re-cache from Lookup Source | <p>Rebuilds the lookup cache to synchronize the persistent cache with the lookup table. Recache the lookup from the database when the Lookup transformation has a persistent lookup cache and the lookup table changes occasionally.</p>  |

## RELATED TOPICS:

- [“Cache Size” on page 68](#)

# Advanced Properties

Configure the persistent lookup cache and connection to a relational database in the advanced properties. The properties that appear are based on the type of lookup source.

The following table describes advanced properties for each type of lookup source:

| Property                         | Lookup Source Type   | Description   |
|----------------------------------|--|---|
| Lookup Cache Persistent          | Flat file, reference table, relational lookup                      | Indicates whether the Integration Service uses a persistent lookup cache, which consists of at least two cache files. If a Lookup transformation is configured for a persistent lookup cache and persistent lookup cache files do not exist, the Integration Service creates the files.   |
| Case Sensitive String Comparison | Flat file  | The Integration Service uses case-sensitive string comparisons when performing lookups on string columns.   |
| Null Ordering                    | Flat file  | Determines how the Integration Service orders null values. You can choose to sort null values high or low. By default, the Integration Service sorts null values high. This overrides the Integration Service configuration to treat nulls in comparison operators as high, low, or null. For relational lookups, null ordering is based on the database default value. |
| Tracing Level                    | Flat file, logical data object, reference table, relational lookup | Sets the amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.  |
| Update Else Insert               | Reference table, relational lookup                                 | Applies to dynamic lookup cache only. The Integration Service updates the row in the cache if the row type entering the Lookup transformation is update, the row exists in the index cache, and the cache data is different than the existing row. The Integration Service inserts the row in the cache if it is new.   |
| Insert Else Update               | Reference table, relational lookup                                 | Applies to dynamic lookup cache only. The Integration Service inserts the row in the cache if the row type entering the Lookup transformation is insert and it is new. If the row exists in the index cache but the data cache is different than the current row, the Integration Service updates the row in the data cache.  |
| Output Old Value on Update       | Reference table, relational lookup                                 | The Integration Service outputs the value that existed in the cache before it updated the row. Otherwise, the Integration Service outputs the updated value that it writes in the cache.  |
| Update Dynamic Cache Condition   | Reference table, relational lookup                                 | Applies to dynamic lookup cache only. An expression that indicates whether to update the dynamic cache. The Integration Service updates the cache when the condition is true and the data exists in the cache. Default is true.   |



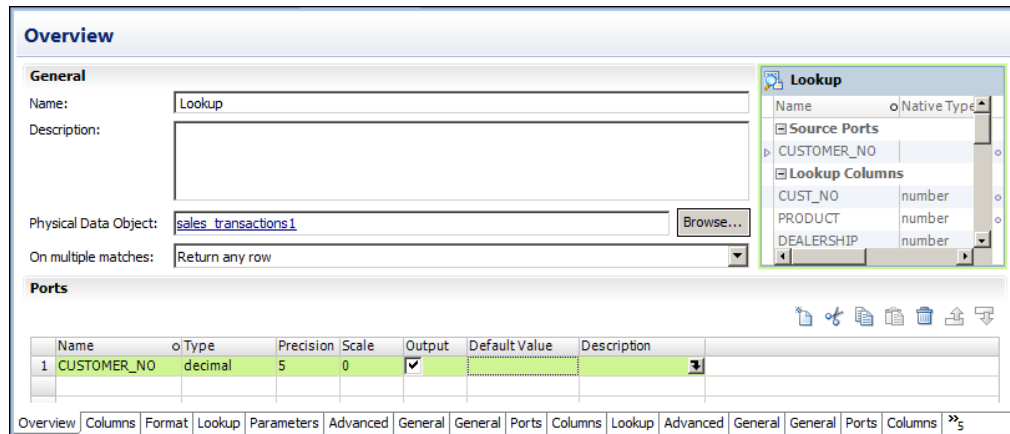
| Property           | Lookup Source Type                 | Description  |
|--------------------|------------------------------------|--|
| Connection         | Reference table, relational lookup | Connection to the relational database that contains the relational lookup source. You can use a parameter for the connection.<br>For reference table lookups, this field is read-only.   |
| Sorted Input       | Flat file                          | Indicates that input data is presorted by groups.  |
| Datetime Format    | Flat file                          | Define a datetime format and field width. Milliseconds, microseconds, or nanoseconds formats have a field width of 29. If you do not select a datetime format for a port, you can enter any datetime format.<br>Default is YYYY-MM-DD HH24:MI:SS. The Datetime format does not change the size of the port. This field is read-only. |
| Thousand Separator | Flat file                          | Value is None. This field is read-only.  |
| Decimal Separator  | Flat file                          | Value is a period. This field is read-only.  |

## Creating a Reusable Lookup Transformation

Create a Lookup transformation to look up data in a flat file, logical data object, reference table, or relational data object.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.
3. Browse to the Lookup wizard.
4. Select **Flat File Data Object Lookup**, **Logical Data Object Lookup**, **Reference Table Lookup**, or **Relational Data Object Lookup**.
5. Click **Next**.  
The **New Lookup Transformation** dialog box appears.
6. Select a physical data object or reference table in the Developer tool.
7. Enter a name for the transformation.
8. For **On multiple matches**, determine which rows that the Lookup transformation returns when it finds multiple rows that match the lookup condition.
9. Click **Finish**.  
The Lookup transformation appears in the editor.
10. In the **Ports** section of the **Overview** view, add output ports to the transformation.

The following figure shows the CUSTOMER\_NO output port in a Lookup transformation:



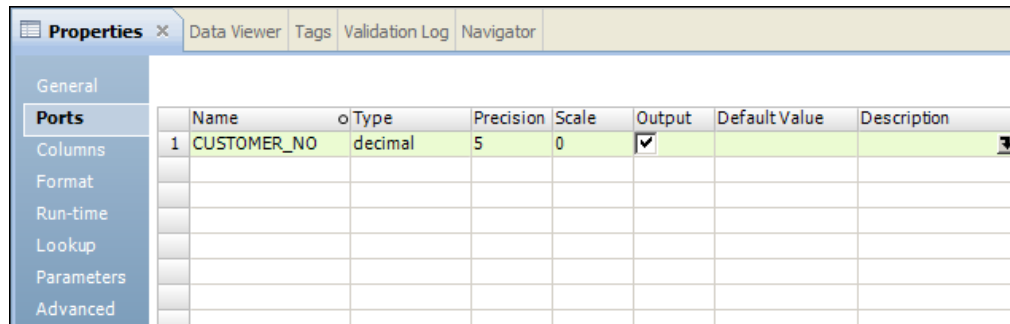
11. On the **Run-time** tab of the **Properties** view, select **Lookup Caching Enabled** to enable lookup caching.  
**Note:** You must add the Lookup transformation to a mapping before you can configure run-time lookup properties.
12. On the **Lookup** tab of the **Properties** view, add one or more lookup conditions.
13. On the **Advanced** tab of the **Properties** view, configure the tracing level, dynamic lookup cache properties, and run-time connection.
14. Save the transformation.

## Creating a Non-Reusable Lookup Transformation

Create a non-reusable Lookup transformation in a mapping or maplet.

1. In a mapping or maplet, drag a Lookup transformation from the Transformation palette to the editor.  
The **New** dialog box appears.
2. Select **Flat File Data Object Lookup**, **Logical Data Object Lookup**, **Reference Table Lookup**, or **Relational Data Object Lookup**.
3. Click **Next**.  
The **New Lookup Transformation** dialog box appears.
4. Select a physical data object or reference table in the Developer tool.
5. Enter a name for the transformation.
6. For **On multiple matches**, determine which rows that the Lookup transformation returns when it finds multiple rows that match the lookup condition.
7. Click **Finish**.  
The Lookup transformation appears in the editor.
8. Select the Lookup transformation in the editor.  
The toolbar appears above the transformation.
9. On the **Ports** tab of the **Properties** view, add output ports to the transformation.

The following figure shows the CUSTOMER\_NO output port in a Lookup transformation:



|   | Name        | Type    | Precision | Scale | Output                              | DefaultValue | Description |
|---|-------------|---------|-----------|-------|-------------------------------------|--------------|-------------|
| 1 | CUSTOMER_NO | decimal | 5         | 0     | <input checked="" type="checkbox"/> |              |             |
|   |             |         |           |       |                                     |              |             |
|   |             |         |           |       |                                     |              |             |
|   |             |         |           |       |                                     |              |             |
|   |             |         |           |       |                                     |              |             |
|   |             |         |           |       |                                     |              |             |
|   |             |         |           |       |                                     |              |             |

10. On the **Run-time** tab of the **Properties** view, select **Lookup Caching Enabled** to enable lookup caching.  
**Note:** You must add the Lookup transformation to a mapping before you can configure run-time lookup properties.
11. On the **Lookup** tab of the **Properties** view, add one or more lookup conditions.
12. On the **Advanced** tab of the **Properties** view, configure the tracing level, dynamic lookup cache properties, and run-time connection.
13. Save the transformation.

## Creating an Unconnected Lookup Transformation

Create an unconnected Lookup transformation when you want to perform a lookup from an expression. You can create a reusable or a non-reusable unconnected Lookup transformation on a flat file, reference table, or relational data object.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.
3. Browse to the Lookup wizard.
4. Select **Flat File Data Object Lookup**, **Reference Table Lookup**, or **Relational Data Object Lookup**.
5. Click **Next**.

The **New Lookup** dialog box appears.

6. Select a physical data object or reference table in the Developer tool.
7. Enter a name for the transformation.
8. For **On multiple matches**, determine which row that the Lookup transformation returns when it finds multiple rows that match the lookup condition. Do not choose **Return All** for an unconnected lookup.
9. Click **Finish**.

The Lookup transformation appears in the editor.

10. In the **Ports** section in the **Overview** view, add ports to the transformation.  
 Create an input port for each argument in the :LKP expression. Create an input port for each lookup condition that you create. You can use an input port in multiple conditions.
11. In the **Ports** section in the **Overview** view, configure one port as the return port.
12. In the **Lookup** view, add one or more lookup conditions to compare the transformation input values with values in the lookup source or cache.

When the condition is true, the lookup returns a value in the return port. If the lookup condition is false, the lookup returns NULL.

13. Create a :LKP expression for a port in a transformation that allows expressions, such as an Aggregator transformation, Expression transformation, or Update Strategy transformation.
14. When you create a mapping, add the unconnected Lookup transformation to the mapping in the editor, but do not connect the ports to the other transformations in the mapping.

## Unconnected Lookup Example

A retail store in California adds a state sales tax to each price for items that it sells to customers within the state. The amount of tax is based on what county that the customer resides in. To retrieve the sales tax, you create a Lookup transformation that receives a county name and then returns a sales tax amount for the county. If the county does not charge a sales tax, the Lookup transformation returns NULL. Call the lookup from an Expression transformation.

Complete the following steps to configure an unconnected lookup of sales tax by county:

1. Import a flat file physical data object that contains the sales tax amounts by county.
2. Create the unconnected Lookup transformation.
3. Add input ports to the Lookup transformation.
4. Define the return port.
5. Create the lookup condition.
6. Call the lookup from an Expression transformation.

### Step 1. Import the sales tax lookup source to the Model repository.

The sales tax file must be in the Model repository before you create the Lookup transformation. For this scenario, the sales tax file contains two fields, Sales\_County and County\_SalesTax. The county is a string that contains a county name. County\_SalesTax is a decimal field that contains a tax rate for the county. The sales tax file is the lookup source.

### Step 2. Create the Unconnected Lookup Transformation

Create a reusable flat file Lookup transformation with the sales tax flat file data object. For this scenario, the transformation name is Sales\_Tax\_Lookup. Select **Return First Row** on multiple matches.

### Step 3. Define the Lookup Transformation Ports

Define the Lookup transformation ports on the **Ports** tab of the **Properties** view.

| Port Type | Name      | Type    | Length | Scale |
|-----------|-----------|---------|--------|-------|
| Input     | In_County | String  | 25     |       |
| Output    | SalesTax  | Decimal | 3      | 3     |

### Step 4. Configure the Lookup Transformation Return Port

The return port is the field in the flat file that the lookup retrieves. On the **Columns** tab, the County\_SalesTax column is the return port.

When the lookup is true, the Integration Service finds the county in the flat file source. The Integration Service returns a sales tax value in the return port. If the Integration Service does not find the county, the lookup result is false and the Integration Service returns NULL in the return port.

## Step 5. Define the Lookup Condition

On the **Lookup** view, define the lookup condition to compare the input value with values in the lookup source.

To add the lookup condition, click the **Lookup Column**.

The lookup condition has the following syntax:

```
SALES_COUNTY = IN_COUNTY
```

## Step 6. Create an Expression Transformation

Create an Expression transformation that receives sales records from a flat file. The Expression transformation receives a customer number, sales amount, and the county of the sale. It returns the customer number, sales amount, and a sales tax.

The Expression transformation has the following ports:

| Port Type    | Name     | Type    | Length | Precision | Default Value |
|--------------|----------|---------|--------|-----------|---------------|
| Input        | County   | String  | 25     | 10        |               |
| Pass-through | Customer | String  | 10     |           |               |
| Pass-through | SalesAmt | Decimal | 10     | 2         |               |
| Output       | SalesTax | Decimal | 10     | 2         | 0             |

The SalesTax port contains a :LKP expression. The expression calls the Sales\_Tax\_Lookup transformation and passes the county name as the parameter. The Sales\_Tax\_Lookup transformation returns the sales tax rate to the expression. The Expression transformation multiplies the tax rate by the sales amount.

Enter the following expression for the SalesTax port:

```
(:LKP.Sales_Tax_Lookup(County) * SalesAmt)
```

The SalesTax port contains the expression result. If the lookup fails, the Lookup transformation returns NULL and the SalesTax port contains null values.

You can add an expression to check for null values in the SalesTax port. If SalesTax is NULL you can configure the SalesTax port to return zero. Add the following text to the lookup expression to check for null values and return zero:

```
IIF(ISNULL(:LKP.Sales_Tax_Lookup(County) * SalesAmt),0, SalesTax)
```

## CHAPTER 26

# Lookup Caches

This chapter includes the following topics:

- [Lookup Caches Overview, 378](#)
- [Lookup Cache Types, 379](#)
- [Uncached Lookup, 380](#)
- [Static Lookup Cache, 380](#)
- [Persistent Lookup Cache, 380](#)
- [Dynamic Lookup Cache, 381](#)
- [Shared Lookup Cache, 382](#)
- [Cache Comparison, 383](#)
- [Cache Partitioning for Lookups, 383](#)

## Lookup Caches Overview

You can configure a Lookup transformation to cache a relational or flat file lookup source. Enable lookup caching on a large lookup table or file to increase lookup performance.

The Integration Service builds a cache in memory when it processes the first row of data in a cached Lookup transformation. The Integration Service creates caches as the source rows enter the Lookup transformation. It allocates memory for the cache based on the amount you configure in the transformation. The Integration Service stores condition values in the index cache and output values in the data cache. The Integration Service queries the cache for each row that enters the transformation.

If the data does not fit in the memory cache, the Integration Service stores the overflow values in cache files. The Integration Service creates the cache files in the cache directory. By default, the Integration Service creates cache files in the directory specified in the CacheDir system parameter. When the mapping completes, the Integration Service releases cache memory and deletes the cache files unless you configure the Lookup transformation to use a persistent cache.

If you use a flat file lookup, the Integration Service caches the lookup source. If you configure a flat file lookup for sorted input, the Integration Service cannot cache the lookup if the condition columns are not grouped. If the columns are grouped, but not sorted, the Integration Service processes the lookup as if you did not configure sorted input.

When you do not configure the Lookup transformation for caching, the Integration Service queries the lookup source for each input row. Whether or not you cache the lookup source, the result of the Lookup query and processing is the same. However, you can increase lookup performance on a large lookup source if you enable lookup caching.

# Lookup Cache Types

You can configure different types of lookup caches. For example, you can configure a shared cache if you want to share the cache among multiple Lookup transformations in the same mapping.

You can configure the following types of lookup caches:

## **Static Cache**

A static cache does not change while the Integration Service processes the lookup. The Integration Service rebuilds a static cache each time it processes the lookup. By default, the Integration Service creates a static cache when you enable caching for a Lookup transformation. The Integration Service builds the cache when it processes the first lookup request. It looks up values in the cache for each row that comes into the Lookup transformation. When the lookup condition is true, the Integration Service returns a value from the lookup cache.

Use a static cache for the following reasons:

- The lookup source does not change while the mapping runs.
- The lookup is an unconnected lookup. You must use a static cache for an unconnected lookup.
- To increase performance. Because the Integration Service does not update the cache while it processes the Lookup transformation, the Integration Service processes a Lookup transformation with a static cache faster than a Lookup transformation with a dynamic cache.
- You want the Integration Service to return the default value for connected transformations or NULL for unconnected transformations when the lookup condition is false.

## **Persistent Cache**

A persistent cache does not change each time the Integration Service processes the lookup. The Integration Service saves the lookup cache files and reuses them the next time it processes a Lookup transformation configured to use the cache. Use a persistent cache when the lookup source does not change.

You can configure the Lookup transformation to rebuild a persistent lookup cache if necessary.

## **Dynamic Cache**

A dynamic lookup cache changes while the Integration Service processes the lookup. The Integration Service builds a dynamic lookup cache when it processes the first lookup request. When it processes each row, the Integration Service dynamically inserts or updates data in the lookup cache and passes the data to the target. The dynamic cache is synchronized with the target.

Use a dynamic cache when you want to update a target based on new and changed records. You might also use a dynamic cache when the mapping requires a lookup on target data, but connection to the target is slow.

## **Shared Cache**

A shared cache can be used by multiple Lookup transformations in the same mapping. Use a shared cache to increase mapping performance. Instead of generating a separate lookup cache for each Lookup transformation, the Integration Service generates one cache.

## Uncached Lookup

An uncached lookup is when the Integration Service does not cache the lookup source. By default, the Integration Service does not use a lookup cache for a Lookup transformation.

The Integration Service processes an uncached lookup the same way it processes a cached lookup except that it queries the lookup source instead of building and querying the lookup cache.

When the lookup condition is true, the Integration Service returns the values from the lookup source. When the Integration Service processes a connected Lookup transformation, it returns the values represented by the lookup/output ports. When it processes an unconnected Lookup transformation, the Integration Service returns the value represented by the return port.

When the condition is not true, the Integration Service returns either NULL or default values. When the Integration Service processes a connected Lookup transformation, it returns the default value of the output port when the condition is not met. When it processes an unconnected Lookup transformation, the Integration Service returns NULL when the condition is not met.

## Static Lookup Cache

A static lookup cache is a cache that the Integration Service does not update when it processes the Lookup transformation. By default, the Integration Service creates a static lookup cache when you configure a Lookup transformation for caching.

The Integration Service builds the cache when it processes the first lookup request. It queries the cache based on the lookup condition for each row that passes into the transformation.

When the lookup condition is true, the Integration Service returns the values from the static lookup cache. When the Integration Service processes a connected Lookup transformation, it returns the values represented by the lookup/output ports. When the Integration Service processes an unconnected Lookup transformation, it returns the value represented by the return port.

When the condition is not true, the Integration Service returns either NULL or default values. When the Integration Service processes a connected Lookup transformation, the Integration Service returns the default value of the output port when the condition is not met. When the Integration Service processes an unconnected Lookup transformation, it returns NULL when the condition is not met.

## Persistent Lookup Cache

A persistent lookup cache is a cache that the Integration Service reuses for multiple runs of the same mapping. Use a persistent lookup cache when the lookup source does not change between mapping runs.

By default, the Integration Service uses a non-persistent cache when you enable lookup caching in a Lookup transformation. The Integration Service deletes the cache files when the mapping completes. The next time you run the mapping, the Integration Service builds the memory cache from the lookup source.

If you configure the Lookup transformation to use a persistent lookup cache, the Integration Service saves and reuses cache files for multiple runs of the mapping. A persistent cache eliminates the time required to read the lookup table and rebuild the lookup cache.



The first time the Integration Service runs a mapping with a persistent lookup cache, the Integration Service saves the cache files to disk. The next time the Integration Service runs the mapping, it builds the memory cache from the cache files.

You can configure the Integration Service to rebuild a persistent lookup cache if the original lookup source changes. When you rebuild a cache, the Integration Service creates new cache files and writes a message to the Integration Service log.

## Rebuilding a Persistent Lookup Cache

You can configure the Integration Service to rebuild the persistent lookup cache. In some cases, the Integration Service will rebuild the persistent lookup cache even if you do not configure it to.

Consider the following rules and guidelines when you rebuild a persistent lookup cache:

- Rebuild a persistent lookup cache if the lookup source changed since the last time the Integration Service built the cache.
- You can rebuild the cache when the mapping contains one or more Lookup transformations that share a cache.
- If the lookup table does not change between mapping runs, configure the Lookup transformation to use a persistent lookup cache. The Integration Service saves and reuses cache files, eliminating the time required to read the lookup table.
- If you configure subsequent Lookup transformations to rebuild the lookup cache, the Integration Service shares the cache instead of rebuilding the cache when it processes the subsequent Lookup transformation.
- If a mapping contains two persistent lookups and you configure the second Lookup transformation to rebuild the cache, then the Integration Service rebuilds the persistent lookup cache for both.

The Integration Service rebuilds the persistent lookup cache in the following scenarios:

- The Integration Service cannot find the cache files.
- The Integration Service cannot reuse the cache. In this instance, it either rebuilds the lookup cache or fails the mapping.
- You enable or disable high precision for the Integration Service.
- You edit the Lookup transformation or the mapping.  
**Note:** The Integration Service does not rebuild the cache if you edit the transformation description.
- You change the number of partitions.
- You change the database connection or the file location used to access the lookup source.
- You change the sort order in Unicode mode.
- You change the Integration Service code page.

## Dynamic Lookup Cache

A dynamic cache is a cache that the Integration Service updates when it processes each row. Use a dynamic lookup cache to keep the cache synchronized with the target.

You can use a dynamic cache with a relational lookup and flat file lookup. The Integration Service builds the cache when it processes the first lookup request. It queries the cache based on the lookup condition for each

row that passes into the Lookup transformation. The Integration Service updates the lookup cache when it processes each row.

Based on the results of the lookup query, the row type, and the Lookup transformation properties, the Integration Service either inserts or updates rows in the cache, or makes no change to the cache.

## Shared Lookup Cache

A shared lookup cache is a static lookup cache that is shared by multiple Lookup transformations in a mapping. Use a shared lookup cache to decrease the amount of time required to build the cache.

By default, the Integration Service shares the cache for Lookup transformations in a mapping that have compatible caching structures. For example, if a mapping contains two instances of the same reusable Lookup transformation in one mapping and you use the same output ports for both instances, the Lookup transformations share the lookup cache by default.

The Integration Service builds the cache when it processes the first Lookup transformation. It uses the same cache to process subsequent Lookup transformations that share the cache. When the Integration Service shares a lookup cache, it writes a message in the Integration Service log.

The Integration Service allocates data cache memory and index cache memory for the first Lookup transformation. It does not allocate additional memory for subsequent Lookup transformations that share the lookup cache.

If the transformation or the cache structure do not allow sharing, the Integration Service creates a new cache.

## Rules and Guidelines for Sharing a Lookup Cache

Consider the following rules and guidelines when you share a lookup cache:

- You can share one or more static caches with a dynamic lookup. If a dynamic lookup shares the cache with a static lookup in the same mapping, the static lookup reuses the cache created by the dynamic lookup.
- You cannot share a cache between dynamic lookups.
- If you configure multiple Lookup transformations to rebuild a persistent lookup cache, the Integration Service builds the cache for the first Lookup transformation, and then shares the persistent lookup cache for the subsequent Lookup transformations.
- If you do not configure the first Lookup transformation to rebuild a persistent lookup cache, but you configure a subsequent Lookup transformation to rebuild the cache, the transformations cannot share the cache. The Integration Service builds the cache when it processes each Lookup transformation.
- The lookup/output ports for subsequent Lookup transformations must match or be a subset of the ports in the Lookup transformation that the Integration Service uses to build the cache. The order of the ports do not need to match.
- Lookup transformations that share the cache must have the following characteristics:
  - The Lookup transformations must use the same ports in the lookup condition.
  - The Lookup transformations must use the same SQL override if one is used.
  - Lookup caching must be enabled in all Lookup transformations.
  - The Lookup transformations must use the same type of lookup source.

- All relational Lookup transformations must use the same database connection.
- The Lookup transformations must use the same lookup table name.
- The structure of the cache for all Lookup transformations must be compatible.

## Cache Comparison

The Integration Service performs differently based on the type of lookup cache that you configure.

The following table compares Lookup transformations with an uncached lookup, a static cache, and a dynamic cache:

| Uncached  | Static Cache  | Dynamic Cache   |
|---|---|---|
| The Integration Service does not insert or update the cache.  | The Integration Service does not insert or update the cache.  | The Integration Service can insert or update rows in the cache as it passes rows to the target.   |
| You can use a relational lookup.  | You can use a relational or flat file lookup.   | You can use a relational or flat file lookup.   |
| <p>When the condition is true, the Integration Service returns a value from the lookup table or cache.</p> <p>When the condition is not true, the Integration Service returns the default value for connected transformations and NULL for unconnected transformations.</p> | <p>When the condition is true, the Integration Service returns a value from the lookup table or cache.</p> <p>When the condition is not true, the Integration Service returns the default value for connected transformations and NULL for unconnected transformations.</p> | <p>When the condition is true, the Integration Service either updates rows in the cache or leaves the cache unchanged, based on the row type. This indicates that the row is in the cache and target table. You can pass updated rows to a target.</p> <p>When the condition is not true, the Integration Service either inserts rows into the cache or leaves the cache unchanged, based on the row type. This indicates that the row is not in the cache or target. You can pass inserted rows to a target table.</p> |

## Cache Partitioning for Lookups

Cache partitioning creates a separate cache for each partition that processes an Aggregator, Joiner, Rank, or Lookup transformation. Cache partitioning increases mapping performance because each partition queries a separate cache in parallel.

When the Integration Service creates partitions for a mapping, it might use cache partitioning for partitioned Lookup transformations.

The Integration Service uses cache partitioning for connected Lookup transformations when the following conditions are true:

- The lookup condition contains only equality operators.
- When the connected Lookup transformation looks up data in a relational table, and the database is configured for case-sensitive comparison.

The Integration Service does not use cache partitioning for unconnected Lookup transformations.

When the Integration Service does not use cache partitioning for a Lookup transformation, all partitions of the Lookup transformation share the same cache. Each partition queries the same cache serially.

## CHAPTER 27

# Dynamic Lookup Cache

This chapter includes the following topics:

- [Dynamic Lookup Cache Overview, 385](#)
- [Uses for a Dynamic Lookup Cache, 386](#)
- [Dynamic Lookup Cache Properties, 386](#)
- [Dynamic Lookup Cache and Output Values, 388](#)
- [Lookup Transformation Values, 388](#)
- [SQL Override and Dynamic Lookup Cache, 391](#)
- [Mapping Configuration for a Dynamic Lookup Cache, 391](#)
- [Conditional Dynamic Lookup Cache Updates, 394](#)
- [Dynamic Cache Update with Expression Results, 395](#)
- [Dynamic Lookup Cache Example, 396](#)
- [Rules and Guidelines for Dynamic Lookup Caches, 397](#)

## Dynamic Lookup Cache Overview

Use a dynamic lookup cache to keep the cache synchronized with the target. You can use a dynamic cache with a relational lookup or flat file lookup.

The Integration Service builds the dynamic lookup cache when it processes the first lookup request. It queries the cache based on the lookup condition for each row that passes into the transformation. The Integration Service updates the lookup cache when it processes each row.

Based on the results of the lookup query, the row type, and the Lookup transformation properties, the Integration Service performs one of the following actions on the dynamic lookup cache when it reads a row from the source:

### **Inserts the row into the cache**

The Integration Service inserts the row when the row is not in the cache and you configured the Lookup transformation to insert rows into the cache. You can configure the transformation to insert rows into the cache based on input ports or generated sequence IDs. The Integration Service flags the row as insert.

### **Updates the row in the cache**

The Integration Service updates the row when the row exists in the cache and you configured the Lookup transformation to update rows in the cache. The Integration Service updates the row in the cache based on the input ports. The Integration Service flags the row as an update row.

### **Makes no change to the cache**

The Integration Service makes no change when the row exists in the cache and you configured the Lookup transformation to insert new rows only. Or, the row is not in the cache and you specified to update existing rows only. Or, the row is in the cache, but based on the lookup condition, nothing changes. The Integration Service flags the row as unchanged.

Based on the value of the NewLookupRow, you can also configure a Router or Filter transformation with the dynamic Lookup transformation to route insert or update rows to the target table. You can route unchanged rows to another target table or flat file, or you can drop them.

## Uses for a Dynamic Lookup Cache

You can configure a Lookup transformation with a dynamic lookup cache to update the cache based on changes in the lookup source.

You might use a dynamic lookup cache for the following reasons:

### **Update a master customer table with new and updated customer information.**

For example, you can use a Lookup transformation to perform a lookup on the customer table to determine if a customer exists in the target. The cache represents the customer table. The Lookup transformation inserts and update rows in the cache as it passes rows to the target.

### **Use an exported flat file as a lookup source instead of a relational table.**

If the connection to the database is slow, you can export the relational table contents to a flat file and use the file as a lookup source. For example, you might need to use this method if an ODBC connection to a database is slow. You can configure the database table as a relational target in the mapping and pass the lookup cache changes back to the database table.

## Dynamic Lookup Cache Properties

Configure the dynamic lookup properties to enable a dynamic lookup cache and configure how the cache is updated. For example, you can configure the values that are inserted and updated in the dynamic cache.

Configure the following properties when you enable a dynamic lookup cache:

### **On Multiple Matches**

Set to Report Error.

### **Dynamic Lookup Cache**

Enables a dynamic lookup cache.

This option is available after you enable lookup caching.

### **Update Else Insert**

Applies to rows entering the Lookup transformation where the row type is update. When enabled, the Integration Service updates existing rows in the cache, and inserts a row if it is new. When disabled, the Integration Service does not insert new rows.

This option is available after you enable dynamic caching.

**Insert Else Update**

Applies to rows entering the Lookup transformation where the row type is insert. When enabled, the Integration Service inserts rows in the cache and updates existing rows. When disabled, the Integration Service does not update existing rows.

This option is available after you enable dynamic caching.

**Output Old Value on Update**

The Lookup transformation can output the existing or new values from the cache. When enabled, the Integration Service outputs the existing values from the lookup/output ports before it updates the value in the cache. When the Integration Service updates a row in the cache, it outputs the value in the lookup cache before it updates the row based on the input data. When the Integration Service inserts a row in the cache, it outputs null values.

Disable the property for the Integration Service to pass the same values from the lookup/output and input/output ports. This property is enabled by default.

This option is available after you enable dynamic caching.

**Update Dynamic Cache Condition**

When enabled, the Integration Service uses the condition expression to determine whether to update the dynamic cache. The Integration Service updates the cache when the condition is true and the data exists in the cache.

Create the expression using lookup ports or input ports. The expression can contain input values or values in the lookup cache. Default is true.

This option is available after you enable dynamic caching.

**NewLookupRow**

The Developer tool adds this port to a Lookup transformation that is configured with a dynamic cache.

The NewLookupRow property can contain one of the following values:

- 0 = No update to the cache.
- 1 = Insert row into cache.
- 2 = Update row in cache.

To keep the lookup cache and the target table synchronized, pass rows to the target when the NewLookupRow value is equal to 1 or 2.

**Associated Port**

The Integration Service uses the value of the associated port when it updates data in the cache. The Integration Service associates input ports and lookup source ports specified in the lookup condition. You must configure associated ports for the remaining lookup source ports in the dynamic lookup. If you do not configure an associated port for all lookup source ports in a dynamic lookup, the mapping validation fails.

You can associate a lookup source port with the following objects:

| Object                | Description  |
|-----------------------|--|
| Input port            | Updates the cache based on the value of an input port.   |
| Associated expression | Select to enter an expression. The Integration Service updates the cache based on the result of the expression.                  |
| Sequence ID           | Generates a primary key for rows inserted in the lookup cache. You can associate a sequence ID with bigint and int columns only. |

#### Ignore Null Inputs for Updates

The Developer tool activates this port property for lookup/output ports when you configure the Lookup transformation to use a dynamic cache. Select this property when you do not want the Integration Service to update the column in the cache with a null input value.

#### Ignore in Comparison

The Developer tool activates this port property for lookup/output ports not used in the lookup condition when you configure the Lookup transformation to use a dynamic cache. The Integration Service compares the values in all lookup ports with the values in their associated ports by default. Select this property if you want the Integration Service to ignore the port when it compares values before updating a row. Use this property to increase the performance of the comparison.

## Dynamic Lookup Cache and Output Values

If you enable a dynamic lookup cache, the output port values vary based on how you configure the dynamic lookup cache. The output value of the lookup/output port depends on whether you choose to output old or new values when the Integration Service updates a row.

You can configure the **Output Old Value On Update** property to specify one of the following types of output values for a lookup/output port:

- Output old values on update. The Integration Service outputs the value that existed in the cache before it updated the row.
- Output new values on update. The Integration Service outputs the updated value that it writes in the cache. The lookup/output port value matches the output port value.

## Lookup Transformation Values

The Lookup transformation contains values for input ports, the lookup, and output ports. If you enable a dynamic lookup cache, the output port values vary based on how you configure the dynamic lookup cache.

The Lookup transformation contains the following types of values:

#### Input value

Value that the Integration Service passes into the Lookup transformation.



### Lookup value

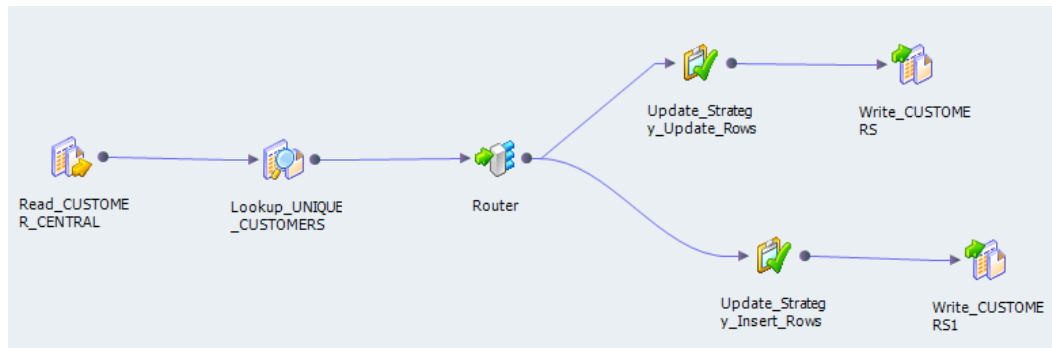
Value that the Integration Service inserts into the cache.

### Output value

Value that the Integration Service passes from the output port of the Lookup transformation. The output value of the lookup/output port depends on whether you choose to output old or new values when the Integration Service updates a row.

## Lookup Transformation Values Example

For example, you create a mapping with the following objects:



For the Lookup transformation, you enable dynamic lookup caching and define the following lookup condition:

`IN_CUST_ID = CUST_ID`

By default, the row type of all rows entering the Lookup transformation is insert. To perform both inserts and updates in the cache and target table, you select the **Insert Else Update** property in the Lookup transformation.

### Initial Cache Values

When you run the mapping, the Integration Service builds the lookup cache from the target table.

The following table shows the initial values of the lookup cache:

| PK_PRIMARYKEY | CUST_ID | CUST_NAME    | ADDRESS           |
|---------------|---------|--------------|-------------------|
| 100001        | 80001   | Marion James | 100 Main St.      |
| 100002        | 80002   | Laura Jones  | 510 Broadway Ave. |
| 100003        | 80003   | Shelley Lau  | 220 Burnside Ave. |

### Input Values

The source contains rows that exist and rows that do not exist in the target table. The Integration Service passes the source rows into the Lookup transformation.

The following table shows the source rows:

| SQ_CUST_ID | SQ_CUST_NAME  | SQ_ADDRESS        |
|------------|---------------|-------------------|
| 80001      | Marion Atkins | 100 Main St.      |
| 80002      | Laura Gomez   | 510 Broadway Ave. |

| <b>SQ_CUST_ID</b> | <b>SQ_CUST_NAME</b> | <b>SQ_ADDRESS</b> |
|-------------------|---------------------|-------------------|
| 99001             | Jon Freeman         | 555 6th Ave.      |

## Lookup Values

The Integration Service looks up values in the cache based on the lookup condition. It updates rows in the cache for existing customer IDs 80001 and 80002. It inserts a row into the cache for customer ID 99001. The Integration Service generates a new key (PK\_PRIMARYKEY) for the new row.

The following table shows the rows and values returned from the lookup:

| <b>PK_PRIMARYKEY</b> | <b>CUST_ID</b> | <b>CUST_NAME</b> | <b>ADDRESS</b>    |
|----------------------|----------------|------------------|-------------------|
| 100001               | 80001          | Marion Atkins    | 100 Main St.      |
| 100002               | 80002          | Laura Gomez      | 510 Broadway Ave. |
| 100004               | 99001          | Jon Freeman      | 555 6th Ave.      |

## Output Values

The Integration Service flags the rows in the Lookup transformation based on the inserts and updates it performs on the dynamic cache. The Integration Service eventually pass the rows to a Router transformation that creates a branch for insert rows and another branch for update rows. Each branch contains an Update Strategy transformation. The Update Strategy transformations flag the rows for insert or update based on the value of the NewLookupRow port.

The output values of the lookup/output and input/output ports depend on whether you choose to output old or new values when the Integration Service updates a row. However, the output values of the NewLookupRow port and any lookup/output port that uses the sequence ID is the same for new and updated rows.

If you choose to output new values, the lookup/output ports output the following values:

| <b>NewLookupRow</b> | <b>PK_PRIMARYKEY</b> | <b>CUST_ID</b> | <b>CUST_NAME</b> | <b>ADDRESS</b>    |
|---------------------|----------------------|----------------|------------------|-------------------|
| 2                   | 100001               | 80001          | Marion Atkins    | 100 Main St.      |
| 2                   | 100002               | 80002          | Laura Gomez      | 510 Broadway Ave. |
| 1                   | 100004               | 99001          | Jon Freeman      | 555 6th Ave.      |

If you choose to output old values, the lookup/output ports output the following values:

| <b>NewLookupRow</b> | <b>PK_PRIMARYKEY</b> | <b>CUST_ID</b> | <b>CUST_NAME</b> | <b>ADDRESS</b>    |
|---------------------|----------------------|----------------|------------------|-------------------|
| 2                   | 100001               | 80001          | Marion James     | 100 Main St.      |
| 2                   | 100002               | 80002          | Laura Jones      | 510 Broadway Ave. |
| 1                   | 100004               | 99001          | Jon Freeman      | 555 6th Ave.      |

When the Integration Service updates rows in the lookup cache it uses the primary key (PK\_PRIMARYKEY) values for rows in the cache and the target table.

The Integration Service uses the sequence ID to generate a primary key for the customer that it does not find in the cache. The Integration Service inserts the primary key value into the lookup cache and it returns the value to the lookup/output port.

The Integration Service outputs the values from the input/output ports that match the input values.

**Note:** If the input value is NULL and you select the Ignore Null property for the associated input port, the input value does not equal the lookup value or the value out of the input/output port. When you select the Ignore Null property, the lookup cache and the target table might become unsynchronized if you pass null values to the target. You must verify that you do not pass null values to the target.

## SQL Override and Dynamic Lookup Cache

You can add a WHERE clause in the lookup query to filter the records used to build the cache and to perform a lookup on the database table for an uncached lookup. However the Integration Service does not use the WHERE clause when inserting rows into a dynamic cache.

When you add a WHERE clause in a Lookup transformation using a dynamic cache, connect a Filter transformation before the Lookup transformation to filter rows that you do not want to insert into the cache or target table. If you do not include the Filter transformation, you might get inconsistent results between the cache and the target table.

For example, you configure a Lookup transformation to perform a dynamic lookup on the employee table, EMP, matching rows by EMP\_ID. You define the following lookup SQL override:

```
SELECT EMP_ID, EMP_STATUS FROM EMP ORDER BY EMP_ID, EMP_STATUS WHERE EMP_STATUS = 4
```

When you first run the mapping, the Integration Service builds the lookup cache from the target table based on the lookup SQL override. All rows in the cache match the condition in the WHERE clause, EMP\_STATUS = 4.

For example, the Integration Service reads a source row that meets the lookup condition you specify, but the value of EMP\_STATUS is 2. Although the target might have the row where EMP\_STATUS is 2, the Integration Service does not find the row in the cache because of the SQL override. The Integration Service inserts the row into the cache and passes the row to the target table. When the Integration Service inserts this row in the target table, you might get inconsistent results when the row already exists. In addition, not all rows in the cache match the condition in the WHERE clause in the SQL override.

To verify that you only insert rows into the cache that match the WHERE clause, add a Filter transformation before the Lookup transformation and define the filter condition as the condition in the WHERE clause in the lookup SQL override.

For the example above, enter the following filter condition in the Filter transformation and the WHERE clause in the SQL override:

```
EMP_STATUS = 4
```

## Mapping Configuration for a Dynamic Lookup Cache

If you use a Lookup with a dynamic cache, you must configure the mapping to update the dynamic lookup cache and write the changed rows to the target.

Complete the following steps to configure a mapping with a dynamic lookup cache:

**Flag the input rows of the Lookup transformation for insert or update.**

By default, the row type of all input rows is insert. Add an Update Strategy transformation before the Lookup transformation to specify different row types for the input rows.

### Specify how the Integration Service handles the input rows for the dynamic cache.

Select the **Insert Else Update** or **Update Else Insert** options to process rows flagged for insert or update.

### Create separate mapping pipelines for rows to be inserted into the target and updated in the target.

Add a Filter or Router transformation after the Lookup transformation to route insert and update rows into separate mapping branches. Use the value of the NewLookupRow to determine the appropriate branch for each row.

### Configure the row type for output rows of the Lookup transformation.

Add an Update Strategy transformation to flag rows for insert or update.

## Insert Else Update

Use the **Insert Else Update** property to update existing rows in the dynamic lookup cache when the row type is insert.

This property only applies to rows entering the Lookup transformation where the row type is insert. When a row of any other row type, such as update, enters the Lookup transformation, the **Insert Else Update** property has no effect on how the Integration Service handles the row.

When you select **Insert Else Update** and the row type entering the Lookup transformation is insert, the Integration Service inserts the row into the cache if it is new. If the row exists in the index cache but the data cache is different than the current row, the Integration Service updates the row in the data cache.

If you do not select **Insert Else Update** and the row type entering the Lookup transformation is insert, the Integration Service inserts the row into the cache if it is new, and makes no change to the cache if the row exists.

The following table describes how the Integration Service changes the lookup cache when the row type of the rows entering the Lookup transformation is insert:

| Insert Else Update Option | Row Found in Cache | Data Cache is Different | Lookup Cache Result | NewLookupRow Value |
|---------------------------|--------------------|-------------------------|---------------------|--------------------|
| Cleared - insert only     | Yes                | -                       | No change           | 0                  |
| Cleared - insert only     | No                 | -                       | Insert              | 1                  |
| Selected                  | Yes                | Yes                     | Update              | 2 <sup>1</sup>     |
| Selected                  | Yes                | No                      | No change           | 0                  |
| Selected                  | No                 | -                       | Insert              | 1                  |

<sup>1</sup> If you select *Ignore Null for all lookup ports not in the lookup condition* and if all those ports contain null values, the Integration Service does not change the cache and the NewLookupRow value equals 0.

## Update Else Insert

Use the **Update Else Insert** property to insert new rows in the dynamic lookup cache when the row type is update.

You can select the **Update Else Insert** property in the Lookup transformation. This property only applies to rows entering the Lookup transformation where the row type is update. When a row of any other row type, such as insert, enters the Lookup transformation, this property has no effect on how the Integration Service handles the row.

When you select this property and the row type entering the Lookup transformation is update, the Integration Service updates the row in the cache if the row exists in the index cache and the cache data is different than the existing row. The Integration Service inserts the row in the cache if it is new.

If you do not select this property and the row type entering the Lookup transformation is update, the Integration Service updates the row in the cache if it exists, and makes no change to the cache if the row is new.

If you select **Ignore Null** for all lookup ports not in the lookup condition and if all those ports contain null values, the Integration Service does not change the cache and the NewLookupRow value equals 0.

The following table describes how the Integration Service changes the lookup cache when the row type of the rows entering the Lookup transformation is update:

| Update Else Insert Option | Row Found in Cache | Data Cache is Different | Lookup Cache Result | NewLookupRow Value |
|---------------------------|--------------------|-------------------------|---------------------|--------------------|
| Cleared (update only)     | Yes                | Yes                     | Update              | 2                  |
| Cleared (update only)     | Yes                | No                      | No change           | 0                  |
| Cleared (update only)     | No                 | -                       | No change           | 0                  |
| Selected                  | Yes                | Yes                     | Update              | 2                  |
| Selected                  | Yes                | No                      | No change           | 0                  |
| Selected                  | No                 | -                       | Insert              | 1                  |

## Dynamic Lookup Cache and Target Synchronization

Configure downstream transformations to ensure that the dynamic lookup cache and the target are synchronized.

When you use a dynamic lookup cache, the Integration Service writes to the lookup cache before it writes to the target table. The lookup cache and target table can become unsynchronized if the Integration Service does not write the data to the target. For example, the target database might reject the data.

Consider the following guidelines to keep the lookup cache synchronized with the lookup table:

- Use a Router transformation to pass rows to the cached target when the NewLookupRow value equals one or two.
- Use the Router transformation to drop rows when the NewLookupRow value equals zero. Or, output the rows to a different target.
- Use Update Strategy transformations after the Lookup transformation to flag rows for insert or update into the target.
- Verify that the Lookup transformation outputs the same values to the target that the Integration Service writes to the lookup cache. When you choose to output new values on update, only connect lookup/output ports to the target table instead of output ports. When you choose to output old values on update, add an Expression transformation after the Lookup transformation and before the Router transformation. Add output ports in the Expression transformation for each port in the target table and create expressions to ensure you do not output null input values to the target.
- Select Insert and Update as Update when you define the update strategy target table options. This ensures that the Integration Service updates rows marked for update and inserts rows marked for insert.

# Conditional Dynamic Lookup Cache Updates

You can update a dynamic lookup cache based on the results of a boolean expression. The Integration Service updates the cache when the expression is true.

For example, you might have a product number, quantity on hand, and a timestamp column in a target table. You need to update the quantity on hand with the latest source values. You can update the quantity on hand when the source data has a timestamp greater than the timestamp in the dynamic cache. Create an expression in the Lookup transformation similar to the following expression:

```
lookup_timestamp < input_timestamp
```

The expression can include the lookup and the input ports. You can access built-in, mapping, and parameter variables. You can include user-defined functions and refer to unconnected transformations.

The expression returns true, false, or NULL. If the result of the expression is NULL, the expression is false. The Integration Service does not update the cache. You can add a check for NULL values in the expression if you need to change the expression result to true. The default expression value is true.

## Conditional Dynamic Lookup Cache Processing

You can create a condition that determines if the Integration Service updates the dynamic lookup cache. If the condition is false or NULL, the Integration Service does not update the dynamic lookup cache.

If the condition is false or NULL, regardless of the Lookup transformation properties, the NewLookupRow value is 0 and the Integration Services does not update the dynamic lookup cache with any row inserts or updates.

If the row exists in the cache and you enable Insert Else Update or Update Else Insert, the NewLookupRow value is 1 and Integration Service updates the new row in the cache.

If the row does not exist in the cache and you enable Insert Else Update or Update Else Insert, the NewLookupRow value is 2 and Integration Service inserts the new row in the cache.

## Configuring a Conditional Dynamic Lookup Cache

You can configure an expression that determines whether the Integration Service updates a dynamic lookup cache.

1. Create the Lookup transformation.
2. On the **Run-time** tab of the **Properties** view, select **Lookup Caching Enabled**.
3. On the **Advanced** tab of the **Properties** view, select **Dynamic Lookup Cache**.
4. To enter the condition, click the down arrow for the **Update Dynamic Cache Condition** property.  
The Expression Editor appears.
5. Define an expression condition.  
You can select input ports, lookup ports, and functions for the expression.
6. Click **Validate** to verify that the expression is valid.
7. Click **OK**.
8. If applicable, configure the other advanced properties that apply to the dynamic lookup cache.

# Dynamic Cache Update with Expression Results

The Lookup transformation can update the dynamic lookup cache values with the results of an expression.

For example, a product table target has a numeric column that contains an order count. Each time the Lookup transformation receives an order for the product, it updates the dynamic cache order\_count with the results of the following expression:

```
order_count = order_count + 1
```

The Lookup transformation returns the order\_count.

You can configure how the Integration Service handles the case where the expression evaluates to null.

## Null Expression Values

The expression returns NULL if one of the values in the expression is null. However, you can configure an expression to return a non-null value.

If the expression refers to a lookup port, but the source data is new, the lookup port contains a default value. The default might be NULL. You can configure an IsNull expression to check for null values.

For example, the following expression checks if lookup\_column is NULL:

```
iif (isnull(lookup_column), input_port, user_expression)
```

If the column is null, then return the input\_port value. Otherwise return the value of the expression.

## Expression Processing

The Integration Service can insert and update rows in the dynamic lookup cache based on the expression results. The expression results might vary based on whether the lookup port value is NULL and is included in the expression.

When you enable Insert Else Update, the Integration Service inserts a row with the expression result if the data is not in the cache. The lookup port value is NULL when data does not exist in the cache. If the expression refers to the lookup port value, the Integration Service substitutes the default port value in the expression. When you enable Insert Else Update and the data exists in the cache, the Integration Service updates the cache with the expression result.

When you enable Update Else Insert, the Integration Service updates the cache with the expression result if the data exists in the cache. When the data does not exist in the cache, the Integration Service inserts a row that contains the expression result. If the expression refers to a lookup port value, the Integration Service substitutes the default port value in the expression.

## Configuring an Expression for Dynamic Cache Updates

You can configure an expression for a dynamic cache lookup update.

You must enable the Lookup transformation to perform dynamic lookups before you can create a conditional expression.

1. Create the Lookup transformation.
2. On the **Run-time** tab of the **Properties** view, select **Lookup Caching Enabled**.
3. On the **Advanced** tab of the **Properties** view, select **Dynamic Lookup Cache**.
4. If applicable, configure the other advanced properties that apply to the dynamic lookup cache.
5. To create an expression, select the **Columns** tab on the **Properties** view.

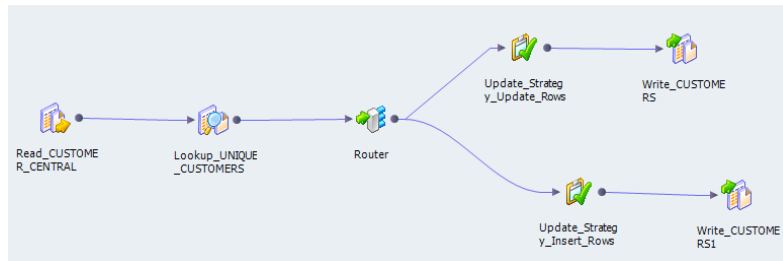
6. Click the drop-down arrow in the **Associated Port** column for the lookup port that you want to update.
7. Select **Associated Expression** from the drop-down list, and click **Enter**.  
The Expression Editor appears.
8. Define the expression.  
You can select input ports, lookup ports, and functions for the expression. The expression return value must match the datatype of the lookup port.
9. Click **Validate** to verify that the expression is valid.
10. Click **OK**.

## Dynamic Lookup Cache Example

You can use a dynamic lookup cache to insert and update rows in the target. When you use a dynamic lookup cache, you can insert and update the same rows in the cache that you insert and update in the target.

For example, you need to update a table that contains customer data. The source data contains rows of customer data to insert or update in the target. Create a dynamic cache that represents the target. Configure a Lookup transformation to lookup customers in the dynamic cache.

The following figure shows a mapping that has a Lookup transformation with a dynamic lookup cache:



The Router transformation splits into two branches. The Router transformation passes insert rows into one branch and update rows into the other branch. Each branch contains an Update Strategy transformation that writes rows to the target. Both branches contain the same target.

When the mapping starts, the Integration Service builds the lookup cache from customer target table. When the Integration Service reads a row that is not in the lookup cache, it inserts the row in the cache.

The Lookup transformation returns each row to a Router transformation. Based on whether the row is marked for insert or update, the Router transformation directs the row to one of the Update Strategy transformations. The Router transformation determines whether rows are marked for insert or update based on the NewLookupRow property. The Update Strategy transformations mark each row as insert or update before passing it to the target.

The customer target table changes as the mapping runs. The Integration Service inserts new rows and updates existing rows in the lookup cache. The Integration Service keeps the lookup cache and customer target table synchronized.

To generate keys for the target, use Sequence-ID in the associated port. The Integration Service uses the sequence ID as the primary key for each new row inserted into the target table.

You increase session performance when you use a dynamic lookup cache because you build the cache from the database once.



# Rules and Guidelines for Dynamic Lookup Caches

Consider the following guidelines when you use a dynamic lookup cache:

- You must set **On Multiple Matches** property to Report Error when you use a dynamic lookup cache. To reset the property, change the dynamic lookup to a static lookup, change the property, and then change the static lookup to a dynamic lookup.
- You cannot share the cache between a dynamic Lookup transformation and static Lookup transformation in the same target load order group.
- You can enable a dynamic lookup cache for a relational or flat file lookup.
- The Lookup transformation must be a connected transformation.
- You can use a persistent or a non-persistent cache.
- If the dynamic cache is not persistent, the Integration Service always rebuilds the cache from the database, even if you do not enable **Re-cache from Lookup Source**.
- You can only create an equality lookup condition. You cannot look up a range of data in a dynamic cache.
- You must associate each lookup port that is not in the lookup condition with an input port, sequence ID, or associated expression.
- Use a Router transformation to pass rows to the cached target when the NewLookupRow value equals one or two.
- Use the Router transformation to drop rows when the NewLookupRow value equals zero. Or, you can output the rows to a different target.
- Verify that the Integration Service outputs the same values to the target that it writes to the lookup cache. When you choose to output new values on update, only connect lookup/output ports to the target table instead of the input/output ports. When you choose to output old values on update, add an Expression transformation after the Lookup transformation and before the Router transformation. Add output ports in the Expression transformation for each port in the target table and create expressions to ensure you do not output null input values to the target.
- When you use a lookup SQL override, map the correct columns to the appropriate targets for lookup.
- When you add a WHERE clause to the lookup SQL override, use a Filter transformation before the Lookup transformation. This ensures that the Integration Service inserts rows in the dynamic cache and target table that match the WHERE clause.
- When you configure a reusable Lookup transformation to use a dynamic cache, you cannot edit the condition or disable the **Dynamic Lookup Cache** property in a mapping.
- Use Update Strategy transformations after the Lookup transformation to flag the rows for insert or update for the target.
- Use an Update Strategy transformation before the Lookup transformation to define some or all rows as update if you want to use the Update Else Insert property in the Lookup transformation.

## CHAPTER 28

# Match Transformation

This chapter includes the following topics:

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- [Match Analysis, 399](#)
- [Match Score Calculations, 402](#)
- [Master Data Analysis, 406](#)
- [Identity Match Analysis and Persistent Index Data, 407](#)
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- [Configuring a Match Analysis Operation, 420](#)

## Match Transformation Overview

The Match transformation is an active transformation that analyzes the levels of similarity between records. Use the Match transformation to find records that contain duplicate information in a data set or between two data sets.

The Match transformation analyzes the values on an input port and generates a set of numeric scores that represent the degrees of similarity between the values. You can select multiple ports to determine the overall levels of similarity between the input records. You specify a minimum score as a threshold value to identify the records that are likely to contain duplicate information.

You can use the Match transformation in the following data projects:

- Customer Relationship Management. For example, a store designs a mail campaign and must check the customer database for duplicate customer records.
- Mergers and acquisitions. For example, a bank buys another bank in the same region, and the two banks have customers in common.
- Regulatory compliance initiatives. For example, a business operates under government or industry regulations that insist all data systems are free of duplicate records.
- Financial risk management. For example, a bank may want to search for relationships between account holders.

- Master data management. For example, a retail chain has a master database of customer records, and each retail store in the chain submits records to the master database on a regular basis.
- Any project that must identify duplicate records in a data set.

## Match Analysis

You can define different types of duplicate analysis in the Match transformation. The duplicate analysis operations that you define depend on the number of data sources in the mapping and the type of information that the sources contain.

Consider the following factors when you configure a Match transformation:

- You can select a single column from a data set or you can select multiple columns.
- You can analyze columns from a single data source or you can analyze two data sources.
- You can configure the Match transformation to analyze the raw data in the input port fields, or you can configure the transformation to analyze the identity information in the data.
- You can configure the Match transformation to write different types of output. The type of output that you select determines the number of records that the transformation writes and the order of the records.
- To increase performance, sort the input records into groups before you perform the match analysis.

## Column Analysis

When you configure a Match transformation, you select one or more columns for analysis.

The Match transformation analyzes columns in pairs. When you select a single column for analysis, the transformation creates a temporary copy of the column and compares the source column with the temporary column. When you select two columns for analysis, the transformation compares the values across the two columns that you select. The transformation compares each value in one column with all of the values in the other column. The transformation returns a match score for each pair of values that it analyzes.

You select the columns to analyze when you configure a strategy in the Match transformation. The strategy specifies the columns to analyze and the algorithm to apply to the columns. The algorithm calculates the levels of similarity between each pair of values. The different algorithms in the transformation use different criteria to measure the levels of similarity between the values. You can define multiple strategies in a transformation, and you can assign different columns to each strategy.

### Column Analysis Example

You want to compare the values in a column of surname data. You create a mapping that includes a data source and a Match transformation. You connect the *Surname* port to the Match transformation. The transformation creates a temporary copy of the data on the *Surname* port when the mapping runs.

The following image shows a fragment of the surname data:

|   | A              | B                |
|---|----------------|------------------|
| 1 | <b>Surname</b> | <b>Surname_1</b> |
| 2 | Annan          | Annan            |
| 3 | Baker          | Baker            |
| 4 | Barker         | Barker           |
| 5 | Edwards        | Edwards          |
| 6 | Parker         | Parker           |
| 7 | Smith          | Smith            |
| 8 | Smith          | Smith            |
| 9 | Zhang          | Zhang            |

The mapping generates a set of match scores that indicate that the following values might be duplicates:

- Baker, Barker
- Barker, Parker
- Smith, Smith

When you review the data, you decide that *Baker*, *Barker*, and *Parker* are not duplicate values. You decide that *Smith* and *Smith* are duplicate values.

## Single-Source Analysis and Dual-Source Analysis

You can configure the Match transformation to analyze data from one or two data sources. You select the ports from each data source when you define a strategy in the transformation.

When you configure the transformation to perform single-source analysis, you select one or more ports from a single data set. When you configure the transformation to perform dual-source analysis, you select one or more ports from each data set. You select the ports in pairs. For each pair of ports that you select, the transformation compares each value in one port with every value in the other port. If you perform single-source analysis on data from a single column, the transformation creates a temporary copy of the port that you select.

**Note:** When you perform identity match analysis, you can compare a data source to a persistent index of identity data that you created in an earlier mapping. Use the **Match Type** options to specify identity analysis with a persistent index.

## Field Match Analysis and Identity Match Analysis

You can configure a Match transformation to perform field match analysis or identity match analysis.

In field match analysis, the Match transformation analyzes the source data that enters the transformation. You can perform field match analysis on any type of data. In identity match analysis, the Match transformation generates an index of alternative data values from the input data and analyzes the index data. Configure the Match transformation for identity match analysis when the input ports contain identity data. An identity is a group of data values that identifies a person or an organization.

A data set can represent a single identity in different ways. For example, the following data values represent the name John Smith:

- John Smith
- Smith, John

- jsmith@email.com
- SMITHJMR

The Match transformation reads the identity data in a record and calculates the possible alternative versions of the identity. The transformation creates an index that includes the current versions and alternative versions of the identities. The Match transformation analyzes the index values and not the values in the input records.

## Identity Population Files

Identity match operations read reference data files called populations. The population files define the potential variations in the identity data. The files do not install with Informatica applications. You buy and download the population data files from Informatica.

Install the files to a location that the Content Management Service can access. Use Informatica Administrator to set the location on the Content Management Service.

## Groups in Match Analysis

A match analysis mapping can take a long time to run because of the number of data comparisons that the transformation must perform. The number of comparisons relates to the number of data values on the ports that you select.

The following table shows the number of calculations that a mapping performs for different numbers of data values on a single port:

| Number of data values | Number of comparisons |
|-----------------------|-----------------------|
| 10,000                | 50 million            |
| 100,000               | 5,000 million         |
| 1 million             | 500,000 million       |

To reduce the time that the mapping takes to run, assign the input data records to groups. A group is a set of records that contain identical values on a port that you specify. When you perform match analysis on grouped data, the Match transformation analyzes the records within each group. The transformation does not compare the records in one group with the records in another group. The groups reduce the overall number of comparisons that the transformation must perform without any loss of accuracy in the mapping analysis.

Consider the following rules and guidelines when you organize data into groups:

- The port on which you group the data is the group key port. A group key port must contain a range of duplicate values, such as a city name or a state name in an address data set. If the mapping data does not contain a usable group key port, use the Key Generator to create the port from the current mapping data. Connect the group key output port from the Key Generator transformation to the Match transformation. You can also use the Key Generator transformation to add sequence identifiers to the mapping data.
- Field match operations must specify a group key port. If you configure the Match transformation for identity analysis, do not select a group key port. The identity analysis generates group keys for the identity index data.
- Do not specify a group key port that you plan to use in the match analysis.
- When you create groups, you must verify that the groups are a valid size. If the groups are too small, the match analysis might not find all the duplicate data in the data set. If the groups are too large, the match

analysis might return false duplicates. Select group keys that create an average group size of 10,000 records.

- Groups do not reorder the position of the records in the mapping data set.

## Match Pairs and Clusters

The Match transformation can read and write different numbers of input rows and output rows, and it can change the sequence of the output rows. You determine the output format for the results of the match analysis.

The transformation can write rows in the following formats:

### Matched pairs

The transformation writes a row for every pair of records that match with a score that meets the match threshold. The transformation writes each pair of records to a single row.

Because a record might match more than one other record, a record might appear on more than one output row.

### Best match

The transformation writes a row for each record in a data set and adds the most similar record from another data set to the same row.

### Clusters

The transformation assigns the output records to clusters based on the levels of similarity between the records. A cluster is a set of records in which each record matches at least one other record with a score that meets the match threshold. The transformation writes each record to a single row.

Each record in a cluster must match at least one other record in the cluster. Therefore, a cluster can contain pairs of records that do not match each other. A cluster can contain a single record if the record does not match any other record.

**Note:** The Clusters option in field analysis corresponds to the Clusters - Match All option in identity analysis. The Clusters - Best Match option in identity analysis combines cluster calculations and matched pair calculations.

Configure the output options on the **Match Output** view of the transformation.

### RELATED TOPICS:

- [“Cluster Output Options” on page 403](#)

## Match Score Calculations

The match score is a numerical value that represents the degree of similarity between two column values. An algorithm calculates a match score as a decimal value in the range 0 through 1. An algorithm assigns a score of 1 when two column values are identical.

When you select multiple column pairs for analysis, the transformation calculates an average score based on the scores in the selected columns. By default, the transformation assigns equal weight to scores from each pair of columns. The transformation does not infer the relative importance of the column data in the data set.

You can edit the weight values that the transformation uses to calculate the match score. Edit the weight values when you want to assign higher or lower priority to columns in the data set.

You can also set the scores that the transformation applies when it finds a null value in a column. By default, the transformation treats null values as data errors and assigns a low match score to any pair of values that contains a null.

**Note:** The algorithm you select determines the match score between two values. The algorithm generates a single score for the two values. The match scores do not depend on the type of match output or the type of scoring method you select.

## Weighted Scores

When you select multiple columns for match analysis, the transformation calculates an average score for each record based on the scores in the columns. The average score includes any weight values that you apply to the comparison algorithms for each column.

By default, all algorithms use a weight value of 0.5. You can increase this value if the selected columns are more likely to contain duplicated information. You can decrease the weight value if duplicate values in the selected columns are less likely to indicate genuine duplicate information between records. The Match transformation uses the average score as the single match score for each pair of records.

## Null Match Scores

A match algorithm applies a predefined match score to a pair of values when one or both values are null. You can edit the match score that a field match algorithm applies to null values.

### Null Match Scores and Field Match Algorithms

When you configure a field match algorithm, verify the match score values that the algorithm applies to null data. A field match algorithm applies a default score of 0.5 when it compares two values and one or both values are null. A score of 0.5 indicates a low level of similarity between data values.

Consider the following rules and guidelines when you verify the null match scores:

- When the algorithm analyzes columns that contain primary keys or other critical data, do not edit the default scores. In this case, a null value represents a data error, and the default scores are appropriate for the data.
- When the algorithm analyzes columns that can optionally contain data, update the null match score values to the same value as the match threshold. You cancel the effect of the null values on the match analysis when you set the null match scores to the match threshold value.

### Null Match Scores and Identity Match Algorithms

An identity match algorithm applies a match score of 0 when it compares two values and one or both values are null. Identity match analysis assigns a record with a null match score to a unique record cluster and records a cluster size value of 1. You cannot edit the score that an identity match algorithm applies to null data.

## Cluster Output Options

Select a cluster output option when you want to organize similar or identical records in the output data.

When you select a cluster output option, the transformation adds a cluster ID value to each output record. You can sort the records by the cluster ID values. The transformation output includes a row for every record. If a record does not match another record with a score that meets the match threshold, the transformation assigns a unique cluster ID to the record. Use the **Match Output** view to select or update the cluster output options.

You can select the following cluster output options:

## Clusters

Select the option to assign cluster ID values to the output records.

### Clusters - Best Match

Select the option to add the record pair with the highest match score to a cluster. Because a record might represent the best match with more than one other record, more than one record pair can share a cluster ID value.

### Clusters - Match All

The **Clusters - Match All** option works in the same way as the **Clusters** option.

The transformation uses **Clusters - Match All** and **Clusters - Best Match** as option names in identity match analysis.

**Note:** If a Data Integration Service runs multiple Match transformations concurrently, the Data Integration Service generates unique cluster ID values for the output from each transformation. Therefore, the cluster ID values for the records that each transformation generates can be non-consecutive.

## The Clusters Option and the Clusters - Match All Option

Select the Clusters option in field match analysis. Select the Clusters - Match All option in identity match analysis.

The Match transformation uses the following rules to create the clusters:

- When two records have a match score that meets the match threshold, the Match transformation adds the records to a cluster.
- When a record in the data set matches any record in the cluster, the transformation adds the record to the cluster.
- If a record in one cluster matches a record in another cluster, the process merges the clusters.
- The transformation performs a continual sweep of the match results until all the records belong to a cluster.
- If a record does not match any other record in the data set, the transformation assigns a unique cluster ID value to the record.

## The Clusters - Best Match Option

Select the Clusters - Best Match option in identity match analysis.

The transformation uses the following rules to create the clusters:

- The transformation identifies the record that has the highest match score with the current record. If the match score meets the threshold, the transformation adds the pair of records to a cluster.
- If one of the matching records is in a cluster, the transformation adds the other record to the current cluster.
- The transformation performs a continual sweep of the match score results until all the records belong to a cluster.
- A cluster can contain a single record if the record does not match any other record in the data.

**Note:** You can use the **Match** property on the **Match Output** view to specify how the transformation compares a single data source to a persistent data store. The **Match** property determines whether the transformation looks for duplicates within the source data or the persistent data store.



## RELATED TOPICS:

- [“Match Pairs and Clusters” on page 402](#)

## Driver Scores and Link Scores in Cluster Analysis

When you select a cluster output option in the Match transformation, you can add link score and driver score data to the output.

The link score is the score between two records that identifies the records as members of the same cluster. The links between records determine the composition of the cluster. Any record can link to any other record in the same cluster.

The driver score is the score between the record with the highest sequence ID value in a cluster and another record in the same cluster. Driver scores provide a means to assess all records in a cluster against a single record. When you add driver scores to the match output, the mapping runs more slowly, as the Match transformation cannot calculate the driver scores until all the clusters are complete.

**Note:** Match analysis generates a single set of scores for each strategy that you define. The driver score and the link score indicate the match scores for different pairs of records in each cluster. The driver scores and link scores can depend on the order in which the records enter the transformation. The driver score might be lower than the match threshold.

### Cluster Analysis Example

You configure a field match strategy to analyze a column of surname data. You set a match threshold of 0.825 in the strategy. You select a clustered output format, and you run the Data Viewer on the transformation.

The following table shows the data that the Data Viewer displays:

| Surname | Sequence ID | Cluster ID | Cluster Size | Driver ID | Driver Score | Link ID | Link Score |
|---------|-------------|------------|--------------|-----------|--------------|---------|------------|
| SMITH   | 1           | 1          | 2            | 1 - 6     | 1            | 1 - 1   | 1          |
| SMYTH   | 2           | 2          | 2            | 1 - 3     | 0.83333      | 1 - 2   | 1          |
| SMYTHE  | 3           | 2          | 2            | 1 - 3     | 1            | 1 - 2   | 0.83333    |
| SMITT   | 4           | 3          | 1            | 1 - 4     | 1            | 1 - 4   | 1          |
| SMITS   | 5           | 4          | 1            | 1 - 5     | 1            | 1 - 5   | 1          |
| SMITH   | 6           | 1          | 2            | 1 - 6     | 1            | 1 - 1   | 1          |

The Data Viewer contains the following information about the surname data:

- SMITT and SMITS do not match any record with a score that meets the match threshold. The Match transformation determines that the records are unique in the data set.  
SMITT and SMITS have a cluster size of 1. To find unique records in cluster output, search for clusters that contain a single record.
- SMITH and SMITH have a link score of 1. The Match transformation determines that the records are identical. The transformation adds the records to a single cluster.
- SMYTH and SMYTHE have a link score of 0.83333. The score exceeds the match threshold. Therefore, the transformation adds the records to a single cluster.

# Master Data Analysis

When you analyze two data sources in the Match transformation, you must identify a source as the master data set. The transformation compares data values from each record in the data set that you specify with the corresponding values in every record in the second data set.

In many organizations, a master data set constitutes a permanent, high-quality data store. Before you add records to a master data set, use the Match transformation to verify that the records do not add duplicate information to the master data.

## Master Data Example

A bank maintains a master data set of customer account records. The bank updates the master data set every day with records that identify new customer accounts. The bank uses a duplicate analysis mapping to verify that the new records do not duplicate the customer information in the master data set. The master data set and the new account tables have a common structure, and the tables use the same type of database. Therefore, the bank can reuse the duplicate analysis mapping each time it needs to update the master data set.

## Directionality in Master Data Set Analysis

The Match transformation compares records from one data set to another in a single direction. The transformation compares each record in the master data set to all of the records in the second data set. The transformation does not compare each record in the second data set to all of the records in the master data set. Therefore, the selection of the master data set can affect the results of the match analysis.

The following table shows two data sets that you can compare in identity match analysis:

| Data Set 1            | Data Set 2         |
|-----------------------|--------------------|
| Alex Bell             | Alexander Bell     |
| Alexander Graham Bell | Thomas Edison      |
| Alva Edison           | Nicola Tesla       |
| Marie Curie           | Irene Joliot Curie |
| Dorothy Crowfoot      | Dorothy Hodgkin    |

If you select Data Set 1 as the master data set and you select the **Best Match** output option, the output includes the following records:

- Alex Bell, Alexander Bell
- Alexander Graham Bell, Alexander Bell

If you select Data Set 2 as the master data set and you select the **Best Match** output option, the output includes the following records:

- Alexander Bell, Alex Bell

When Data Set 2 is the master data set, the transformation cannot match Alexander Bell and Alexander Graham Bell, because Alexander Bell already matches Alex Bell in the output data.

## Mapping Reuse

If you add data to a master data set on a regular basis, configure a duplicate analysis mapping that you can reuse. You can reuse the mapping if the port configurations on the data source that you compare to the master data set do not change.

When you run the mapping, verify that the transformation specifies the master data and the newer data. You can run the mapping without any other configuration update.

## Identity Match Analysis and Persistent Index Data

When you run a mapping to analyze identity information, the Match transformation generates an index that stores the alternative versions of the identities in the data set. By default, the Match transformation writes the index data to temporary files. You can configure the transformation to save the index data to database tables.

The index tables that you generate represent a data store that you can reuse in subsequent mappings. You can compare the index tables to a data source, and you can optionally update the index tables with index data from the data source. Because the transformation does not regenerate the index tables, the subsequent mappings run faster. Additionally, the index tables can represent a trusted data store of identity data.

### RELATED TOPICS:

- [“Match Performance in Identity Analysis” on page 410](#)

## Rules and Guidelines for Persistent Index Data

Consider the following rules and guidelines when you configure a Match transformation to analyze a master data set of identity information:

- To generate a reusable index for a master data set, configure the transformation to write the index data to database tables. The database tables constitute a persistent store of the index data.
- To compare the identities in another data set to the index data store, configure the data set as the mapping data source. Configure the Match transformation to read the data source and the index data store. Select the index tables from the default schema of the database connection that you specify.
- The Match transformation adds the sequence identifier value from the input record to the index data rows that correspond to the record. The *SequenceID* input port contains the sequence identifiers. The transformation uses the sequence identifiers to track the index data through the different steps in the match analysis. Do not disconnect the sequence ID port.
- When you connect a Match transformation to an index store, the transformation reuses the population, key level, key type, and key field property values from the transformation that created the store. The transformation also reuses the port configuration from the transformation that created the store.  
  
If the transformation properties do not match, the identity analysis cannot compare the mapping source data and the index data correctly.
- The Match transformation uses the data on the input port that you select as the key field to generate the identity index. The transformation can also write data from other ports to the index. If you disconnect the non-key field data ports from the transformation, you erase any data in the corresponding index columns when you run the mapping. To preserve the input port data in the index tables, do not disconnect the input data ports.

- You can disable the match analysis in the Match transformation when you generate the index table data for a data set. For example, you might disable the match analysis when you create an index store for a data set. When you disable match analysis, the mapping runs faster.

When you disable match analysis, the Match transformation can generate and display persistence status codes and persistence status descriptions. The transformation does not generate or display match scores or other data associated with the results of the match analysis. For example, if you configure the transformation to assign records to clusters and you disable match analysis, the transformation does not generate or display cluster ID values.

- You determine whether the Match transformation updates the index store with data from the mapping source. The Match transformation uses sequence identifiers to determine whether the rows in the index store and in the mapping data represent the same records.

## Match Mapping Performance

You can preview the data factors that determine the performance of the Match transformation before you run the mapping that contains the transformation. You can verify that the system has the resources to run the mapping. You can also verify that you configured the transformation correctly to measure the levels of similarity in the input data.

Use the **Match Performance Analysis** option to verify that the system has the required resources. Use the **Match Cluster Analysis** option to verify that the mapping can accurately measure the levels of similarity in the input data.

Run match performance analysis and match cluster analysis on any Match transformation that reads a single data source. Run match performance analysis on any Match transformation that performs dual-source field match analysis. Do not run match performance analysis or match cluster analysis on an identity match strategy that connects to index tables.

### Drill-down on Match Performance Analysis

You can drill down on the match analysis data to view the record pairs that meet or exceed the match threshold. Double-click a record in the **Details** view, and use the Data Viewer to view the records that match the record that you select. The Data Viewer displays the data for each pair of records on a single row. The row contains the row identifier of each record in the pair.

### Drill-down on Match Cluster Analysis

You can drill down on the cluster analysis data to view the records in each cluster. Double-click a cluster in the **Details** view and read the data in the Data Viewer. The Data Viewer displays one cluster at a time. The cluster data includes the score options that you selected, such as the driver score, link score, driver identifier, or link identifier.

### Match Transformation Logging

When you run a mapping that uses a Match transformation, the Developer tool log tracks the number of comparison calculations that the mapping performs. To view the log data, select the **Show Log** option in the Data Viewer.

The mapping updates the log every 100,000 calculations.

## Viewing Match Cluster Analysis Data

You can view statistical data on the clusters that the transformation can create. The cluster statistics summarize the level of record duplication in the data set based on the current mapping configuration.

To view the data, right-click the Match transformation in the mapping canvas and select **Match Cluster Analysis**.

Before you run the analysis, validate the mapping that contains the transformation.

Match cluster analysis displays data for the following properties:

| Property                            | Description   |
|-------------------------------------|---|
| Source                              | The number of input data rows.  |
| Last run                            | The date and time of the analysis.  |
| Total number of discovered clusters | The number of clusters that the match analysis generates when the mapping runs.   |
| Minimum cluster size                | The number of records in the cluster or clusters that contain the fewest records. If the minimum cluster size is 1, the data set contains at least one unique record.                       |
| Maximum cluster size                | The number of records in the cluster or clusters that contain the most records. If this value greatly exceeds the average cluster size, the largest cluster might contain false duplicates. |
| Number of unique records            | The number of records in the data set that do not match another record with a score that meets the match threshold.   |
| Number of duplicate records         | The number of records in the data set that match another record with a score that meets the match threshold.  |
| Total comparisons                   | The number of comparison operations that the mapping performs.  |
| Average cluster size                | The average number of records in a cluster.   |

## Viewing Match Performance Analysis Data

You can view statistical data on the record groups that the mapping reads as input data.

To view the data, right-click the Match transformation in the mapping canvas and select **Match Performance Analysis**.

Before you run the analysis, validate the mapping that contains the transformation.

Match performance analysis displays data for the following properties:

| Property                          | Description   |
|-----------------------------------|---|
| Source                            | The number of input data rows.  |
| Last run                          | The date and time of the analysis.  |
| Total number of discovered groups | The number of groups defined for the data set, based on the selected group key value. |

| Property                                 | Description  |
|--|--|
| Throughput (records per minute)          | Variable value that estimates the speed of the match analysis. You set this value. Use the value to estimate the time required to run the match analysis.  |
| Estimated time to match records          | The time taken to analyze all records in the data set, based on the Match transformation configuration.  |
| Total number of pairs generated          | The number of comparisons that the transformation must perform, based on the number of input data rows and the number of groups.   |
| Minimum group size                       | Variable value that indicates the minimum number of records a group can contain. You set this value. Use the value to verify that the mapping will create groups of a usable size.<br><b>Note:</b> The minimum group size value does not determine the size of the groups created when the mapping runs.           |
| Number of groups below minimum threshold | The number of groups that contain fewer records than the minimum group size value. If many groups are below the minimum group size, you might need to edit the transformation and select a different group key.  |
| Maximum group size                       | Variable value that indicates the maximum number of records a group can contain. You set this value for the performance analysis. Use the value to verify that the mapping will create groups of a usable size.<br><b>Note:</b> The value does not determine the size of the groups created when the mapping runs. |
| Number of groups above maximum threshold | The number of groups that contain more records than the maximum group size value. If many groups are above the maximum group size, you might need to edit the transformation and select a different group key.   |

## Match Performance in Identity Analysis

To improve the mapping performance when you perform identity analysis on two data sets, configure the Match transformation to read identity index data from database tables. Run a mapping to create the index tables for the master data set. Run the mapping again to compare the index data to another data source.

Use the options on the **Match Type** view to identify the database tables that store the index data. Use the same options to select the index tables when you configure the transformation to compare the index data to data from another source.

To write the index data to database tables, perform the following tasks:

1. Create a mapping that reads a data source of identity information.
2. Configure a Match transformation in the mapping to write the index data to a database.
3. Run the mapping to generate the index data. The index data represents a data store that you can reuse.

To read the index data from database tables, perform the following tasks:

1. Create a mapping that reads another identity data source.
2. Configure a Match transformation in the mapping to read the index data from the database that you specified earlier.

When the mapping data source and the index data share a common structure, you can reuse the mapping that generated the index data.

3. Run the mapping to compare the data source to the index data.

The mapping generates index data for the data source. The mapping does not need to generate index data for the larger data set. Therefore, the mapping runs faster than a dual-source mapping that generates index data for both data sets.

## RELATED TOPICS:

- [“Identity Match Analysis and Persistent Index Data” on page 407](#)

## Creating a Data Store for Identity Index Data

Configure a mapping that reads a data source that contains identity information. Use a Match transformation to write the index data to a database.

1. Create a mapping, and add the data source to the mapping canvas.
2. Add a Match transformation to the mapping canvas.
3. On the data source, select the ports that contain the identity information.
  - Connect the identity information ports to the Match transformation.
  - Connect the port that contains the sequence identifier values to the Match transformation.
4. On the Match transformation, select the **Match Type** view.
5. Set the match type to **Identity Match with Persistent Record ID**.
6. Configure the following options to create the index data store.
  - Set the persistence method to **Update the database with new IDs**.
  - Verify the matching process value. The default value is **Enable**. If you disable the matching process, the mapping creates the identity index tables but does not perform match analysis on the data.
  - On the DB Connection menu, select a database for the index tables.
  - On the Persistent Store menu, select **Create New**. Enter a name for the index in the **Create Storage Tables** dialog box.
7. Perform any other configuration step that the Match transformation requires. For example, configure a transformation strategy.
8. Add a target data object to the mapping.
9. Connect the Match transformation output ports to the target data object.
10. Run the mapping.

The mapping writes the index data for the data source to the database tables that you specify.

## Using the Index Data Store in Single-Source Analysis

Configure a mapping that reads a data source of identity information. Use a Match transformation to compare the data source to the index data store for the master data set.

Before you configure the mapping, verify that the data source contains a column of sequence identifier values.

To save time, you can copy or reuse the mapping that created the index data store.

1. Open the mapping that generated the index data store.  
Alternatively, open a copy of the mapping.
2. Verify the data source in the mapping.

If required, replace the data source with a source that contains the current data.

**Note:** If you delete the data source, you also delete the port connections on the Match transformation.

3. Identify the data source ports that contain the identity information.
  - Connect the identity information ports to the Match transformation.
  - Connect the port that contains the sequence identifier values to the Match transformation.  
The input ports and the input port order must correspond to the input ports on the transformation that created the index tables.
4. On the Match transformation, select the **Match Type** view.
5. Set the match type to **Identity Match with Persistent Record ID**.
6. Verify the population, key level, key type, and key field values.
7. Configure the options to identify the index data store:
  - Set the persistence method. For example, select **Do not update the database** to preserve the current data in the index tables.
  - Set the matching process to **Enable**.
  - On the DB Connection menu, select the database that contains the index tables.
  - On the Persistent Store menu, browse to the tables that contain the index data.
8. Configure the following properties on the Match Output view:
  - Match. Identifies the records to analyze when the transformation reads index data from database tables.
  - Output. Filters the records that the transformation writes as output.
9. Perform any other configuration step that the Match transformation requires.  
For example, configure a transformation strategy.
10. Verify the data target in the mapping.  
If required, replace the data target with another target object.
11. Connect the Match transformation output ports to the target data object.
12. Run the mapping.

The mapping compares the data source records with the index data store. The transformation writes the index data for the data source to the data store.

## Match Transformation Views

The Match transformation organizes the options that you can configure on a series of views. In a reusable transformation, the views appear as tabs on the Developer tool canvas. To open a view, click a tab. In a nonreusable transformation, the views appear as a list on the canvas. To open a view, click an item on the list.

When you configure a match analysis operation, you can configure the following views:

### General

Use the General view to update the name and the description of a nonreusable Match transformation. The description is optional.



**Ports**

Use the Ports view to verify the input ports and output ports on a nonreusable Match transformation.

**Overview**

Use the Overview to update the name and the description of a reusable transformation. The description is optional. You also use the Overview to create the input ports and output ports on a reusable transformation.

**Match Type**

Use the Match Type view to select the type of duplicate analysis that the transformation performs. You can select field match analysis or identity match analysis. You can specify a single data source or two data sources.

**Strategies**

Use the Strategies view to define one or more strategies to analyze the input data. You select two data columns in each strategy, and you assign a match analysis algorithm to the columns.

**Match Output**

Use the Match Output view to specify the structure and format of the output data.

**Parameters**

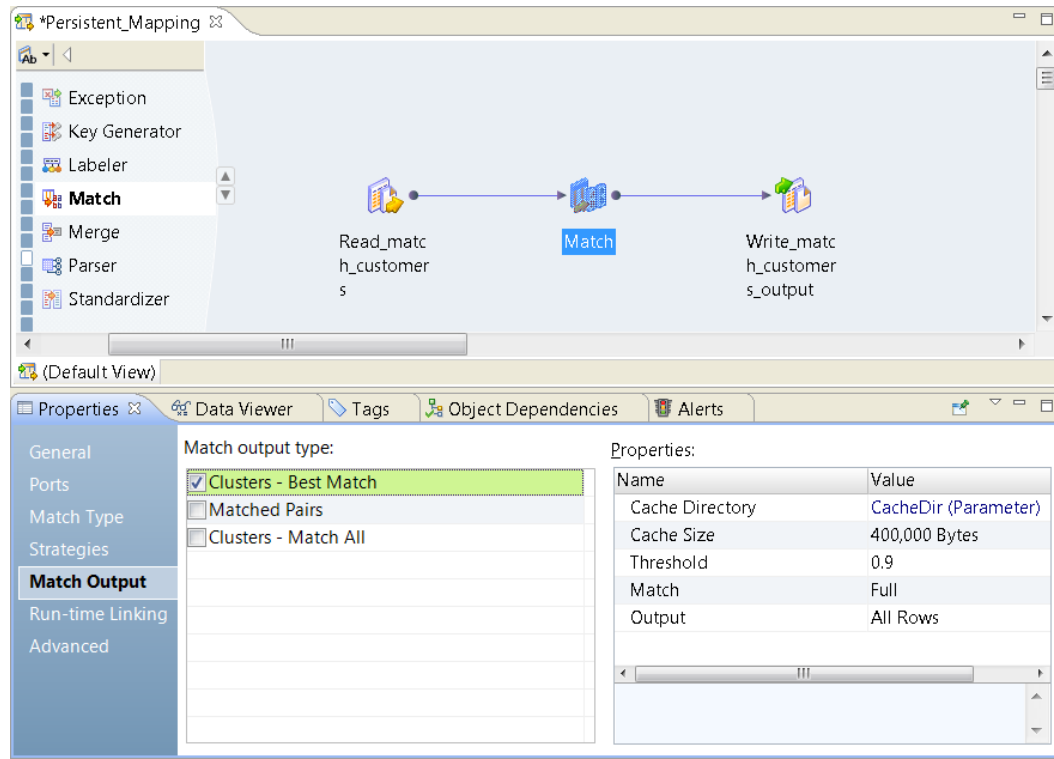
Use the Parameters view to define any parameter that the Data Integration Service can apply to the transformation when you run a mapping that contains the transformation.

**Advanced**

Use the Advanced view to specify the following properties:

- The level of detail in any log message that the mapping writes for the transformation.
- The number of processes that identity match operations use when you run a mapping that contains the transformation.
- Whether the transformation passes data from identical records directly to the output ports. You can filter identical records when you configure the transformation to write clustered output.

The following image shows the views on a Match transformation that you configure for identity analysis with a persistent index store:



## Match Transformation Ports

The Match transformation includes a set of predefined input ports and output ports that contain metadata for the match analysis operations that you define. The transformation selects or clears the ports when you configure the match type and match output options.

When you configure the transformation, review the metadata ports. When you add the transformation to a mapping, verify that you connect the metadata ports to the correct ports on the upstream and downstream mapping objects.

### Match Transformation Input Ports

The predefined input ports contain the metadata that the transformation requires for match analysis.

After you create a Match transformation, you can configure the following input ports:

#### SequenceId

Unique identifier for each record in the mapping source data set. Every record in an input data set must include a unique sequence identifier. If a data set contains duplicate sequence identifiers, the Match transformation cannot identify duplicate records correctly. Use the Key Generator transformation to create unique identifiers if none exist in the data.

When you create an index data store for identity data, the Match transformation adds the sequence identifier for each record to the data store. When you configure the transformation to compare a data

source with the index data store, the transformation might find a common sequence identifier in both data sets. The transformation can analyze the sequence identifiers if they are unique in the respective data sets.

**GroupKey**

Key value that identifies the group to which the record belongs.

**Note:** To improve mapping performance, configure the GroupKey input port and the output port that connects to it with the same precision value.

## Match Transformation Output Ports

The predefined output ports contain metadata about the analysis that the transformation performs.

After you create a Match transformation, you can configure the following output ports:

**GroupKey**

Key value that identifies the group to which the record belongs.

Downstream transformations such as the Association transformation can read the group key value.

**ClusterId**

The identifier of the cluster to which the record belongs. Used in cluster output.

**ClusterSize**

The number of records in the cluster to which a record belongs. When a cluster contains a unique record, the cluster size is 1. Used in cluster output.

**RowId and RowId1**

A unique row identifier for the record. The Match transformation uses the row identifier to identify the row during the match analysis operations. The identifier might not match the row number in the input data.

**DriverId**

The row identifier of the driver record in a cluster. Used in cluster output. The driver record is the record in the cluster with the highest value on the SequenceID input port.

**DriverScore**

The transformation assigns a driver score in matched pair output and clustered output. In a matched pair, the driver score is the match score between the pair of records. In a cluster, the driver score is the match score between the current record and the driver record in the cluster.

**LinkId**

The row identifier of the record that matched with the current record and linked it to the cluster. Used in cluster output.

**LinkScore**

The match score between two records that results in the creation of a cluster or the addition of a record to a cluster. The LinkID port identifies the record with which the current record shares the link score. Used in cluster output.

**PersistenceStatus**

An eight-character code that represents the results of the match analysis on an input record. Used in single-source identity analysis when the transformation compares the data source to an index data store.

The transformation populates the first three characters in the code. The transformation can return different characters at each position. The transformation returns 0 for positions four through eight.

When you configure the transformation to generate matched pair output, the transformation creates a `PersistenceStatus` port and a `PersistenceStatus1` port.

#### **PersistenceStatusDesc**

A text description of the persistence status code values. Used in single-source identity analysis when the transformation compares the data source to an index data store.

When you configure the transformation to generate matched pair output, the transformation creates a `PersistenceStatusDesc` port and a `PersistenceStatusDesc1` port.

## Persistence Status Codes and Persistence Status Descriptions

The persistence status codes and the persistence status descriptions describe the relationship between the different types of index data that the Match transformation analyzes. The transformation generates the status codes and the status descriptions when you configure the transformation to read a persistent identity data store.

The transformation writes the persistence status code to the `PersistenceStatus` port. The code contains eight characters. The transformation populates the first three positions in the string with code values. The transformation returns 0 for positions four through eight.

The transformation writes the persistence status description to the `PersistenceStatusDesc` port. The description contains three comma-separated text strings that describe the values in the first three positions in the persistence status code.

The transformation uses the sequence identifier values from the source data records to compare the index data for the two data sets.

The following table describes the types of information that the transformation writes at each position in the status description and the status code:

| Position | Description  |
|----------|--|
| 1        | Identifies the data set that contains the record.  |
| 2        | Indicates the duplicate status of the record. The transformation looks for common sequence identifiers between the transformation input data and the index data store. |
| 3        | Describes any action that the transformation performs on the data.   |
| 4-8      | The status code contains 0 at each position.<br>The status description does not contain text for the positions.  |

## Status Code Values and Status Description Values

The persistence status codes and the persistence status descriptions describe the relationship between the transformation input records and the records that the data store represents. The transformation uses sequence identifier values to identify the records and to determine the relationship between the records in the data sets.

The persistence status code and the persistence status descriptions have a common structure. The status codes and the status descriptions contain the same information at each position in the output data string.

## Data Set Status

The first value in the status code and in the status description identifies the data set that contains the record.

The following table describes the status codes and the status descriptions that the transformation can return in the first position:

| Status Code | Status Description  |
|-------------|---|
| S           | Store.<br>The current record originates in the index data store.          |
| I           | Input.<br>The current record originates in the transformation input data. |

## Duplicate Record Status

The second value in the status code and in the status description describes the relationship between the transformation index data and the persistent data store.

The following table describes the status codes and the status descriptions that the transformation can return in the second position:

| Status Code | Status Description  |
|-------------|---|
| A           | Absent.<br>The index data store does not contain data for the current record.   |
| E           | Exists.<br>The current record is present in the index data store and in the transformation input data.  |
| I           | Invalid.<br>The transformation cannot analyze the current record. For example, the transformation cannot generate index data for the record because the key field on the Match Type tab is not compatible with the record data. |
| N           | New.<br>The record is present in the data source.   |
| 0           | [Dash]<br>The record is present in the index data store.  |

## Data Store Status

The third value in the status code and in the status description describes any action that the transformation performs on the index data tables.

The following table describes the status codes and the status descriptions that the transformation can return in the third position:

| Status Code | Status Description  |
|-------------|---|
| A           | Added.<br>The transformation adds the index data for the current input record to the persistent data store.<br>The transformation input data and the persistent index data have different sequence identifiers.   |
| I           | Ignored.<br>The transformation does not add any index data for the current input record to the persistent data store.   |
| N           | The transformation returns one of the following descriptions: <ul style="list-style-type: none"><li>- No change.<br/>The current record originates in the persistent data store, and the transformation takes no action.</li><li>- Not added.<br/>The transformation does not update the persistent data store with any data for the current input record because of the match policy that you defined.</li></ul> |
| R           | Removed.<br>The transformation removes the index data for the record from the index data store.   |
| U           | Updated.<br>The transformation updates the rows in the persistent data store with index data from the transformation input record.<br>The transformation input data and the persistent index data have common sequence identifiers.   |

### Persistence Status Description Example

The persistence status code INA00000 has the following persistence status description:

*Input, New, Added*

The status code and the status description contain the following information about the record:

- The record originates in the transformation input data.
- The persistent data store does not contain a copy of the record.
- The transformation adds the index data for the record to the persistent data store.

## Output Ports and Match Output Selection

The match output options that you select determine the output ports on the transformation. For example, the transformation creates a ClusterId port and ClusterSize port when you select a clustered output type.

Select the type of transformation output that you need, and review the ports on the transformation.

If you update the match output type, verify the output port configuration on the transformation after you do so. If you use the transformation in a mapping, you might need to reconnect the output ports to the downstream objects in the mapping.

# Match Mapplets

A match mapplet is a type of maplet that you can create and embed in Match transformations.

You create match mapplets by saving the configuration of a Match transformation as a match mapplet. When you create a match mapplet, you convert Match transformation settings into Comparison and Weighted Average transformations.

After you create a match mapplet, you can add transformations to customize the match analysis. For example, you can add an Expression transformation to evaluate the link scores of two strategies and choose the highest score.

Unlike Match transformations, match mapplets are passive, which means that you can use them as rules within the Analyst tool. Use match mapplets in the Analyst tool to match records as part of data profiling processes.

The Match transformation can only read match mapplets that you create from within a Match transformation.

## Creating a Match Mapplet

Create a match mapplet to define a match analysis operation that uses multiple transformations.

1. Open a Match transformation in the editor and select the **Strategies** view.
2. Select **Use Match Rule**.
3. In the **Name** field, select **Create new**.

The **New Mapplet** window opens.

4. In the **New Mapplet** window, enter a name for the mapplet and choose a location to save the mapplet.
5. Optionally, select **Reuse Strategies from the Match transformation** to copy the inputs, strategies, and weights from the current Match transformation to the match mapplet.

**Note:** Informatica recommends using this setting to quickly create match mapplets that replicate the match functionality currently defined in Match transformations.

6. Click **Finish**.

The match mapplet opens in the editor.

7. Optionally, create match operations by adding and configuring Comparison transformations and Weighted Average transformations in the match mapplet.
8. Click **File > Save** to save the mapplet.
9. Close the mapplet and select the editor that contains the Match transformation. Verify that the mapplet you created appears in the **Name** field.
10. Optionally, configure the match fields in the mapplet by clicking the **Match Fields** button.  
The **Configure Match Rule** window opens.
11. Double-click the fields in the **Input Fields** and **Available Inputs** columns to assign input ports to match inputs.
12. Click **File > Save** to save the transformation.

## Using a Match Mapplet

You can select and configure a previously defined match mapplet in the Match transformation.

1. Open a Match transformation in the editor and select the **Strategies** view.

2. Select **Use Match Rule**.
3. In the **Name** field, select **Use Existing**.  
The **Configure Match Rule** window opens.
4. Click **Browse** to locate a match maplet in the repository.  
**Important:** You can only select maplets created by the Match transformation.  
The **Select Match Maplet** window opens.
5. Select a match maplet and click **OK**.
6. Double-click the fields in the **Input Fields** and **Available Inputs** columns to assign input ports to match inputs.
7. Click **OK**.  
The **Configure Match Rule** window closes.
8. Click **File > Save** to save the Match transformation.

## Configuring a Match Analysis Operation

To configure a match operation, connect source data to the Match transformation and edit the properties in the transformation views.

1. Create a Match transformation and connect source data to the transformation.
2. Select the **Match Type** view and choose a match type.
3. Configure the properties for the type of match operation that you select.  
If you selected a dual source match type, configure the **Master Data Set** property.
4. Select the **Strategies** view and choose **Define match strategies**.
5. Click **New**.  
The **New Match Strategy** wizard opens.
6. Choose a match strategy and click **Next**.
7. Optionally, edit the weight and null match settings. Click **Next**.
8. Double-click the cells in the Available column to select the input ports to analyze.  
Click **Next** to configure another strategy, or click **Finish** to exit the wizard.  
**Note:** To edit the strategy configuration, click the arrow in the cell for that strategy in the **Strategies** view.
9. Select the **Match Output** view.  
Choose a match output type and configure the properties.

**Note:** You can also configure match strategies by selecting or creating a match maplet in the **Strategies** view. A match maplet is a type of maplet that you can embed in a Match transformation.



## CHAPTER 29

# Match Transformations in Field Analysis

This chapter includes the following topics:

- [Field Match Analysis, 421](#)
- [Process Flow for Field Match Analysis, 421](#)
- [Field Match Type Options, 422](#)
- [Field Match Strategies, 422](#)
- [Field Match Output Options, 425](#)
- [Field Match Advanced Properties, 427](#)
- [Field Match Analysis Example, 427](#)

## Field Match Analysis

Perform field match analysis to find similar or duplicate records in a data set or between two data sets.

When you configure the Match transformation for field match analysis, you set the options on the following views:

- Match Type
- Strategies
- Match Output

Optionally, set the options on the Parameters and Advanced views.

## Process Flow for Field Match Analysis

The following process flow summarizes the steps that you take to configure a Match transformation for field match analysis. You can define a process that uses the Match transformation alone or that uses the Match transformation and other transformations.

**Note:** When you add a Match transformation to a mapping in field match analysis, add an upstream Key Generator transformation to the mapping.

To prepare the data for the Match transformation, perform the following steps:

1. Organize the source data records into groups.  
Use a Key Generator transformation to assign a group key value to each record. The group assignments reduce the number of computations that the Match transformation must perform.
2. Verify that the data source records contain unique sequence identifier values. You can use a Key Generator transformation to create the values.

Perform the following steps in the Match transformation:

1. Specify field analysis as the match type, and specify the number of data sources.  
If you configure the transformation to analyze two data sets, select a master data set.  
Use the **Match Type** view to set the type and the number of data sources.
2. Define a match analysis strategy. Select an algorithm, and assign a pair of columns to the algorithm.  
Use the **Strategies** view to define the strategy.
3. Specify the method that the transformation uses to generate the match analysis results.
4. Set the match threshold value. The match threshold is the minimum score that can identify two records as duplicates of one another.  
Use the **Match Output** view to select the output method and the match threshold.  
**Note:** You can set the match threshold in a Match transformation or a Weighted Average transformation. Use the Weighted Average transformation if you create a match maplet.

## Field Match Type Options

The Match Type view contains a single option that applies to dual-source match analysis. The option identifies the master data set. The Match Type view does not contain an option for single-source match analysis.

When you analyze two data sets, you must select one as a master data set. If neither data set represents a master data set in the project or the organization, select the larger data set as the master data set.

Use the **Master Data Set** option to specify the master data set.

## Field Match Strategies

The Strategies view lists the strategies that you define for the input data.

The strategies determine how the transformation measures the similarities and differences between the data source records.

## Field Match Algorithms

The Match transformation includes algorithms that compare data values across two columns. Each algorithm calculates the degree of difference between data values in a different way.

Select an algorithm that can measure the types of data difference that you expect to find in the columns that you select.

## Bigram

Use the Bigram algorithm to compare long text strings, such as postal addresses entered in a single field.

The Bigram algorithm calculates a match score for two data strings based on the occurrence of consecutive characters in both strings. The algorithm looks for pairs of consecutive characters that are common to both strings. It divides the number of pairs that match in both strings by the total number of character pairs.

### Bigram Example

Consider the following strings:

- larder
- lerder

These strings yield the following Bigram groups:

```
l a, a r, r d, d e, e r
l e, e r, r d, d e, e r
```

Note that the second occurrence of the string "e r" within the string "lerder" is not matched, as there is no corresponding second occurrence of "e r" in the string "larder".

To calculate the Bigram match score, the transformation divides the number of matching pairs (6) by the total number of pairs in both strings (10). In this example, the strings are 60% similar and the match score is 0.60.

## Hamming Distance

Use the Hamming Distance algorithm when the position of the data characters is a critical factor, for example in numeric or code fields such as telephone numbers, ZIP Codes, or product codes.

The Hamming Distance algorithm calculates a match score for two data strings by computing the number of positions in which characters differ between the data strings. For strings of different length, each additional character in the longest string is counted as a difference between the strings.

### Hamming Distance Example

Consider the following strings:

- Morlow
- Marlowes

The highlighted characters indicate the positions that the Hamming algorithm identifies as different.

To calculate the Hamming match score, the transformation divides the number of matching characters (5) by the length of the longest string (8). In this example, the strings are 62.5% similar and the match score is 0.625.

## Edit Distance

Use the Edit Distance algorithm to compare words or short text strings, such as names.

The Edit Distance algorithm calculates the minimum "cost" of transforming one string to another by inserting, deleting, or replacing characters.

### Edit Distance Example

Consider the following strings:

- Levenston
- Levenshtein

The highlighted characters indicate the operations required to transform one string into the other.

The Edit Distance algorithm divides the number of unchanged characters (8) by the length of the longest string (11). In this example, the strings are 72.7% similar and the match score is 0.727.

## Jaro Distance

Use the Jaro Distance algorithm to compare two strings when the similarity of the initial characters in the strings is a priority.

The Jaro Distance match score reflects the degree of similarity between the first four characters of both strings and the number of identified character transpositions. The transformation weights the importance of the match between the first four characters by using the value that you enter in the Penalty property.

### Jaro Distance Properties

When you configure a Jaro Distance algorithm, you can configure the following properties:

#### Penalty

Determines the match score penalty if the first four characters in two compared strings are not identical. The transformation subtracts the full penalty value for a first-character mismatch. The transformation subtracts fractions of the penalty based on the position of the other mismatched characters. The default penalty value is 0.20.

#### Case Sensitive

Determines whether the Jaro Distance algorithm considers character case when it compares characters.

### Jaro Distance Example

Consider the following strings:

- 391859
- 813995

If you use the default Penalty value of 0.20 to analyze these strings, the Jaro Distance algorithm returns a match score of 0.513. This match score indicates that the strings are 51.3% similar.

## Reverse Hamming Distance

Use the Reverse Hamming Distance algorithm to calculate the percentage of character positions that differ between two strings, reading from right to left.

The Hamming Distance algorithm calculates a match score for two data strings by computing the number of positions in which characters differ between the data strings. For strings of different length, the algorithm counts each additional character in the longest string as a difference between the strings.

### Reverse Hamming Distance Example

Consider the following strings, which use right-to-left alignment to mimic the Reverse Hamming algorithm:

- 1-999-9999
- **011-01**-999-9991

The highlighted characters indicate the positions that the Reverse Hamming Distance algorithm identifies as different.

To calculate the Reverse Hamming match score, the transformation divides the number of matching characters (9) by the length of the longest string (15). In this example, the match score is 0.6, indicating that the strings are 60% similar.

## Field Match Strategy Properties

Open the **Strategy** wizard on the **Strategies** view and configure the properties for each field match strategy.

When you configure a field match strategy, you can configure the following properties:

### **Name**

Identifies the strategy by name.

### **Weight**

Determines the relative priority assigned to the match score when the overall score for the record is calculated. Default is 0.5.

### **Single Field Null**

Defines the match score that the algorithm applies to a pair of data values when one value is null. Default is 0.5.

### **Both Fields Null**

Defines the match score that the algorithm applies to a pair of data values when both values are null. Default is 0.5.

**Note:** A match algorithm does not calculate a match score when one or both of the matched column values are null. The algorithm applies the scores defined in the null match properties. You cannot clear the null match properties.

## Field Match Output Options

Configure the **Match Output** options to define the output format for field match analysis.

You configure the options in the **Match Output Type** area and the **Properties** area.

## Match Output Types

The Match Output view includes options that specify the output data format. You can configure the transformation to write records in clusters or in matched pairs.

Select one of the following match output types:

### **Best Match**

Writes each record in the master data set with the record that represents the best match in the second data set. The match operation selects the record in the second data set that has the highest match score for the master record. If two or more records return the highest score, the match operation selects the first record in the second data set. Best Match writes each pair of records to a single row.

You can select **Best Match** when you configure the transformation for dual-source analysis.

### **Clusters**

Writes clusters that contain sets of records that link to each other with match scores that meet the match threshold. Each record must match at least one other record in the cluster with a score that meets the threshold.

You can select **Clusters** when you configure the transformation for single-source analysis and dual-source analysis.

### Matched Pairs

Writes all pairs of records that match each other with a score that meets the match threshold. The transformation writes each pair to a single row and adds the match score for each pair to each row. If a record matches more than one other record, the transformation writes a row for each record pair.

You can select **Matched Pairs** when you configure the transformation for single-source and dual-source analysis.

## Match Output Properties

The Match Output view includes properties that specify the cache memory behavior, the match score threshold, and the match scores that appear in the transformation output.

You can also use the match output properties to specify how the transformation adds match score values to the output records.

After you select a match output type, configure the following properties:

### Cache Directory

Specifies the directory to which the Data Integration Service writes temporary data during field match analysis. The Data Integration Service writes temporary files to the directory when the volume of data that the match analysis generates is greater than the available system memory. The Data Integration Service deletes the temporary files after the mapping runs.

You can enter a directory path on the property, or you can use a parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory. The default value is the CacheDir system parameter.

### Cache Size

Determines the amount of system memory that the Data Integration Service assigns to field match analysis. The default value is 400,000 bytes.

Before it sorts the data, the Data Integration Service allocates the amount of memory that you specify. If the match analysis generates a greater amount of data, the Data Integration Service writes the excess data to the cache directory. If the match analysis requires more memory than the system memory and the file storage can provide, the mapping fails.

**Note:** If you enter a value of 65536 or higher, the transformation reads the value in bytes. If you enter a lower value, the transformation reads the value in megabytes.

### Threshold

Sets the minimum match score that identifies two records as potential duplicates of each other.

You can assign a parameter to the threshold value. Set a decimal value in the range 0 through 1.

### Scoring Method

Determines the match score values that appear in the transformation output. Select a scoring method for cluster outputs.

The following table describes the scoring method options:

| Scoring Method Option | Description   |
|-----------------------|---|
| Both                  | Adds the link score and the driver score to each record in the cluster. |
| Link Score            | Adds the link score to each record in the cluster. Default option.      |

| Scoring Method Option | Description  |
|-----------------------|--|
| Driver Score          | Adds the driver score to each record in the cluster.     |
| None                  | Does not add a match score to any record in the cluster. |

**Note:** If you add the driver score to the records, you increase the mapping run time. The mapping waits until all clusters are complete before it adds the driver score values to the records.

## Field Match Advanced Properties

The transformation includes advanced properties that determine the number of execution instances, how the transformation analyzes identical rows, and the tracing level for log data.

You can configure the following advanced properties:

### Execution Instances

Determines the number of threads that the transformation uses at run time.

The Match transformation uses a single execution instance in field match analysis. You can edit the number of execution instances when you configure the transformation for identity match analysis.

### Filter Exact Match

Determines whether the transformation applies the comparison algorithm in a match strategy to pairs of identical records in the input data.

When the transformation finds a pair of identical records, the algorithm does not need to analyze the levels of similarity between the records. The transformation can pass the records directly to the output stage without additional analysis. To configure the transformation to pass the identical records directly to the output stage, select Filter Exact Match. When the input data contains many identical rows, the comparison algorithm performs fewer calculations, and the mapping runs faster.

Select the option when the input data contains many identical rows. Do not select the option if the input data does not contain many identical rows, as the transformation might run more slowly.

**Note:** The transformation output contains the same record data when you select or clear the option. The transformation might assign different link scores and driver scores to the output records when you select and clear the option.

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Field Match Analysis Example

You are a data steward at a retail bank. You receive a set of account records for the customers who opened bank accounts in the past seven days. You want to verify that the data set does not contain duplicate records. You design a mapping to search the records for duplicate data.

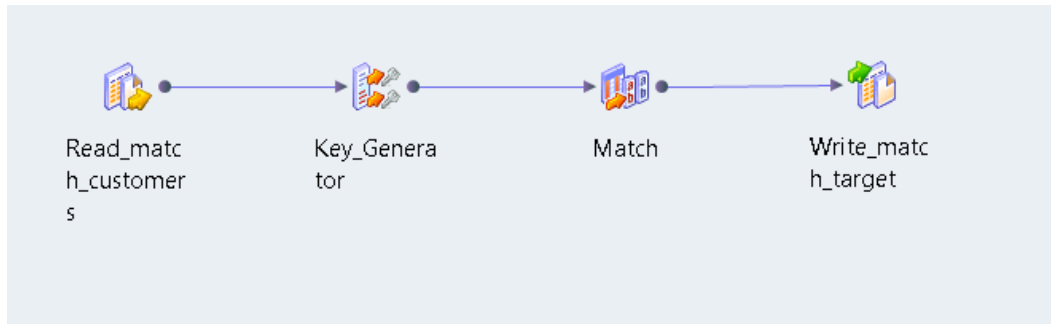
## Create the Mapping

Create a mapping that looks for duplicate data in multiple fields.

The mapping performs the following tasks:

- It reads a data source.
- It adds a group key value and sequence identifier value to the source records.
- It analyzes the field data in the records.
- It writes the results to a data target.

The following image shows the mapping in the Developer tool:



The mapping that you create contains the following objects:

| Object Name          | Description   |
|----------------------|---|
| Read_Match_Customers | Data source.<br>Contains the account holder details, including names, addresses, and account numbers.     |
| Key_Generator        | Key Generator transformation.<br>Adds group key values and sequence identifier values to the source data. |
| Match                | Match transformation.<br>Analyzes the levels of duplication in the account data.                          |
| Write_match_target   | Data target.<br>Contains the results of the field analysis.   |

## Input Data Sample

The data set contains the account number, name, address, and employer for each customer. You create a data source from the data set in the Model repository. You add the data source to the mapping.

The following data fragment shows a sample of the customer account data:

| CustomerID | Lastname | City        | State | ZIP   |
|------------|----------|-------------|-------|-------|
| 15954467   | JONES    | SCARSDALE   | NY    | 10583 |
| 10110907   | JONES    | MINNEAPOLIS | MN    | 55437 |



| CustomerID | Lastname | City         | State | ZIP   |
|------------|----------|--------------|-------|-------|
| 19131127   | JONES    | INDIANAPOLIS | IN    | 46240 |
| 10112097   | JONES    | HOUSTON      | TX    | 77036 |
| 19133807   | JONES    | PLANTATION   | FL    | 33324 |
| 10112447   | JONES    | SCARSDALE    | NY    | 10583 |
| 15952487   | JONES    | HOUSTON      | TX    | 77002 |
| 10112027   | JONES    | OAKLAND      | CA    | 94623 |

## Key Generator Transformation Configuration

When you configure the Key Generator transformation, connect the data source ports that you want to analyze. Specify the port that contains the group key data. If the records do not include a unique identifier, use the sequence ID port to add unique identifiers to the record.

When you specify the group key port, consider the following guidelines:

- Select a port that contains values that repeat regularly in the port data. Preferably, select a port that creates groups that are similar in size.
- Select a port that is not relevant to the duplicate analysis.

In the current example, select the City port as the group key. If an account name appears more than once in a city, the accounts might contain duplicate data. If an account name appears more than once in different cities, the accounts are unlikely to be duplicates.

**Tip:** Run a column profile on the data source before you select the group key port. The profile results can indicate the number of times each value appears on a port.

## Match Transformation Configuration

Add a nonreusable Match transformation to the mapping to perform the field analysis.

Complete the following tasks to configure the Match transformation:

1. Select the type of match analysis to perform.
2. Connect the input ports to the transformation.
3. Configure strategies to compare the record data.
4. Select the type of match output data that the transformation creates.
5. Connect the output ports to a data target.

### Select the Type of Match Operation

Use the options on the **Match Type** view to select the match operation. To compare the account data, configure the transformation to perform single-source field analysis.

## Connect the Input Ports

Connect the customer account data ports to the Match transformation.

The Match transformation uses preset input ports to determine the order in which it processes the records. The transformation uses a sequence identifier to track the records from the input ports to the matched pairs or clusters that it writes as output. The transformation uses a group key to sort the records that it processes.

Connect the following preset ports on the Match transformation to the preset output ports on the Key Generator transformation:

- SequenceID
- GroupKey

## Configure the Strategies for Field Analysis

Use the options on the **Strategies** view to configure the strategies. The strategies determine the types of analysis that the transformation performs on the record data.

Create the following strategies:

- Create a strategy that uses the Edit Distance algorithm to analyze the customer identification numbers. Select the CustomerID\_1 and CustomerID\_2 ports.
- Create a strategy that uses the Jaro Distance algorithm to analyze the surname data. Select the Lastname\_1 and Lastname\_2 ports.  
**Note:** The Jaro Distance algorithm applies an additional penalty to similar strings that start with different characters. Therefore, the Jaro Distance algorithm can apply a high match score to PATTON and PATTEN but apply a lower match score to BAYLOR and TAYLOR.
- Create a strategy that uses the Reverse Hamming Distance algorithm to analyze the ZIP code data. Select the Zip\_1 and Zip\_2 ports.

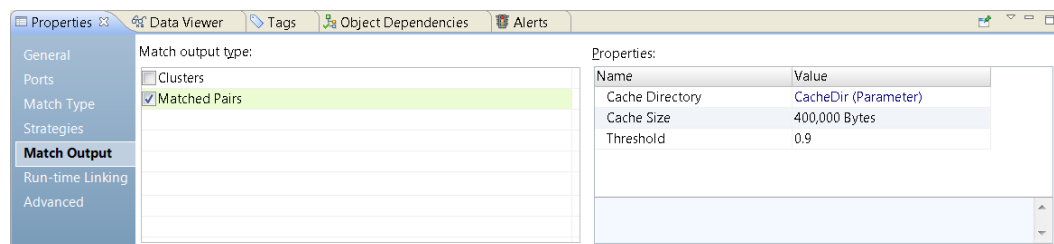
## RELATED TOPICS:

- [“Field Match Algorithms” on page 422](#)

## Select the Match Output Type

Use the options on the **Match Output** view to define the output format for the results of the match analysis.

The following image shows the Match Output view for single-source field analysis:



You configure the transformation to organize the output records in matched pairs. Because the transformation returns records in pairs, the results of the analysis do not include unique records.

## Connect the Output Ports

Connect the Match transformation output ports to the data target in the mapping. Select the ports that contain the record data that you want to write to the data target.

The transformation includes preset ports that identify the records in each matched pair. The preset port names are **RowId** and **RowId1**. Each row ID value identifies a record in the output data.

The row ID values correspond to the ports that you select in a match strategy. When you configure a strategy, you select port names with the suffix **\_1** or **\_2**. The RowId value identifies the record that contains a port with the suffix **\_1**. The RowId1 value identifies the record that contains a port the suffix **\_2**.

You can use other output ports to review the relationships between the records. The link port values and driver port values indicate the extent of the similarity between the records in each cluster.

In the current example, you connect all the ports to the data target. To view the output data on the ports, run the Data Viewer.

## Run the Data Viewer

Run the Data Viewer to review the results of the match analysis. By default, the Data Viewer shows all the output ports on the Match transformation. When you run the mapping, you update the data target with the data from the output ports.

The following image shows the output data in the Data Viewer:

|   | Lastname_1 | Firstname_1 | Company_1     | Address1_1   | City_1      | State_1 | Zip_1 | Customer1... | Lastname_2 | Firstname_2 | Company_2   | Address1_2   | City_2      |
|---|------------|-------------|---------------|--------------|-------------|---------|-------|--------------|------------|-------------|-------------|--------------|-------------|
| 1 | Chan       | David       | SANDS BR...   | 515 FOLS...  | SAN FRAN... | CA      | 94105 | 15954522     | Chan       | Roy         | PG&E (PA... | 77 BEALE...  | SAN FRAN... |
| 2 | Andersen   | Keith       | CHARLES...    | 1100 N.E...  | SAN ANT...  | TX      | 78209 | 10110428     | Andersen   | Keith       | CHARLES...  | 1100 N.E...  | SAN ANT...  |
| 3 | Abrary     | David       | AIRFINAN...   | 488 MADL...  | NEW YORK    | NY      | 10022 | 15954929     | Abrary     | Julianne    | TRANSOC...  | 39 EAST 5... | NEW YORK    |
| 4 | Chan       | Agusta      | J. STREICH... | 86 TRINIT... | NEW YORK    | NY      | 10006 | 19132518     | Chan       | Carmen      | AMERICA...  | 86 TRINIT... | NEW YORK    |

The Data Viewer verifies that the customer account data includes one or more duplicate records.

Consider the following data in the Data Viewer:

- The transformation determines that the records for Augusta Chan and Carmen Chan might contain the same information because they contain the same surname and address data. When you review the records, you decide that the records are unique in the data set. However, you notice that the records share a common customer ID value. Because the customer ID column is a primary key in the data set, you contact the New York office. The New York office resolves the error.
- The transformation determines that the records for Keith Anderson might contain the same information. When you review the records, you verify that the two records represent the same account. However, you notice that the records have different customer ID values. Because a customer account must have a single ID value, you contact the San Antonio office. The San Antonio office resolves the error.

## Conclusion

The results of the match analysis indicate that the customer account data set includes at least one pair of duplicate records. You contact the local branch for the accounts that you need to verify. You verify that the other records in the data set uniquely identify a customer account.

## CHAPTER 30

# Match Transformations in Identity Analysis

This chapter includes the following topics:

- [Identity Match Analysis, 433](#)
- [Process Flow for Identity Match Analysis, 434](#)
- [Identity Match Type Properties, 434](#)
- [Identity Match Strategies, 438](#)
- [Identity Match Output Options, 440](#)
- [Identity Match Advanced Properties, 443](#)
- [Persistent Index Case Study, 444](#)
- [Identity Match Analysis Example, 446](#)

## Identity Match Analysis

Perform identity match analysis to find similar or duplicate identities in a data set or between two data sets.

Similar identities in two or more records might indicate record duplication. Or, the similar identities might indicate a connection between the records, such as a shared family identity or a shared employer identity.

When you configure the Match transformation for identity match analysis, you set the options on the following views:

- Match Type
- Strategies
- Match Output

Optionally, set the options on the Parameters and Advanced views.

When you configure a Match transformation for identity match analysis, connect input ports to all of the primary required fields in an identity strategy. Most identity strategies contain primary required fields. Some strategies also contain secondary required fields. Connect an input port to at least one secondary required field.

# Process Flow for Identity Match Analysis

The following process flow summarizes the steps that you take to configure a Match transformation for identity match analysis. You can define a process that uses the Match transformation alone or that uses the Match transformation and other transformations.

Before you connect the Match transformation to upstream data objects, verify that the records contain unique sequence identifier values. You can use a Key Generator transformation to create the values. When you perform identity match analysis, you can optionally organize the input data into groups.

Perform the following steps in the Match transformation:

1. Specify identity analysis as the match type, and specify the number of data sources.  
If you configure the transformation to analyze two data sets, select a master data set.  
Use the **Match Type** view to set the type and the number of data sources.
2. Identify the location to store the index data. The transformation can write the index data to temporary files or save the index data to database tables.  
Use the **Match Type** view to specify the index data store.
3. Define a match analysis strategy. Select a population and a comparison algorithm, and assign a pair of columns to the algorithm.  
The population indicates the column pairs to select.  
Use the **Strategies** view to define the strategy.
4. Specify the method that the transformation uses to generate the match analysis results.
5. Set the match threshold value. The match threshold is the minimum score that can identify two records as duplicates of one another.  
Use the **Match Output** view to select the output method and the match threshold.  
**Note:** You can set the match threshold in a Match transformation or a Weighted Average transformation. Use the Weighted Average transformation if you create a match maplet.

## Identity Match Type Properties

Use the Match Type view to specify the type of analysis that the Match transformation performs and to set the properties that define the analysis. You can specify single-source analysis or dual-source analysis. You can also specify a persistent data store for the identity index data.

The properties that you configure depend on the type of analysis that you select. Many of the options are common to all types of analysis.

### Common Properties

The following properties are common to all types of identity analysis:

#### Population

Identifies the population file that the transformation uses. The population file contains the key-building algorithms that generate the index keys.

**Key Level**

Determines the number of keys that the identity algorithms generate. The default setting is Standard. The Limited setting results in a lower number of keys, higher accuracy, and longer processing time. The Extended setting results in a higher number of keys, lower accuracy, and shorter processing time.

**Key Type**

Describes the type of information that the key field contains. Identity analysis can generate keys for person names, organizations, and addresses. Select the key type that best describes the column that you specify on **Key Field** property.

**Search Level**

Indicates the balance of search depth and search speed that the transformation applies to the match analysis. The search depth correlates inversely to the number of matches returned. For example, the **Exhaustive** option returns fewer matches.

**Key Field**

Specifies the column that the Match transformation uses to generate the index key data. Verify that the column that you select contains the type of information that you specified on the **Key Type** property.

**Index Directory**

Identifies the directory to which the Data Integration Service writes index key data for the current transformation. By default, the property is blank. If you do not specify an index directory, the Data Integration Service uses the location that you set on the Content Management Service.

You can enter a path to the directory, or you can use a parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory.

**Cache Directory**

Identifies the directory to which the Data Integration Service writes temporary data during the index creation stage of identity match analysis. Update the property to specify a location for data from the current transformation. By default, the property is blank. If you do not specify a cache directory, the Data Integration Service uses the location that you set on the Content Management Service.

You can enter a path to the directory, or you can use a parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory.

**Cache Size**

Determines the amount of system memory that the Data Integration Service assigns to identity index creation. The default value is 400,000 bytes.

If the index creation operation generates a greater amount of data, the Data Integration Service writes the excess data to the cache directory. If the operation requires more memory than the system memory and the file storage can provide, the mapping fails.

**Note:** If you enter a value of 65536 or higher, the transformation reads the value in bytes. If you enter a lower value, the transformation reads the value in megabytes.

**Dual-Source Properties**

Set the following property in addition to the common properties when you configure the transformation for dual-source analysis:

**Master Data Set**

Identifies the data source that contains the master data. Specify a master data set in dual-source analysis.

## Persistent Data Storage Properties

Set the following properties in addition to the common properties when you configure the transformation to use the persistent index data store:

### Persistence Method

Specifies whether the transformation updates the current index tables with index data from the mapping data source. Select one of the following options:

- **Update the database with new IDs.**  
The transformation adds all rows to the index data that do not duplicate a sequence identifier in the index data. The transformation does not update the current rows in the index.  
  
By default, the transformation performs match analysis when you select the option. You can use the Matching Process option to enable or disable the match analysis.
- **Do not update the database.**  
The transformation does not update the index tables with index data from the mapping data source.  
  
The transformation performs match analysis when you select the option.
- **Remove IDs from the database.**  
The transformation deletes rows from the index tables if the rows share sequence identifiers with the mapping source data.  
  
The transformation does not perform match analysis when you select the option.
- **Update the current IDs in the database.**  
The transformation replaces rows in the index tables with rows from the mapping source data if the rows share sequence identifiers. The transformation does not add rows to the index.  
  
By default, the transformation performs match analysis when you select the option. You can use the Matching Process option to enable or disable the match analysis.

The default persistence method is **Update the database with new IDs**.

### Matching Process

Determines whether the current transformation performs identity analysis.

The option that you select on the Persistence Method property determines the options on the Matching Process property.

### DB Connection

Identifies the database that contains the index tables.

### Persistent Store

Identifies the index tables within the database that you specify.

## RELATED TOPICS:

- [“Persistent Index Case Study” on page 444](#)
- [“Persistence Method Parameters” on page 437](#)

## Index Directory and Cache Directory Properties

The index directory and the cache directory store the temporary data that the Match transformation generates during identity analysis.

The Data Integration Service writes data to the index directory if you do not configure the transformation to write the index data to database tables. The Data Integration Service writes data to the cache directory if the



identity analysis requires a greater amount of memory than the cache size specifies. By default, the properties are blank on the Match Type view. If you do not specify an index directory or a cache directory, the Data Integration Service reads the directory paths from the Content Management Service.

When you specify an index directory or a cache directory on the Match Type view, enter a local path on the Data Integration Service machine. You can enter a fully qualified path or a relative path. If you enter a relative path, start the path with a period. The path is relative to the `tomcat/bin` directory on the Data Integration Service machine.

The following table shows a relative path on a cache directory or index directory property and identifies the fully qualified path that the property represents:

| Relative Path     | Fully Qualified Path  |
|-------------------|---|
| <code>./ch</code> | <code>[Informatica_installation_directory]/tomcat/bin/ch</code> |

You can configure the index directory property and the cache directory property to identify the same directory. If you specify the same directory on each property, the Data Integration Service creates directories in the directory that you specify. The Data Integration Service creates an `index` directory for the index data and a `cache` directory for the cache data. If you specify different directories on each property, the Data Integration Service writes the data to the directories that you specify.

The Data Integration Service deletes the index files and the cache files from the directories after the mapping runs. The Data Integration Service does not delete the directories. The Data Integration Service can reuse the directories in other mappings if the Match transformation identifies the directories.

## Content Management Service Properties

The Content Management Service specifies the following default locations for the index directory and the cache directory:

- `./identityIndex`. Default directory for the identity index data.
- `./identityCache`. Default directory for the identity cache data.

If you do not set the properties on the Match transformation, the Data Integration Service creates the default directories when you run an identity match mapping. The Data Integration Service creates the directories in the `tomcat/bin` directory.

## Persistence Method Parameters

When you select a persistence data index in identity match analysis, you can use a parameter to identify the persistence method. Use a string to define the parameter value.

The following table lists the persistence methods that you can select on the **Match Type** tab and the parameter values that you can set for the methods:

| Persistence Method                     | Parameter            |
|--|----------------------|
| Update the database with new IDs       | <code>ignore</code>  |
| Do not update the database             | <code>addNone</code> |
| Remove IDs from the database           | <code>remove</code>  |
| Update the current IDs in the database | <code>update</code>  |

The parameter values are case-sensitive.

## RELATED TOPICS:

- [“Identity Match Type Properties” on page 434](#)

# Identity Match Strategies

The Strategies view lists the strategies that you define for the identity data. The strategies determine how the transformation measures the similarities and differences between the data in the identity index.

## Identity Match Algorithms

The Match transformation includes predefined identity algorithms that compare the data values in the identity index. Select the algorithm that best represents the type of identity data in the data set.

The following table describes the algorithms and identifies the inputs that you select for each one:

| Identity Algorithm | Description  |
|--------------------|--|
| Address            | Identifies records that share an address.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"><li>- Address</li></ul> The algorithm does not require a secondary input.   |
| Contact            | Identifies records that share a contact at a single organization location.<br>The algorithm requires the following primary inputs: <ul style="list-style-type: none"><li>- Person_Name</li><li>- Organization_Name</li><li>- Address_Part1</li></ul> The algorithm does not require a secondary input.   |
| Corp Entity        | Identifies records that share corporate identification data. Optionally, select this algorithm to analyze address and telephone data.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"><li>- Organization_Name</li></ul> The algorithm does not require a secondary input.   |
| Division           | Identifies records that share an office location within an organization.<br>The algorithm requires the following primary inputs: <ul style="list-style-type: none"><li>- Organization_Name</li><li>- Address_Part1</li></ul> The algorithm does not require a secondary input.   |
| Family             | Identifies individuals that belong to a family. Analyzes name, address, and telephone number data.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"><li>- Person_Name</li></ul> The algorithm requires one of the following secondary inputs: <ul style="list-style-type: none"><li>- Address_Part1</li><li>- Telephone_Number</li></ul> |

| Identity Algorithm | Description  |
|--------------------|--|
| Fields             | Identifies records that share data on ports that you select.<br>The algorithm does not specify any required input. Select the port or ports that might contain duplicate identity data.  |
| Household          | Identifies individuals that belong to a household. Analyzes name data and address data.<br>The algorithm requires the following primary inputs: <ul style="list-style-type: none"> <li>- Person_Name</li> <li>- Address_Part1</li> </ul>   |
| Individual         | Identifies duplicate individuals. Analyzes name, date of birth, and personal identification data such as Social Security numbers, account numbers, and vehicle identification numbers.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"> <li>- Person_Name</li> </ul> The algorithm requires one of the following secondary inputs: <ul style="list-style-type: none"> <li>- Date</li> <li>- ID</li> </ul> |
| Organization       | Identifies records that share organization data.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"> <li>- Organization_Name</li> </ul> The algorithm does not require a secondary input.  |
| Person Name        | Identifies records that share information about individuals.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"> <li>- Person_Name</li> </ul> The algorithm does not require a secondary input.  |
| Resident           | Identifies duplicate individuals at an address. Optionally, configure this strategy to analyze personal identification data.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"> <li>- Person_Name</li> <li>- Address_Part1</li> </ul> The algorithm does not require a secondary input.   |
| Wide Contact       | Identifies records that share a contact at an organization.<br>The algorithm requires the following primary inputs: <ul style="list-style-type: none"> <li>- Person_Name</li> <li>- Organization_Name</li> </ul> The algorithm does not require a secondary input.   |
| Wide Household     | Identifies individuals that belong the same household.<br>The algorithm requires the following primary input: <ul style="list-style-type: none"> <li>- Address_Part1</li> </ul> The algorithm does not require a secondary input.  |

## Identity Match Strategy Properties

Configure the properties for each identity strategy.

When you configure an identity strategy, you can configure the following strategy properties:

### Population

Determines the population to apply to identity analysis. Populations contain key-building algorithms for specific locales and languages.

### Match level

Determines the balance of search quality and search speed. The search speed is inversely related to the number of matches returned. Searches that use the `Loose` setting return fewer matches, while searches that use the `Conservative` setting return more matches.

## Identity Match Output Options

The Match Output view includes options that specify the output data format. You can configure the transformation to write records in clusters or in matched pairs. You can also configure the transformation to include or exclude different categories of identity when you perform identity analysis against a persistent index data store.

You configure the options in the **Match output type** area and the **Properties** area.

## Match Output Types

The Match Output view includes options that specify the output data format. You can configure the transformation to write records in clusters or in matched pairs.

Select one of the following match output types:

### Best Match

Writes each record in the master data set with the record that represents the best match in the second data set. The match operation selects the record in the second data set that has the highest match score for the master record. If two or more records return the highest score, the match operation selects the first record in the second data set. Best Match writes each pair of records to a single row.

You can select **Best Match** when you configure the transformation for dual-source analysis.

### Clusters - Best Match

Writes clusters that represent the best match between one record and another record in the same data set or between two data sets. The match score between the two records must meet the match threshold. Best match clusters can contain more than two records if a record represents the best match with more than one other record.

You can select **Clusters - Best Match** in any type of identity analysis.

**Note:** The index data storage method that you select can affect the contents of the cluster output in **Clusters - Best Match** mode. A transformation that connects to index tables can create different clusters than a transformation that stores index data for the same records in temporary files. The index data storage method does not affect the match scores that the transformation generates for pairs of records.

### Clusters - Match All

Writes clusters of records that match with a score that meets the match threshold. Each record must match at least one other record in the cluster.

You can select **Clusters - Match All** in any type of identity analysis.

### Matched Pairs

Writes all pairs of records that match each other with a score that meets the match threshold. The transformation writes each pair to a single row and adds the match score for each pair to each row. If a record matches more than one other record, the transformation writes a row for each record pair.

You can select **Matched Pairs** in any type of identity analysis.

## Match Output Properties

The Match Output view contains properties that specify the cache memory behavior and the match score threshold. You can also use the properties to determine how the transformation selects data store records for analysis and writes data store records as output.

After you select a match output type, configure the following properties:

### Cache Directory

Specifies the directory to which the Data Integration Service writes temporary data during identity match analysis. The Data Integration Service writes temporary files to the directory when the volume of data that the match analysis generates is greater than the available system memory. The Data Integration Service deletes the temporary files after the mapping runs.

You can enter a directory path on the property, or you can use a system parameter to identify the directory. Specify a local path on the Data Integration Service machine. The Data Integration Service must be able to write to the directory. The default value is the CacheDir system parameter.

### Cache Size

Determines the amount of system memory that the Data Integration Service assigns to identity match analysis. The default value is 400,000 bytes.

If the match analysis generates a greater amount of data, the Data Integration Service writes the excess data to the cache directory. If the match analysis requires more memory than the system memory and the file storage can provide, the mapping fails.

**Note:** If you enter a value of 65536 or higher, the transformation reads the value in bytes. If you enter a lower value, the transformation reads the value in megabytes.

### Match

Identifies the records to analyze when the transformation reads index data from database tables. Use the options on the **Match Type** view to identify the index tables.

By default, the transformation analyzes all the records in the data source and the index database tables. Configure the Match property to specify a subset of the records for duplicate analysis.

### Output

Filters the records that the transformation writes as output when you configure the transformation to read index database tables. Use the options on the **Match Type** view to identify the index tables.

By default, the Match transformation writes all records from the data source and the index database tables as output. Configure the **Output** property when you do not need to review all the records in the input data.

### Threshold

Sets the minimum match score that identifies two records as potential duplicates of each other.

You can assign a parameter to the threshold value. Set a decimal value in the range 0 through 1.

## Match Property Configuration

Use the **Match** property on the **Match Output** view to specify how the transformation selects input data for analysis. Configure the property when you configure the Match transformation to read a persistent store of index data. The Match property refines the options that you set on the **Match Type** view.

You can configure the Match property to perform the following types of analysis:

### Compare the data source records with the index data records

To look for duplicate records between the data source and the index data tables, select **Exclusive**.

When you select the Exclusive option, the Match transformation compares the data source records with the index data store. The transformation does not analyze the records within the data source or within the data store.

Select **Exclusive** when you know that the index data store does not contain duplicate records, and you know that the data source does not contain duplicate records.

### Compare the data source records with the index data records, and compare the data source records with each other

To look for duplicates in the data source and to look for duplicates between the data source and the index tables, select **Partial**.

The transformation compares the data source records with the index data store. The transformation also compares the records within the data source with each other.

Select **Partial** when you know that the index data store does not contain duplicate records, but you have not performed any duplicate analysis on the data source.

### Compare all records in the data source and the index tables as a single data set

To look for duplicates between the data source and the index tables, and to look for duplicates within the data source and within the index tables, select **Full**. The default option is Full.

The transformation analyzes the data source and the data store as a single data set and compares all record data within the data set.

Select **Full** when you cannot verify that either data set is free of duplicate records.

## Output Property Configuration

Use the **Output** property on the **Match Output** view to filter the records that the transformation writes as output. Configure the property when you specify index data tables and you select a clustered output format. Filter the records to limit the output to clusters that contain one or more records from the data source.

You can filter the output data in the following ways:

### Write every cluster that includes a record from the data source or the index tables

Select **All Rows**. The transformation writes every cluster that contains at least one record from either the data source or the index data store. The default is All Rows.

Because a cluster can contain a single record, the output contains all records.

### Write every cluster that includes a record from the data source

Select **New and Associated Rows**. The transformation writes every cluster that contains at least one record from the data source.

Because a cluster can contain a single record, the output contains all records in the data source. The clusters can also include records from the index tables.

### Write every cluster from the data source

**Select New Rows Only.** The transformation writes the clusters that contains records from the data source. The output does not contain any record from the index tables.

## Identity Match Advanced Properties

The transformation includes advanced properties that determine the number of execution instances, whether the transformation analyzes identical rows, and the tracing level for log data.

You can configure the following advanced properties:

### Execution Instances

Specifies the number of threads that the Data Integration Service tries to create for the current transformation at run time. The Data Integration Service considers the Execution Instances value if you override the Maximum Parallelism run-time property on the mapping that contains the transformation. The default Execution Instances value is Auto.

The Data Integration Service considers multiple factors to determine the number of threads to assign to the transformation. The principal factors are the Execution Instances value and the values on the mapping and on the associated application services in the domain.

The Data Integration Service that runs the mapping reads the following values to determine the number of threads to use for the transformation:

- The *Maximum Parallelism* value on the Data Integration Service. Default is 1.
- Any *Maximum Parallelism* value that you set at the mapping level. Default is Auto.
- The *Execution Instances* value on the transformation. Default is Auto.

If you override the Maximum Parallelism value at the mapping level, the Data Integration Service attempts to use the lowest value across the properties to determine the number of threads.

If you use the default Maximum Parallelism value at the mapping level, the Data Integration Service ignores the Execution Instances value.

Consider the following rules and guidelines when you set the number of execution instances:

- Multiple users might run concurrent mappings on a Data Integration Service. To calculate the correct number of threads, divide the number of central processing units that the Data Integration Service can access by the number of concurrent mappings.
- When you use the default Execution Instances value and the default Maximum Parallelism values, the transformation operations are not partitionable.

### Filter Exact Match

Determines whether the transformation applies the comparison algorithm in a match strategy to pairs of identical records in the input data.

When the transformation finds a pair of identical records, the algorithm does not need to analyze the levels of similarity between the records. The transformation can pass the records directly to the output stage without additional analysis. To configure the transformation to pass the identical records directly to the output stage, select Filter Exact Match. When the input data contains many identical rows, the comparison algorithm performs fewer calculations, and the mapping runs faster.

Select the option when the input data contains many identical rows. Do not select the option if the input data does not contain many identical rows, as the transformation might run more slowly.

**Note:** The transformation output contains the same record data when you select or clear the option. The transformation might assign different link scores and driver scores to the output records when you select and clear the option.

#### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Persistent Index Case Study

You are a data steward at a retail bank that has multiple branches. You manage a master set of the customer account records from all of the branches. You use a set of index database tables to verify that the customer account database does not contain redundant or duplicate records.

To create and manage the index data store, you perform the following operations:

- You create the data store.
- You update the data store with the most recent data from the bank branches.

You might add account data to the data store, or you might update the current data in the data store.

- You remove obsolete records from the data store.

You understand that each operation might create duplicate records in the data store. You decide to develop a policy to analyze the branch data before you add the data to the master data store data. You use identity match analysis to analyze the branch data and to verify that the data does not create duplicate identities in the data store. You configure the persistent index options on the Match transformation to analyze the branch data and the data store.

### Develop a Policy for Persistent Index Data Management

As a data steward, you define a business rule that states that the customer account data store cannot contain duplicate identities. You design an identity match mapping to analyze the branch data in a staging database before you add the data to the data store.

The operations to add the branch data to the data store can create duplicate identities in the following cases:

- The branch data contains duplicate identities.
- The branch data contains an identity that the index also contains.
- The branch data contains a newer version of an identity in the data store, and the newer version matches another identity in the index.

When you compare the staging database to the data store, select the persistent index options that reflect the duplicate record status of the branch data. Before you update the data store, you might decide to compare the branch data with the index data.

**Note:** You can enable and disable match analysis on some of the options. Enable match analysis to analyze the mapping data or to compare the index data store to the mapping data. Disable match analysis when you do not need to compare the data. You can also use the Match properties on the Match Output tab to include or exclude data from match analysis.



## Compare a Mapping Data Source with the Index Data Store

To compare the mapping input data with the index data store and to make no change to the data store, select the following option:

- Do not update the database

The mapping compares the input data to the index data store. The mapping does not add, remove, or update any data in index data store.

You cannot disable identity match analysis when you select the option.

Because you do not update the index data, you cannot create duplicate rows in the store. Select the option from the Match properties on the Match Output tab that meets the current needs of the data project. For example, select the **Full** option. The **Full** option verifies that the mapping data does not contain duplicates and verifies that the mapping data does not add duplicates to the data store.

**Note:** Use the option to compare the mapping data and the data store before you update the data store. If the mapping output indicates that the mapping data does not add duplicates to the data store, run the mapping again. Select the option to update the database when you run the mapping again.

## Create the Data Store and Add Rows to the Data Store

To create a data store or to add rows from the mapping data to a data store, select the following option:

- Update the database with new IDs

The mapping adds a row to the data store if the row does not share a sequence identifier with a row in the data store. The mapping does not overwrite any row in the index tables. When you specify empty database tables, the mapping writes all of the mapping index data to the tables.

You can enable or disable identity match analysis when you select the option. The option enables match analysis by default.

Because you do not update the index rows, select the **Exclusive** option or the **Partial** option from the Match properties on the Match Output tab. Use the **Exclusive** option if you verified the uniqueness of the mapping data rows in an earlier process.

## Update the Rows in the Data Store

To update a current row in the data store with the mapping data, select the following option:

- Update the current IDs in the database

The mapping updates a current record in the data store if the record shares a sequence identifier with a record in the mapping data. The mapping does not add any row to the index tables.

You can enable or disable identity match analysis when you select the option. The option disables match analysis by default.

Because you do not add index rows to the index tables, select the **Full** option from the Match properties on the Match Output tab.

**Note:** When you update the rows in the data store, you expect to find duplicates between the mapping source data and the data store. Select the **Full** option to verify that the identity data that you add to the store does not match the current data in the store.

## Remove Rows from the Data Store

To remove rows from the data store, select the following option:

- Remove IDs from the database

The mapping deletes a row from the data store if the row shares a sequence identifier with a record in the mapping data.

You can enable or disable identity match analysis when you select the option. The option disables match analysis by default.

**Note:** When you remove data from a data store, you change the relationships between the rows in the store. If the store contains duplicate identities, you might remove data for a driver record or a linked record in a cluster. Or, you might remove data for the best match in a matched pair. When you run the mapping again, the mapping might generate different clusters or duplicate pairs. If you remove rows from a data store that does not contain duplicate records, you cannot change the duplicate status of the records. When you run the mapping after you delete the rows, the mapping generates the same match scores for the identities that remain in the data set.

## Identity Match Analysis Example

You are a human resources officer at a software organization with development centers in different cities. The organization stores personnel records for staff members in a database at the head office. The development centers hire staff at regular intervals, and the centers send you the personnel data for the staff members that they hire.

You add the personnel records to a spreadsheet file, and you use the file data to update the employee database. You are concerned that the current file might contain duplicate identities.

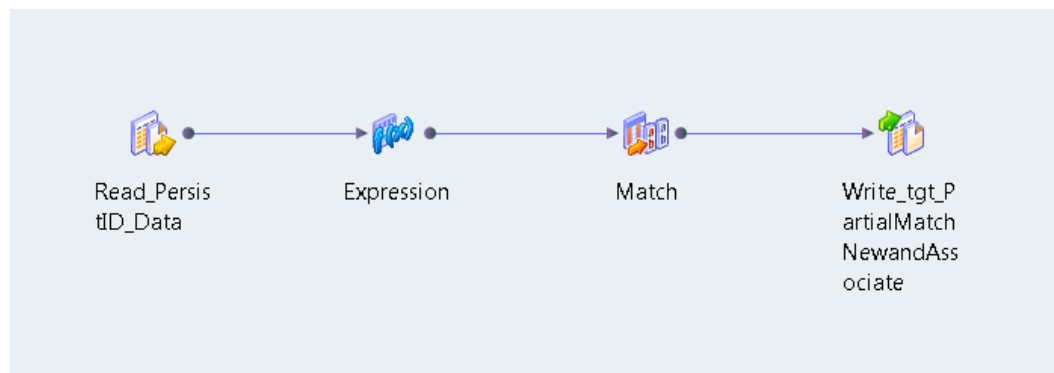
You design a mapping to perform identity analysis on the employee records. You configure a Match transformation to search for duplicate identities in the spreadsheet file. You must also verify that the file data does not duplicate any employee data in the master database. You configure the Match transformation to compare the file data with the master data that you store for the organization employees.

Because the database is a master data set, you store the index data for the staff records in a persistent data store.

### Create the Mapping

Create a mapping that looks for duplicate identities. The mapping reads a data source, adds a sequence identifier to the source records, performs identity analysis, and writes the results to a data target.

The following image shows the mapping in the Developer tool:



The mapping that you create contains the following objects:

| Object Name                           | Description  |
|---------------------------------------|--|
| Read_PersistID_Data                   | Data source.<br>Contains the employee names and details.                                   |
| Expression                            | Expression transformation.<br>Adds sequence identifier values to the source data.          |
| Match                                 | Match transformation.<br>Analyzes the levels of duplication in the source data identities. |
| Write_tgt_PartialMatchNewandAssociate | Data target.<br>Contains the results of the identity analysis.                             |

**Note:** The mapping does not use a Key Generator transformation. In identity match analysis, the Key Generator transformation is optional.

## Input Data Sample

The staff file contains the name of the employee, the city in which the employee works, and the designated role of the employee. You create a data source from the staff file in the Model repository. You add the data source to the mapping.

The following data fragment shows a sample of the employee data in the staff file:

| Name     | City      | Designation |
|----------|-----------|-------------|
| Chaithra | Bangalore | SE          |
| Ramanan  | Chennai   | SSE         |
| Ramesh   | Chennai   | SSE         |
| Ramesh   | Chennai   | Lead        |
| Sunil    | Bangalore | Principal   |
| Venu     | Hyderabad | Principal   |
| Harish   | Bangalore | SE          |
| Sachin   | Bangalore | SSE         |

## Expression Transformation Configuration

When you configure the Expression transformation, connect all the data source ports that you want to include in the mapping output. Connect the ports as pass-through ports. Create an expression to add a sequence identification value to the ports.

The following expression creates the variable *Init3* and adds the integer value 1267 to each sequence identifier:

Init3+1267

The following table describes the ports on the Expression transformation that reads the employee data source:

| Name        | Port Type | Port Group  |
|-------------|-----------|-------------|
| SEQID       | bigint    | Output Only |
| Name        | string    | Passthrough |
| City        | string    | Passthrough |
| Designation | string    | Passthrough |
| Init3       | integer   | Variable    |

## Match Transformation Configuration

Add a nonreusable Match transformation to the mapping to perform the identity analysis.

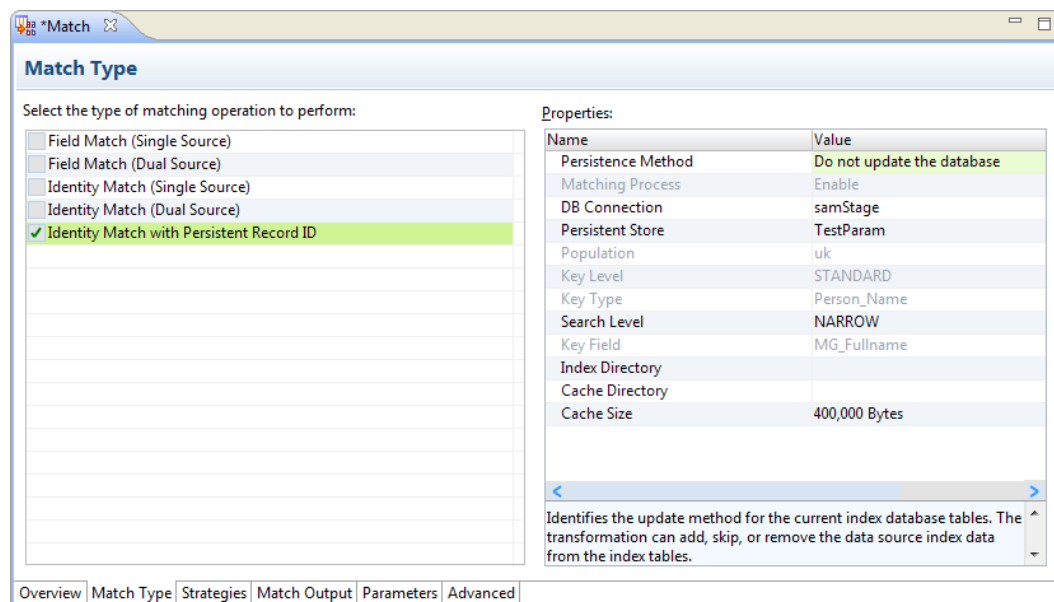
Perform the following tasks to configure the transformation:

1. Select the type of match analysis to perform.
2. Connect the input ports to the transformation.
3. Configure a strategy to compare the record data.
4. Select the type of match output data that the transformation creates.
5. Connect the output ports to a data target.

### Select the Type of Match Operation

Use the options on the Match Type view to select the match operation.

The following image shows the Match Type view:



To compare the index data from the data source with the index data from the master data set, select **Identity Match with Persistent Record ID**. Update the persistence method so that the match analysis does not add data to the index tables. You can determine whether to update the index tables after you review the results of the mapping.

Use the **DB Connection** option to identify the database that contains the index data. Use the **Persistent Store** option to select the index tables.

**Note:** The Match transformation reads the identity population, key level, key type, and key field property values from the metadata in the index database tables. The values match the corresponding properties on the transformation that created the index data store.

## Connect the Input Ports

Connect the input data ports to the transformation. Verify that the port names, port order, data types, and precisions must match the port configurations of the transformation that created the data store.

The Match transformation uses preset input ports to determine the order in which it processes the records. The transformation uses a sequence identifier to track the records from the input ports to the matched pairs or clusters that it writes as output. The transformation uses a group key to sort the records that it processes.

Connect the preset ports to the following ports on the Expression transformation:

- SequenceID. Connect to the SEQID port from the Expression transformation.
- GroupKey. Connect to the City port from the from the Expression transformation.

## Configure a Strategy for Identity Analysis

Use the options on the Strategies view to configure a strategy. The strategy determines the type of analysis that the transformation performs on the record data.

Select the Person\_Name algorithm for the record data. Select the Name input port for analysis. Because the transformation creates a copies of the port data, you select the Name\_1 port and Name\_2 port.

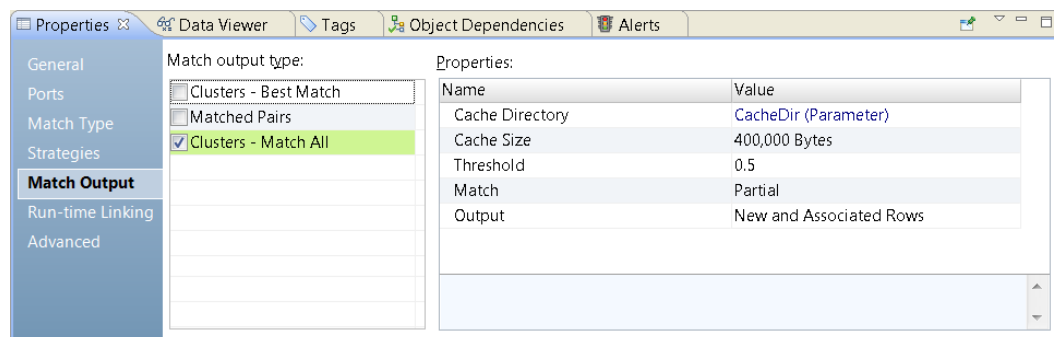
### RELATED TOPICS:

- [“Identity Match Algorithms” on page 438](#)

## Select the Match Output Type

Use the options on the Match Output view to define the output format for the results of the match analysis

The following image shows the Match Output view for single-source identity analysis:



You configure the transformation to organize the output records in clusters. Each cluster contains all the records that match at least one other record, based on the match properties that you specify. The match properties determine how the transformation compares the data source records to the index records.

The following table describes the match property options that you specify to analyze the staff record data:

| Match Property | Option                  | Option Description   |
|----------------|-------------------------|--|
| Match          | Partial                 | The transformation compares the data source records with the index data store. The transformation also compares the records within the data source with each other.  |
| Output         | New and Associated Rows | The transformation writes every cluster that contains at least one record from the data source. The clusters can include records from the index data store. Because a cluster can contain a single record, the output contains all records in the data source. |

## RELATED TOPICS:

- [“Match Property Configuration” on page 442](#)
- [“Output Property Configuration” on page 442](#)

## Connect the Output Ports

Connect the Match transformation output ports to the data target in the mapping. Select the ports that contain the record data that you want to write to the data target.

The transformation includes a series of preset ports for clustered data. Select the preset ports that indicate duplicate status of the records and identify the data source that stores each record.

The following ports contain data that you can use to find duplicate records and determine the source or the records:

- The **ClusterSize** port indicates the number of records in a cluster. If a record belongs to a cluster with a cluster size greater than 1, the transformation considers the record to be a duplicate of another record.
- The **ClusterID** port identifies the cluster that a record belongs to. Use the ClusterID data to find the records that are duplicates of the current record.
- The **PersistenceStatus** port uses a code value to describe the relationship between the index data from the mapping source and the index data in the data store.
- The **PersistenceStatusDesc** port returns a text description of the values on the PersistenceStatus port code.

You can use other ports to review the relationships between the cluster records. The link port values and driver port values indicate the extent of the similarity between the records in each cluster.

In the current example, you connect all the ports to the data target. To view the output data on the ports, run the Data Viewer.

## RELATED TOPICS:

- [“Persistence Status Codes and Persistence Status Descriptions” on page 416](#)
- [“Status Code Values and Status Description Values” on page 416](#)

## Run the Data Viewer

Run the Data Viewer to review the results of the match analysis. By default, the Data Viewer shows all the output ports on the Match transformation. When you run the mapping, you update the data target with the data from the output ports.

The following image shows the output data in the Data Viewer:

Configuration: New\_configuration (1) Run Show: (Multiple...) Choose...

Output Name: Match.Output

|    | Name   | ClusterSize | PersistenceStatusDesc  | Designation | GroupKey  | LinkId    | ClusterId | LinkScore | PersistenceSt... |
|----|--------|-------------|------------------------|-------------|-----------|-----------|-----------|-----------|------------------|
| 1  | Chaith | 2           | Input, Exists, Ignored | SE          | Bangalore | S - 1     | 000000001 | 1         | IEI00000         |
| 2  | Chaith | 2           | Store, -, No change    | SE          | Bangalore | 1 - 1267  | 000000001 | 1         | SON00000         |
| 3  | Ramana | 2           | Input, Exists, Ignored | SSE         | Chennai   | S - 2     | 000000002 | 1         | IEI00000         |
| 4  | Ramana | 2           | Store, -, No change    | SSE         | Chennai   | 1 - 2534  | 000000002 | 1         | SON00000         |
| 5  | Ramesh | 4           | Input, Exists, Ignored | SSE         | Chennai   | S - 3     | 000000003 | 1         | IEI00000         |
| 6  | Ramesh | 4           | Input, Exists, Ignored | Lead        | Chennai   | S - 3     | 000000003 | 1         | IEI00000         |
| 7  | Ramesh | 4           | Store, -, No change    | SSE         | Chennai   | 1 - 3801  | 000000003 | 1         | SON00000         |
| 8  | Ramesh | 4           | Store, -, No change    | Lead        | Chennai   | 1 - 3801  | 000000003 | 1         | SON00000         |
| 9  | Sunil  | 2           | Input, Exists, Ignored | Principal   | Bangalore | S - 5     | 000000004 | 1         | IEI00000         |
| 10 | Sunil  | 2           | Store, -, No change    | Principal   | Bangalore | 1 - 6335  | 000000004 | 1         | SON00000         |
| 11 | Venu   | 2           | Input, Exists, Ignored | Principal   | Hydrabad  | S - 6     | 000000005 | 1         | IEI00000         |
| 12 | Venu   | 2           | Store, -, No change    | Principal   | Hydrabad  | 1 - 7602  | 000000005 | 1         | SON00000         |
| 13 | Harish | 2           | Input, Exists, Ignored | SE          | Bangalore | S - 7     | 000000006 | 1         | IEI00000         |
| 14 | Harish | 2           | Store, -, No change    | SE          | Bangalore | 1 - 8869  | 000000006 | 1         | SON00000         |
| 15 | Sachin | 2           | Input, Exists, Ignored | SSE         | Bangalore | S - 8     | 000000007 | 1         | IEI00000         |
| 16 | Sachin | 2           | Store, -, No change    | SSE         | Bangalore | 1 - 10136 | 000000007 | 1         | SON00000         |

Row 1 to 16

The Data Viewer verifies that the file contains records that duplicate the data in the master data set.

Consider the following data values in the Data Viewer:

- Each record in the data set belongs to a cluster that contains two or more records. Therefore, each record is a duplicate of at least one other record. The transformation assigns a cluster size of 1 to unique records. The data source does not contain any record that the master data set does not contain.
- The **PersistenceStatusDesc** data identifies the origin of the record and indicates if the Match transformation adds the record to the index tables. The column indicates that each input record exists in the master data set. The transformation does not add data to the master data index.

## Conclusion

The results of the match analysis indicate that the staff record file does not contain any record that the master data set does not contain. The persistence status descriptions indicate that the mapping does not update the index tables with any data from the data source. You discard the staff record file.

When you receive another update from the regional offices, you can create another file and compare it to the master data set. You can reuse the mapping and the index tables. Because you store the index data for the master data set in the database tables, you do not need to regenerate the index data.



## CHAPTER 31

# Merge Transformation

This chapter includes the following topics:

- [Merge Transformation Overview, 453](#)
- [Configuring a Merge Strategy, 453](#)
- [Merge Transformation Advanced Properties, 454](#)

## Merge Transformation Overview

The Merge transformation is a passive transformation that reads the data values from multiple input columns and creates a single output column.

Use the Merge transformation to create data in a preferred format. For example, you can combine Customer\_Firstname and Customer\_Surname fields to create a field called Customer\_FullName.

Within a Merge transformation, you can create multiple merge strategies. The Merge transformation provides a wizard that you use to create strategies.

## Configuring a Merge Strategy

To configure a merge strategy, edit the settings in the **Strategies** view of a Merge transformation.

1. Select the **Strategies** view.
2. Click **New**.  
The **New Strategy** wizard opens.
3. Click the **Inputs** field to select input ports for the strategy.
4. To define the merge character to place between merged items, click **Choose**. If you do not select a merge character, the Merge transformation uses a space character by default.
5. Optionally, select **Include empty strings in merged output** to include empty input strings in the output.
6. Click **Finish**.

# Merge Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Merge transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

## **Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 32

# Normalizer Transformation

This chapter includes the following topics:

- [Normalizer Transformation Overview, 455](#)
- [Multiple-Occurring Fields, 456](#)
- [Multiple-Occurring Records, 457](#)
- [Input Hierarchy Definition, 458](#)
- [Normalizer Transformation Output Groups and Ports, 461](#)
- [Key Generation for Output Groups, 465](#)
- [Normalizer Transformation Advanced Properties, 465](#)
- [Creating a Normalizer Transformation, 466](#)
- [Creating a Normalizer Transformation from an Upstream Source, 467](#)
- [Normalizer Mapping Example, 467](#)

## Normalizer Transformation Overview

The Normalizer transformation is an active transformation that transforms one source row into multiple target rows. When the Normalizer transformation receives a row that contains multiple-occurring data, it returns a row for each instance of the multiple-occurring data.

The Normalizer transformation parses multiple-occurring data into separate output rows. For example, a relational source row might contain four quarters of sales. The Normalizer transformation generates a separate output row for each sales occurrence.

When you define the Normalizer transformation, you configure an input row hierarchy that describes the source data structure. Optionally, you can define records in the transformation input hierarchy. A record is a container for a group of fields. Define a record when a group of fields occurs multiple times in the source data. The input hierarchy determines how you can configure the transformation output groups.

The Normalizer transformation transforms data from relational tables or from flat file sources.

# Multiple-Occurring Fields

When a field repeats multiple-times in the source data, you can define the field as a multiple-occurring field in the input row hierarchy. The Normalizer transformation can return a separate row for each occurrence of a multiple-occurring field or group of fields in a source.

A source row might contain four quarters of sales by store:

| Store  | Sales (1) | Sales (2) | Sales (3) | Sales (4) |
|--------|-----------|-----------|-----------|-----------|
| Store1 | 100       | 300       | 500       | 700       |
| Store2 | 250       | 450       | 650       | 850       |

When you define the Normalizer input hierarchy, you can combine the four Sales fields into one multiple-occurring field. Define a field name such as Qtr\_Sales and configure it to occur four times in the source.

When the output group contains the store data and the sales data, the Normalizer transformation returns a row for each Store and Qtr\_Sales combination. The output row contains an index that identifies which instance of Qtr\_Sales that is in the output row.

The transformation returns the following rows:

| Store  | Qtr_Sales | Qtr (GCID) |
|--------|-----------|------------|
| Store1 | 100       | 1          |
| Store1 | 300       | 2          |
| Store1 | 500       | 3          |
| Store1 | 700       | 4          |
| Store2 | 250       | 1          |
| Store2 | 450       | 2          |
| Store2 | 650       | 3          |
| Store2 | 850       | 4          |

When an output group contains single-occurring columns and a multiple-occurring column, the Normalizer returns duplicate data for the single-occurring columns in each output row. For example, Store1 and Store2 repeat for each instance of Qtr\_Sales.

A source row might contain more than one level of multiple-occurring data. You can configure the Normalizer transformation to return separate rows at each level based on how you define the input hierarchy.

## Generated Column ID

The Normalizer transformation returns a generated column ID (GCID) output port for each instance of a multiple-occurring field.

The generated column ID port is an index for the instance of the multiple-occurring data. For example, if a field occurs four times in a source record, the Developer tool returns a value of 1, 2, 3, or 4 in the generated column ID port based on which instance of the multiple-occurring data occurs in the row.

# Multiple-Occurring Records

You can define multiple-occurring records in the Normalizer transformation source data. Records are groups of fields. Define records in the Normalizer transformation when you need to define groups of source fields that are multiple-occurring.

## Multiple-Occurring Records Example

The following Customer row contains customer information with home address information and business address information:

```
CustomerID
FirstName
LastName
Home_Street
Home_City
Home_State
Home_Country
Business_Street
Business_City
Business_State
Business_Country
```

When you configure the Normalizer transformation, you can define an input structure that contains the customer fields and a multiple-occurring address record. The address record occurs twice. When you configure the Normalizer transformation output groups, you can return the Address record to a different target than the CustomerID, FirstName, and LastName fields.

The following example shows an input structure with a multiple-occurring address record:

```
CustomerID
FirstName
LastName
Address (occurs twice)
    Street
    City
    State
    Country
```

Subrecords are records within records. When you define records and subrecords, you define an input hierarchy of fields in the source row. Each record is a node in a hierarchy that you can reference when you define the transformation output.

For example, the source row might contain multiple phone numbers for each address type:

```
CustomerID
FirstName
LastName
Home_Street
Home_City
Home_State
Home_Country
Telephone_No
Cell_Phone_No
Alternate_Phone_No
Business_Street
Business_City
Business_State
Business_Country
Business_Telephone_No
Business_Cell_Phone_No
Business-Alternate_Phone1
```

You define an input hierarchy where Address is the parent of Phone. When you define the Normalizer transformation output, you can return the addresses and the phone numbers to separate targets than the customer information.

Define an input hierarchy similar to the following example:

```
CustomerID
FirstName
LastName
Address (occurs twice)
    Street
    City
    State
    Country
Phone
    Telephone_No (occurs three times)
```

## Input Hierarchy Definition

When you create a Normalizer transformation, you define an input hierarchy that describes records and fields in the source. Define the input hierarchy on the **Normalizer** view of the transformation.

The Developer tool creates the transformation input ports based on the fields that you define in the input hierarchy. Define the input group structure before you define the transformation output groups.

When you define an input hierarchy, you must define an input structure that corresponds to the structure of the source data. The source data might contain more than one group of multiple-occurring fields. To define the structure, you can configure a record that occurs at the same level as another record in the source. Or, you can define records that occur within other records.

### Input Hierarchy Example

The following source row contains customer fields and an address record that occurs twice:

```
CustomerID
FirstName
LastName
Address
    Street
    City
    State
    Country
Address1
    Street1
    City1
    State1
    Country1
```

When you define the input structure in the **Normalizer** view, you can add the CustomerID, FirstName, and LastName as fields. Define an Address record and include the Street, City, State, and Country fields in the address. Change the Address Occurs value to 2.

The following image shows the input hierarchy in the **Normalizer** view:

| Normalizer |       |        |        |           |       |  |
|------------|-------|--------|--------|-----------|-------|--|
| Name       | Level | Occurs | Type   | Precision | Scale |  |
| CustomerID | 1     | 1      | string | 10        | 0     |  |
| FirstName  | 1     | 1      | string | 10        | 0     |  |
| LastName   | 1     | 1      | string | 10        | 0     |  |
| Address    | 1     | 2      |        |           |       |  |
| Street     | 2     | 1      | string | 10        | 0     |  |
| City       | 2     | 1      | string | 10        | 0     |  |
| State      | 2     | 1      | string | 10        | 0     |  |
| Country    | 2     | 1      | string | 10        | 0     |  |

The **Occurs** column in the **Normalizer** view identifies the number of instances of a field or record in a source row. Change the value in the **Occurs** column for multiple-occurring fields or records. In this example, the customer fields occur one time, and the Address record occurs twice.

The **Level** column in the **Normalizer** view indicates where a field or record appears in the input hierarchy. The customer fields are at level 1 in the hierarchy. The Address record is also level 1.

## Normalizer Transformation Input Ports

The Developer tool creates the Normalizer transformation input ports when you define the input hierarchy in the **Normalizer** view. When you change fields in the input hierarchy, the Developer tool changes the input ports.

View the Normalizer transformation input ports in the **Overview** view. You can reorder the input ports in the **Overview** view. To change the input ports, update the input hierarchy in the **Normalizer** view.

When you define a field as multiple-occurring in the input hierarchy, the Developer tool creates one input port for each instance of the multiple-occurring field. When a record is multiple-occurring, the Developer tool creates an input port for each instance of the fields in the record.

### Input Ports Example

The following image shows the input ports that the Developer tool creates for the customer data and the multiple-occurring address data:

| Ports |            |        |           |       |                 |
|-------|------------|--------|-----------|-------|-----------------|
|       | Name       | Type   | Precision | Scale | Location        |
|       | Input      |        |           |       |                 |
| 1     | CustomerID | string | 10        | 0     | CustomerID      |
| 2     | FirstName  | string | 10        | 0     | FirstName       |
| 3     | LastName   | string | 10        | 0     | LastName        |
| 4     | Street     | string | 10        | 0     | Address.Street  |
| 5     | Street1    | string | 10        | 0     | Address.Street  |
| 6     | City       | string | 10        | 0     | Address.City    |
| 7     | City1      | string | 10        | 0     | Address.City    |
| 8     | State      | string | 10        | 0     | Address.State   |
| 9     | State1     | string | 10        | 0     | Address.State   |
| 10    | Country    | string | 10        | 0     | Address.Country |
| 11    | Country1   | string | 10        | 0     | Address.Country |

## Merge Fields

You can merge fields of similar data into a single multiple-occurring field in the **Normalizer** view. You might need to merge fields when you drag ports from another object to create a Normalizer transformation in a mapping.

A source row might contain multiple fields that contain different types of salary data, such as `Base_Salary`, `Bonus_Pay`, and `Sales_Commissions`. You can merge the fields to create one `Salary` field that occurs three times.

The following image shows an employee row with three types of salary selected in the Normalizer view:

| Normalizer        |       |        |         |          |       |
|-------------------|-------|--------|---------|----------|-------|
| Name              | Level | Occurs | Type    | Preci... | Scale |
| EmployeeID        | 1     | 1      | string  | 10       | 0     |
| Base_Salary       | 1     | 1      | decimal | 10       | 0     |
| Bonus_Pay         | 1     | 1      | decimal | 10       | 0     |
| Sales Commissions | 1     | 1      | decimal | 10       | 0     |

You can merge the three types of salary data into a `Salary` field that occurs three times.

The following image shows the `Salary` field:



| Normalizer |       |        |         |          |       |  |
|------------|-------|--------|---------|----------|-------|--|
|            |       |        |         |          |       |  |
| Name       | Level | Occurs | Type    | Preci... | Scale |  |
| EmployeeID | 1     | 1      | string  | 10       | 0     |  |
| Salary     | 1     | 3      | decimal | 10       | 0     |  |
|            |       |        |         |          |       |  |
|            |       |        |         |          |       |  |

## Merging Fields

Merge fields of the same type into one multiple-occurring field on the Normalizer view.

1. Click the **Normalizer** view.
2. Select the fields that you want to merge.
3. Click the **Merge** button.  
The **Merge Fields** dialog box appears.
4. Enter a name for the merge field, the type, the precision, the scale, and occurrence of the multiple-occurring field.
5. Click **OK**.

# Normalizer Transformation Output Groups and Ports

Define output groups and ports in the Overview view of the Normalizer transformation. You can define the output groups after you define the transformation input hierarchy.

The Developer tool generates at least one output group by default. The output group contains all the level 1 fields from the input ports and the first multiple-occurring field. When you define more than one multiple-occurring field in the Normalizer view, the Developer tool creates an output group for each additional multiple-occurring field. You can stop the Developer tool from generating the additional output groups by disabling the `Generate First Level Output Groups` advanced property.

The following source row contains the customer data, the multiple-occurring sales field, and the multiple-occurring phone field:

```
CustomerID
LastName
FirstName
Sales (occurs 4 times)
Phone (occurs 3 times)
```

The Developer tool creates two output groups from the input structure:

```
Output
CustomerID
LastName
FirstName
Sales

Output1
Phone
GCID_Phone
```

The Developer tool creates an Output1 group because the source data contains more than one multiple-occurring field. The Developer tool does not create groups for fields that you define in records. When you define records, you must define the output groups that contain the fields in the records.

The following source row contains customer fields and an address record that occurs twice:

```
CustomerID
  FirstName
  LastName
  Address
    Street
    City
    State
    Country
  Address1
    Street1
    City1
    State1
    Country1
```

The Developer tool creates an output group that contains the following fields.

```
CustomerID
  FirstName
  LastName
```

The Developer tool creates a default output group for the level 1 customer fields. The default output group does not include the Address record. You must configure how to return the Address data in the output.

Create the output groups based on how you need to structure the output rows. When the source row contains customer data and address data, you can create an output group for the customer fields. You can create another output group for the address fields. Or, you can update the default output group and add the address fields to it. The following examples show different output results based on the output group configuration.

## Create an Output Group

Create an output group in the **Overview** view of the Normalizer transformation.

When you open the **Overview** view of the Normalizer transformation, the Developer tool shows the default groups it creates from the input hierarchy.

When you create a new output group, a dialog box shows a list of the fields and records in the input hierarchy. Select which fields or records to include in the group.

### Output Group Example

The following image shows the **New Output Group** dialog box:

### New Output Group

Select the Normalizer fields to add to the output group.

| Name  | Occurs | Type   | Precision | Scale |  |
|---|--------|--------|-----------|-------|--|
| <input type="checkbox"/> CustomerID         | 1      | string | 10        | 0     |  |
| <input type="checkbox"/> FirstName          | 1      | string | 10        | 0     |  |
| <input type="checkbox"/> LastName           | 1      | string | 10        | 0     |  |
| <input checked="" type="checkbox"/> Address | 1      |        |           |       |  |
| <input checked="" type="checkbox"/> Street  | 1      | string | 10        | 0     |  |
| <input checked="" type="checkbox"/> City    | 1      | string | 10        | 0     |  |
| <input checked="" type="checkbox"/> State   | 1      | string | 10        | 0     |  |
| <input checked="" type="checkbox"/> Country | 1      | string | 10        | 0     |  |

When you select the Address record, the Developer tool creates a group of output ports that correspond to the fields in the Address record. The Output1 group contains the Street, City, State, and Country ports. You can change the ports in the output group.

The following image shows the Output group and the Output1 group in the **Overview** view:

|         |              |        |    |   |                 |
|---------|--------------|--------|----|---|-----------------|
| Output  |              |        |    |   |                 |
| 1       | CustomerID   | string | 10 | 0 | CustomerID      |
| 2       | FirstName    | string | 10 | 0 | FirstName       |
| 3       | LastName     | string | 10 | 0 | LastName        |
| Output1 |              |        |    |   |                 |
| 1       | Street       | string | 10 | 0 | Address.Street  |
| 2       | State        | string | 10 | 0 | Address.State   |
| 3       | Country      | string | 10 | 0 | Address.Country |
| 4       | GCID_Address | bigint | 19 | 0 | Address         |

You might configure the Normalizer transformation to return the rows from the Output group to a Customer table.

The Customer table receives data similar to the following rows:

```
100, Robert, Bold
200, James, Cowan
```

You might return the rows from the Output1 group to an Address table. The Address table receives the Street, City, State, Country, and GCID.

The Address table receives data similar to the following rows:

```
100 Summit Dr, Redwood City, CA, United States,1
41 Industrial Way, San Carlos, CA, United States,2
85 McNulty Way, Los Angeles, CA, United States,1
55 Factory Street, Los Vegas, NV, United States,2
```

The GCID identifies which instance of the customer address is in the output row. In this example, the Normalizer transformation returns two instances of the Address record. Each output row contains a GCID value of 1 or 2.

## Update an Output Group

You can update a Normalizer transformation output group. You can add or remove the fields in the group.

By default, the Developer tool creates level 1 output groups when you define an input hierarchy. The Developer tool does not include records in the groups. You can update the default output groups and add records to them.

To update an output group, highlight the group name and click **New > Update Group**. The **Edit Output Group** dialog box shows the fields in the input hierarchy. Choose which fields to include in the group.

### Update Output Group Example

In the previous example, the Developer tool created a default output group with the CustomerID, FirstName, and LastName fields.

The following image shows the default output group:

|   | Output     |        |    |   |            |
|---|------------|--------|----|---|------------|
| 1 | CustomerID | string | 10 | 0 | CustomerID |
| 2 | FirstName  | string | 10 | 0 | FirstName  |
| 3 | LastName   | string | 10 | 0 | LastName   |

You can update the default output group and add the Address record to it.

The following image shows the **Edit Output Group** dialog box:

**Edit Output Group**  
Select the Normalizer fields to include in the output group.

| Name   | Occurs | Type   | Precision | Scale |
|--|--------|--------|-----------|-------|
| <input checked="" type="checkbox"/> CustomerID | 1      | string | 10        | 0     |
| <input checked="" type="checkbox"/> FirstName  | 1      | string | 10        | 0     |
| <input checked="" type="checkbox"/> LastName   | 1      | string | 10        | 0     |
| <input checked="" type="checkbox"/> Address    | 2      |        |           |       |
| <input checked="" type="checkbox"/> Street     | 1      | string | 10        | 0     |
| <input checked="" type="checkbox"/> State      | 1      | string | 10        | 0     |
| <input checked="" type="checkbox"/> Country    | 1      | string | 10        | 0     |
|  |        |        |           |       |

In this example, the CustomerID, FirstName, and LastName are level 1 nodes. The Address record is also a level 1 node. The Normalizer transformation can return Address in the same row as the customer data. Since Address is multiple-occurring, the Developer tool adds the GCID\_Address index to the output group.

The following image shows the ports in the Output group:

|   | Output       |        |    |   |                 |
|---|--------------|--------|----|---|-----------------|
| 1 | CustomerID   | string | 10 | 0 | CustomerID      |
| 2 | FirstName    | string | 10 | 0 | FirstName       |
| 3 | LastName     | string | 10 | 0 | LastName        |
| 4 | Street       | string | 10 | 0 | Address.Street  |
| 5 | State        | string | 10 | 0 | Address.State   |
| 6 | Country      | string | 10 | 0 | Address.Country |
| 7 | GCID_Address | bigint | 19 | 0 | Address         |

When the customer fields and the multiple-occurring address fields are in the output group, the Normalizer transformation returns the same customer fields for each instance of the address data.

The following example shows the rows that the Normalizer transformation generates from the output group:

```
100, Robert, Bold, 100 Summit Dr, Redwood City, CA, United States,1
100, Robert, Bold, 41 Industrial Way, San Carlos, CA, United States,2
200, James, Cowan, 85 McNulty Way, Los Angeles, CA, United States,1
200, James, Cowan, 55 Factory Street, Los Vegas, NV, United States,2
```

The GCID port contains the Address instance number. The GCID value is 1 or 2.

## Key Generation for Output Groups

You can configure a Sequence Generator transformation to generate keys that link each output row that the Normalizer transformation returns from the same source row.

You can add a Sequence Generator transformation before the Normalizer transformation in a mapping. The Sequence Generator transformation adds a sequence number to each source row. When the Normalizer transformation returns multiple output groups or rows from the same source row, each output row receives the same sequence number. You can use the number as a key in a primary key-foreign key relationship between target tables.

For example, the Normalizer transformation returns customer information in an output group and it returns order information in another output group. You can use the sequence number to link the customer information in a table to the order information in another table.

## Normalizer Transformation Advanced Properties

Configure properties for the Normalizer transformation on the **Advanced** tab.

Configure the following properties on the **Advanced** tab:

### Automatically generate first-level output groups

Automatically generates the output groups when the Normalizer transformation contains more than one multiple-occurring group.

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Generate First Level Output Groups

The Developer tool generates the Normalizer transformation first-level output group by default. The Developer tool generates additional output groups when you define more than one multiple-occurring field in the Normalizer view.

The Developer tool creates an output group that contains all level 1 single-occurring fields and the first level 1 multiple-occurring field. The Developer tool creates an additional output group when the transformation contains more than one multiple-occurring field.

The Developer tool does not create an output group for level 1 records. When you define a level 1 record, you must configure where you to put them in the output.

To stop the Developer tool from creating output groups for multiple-occurring fields, disable the **Automatically Generate First-Level Output Groups** advanced property.

## Creating a Normalizer Transformation

You can create a reusable or non-reusable Normalizer transformation. Reusable transformations can exist in multiple mappings. Non-reusable transformations exist within a single mapping.

1. To create a transformation, use one of the following methods:

| Option       | Description  |
|--------------|--|
| Reusable     | Select a project or folder in the <b>Object Explorer</b> view. Click <b>File &gt; New &gt; Transformation</b> . Select the Normalizer transformation and click <b>Next</b> .   |
| Non-reusable | In a mapping or mapplet, drag a Normalizer transformation from the <b>Transformation</b> palette to the editor. You can drag ports from source data objects or from transformations in the mapping to define the transformation. |

The **New Normalizer Transformation** wizard appears.

2. Enter a name for the transformation.
3. Click **Next**.

The **Normalizer Definition** page appears.

4. To add a record, click the **New** button and then select **Record**.
5. To add a field, click the **New** button and then select **Field**.  
To add a field to a record, you must select the record before you add the field.
6. Optionally, double-click the value in the **Occurs** column to change the occurrence of a field or record.
7. Click **Next**.

The **Normalizer Ports** page appears.

8. To add an output group, click the **New** button and then select **New Output Group**.
9. To edit an output group, select the output group that you want to edit. Click the **New** button and then select **Edit Output Group**.
10. Click **Finish**.

The transformation appears in the editor.

# Creating a Normalizer Transformation from an Upstream Source

You can create an empty Normalizer transformation and drag the ports from a source data object or from a transformation into the Normalizer transformation to create input and ports.

1. Create a mapping that includes the source or transformation to pass the source data to the Normalizer transformation.
2. To create the Normalizer transformation, select the Normalizer transformation from the Transformation palette and drag the transformation to the editor.

The Normalizer dialog box appears.

3. Click **Finish** to create an empty transformation.
4. Select ports from a source or transformation in the mapping and drag them to the Normalizer transformation.
5. Open the **Normalizer** view to update the default group and organize fields into records as required.
6. To merge multiple fields into a single multiple-occurring field, select the fields in the **Normalizer** view and click the **Merge** option.

Choose a name for the multiple-occurring field.

## Normalizer Mapping Example

A retail organization receives sales totals for the stores in the organization. The organization receives a row of data that contains store information and four sales amounts. Each sales amount represents the total sales for one quarter of the year.

The following example shows how to define a Normalizer transformation to return the sales data to a Store target and a Sales target. The Store target receives one row for each store. The Sales target receives four rows from each store. Each row contains one quarter of sales data.

A Sequence Generator transformation generates a unique ID for each store. The Normalizer transformation returns the StoreID with each output row.

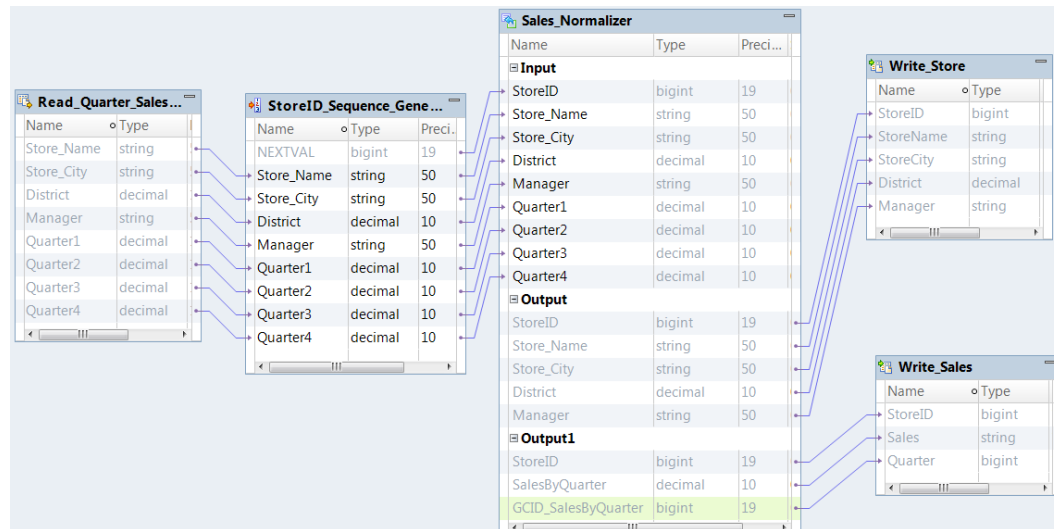
Create a mapping with a Read transformation, a Sequence Generator transformation, the Normalizer transformation, and two Write transformations.

### Normalizer Example Mapping

Create a mapping that contains the Normalizer transformation to normalize multiple-occurring quarterly sales data from a flat file source.

The Normalizer transformation generates a separate output row for each quarter of sales and writes the normalized sales amounts to a the Sales target. The Normalizer transformation writes the Store information to a Store target.

The following figure shows the Normalizer transformation mapping:



The mapping contains the following objects:

#### Read\_STORE

A data source that contains multiple-occurring fields.

#### StoreID Sequence Generator transformation

A Sequence Generator transformation that generates a storeID key to link the Store table to the Sales table.

#### Sales\_Normalizer

A Normalizer transformation that normalizes the multiple-occurring sales data.

#### Write\_Store

A target that receives the store information from the Normalizer transformation.

#### Write\_Sales

A target that receives the sales numbers from the Normalizer transformation.

## Normalizer Example Definition

The source is a flat file that contains store information and quarterly sales data. Define the structure of the source data in the **Normalizer** view.

The STORE flat file contains the following source data:

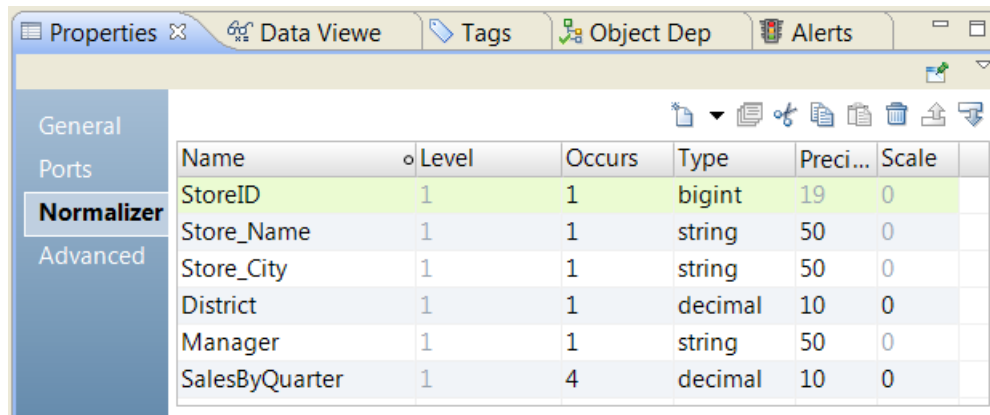
| StoreID | Store_Name | Store_City | District | Manager | Quarter1 | Quarter2 | Quarter3 | Quarter4 |
|---------|------------|------------|----------|---------|----------|----------|----------|----------|
| 1       | BigStore   | New York   | East     | Robert  | 100      | 300      | 500      | 700      |
| 2       | SmallStore | Phoenix    | West     | Radhika | 250      | 450      | 650      | 850      |

Add the flat file to a mapping as a Read transformation, and then create an empty Normalizer transformation. Drag the ports from the Read\_STORE data object to the Normalizer transformation to create the Normalizer definition.

The **Normalizer** view contains one instance of the Store\_Name, Store\_City, District, and Manager fields. The **Normalizer** view contains four instances of a field called QUARTER. Merge the QUARTER fields to create one SalesByQuarter field that occurs four times.



The following figure shows the Normalizer definition with merged Quarter fields:



The screenshot shows a software window titled 'Properties' with tabs for 'Data View', 'Tags', 'Object Dep', and 'Alerts'. The 'Data View' tab is active, displaying a table with the following columns: Name, Level, Occurs, Type, Precision, and Scale. The table contains six rows of data:

| Name           | Level | Occurs | Type    | Preci... | Scale |
|----------------|-------|--------|---------|----------|-------|
| StoreID        | 1     | 1      | bigint  | 19       | 0     |
| Store_Name     | 1     | 1      | string  | 50       | 0     |
| Store_City     | 1     | 1      | string  | 50       | 0     |
| District       | 1     | 1      | decimal | 10       | 0     |
| Manager        | 1     | 1      | string  | 50       | 0     |
| SalesByQuarter | 1     | 4      | decimal | 10       | 0     |

## Normalizer Example Input and Output Groups

After you modify the input hierarchy, the Normalizer transformation has one input group and one default output group. You need to reorganize the output ports into two groups. You need one group that contains the Store information and one group that contains the Sales information.

The input group contains a port for each field in the source. The output group contains ports for the store fields and port for the multiple-occurring SalesByQuarter field. The output group also contains a generated column ID, `GCID_SalesByQuarter`, that corresponds to the multiple-occurring SalesByQuarter field.

To return the quarterly sales to a different target, create a new group in the **Overview** view. In the Output1 group, add the following fields:

```
StoreID
SalesByQuarter
GCID_SalesByQuarter
```

Update the default output group. Remove the following fields:

```
SalesByQuarter
GCID_SalesByQuarter
```

The following image shows the input group and output groups in the **Overview** view:

The screenshot shows the 'Overview' view of a Normalizer transformation in Data Studio. The left sidebar has tabs for 'General', 'Ports', 'Normalizer', and 'Advanced'. The 'Ports' tab is selected, showing a table of input and output ports. The input group contains 9 ports, and the output group contains 6 ports. The 'StoreID' port is highlighted as the generated key.

|                | Name                | Type    | Precision | Scale | Location   |
|----------------|---------------------|---------|-----------|-------|------------|
| <b>Input</b>   |                     |         |           |       |            |
| 1              | StoreID             | bigint  | 19        | 0     | StoreID    |
| 2              | Store_Name          | string  | 50        | 0     | Store_N... |
| 3              | Store_City          | string  | 50        | 0     | Store_City |
| 4              | District            | decimal | 10        | 0     | District   |
| 5              | Manager             | string  | 50        | 0     | Manager    |
| 6              | Quarter1            | decimal | 10        | 0     | SalesBy... |
| 7              | Quarter2            | decimal | 10        | 0     | SalesBy... |
| 8              | Quarter3            | decimal | 10        | 0     | SalesBy... |
| 9              | Quarter4            | decimal | 10        | 0     | SalesBy... |
| <b>Output</b>  |                     |         |           |       |            |
| 1              | StoreID             | bigint  | 19        | 0     | StoreID    |
| 2              | Store_Name          | string  | 50        | 0     | Store_N... |
| 3              | Store_City          | string  | 50        | 0     | Store_City |
| 4              | District            | decimal | 10        | 0     | District   |
| 5              | Manager             | string  | 50        | 0     | Manager    |
| <b>Output1</b> |                     |         |           |       |            |
| 1              | StoreID             | bigint  | 19        | 0     | StoreID    |
| 2              | SalesByQuarter      | decimal | 10        | 0     | SalesBy... |
| 3              | GCID_SalesByQuarter | bigint  | 19        | 0     | SalesBy... |

The StoreID is the generated key that links the Store information with the Sales information. Verify that both output groups return the StoreID.

## Normalizer Example Mapping Output

Add the Write transformation to the mapping and connect the Normalizer transformation output ports to the data objects.

When you run the mapping, the Normalizer transformation writes the following rows to the Store target:

| StoreID | Store_Name | Store_City | District | Manager |
|---------|------------|------------|----------|---------|
| 1       | BigStore   | New York   | East     | Robert  |
| 2       | SmallStore | Phoenix    | West     | Radhika |

The Normalizer transformation writes the following rows to the Sales target:

| StoreID | SalesByQuarter | GCID_SalesByQuarter |
|---------|----------------|---------------------|
| 1       | 100            | 1                   |
| 1       | 300            | 2                   |
| 1       | 500            | 3                   |
| 1       | 700            | 4                   |
| 2       | 250            | 1                   |
| 2       | 450            | 2                   |
| 2       | 650            | 3                   |
| 2       | 850            | 4                   |

## CHAPTER 33

# Parser Transformation

This chapter includes the following topics:

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## Parser Transformation Overview

The Parser transformation is a passive transformation that parses input data values into new ports. The transformation writes the values to new ports according to the types of information the values contain and the position of the values in the input string.

You use a Parser transformation when you want to change the structure of a data set. The Parser transformation can add columns to a data set and write data values to new columns. Use a Parser transformation when a data column contains multiple values in a single column and you want to write the data values to individual columns based on the type of information they contain.

The Parser transformation parses data values into the output ports that you define. If the transformation can identify an input data value but a defined output port is not available, the transformation writes it to an overflow port. If the transformation cannot identify an input data value, it writes it to an unparsed data port.

# Parser Transformation Modes

When you create a Parser transformation, select either token parsing mode or pattern-based parsing mode.

You select one of the following modes:

- Token parsing mode. Use this mode to parse input values that match values in reference data objects such as token sets, regular expressions, probabilistic models, and reference tables. You can use multiple token parsing strategies in a transformation.
- Pattern-based parsing mode. Use this mode to parse input values that match values in pattern sets.

## When to Use a Parser Transformation

Use the Parser transformation when the data fields in a column contain more than one type of information and you want to move the field values to new columns. The Parser transformation lets you create new column for each type of information in a data set.

The following examples describe some types of structural change you can perform with a Parser transformation.

### Create new columns for contact data

You can create a data structure that parses name data from a single column into multiple columns. For example, you can create columns for salutations, first names, middle names, and surnames.

You configure the transformation with a probabilistic model that represents the structures of the person names on the input port. You use a sample of the input port data to define the model.

You create a token parsing strategy that applies the probabilistic model to the input port and writes the name values to new columns. The transformation writes the name values to the new columns based on the position of each value in the input string and the type of name that the value represents.

**Note:** You can also use a pattern-based parsing strategy to parse contact data. When you configure a pattern-based parsing strategy, you define the patterns that represents the structures of the names on the input port.

### Create address columns

You can create a data structure that parses a single column of address data into multiple columns that describe a deliverable address.

Configure the transformation with reference tables that contain recognizable address elements, such as ZIP Codes, state names, and city names. Create a token parsing strategy that writes each address element to a new port.

You cannot use a reference table to parse street address data from an input string, because street name and number data is too general to be captured in a reference table. However, you can use the Overflow port to capture this data. When you have parsed all city, state, and ZIP data from an address, the remaining data contains street information.

For example, use a token parsing strategy to split the following address into address elements:

```
123 MAIN ST NW STE 12 ANYTOWN NY 12345
```

The parsing strategy can write the address elements to the following columns:

| Column Name | Data                  |
|-------------|-----------------------|
| Overflow    | 123 MAIN ST NW STE 12 |
| City        | ANYTOWN               |
| State       | NY                    |
| ZIP         | 12345                 |

#### Create product data columns

You can create a data structure that parses a single column of product data into multiple columns that describe the product inventory details.

Configure the transformation with token sets that contain inventory elements, such as dimension, color, and weight. Create a token parsing strategy that writes each inventory element to a new port

For example, use a token parsing strategy to split the following paint description into separate inventory elements:

500ML Red Matt Exterior

The parsing strategy can write the address elements to the following columns:

| Column Name | Data  |
|-------------|-------|
| Size        | 500ML |
| Color       | Red   |
| Style       | Matt  |
| Exterior    | Y     |

## Reference Data Use in the Parser Transformation

Informatica Developer installs with multiple reference data objects that you can use with the Parser transformation. You can also create reference data objects in the Developer tool.

When you add a reference data object to a Parser transformation, the transformation writes the strings that match a value in the object to new columns that you specify.

The following table describes the types of reference data you can use:

| Reference Data Type  | Description  |
|----------------------|--|
| Pattern sets         | Identifies data values based on the relative position of each value in the string.   |
| Probabilistic models | Adds fuzzy match capabilities to token parsing operations. The transformation can use a probabilistic model to infer the type of information in a string. To enable the fuzzy match capabilities, you compile the probabilistic model in the Developer tool. |
| Reference tables     | Finds strings that match the entries in a database table.  |
| Regular expressions  | Identifies strings that match conditions that you define. You can use a regular expression to find a string within a larger string.  |
| Token sets           | Identifies strings based on the types of information they contain.<br>Informatica installs with token sets different types of token definitions, such as word, telephone number, post code, and product code definitions.                                    |

## Pattern Sets

A pattern set contains expressions that identify data patterns in the output of a token labeling operation. You can use pattern sets to analyze the Tokenized Data output port and write matching strings to one or more output ports. Use pattern sets in Parser transformations that use pattern parsing mode.

For example, you can configure a Parser transformation to use pattern sets that identify names and initials. This transformation uses the pattern sets to analyze the output of a Labler transformation in token labeling mode. You can configure the Parser transformation to write names and initials in the output to separate ports.

## Probabilistic Models

A probabilistic model identifies tokens by the types of information they contain and by the positions that they occupy an input string.

A probabilistic model contains reference data values and label values. The reference data values represent the data on an input port that you connect to the transformation. The label values describe the types of information that the reference data values contain. You assign a label to each reference data value in the model.

To link the reference data values to the labels in a probabilistic model, you compile the model. The compilation process generates a series of logical associations between the data values and the labels. When you run a mapping that reads the model, the Data Integration Service applies the model logic to the transformation input data. The Data Integration Service returns the label that most accurately describes the input data values.

You create a probabilistic model in the Developer tool. The Model repository stores the probabilistic model object. The Developer tool writes the data values, the labels, and the compilation data to a file in the Informatica directory structure.

**Note:** If you add a probabilistic model to a token parsing operation and you then edit the label configuration in the probabilistic model, you invalidate the operation. When you update the label configuration in a probabilistic model, recreate any parsing operation that uses the model.

## Reference Tables

A reference table is a database table that contains at least two columns. One column contains the standard or required version of a data value, and other columns contain alternative versions of the value. When you add a reference table to a transformation, the transformation searches the input port data for values that also appear in the table. You can create tables with any data that is useful to the data project you work on.

## Regular Expressions

In the context of parsing operations, a regular expression is an expression that you can use to identify one or more strings in input data. The Parser transformation writes identified strings to one or more output ports. You can use regular expressions in Parser transformations that use token parsing mode.

Parser transformations use regular expressions to match patterns in input data and parse all matching strings to one or more outputs. For example, you can use a regular expression to identify all email addresses in input data and parse each email address component to a different output.

## Token Sets

A token set contains expressions that identify specific tokens. You can use token sets in Parser transformations that use token parsing mode.

Use token sets to identify specific tokens as part of parsing operations. For example, you can use a token set to parse all email addresses that use that use an "AccountName@DomainName" format.

# Token Parsing Operations

In token parsing mode, the Parser transformation parses strings that match data in token sets, regular expressions, probabilistic models, or reference table entries.

To perform token parsing, add strategies on the **Strategies** view of the transformation. You can add one or more operations to each strategy. The transformation provides a wizard that you use to create strategies.

You can add the following types of operations to a token parsing strategy:

### **Parse using Token Set**

Use predefined or user-defined token sets to parse input data. Token set operations can use custom regular expressions that write data to one or more outputs.

You can also use probabilistic models to identify and parse input data values.

### **Parse using Reference Table**

Use reference tables to parse input data.

The transformation performs the operations in the order in which they appear in the strategy.

# Token Parsing Ports

Configure the token parsing ports with settings appropriate for your data.

A Parser transformation in token parsing mode has the following port types:

## Input

Contains data that you pass to the Parser transformation. The transformation merges all input ports into a combined data string using the **Input Join Character** specified on the **Strategies** tab. If you do not specify an input join character, the transformation uses a space character by default.

## Parsed Output Ports

User-defined output port(s) that contains successfully parsed strings. In cases where multiple parsing strategies use the same output, the transformation merges the output into a combined data string using the **Output Join Character** specified on the **Strategies** tab. If you do not specify an output join character, the transformation uses a space character by default.

## Overflow

Contains successfully parsed strings that do not fit into the number of outputs defined in the transformation. For example, if the transformation only has two "WORD" outputs, the string "John James Smith" results in an overflow output of "Smith." The Parser transformation creates an overflow port for each strategy that you add.

When you select the Detailed Overflow option, the transformation creates an overflow port for each label in the model.

## Unparsed

Contains strings that the transformation cannot parse successfully. The Parser transformation creates an unparsed port for each strategy that you add.

## Output Ports in Probabilistic Matching

When you configure a parsing strategy to use probabilistic matching techniques, the Parser transformation adds a port to store the match scores for each output port.

The following table describes the types of port:

| Port Type          | Port Created in Probabilistic Matching                  |
|--------------------|---|
| Parsed output port | [label name] output<br>[label name] score output        |
| Overflow data port | [overflow data] output<br>[[overflow data] score output |
| Unparsed data port | [unparsed data] output<br>[unparsed data] score output  |

# Token Parsing Properties

Configure properties for token parsing operations on the **Strategies** view in the Parser transformation.



## General Properties

General properties apply to all token parsing operations you define in the strategy. You use the general properties to name the strategy, specify input and output ports, and specify whether the strategy enables probabilistic matching techniques.

The following table describes the general properties.

| Property                              | Description  |
|---------------------------------------|--|
| Name                                  | Provides a name for the strategy.  |
| Inputs                                | Identifies the input ports that the strategy operations can read.  |
| Outputs                               | Identifies the output ports that the strategy operations can write to.   |
| Description                           | Describes the strategy. The property is optional.  |
| Use probabilistic matching techniques | Specifies that the strategy can use a probabilistic model to identify tokens.  |
| Input Join Character                  | Specifies the character used to join input data ports. The transformation merges all input ports into a combined data string and parses the complete string. |
| Output Join Character                 | Specifies the character used to join output data values when multiple parsing operations use the same output.  |
| Reverse Enabled                       | Configures the strategy to parse data from right to left. This property is disabled for probabilistic matching.  |
| Overflow Reverse Enabled              | Configures the strategy to parse the overflow data from right to left. This property is disabled for probabilistic matching.                                 |
| Detailed Overflow Enabled             | Creates a unique overflow field for each parsing operation.  |
| Delimiters                            | Specifies the delimiter that separates the input data into separate tokens. Default is space.  |

## Probabilistic Model Properties

You can select a probabilistic model in place of a token set when you configure a token parsing strategy. Select the **Parse using Token Set** operation and select the option to use probabilistic matching techniques.

The following table describes the probabilistic model properties:

| Property            | Description  |
|---------------------|--|
| Name                | Provides a name for the operation.   |
| Filter Text         | Uses characters or wildcards you enter to filter the list of token sets, probabilistic models, or regular expressions. |
| Probabilistic Model | Identifies the probabilistic model you select.   |

## Reference Table Properties

Reference table properties apply when you configure a labeling operation to use a reference table.

The following table describes the reference table properties:

| Property                          | Description  |
|-----------------------------------|--|
| Name                              | Provides a name for the operation.   |
| Reference Table                   | Specifies the reference table that the operation uses to parse input values.     |
| Case Sensitive                    | Determines whether input strings must match the case of reference table entries. |
| Replace Matches with Valid Values | Replaces parsed data with the data from the Valid column in the reference table. |
| Outputs                           | Specifies the output ports for the parsed data.                                  |

## Token Set Properties

Token set properties apply when you configure a parsing operation to use token sets.

Select the **Parse using Token Set** operation to parse input with token sets. Clear the option to use probabilistic matching techniques.

The following tables describe the token set properties:

| Property  | Description  |
|---|--|
| Name  | Provides a name for the operation.   |
| Token Sets (Single Output Only)                 | Specifies the token set that the operation uses to parse data. The operation writes the data to a single port.   |
| Regular Expression (Single or Multiple Outputs) | Specifies the regular expression that the operation uses to parse data. The operation writes the data to multiple ports if it finds multiple strings in the input field. |
| Outputs   | Identifies the output ports that the operations writes to.   |

You can add, edit, import, or remove a token set or a regular expression. You can also filter the list of the token sets.

The following table describes the properties that you use to perform the tasks:

| Property    | Description   |
|-------------|---|
| Filter text | Filters the list of token sets or regular expressions. Use text characters and wildcard characters as a filter. |
| Add         | Use to define a custom token set or regular expression.   |
| Edit        | Edits the contents of a custom token set.   |

| Property | Description  |
|----------|--|
| Import   | Imports a nonreusable copy of a token set or regular expression from a folder in the Model repository. If you update the source object for the token set or regular expression, the Data Integration Service does not update the nonreusable copy. |
| Remove   | Deletes a custom token set or regular expression.  |

## Pattern-Based Parsing Mode

In pattern-based parsing mode, the Parser transformation parses patterns made of multiple strings.

You can use the following methods to define patterns in pattern-based parsing mode:

- Parse input data using patterns defined in reference tables. You can create a pattern reference table from the profiled output of a Labeler transformation that uses the token labeling mode.
- Parse input data using patterns that you define.
- Parse input data using patterns that you import from a reusable pattern set in the Model repository. Changes to the reusable pattern set do not update the data you add in the Parser transformation.

You can use the "+" and "\*" wildcards to define a pattern. Use "\*" characters to match any string, and "+" characters to match one or more instances of the preceding string. For example, use "WORD+" to find multiple consecutive instances of a word token, and use "WORD \*" to find a word token followed by one or more tokens of any type.

You can use multiple instances of these methods within the Parser transformation. The transformation uses the instances in the order in which they are listed on the **Configuration** view.

**Note:** In pattern-based parsing mode, the Parser transformation requires the output of a Labeler transformation that uses token labeling mode. Create and configure the Labeler transformation before creating a Parser transformation that uses pattern-based parsing mode.

## Pattern-Based Parsing Ports

Configure the pattern-based parsing ports with settings appropriate for your data.

A Parser transformation that uses the pattern-based parsing mode has the following port types:

### Label\_Data

Connect this port to the `Labeled_Output` port of a Labeler transformation that uses the token labeling mode.

### Tokenized\_Data

Connect this port to the `Tokenized_Data` output port of a Labeler transformation that uses the token labeling mode.

### Parse\_Status

If a match is found for the input pattern, this port outputs the value `Matched`. If no match is found, it outputs `Unmatched`.

### Overflow

Successfully parsed strings that do not fit into the number of outputs defined in the transformation. For example, if only two "WORD" outputs are defined, the string "John James Smith" results in an overflow output of "Smith" by default.

### Parsed

Successfully parsed strings in user-defined ports.

## Configuring a Token Parsing Strategy

To configure a token parsing strategy, open a Parser transformation in token parsing mode and select the **Strategies** view.

1. Select the **Strategies** view.
2. Click **New**.

The **New Strategy** wizard opens.

3. Click the **Inputs** field to select ports for the strategy.
4. Configure the strategy properties and click **Next**.
5. Choose an operation and click **Next**.
6. Configure the operation properties and select output ports for successfully parsed data.
7. Optionally, click **Next** to add more operations to the strategy.
8. After you add all operations to the strategy, click **Finish**.
9. Optionally, add more strategies to the transformation.
10. Optionally, change the order in which the transformation processes strategies and operations. Select a strategy or operation and click **Move Up** or **Move Down**.

## Configuring a Pattern Parsing Strategy

To configure a pattern parsing strategy, open a Parser transformation in pattern parsing mode and select the **Patterns** view.

Before you configure the transformation to parse patterns, verify that the **Patterns** view shows the output port names you expect. The Parser transformation parses tokens to output ports you select. Create additional output ports if necessary.

1. Select the **Patterns** view.
2. Add one or more patterns to the strategy. You can add patterns in the following ways:

- Enter data values to create a pattern. Click **New** and select **New Pattern**.

If you select **New Pattern**, click **Enter Patterns Here** and enter one or more token types. The tokens you enter must match the token structure of an input data field. Add patterns need to describe the token structures on the input port.

- Import data values from a reference table. Click **New** and select **New Reference Table**.

If you select **New Reference Table**, browse the repository for a reference table and select a column that contains a list of token structures.

- Import data values from a pattern set. Click **Import** and select a reusable pattern set in the Model repository.

If you select **Import**, browse the content sets defined in the repository and select a reusable pattern set.

**Note:** You can use the **Filter text** field to filter the lists of reference tables and pattern sets.

You can mix pattern sets and reference tables in the Patterns column.

3. Assign each token in the Patterns column to an output port.

- To assign a token to an output port, double-click in the port column and select the token name from the menu.
- To parse multiple tokens to a single output, double-click in the port column and select **Custom**. Assign tokens to the port and select the delimiter to use.

Assign the tokens in each row of the pattern to one or more output ports.

4. Save the transformation.

## Parser Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Parser transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 34

# Rank Transformation

This chapter includes the following topics:

- [Rank Transformation Overview, 482](#)
- [Rank Transformations in Dynamic Mappings, 483](#)
- [Rank Transformation Ports, 483](#)
- [Rank Port, 485](#)
- [Define Group By Ports, 485](#)
- [Rank Caches, 486](#)
- [Rank Transformation Advanced Properties, 487](#)

## Rank Transformation Overview

The Rank transformation is an active transformation that limits records to a top or bottom range. Use a Rank transformation to return the largest or smallest numeric value in a port or group. Or use a Rank transformation to return the strings at the top or the bottom of a mapping sort order.

During a mapping run, the Data Integration Service caches input data until it can perform the rank calculations.

The Rank transformation differs from the transformation functions MAX and MIN. The Rank transformation returns a group of top or bottom values, not just one value. For example, use a Rank transformation to select the top 10 salespersons in a given territory. Or, to generate a financial report, you might use a Rank transformation to identify the three departments with the lowest expenses in salaries and overhead. While the SQL language provides many functions designed to handle groups of data, identifying top or bottom strata within a set of rows is not possible using standard SQL functions.

You connect all ports representing the same row set to the transformation. The rows that fall within that rank, based on some measure you set when you configure the transformation, pass through the Rank transformation.

As an active transformation, the Rank transformation might change the number of rows passed through it. You might pass 100 rows to the Rank transformation, but select to rank only the top 10 rows. The top 10 rows pass from the Rank transformation to another transformation.

You can connect ports from one transformation to the Rank transformation. You can also create local variables and write non-aggregate expressions.

## Ranking String Values

You can configure the Rank transformation to return the top or bottom values of a string port. The Data Integration Service sorts strings based on the sort order selected for the deployed mapping.

When you configure the application that contains the mapping, you select the sort order that the Data Integration Service uses to run the mapping. You can select binary or a specific language such as French or German. If you select binary, the Data Integration Service calculates the binary value of each string and sorts the strings using the binary values. If you select a language, the Data Integration Service sorts the strings alphabetically using the sort order for the language.

## Rank Transformation Properties

When you create a Rank transformation, you can configure the following properties:

- Enter a cache directory.
- Select the top or bottom rank.
- Select the input/output port that contains values used to determine the rank. You can select only one port to define a rank.
- Select the number of rows that you want to rank.
- Define groups for ranks, such as the 10 least expensive products for each manufacturer.

## Rank Transformations in Dynamic Mappings

You can use a Rank transformation in a dynamic mapping. You can configure dynamic ports in the transformation and reference the generated ports.

If you reference a generated port in the Rank transformation and the generated port does not exist at run time, the mapping fails.

If you specify a dynamic port as a Rank port, the dynamic port can have no more than one generated port.

If you specify a dynamic port as the Group By port, the Data Integration service considers all the generated ports as Group By ports. The mapping is not valid if you specify a generated port as a Group By port and you specify the parent dynamic port as a Rank port or as a Group By port.

You can parameterize the Rank port and the Group By ports. Use a port type parameter for the Rank port. Use a port list type parameter for the Group By ports.

## Rank Transformation Ports

The Rank transformation includes input, input/output, or output ports that are connected to another transformation in the mapping. The transformation also includes pass-through, and variable ports.

A Rank transformation has the following port types:

### **Input**

Receives data from upstream transformations. You can designate input ports as input/output ports. The transformation must have at least one input port.

**Dynamic Port**

A port that can receive multiple columns to create a dynamic number of generated ports. A generated port is a port within a dynamic port that represents a single column. You can create input, output, and variable dynamic ports.

**Output**

Passes data to downstream transformations. You can designate output ports as input/output ports. The transformation must have at least one output port.

**Pass-Through**

Passes data unchanged.

**Variable**

Used for local variables. You can use a variable port to store values or calculations to use in an expression. Variable ports cannot be input or output ports. They pass data within the transformation.

## Rank Index

The Developer tool creates a RANKINDEX port for each Rank transformation. The Data Integration Service uses the Rank Index port to store the ranking position for each row in a group.

For example, you might create a Rank transformation to identify the 50 highest paid employees in the company. You identify the SALARY column as the input/output port used to measure the ranks, and configure the transformation to filter out all rows except the top 50.

After the Rank transformation identifies all rows that belong to a top or bottom rank, it then assigns rank index values. In the case of the top 50 employees, measured by salary, the highest paid employee receives a rank index of 1. The next highest-paid employee receives a rank index of 2, and so on. When measuring a bottom rank, such as the 10 lowest priced products in the inventory, the Rank transformation assigns a rank index from lowest to highest. Therefore, the least expensive item would receive a rank index of 1.

If two rank values match, they receive the same value in the rank index and the transformation skips the next value. For example, if you want to see the top five retail stores in the country and two stores have the same sales, the return data might look similar to the following:

| RANKINDEX | SALES | STORE       |
|-----------|-------|-------------|
| 1         | 10000 | Orange      |
| 1         | 10000 | Brea        |
| 3         | 90000 | Los Angeles |
| 4         | 80000 | Ventura     |

The RANKINDEX is an output port only. You can pass the rank index to another transformation in the mapping or directly to a target.



# Rank Port

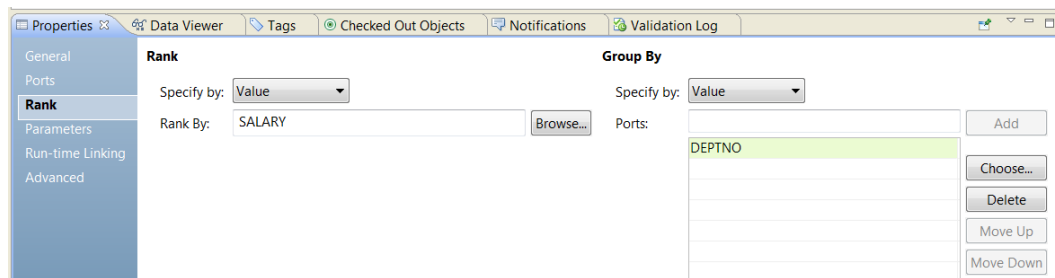
The rank port determines the column to rank values by.

You must designate one input/output or output ports as the rank port. For example, you create a Rank transformation to rank the top employees in each department based on salary. The Salary port contains the salary for each employee. You designate the Salary input/output port as the Rank port.

Select the rank port on the **Rank** tab of the **Properties** view. You can use a parameter for the rank port. To use a parameter, select **Specify By Parameter**. Browse for a port parameter, or create a port parameter. The parameter default value is the name of a port or generated port.

You must link the rank port to another transformation.

The following image shows the **Rank** tab:



## Define Group By Ports

You can configure the Rank transformation to create groups for ranked rows.

For example, if you want to select the 10 most expensive items by manufacturer, you would first define a group for each manufacturer. In the **Group By** panel of the **Rank** tab, you can set one of the input, input/output, or output ports as a group by port.

For each unique value in the group port, the transformation creates a group of rows falling within the rank definition (top or bottom, and a particular number in each rank).

The Rank transformation changes the number of rows in two different ways. By filtering all but the rows falling within a top or bottom rank, you reduce the number of rows that pass through the transformation. By defining groups, you create one set of ranked rows for each group.

For example, if you create a Rank transformation that ranks the top five salespersons grouped by quarter, the rank index numbers the salespeople from 1 to 5 for each quarter:

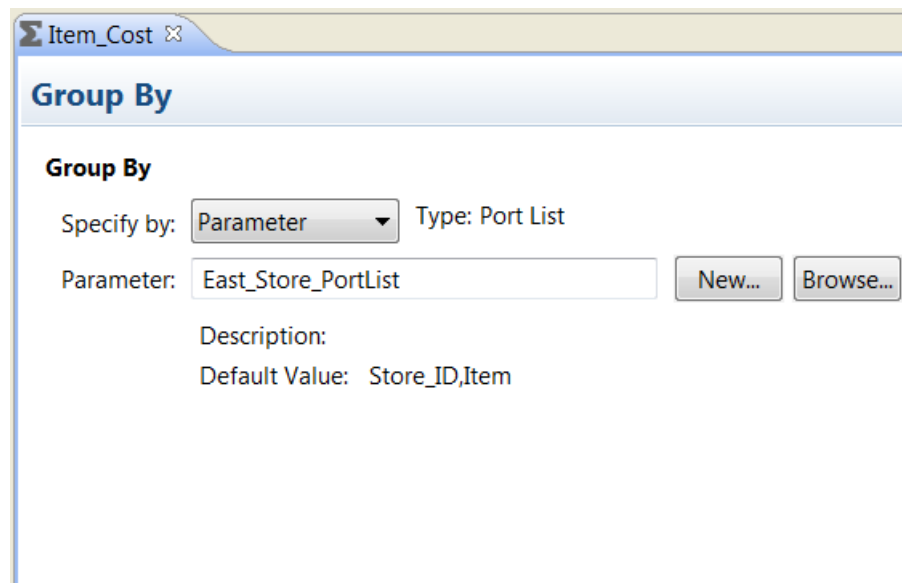
| RANKINDEX | SALES_PERSON | SALES  | QUARTER |
|-----------|--------------|--------|---------|
| 1         | Sam          | 10,000 | 1       |
| 2         | Mary         | 9,000  | 1       |
| 3         | Alice        | 8,000  | 1       |
| 4         | Ron          | 7,000  | 1       |
| 5         | Alex         | 6,000  | 1       |

Set the number of rows to include in a ranking on the **Advanced** tab of the **Properties** view.

## Group By Parameters

You can configure a port list parameter that contains one or more ports to include in the group. Create a port list parameter by selecting ports from a list of the ports in the transformation.

The following image shows the **Group By** tab when you use a parameter to identify the ports in the group:



You can browse for a port list parameter or click **New** to create a port list parameter. If you choose to create a port list parameter, you can select the ports from a list of the ports in the transformation.

## Rank Caches

When you run a mapping that uses a Rank transformation, the Data Integration Service creates an index cache and data cache in memory to run the transformation. If the Data Integration Service requires more space than available in the memory cache, it stores overflow data in cache files.

When you run a mapping that uses a Rank transformation, the Data Integration Service compares an input row with rows in the data cache. If the input row out-ranks a cached row, the Data Integration Service replaces the cached row with the input row. If you configure the Rank transformation to group rows, the Data Integration Service ranks rows within each group.

The Data Integration Service creates the following caches for the Rank transformation:

- Index cache that stores group values as configured in the group by ports.
- Data cache that stores information based on the group by ports.

# Rank Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Rank transformation.

Configure the following properties on the **Advanced** tab:

## **Top/Bottom**

Specifies whether you want the top or bottom ranking for a column.

## **Number of Ranks**

Number of rows to include in the top or bottom ranking.

## **Case-Sensitive String Comparison**

Specifies whether the Data Integration Service uses case-sensitive string comparisons when it ranks strings. Clear this option to have the Data Integration Service ignore case for strings. By default, this option is selected.

## **Cache Directory**

Directory where the Data Integration Service creates the index cache files and data cache files. Verify that the directory exists and contains enough disk space for the cache files.

Enter multiple directories separated by semicolons to increase performance during cache partitioning. Cache partitioning creates a separate cache for each partition that processes the transformation.

Default is the CacheDir system parameter. You can configure another system parameter or user-defined parameter for this property.

## **Rank Data Cache Size**

Amount of memory that the Data Integration Service allocates to the data cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.

## **Rank Index Cache Size**

Amount of memory that the Data Integration Service allocates to the index cache for the transformation at the start of the mapping run. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.

## **Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## RELATED TOPICS:

- [“Cache Size” on page 68](#)

## CHAPTER 35

# Read Transformation

This chapter includes the following topics:

- [Read Transformation Overview, 488](#)
- [Read Transformation Properties , 488](#)
- [Synchronize Relational Data Objects, 492](#)
- [Change the Source Data Object, 492](#)
- [Read Transformation Parameters, 494](#)
- [Constraints , 495](#)
- [Create a Read Transformation, 495](#)

## Read Transformation Overview

The Read transformation is a passive transformation that reads data from a source. You can create a Read transformation from a physical data object or a logical data object. The Read transformation is nonreusable.

You can configure different properties for a Read transformation based on the type of data object that you used to create the transformation. For example, if you create a Read transformation from a relational data object, you can configure SQL overrides and define constraints. The properties that you can configure also depend on whether you have configured parameters for the transformation.

Read transformations can contain dynamic sources. You can configure a Read transformation to dynamically update its ports, metadata, and other properties. For information about configuring dynamic sources, read the "Dynamic Mappings" chapter in the *Informatica Developer Mapping Guide*.

## Read Transformation Properties

After you create a Read transformation, you can configure properties for the transformation.

Configure Read transformation properties on property tabs. The tabs you can use depend on the type of source that the Read transformation represents.

The following table describes each property tab and identifies the source type you use the tab for:

| Property Tab           | Description   | Source Type   |
|------------------------|---|---|
| General                | Specify transformation properties and behavior.<br>For relational and customized data object sources, synchronize transformation input ports with source. | All   |
| Data Object            | Specify the transformation data source.   | - Relational<br>- Flat file<br>- Customized data object           |
| Ports                  | Set port definition by the associated data object.  | - Relational<br>- Customized data object<br>- Logical data object |
| Format                 | Input settings for a flat file data source  | Flat file   |
| Query                  | Specify a query to the source.  | - Relational<br>- Customized data object<br>- Logical data object |
| Run-time               | Define run-time behavior.   | - Relational<br>- Flat file<br>- Customized data object           |
| Sources                | Select source tables and configure source details.  | - Relational<br>- Customized data object                          |
| Data Object Parameters | Set parameter properties.   | - Flat file<br>- Customized data object<br>- Logical data object  |
| Run Time Linking       | Configure a group-to-group link between transformations that uses a parameter, a link policy, or both to determine which ports to link at run time.       | All   |
| Advanced               | Set tracing level and row order.<br>For a relational source, set option to create or replace the target table at run time.                                | All   |

## General Properties

You can configure the name and description of the Read transformation. You can also configure the following properties:

### When Column Metadata Changes

Available for relational sources. Select one of the following options:

- Synchronize output ports. The Developer tool updates Read transformation output ports with metadata changes that the Model repository stores for the data object.
- Do not synchronize. The Read transformation does not show metadata changes in the data object.

### Physical Data Object

Available for flat file and customized sources. The object used to create the transformation.

You can select the data object name and configure its properties.

## Data Object Properties

On the Data Object tab, you can specify or change the Read transformation source, and make relational, flat file, and customized data object sources dynamic.

You can configure the following properties:

### Specify By

To specify source columns and metadata for the Read transformation, select one of the following options:

- **Value.** The Read transformation uses the associated data object to specify source columns and metadata.
- **Parameter.** The Read transformation uses a parameter to specify source columns and metadata.

### Data Object

If you created the Read transformation from an existing data object, the field displays the name of the object. Click **Browse** to change the data object to associate with the Read transformation.

### At runtime, get data object columns from data source

When you enable this option, the Data Integration Service fetches metadata and data definition changes from source tables to the Read transformation.

## Query Properties

Configure an SQL query to a relational resource or customized data object.

When you configure properties on the **Query** tab, you choose to configure simple or advanced properties.

In the **Simple** properties view, you configure the default SQL statement as a Define Distinct statement, and to edit the hints, join, filter and sort conditions for the statement.

In the **Advanced** properties view, you can define a custom SQL query. You can select from columns in the associated data object, or from parameters, or create a new parameter to represent a data object.

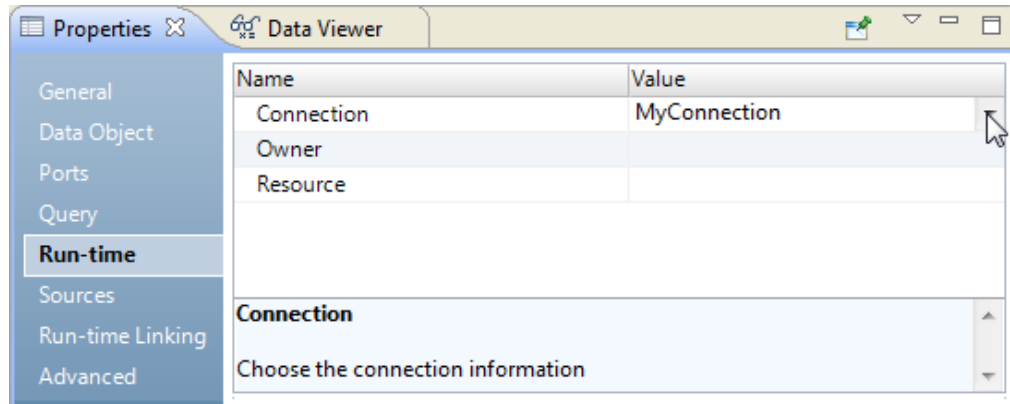
## Run-Time Properties

You can configure the following Read transformation properties on the **Run-time** tab:

### Connection

Available for relational sources. Connection used by the transformation. Click in the right side of the field to change the connection.

The following image shows the location of the dropdown button to click:



## Sources Properties

Configure the details of sources for relational resources and customized data objects. You can change the relational data object definition after you import it to the repository. You can add and remove ports, define primary keys, and configure relationships between multiple relational data objects in the repository.

The **Sources** tab enables you to configure the following settings:

### All sources

Use the Add and Remove buttons to add and remove additional sources for the transformation.

### General tab

Change the name and description for the selected source. Click the source name to change other details.

### Keys tab

Designate resource columns as keys.

### Relationships tab

Add and remove relationships between multiple relational resources.

## Advanced Properties

The Data Integration Service can run SQL commands.

The Data Integration Service runs pre-mapping SQL commands against the source database before it reads the source. It runs post-mapping SQL commands against the source database after it Reads to the source. You can configure the following Read transaction properties on the Advanced tab:

### Tracing level

Control the amount of detail in the mapping log file.

### PreSQL

SQL command the Data Integration Service runs against the source database before it reads the source.

The Developer tool does not validate the SQL.

### PostSQL

SQL command that the Data Integration Service runs against the source database after it Reads to the source.

The Developer tool does not validate the SQL.

## Constraints

SQL statements for table-level referential integrity constraints. Applies to relational sources only.

# Synchronize Relational Data Objects

You can synchronize physical data objects when their sources change. When you synchronize a physical data object, the Developer tool reimports the object metadata from the source you select.

You can synchronize all physical data objects. When you synchronize relational data objects or customized data objects, you can retain or overwrite the key relationships you define in the Developer tool.

Choose from among several methods to synchronize mapping objects:

### Synchronize a relational resource.

To synchronize any physical data object, right-click the object in the **Object Explorer** view, and select **Synchronize**.

### Synchronize transformation ports with the physical data object.

In the Data Object tab of a transformation, select the option **Get data object columns from data source**.

When the mapping runs, the Data Integration Service fetches column information from the data source and refreshes the data object definition in the Model repository.

### Synchronize ports when metadata changes

In the General tab of a transformation, select the option to synchronize ports. The exact label of this option depends on the type of transformation you configure. For example, for a Read transformation, the option is **When metadata changes, synchronize output ports**.

When the mapping runs, the Data Integration Service synchronizes column metadata in the transformation with the metadata in the data source.

# Change the Source Data Object

A Read transformation is based on a physical data object or a logical data object in the Model repository. You can change the data object when you configure a Read transformation. You can parameterize the data object to change the data object at run time. For example, you might test a mapping with a different source file than the source file you use for a production mapping run.

When you create a transformation from a physical data object, information about the data object appears on the **Data Object** tab of the transformation properties. You can click the data object name to view the physical data object definition from the Model repository.

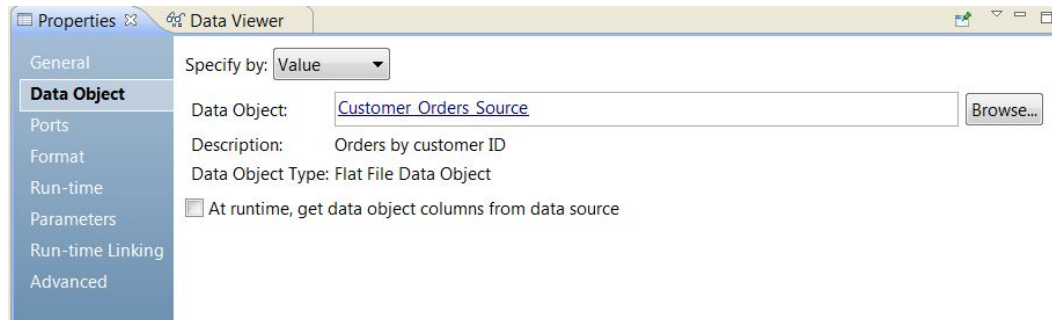
You can change the data object for the transformation by browsing for a different physical data object in the Model repository. When you change the data object, the transformation uses the run time properties and the advanced properties of the data object that you select.

You can update the structure of the data object at run time based on changes in the data source. The data source is the physical file or the database table that the data object represents. When you enable the Data Integration Service to get data columns from the data source, the Data Integration Service examines the structure of the data source. The Data Integration Service updates the data object ports in the transformation



instance based on the data source. The Data Integration Service does not change the physical data object definition in the Model repository.

The following image shows the **Data Object** tab:



The **Data Object** tab has the following fields:

#### **Specify by**

Choose **Value** to enter a specific data object name. Choose **Parameter** to parameterize the data object.

#### **Data object**

The name of the data object in the Model repository. You can click the **Data Object** link to open the data object definition from the repository. You can also Browse for a different data object in the Model repository.

#### **Description**

The description of the data object in the repository. Read-only.

#### **Data object type**

Describes the type of data object, such as a flat file data object, a relational table object, or a customized data object.

#### **At run time, get the data object columns from data source**

Updates the structure of the data object for the transformation instance at run time. Updates the structure based on the columns from the data file or the table that the data object refers to.

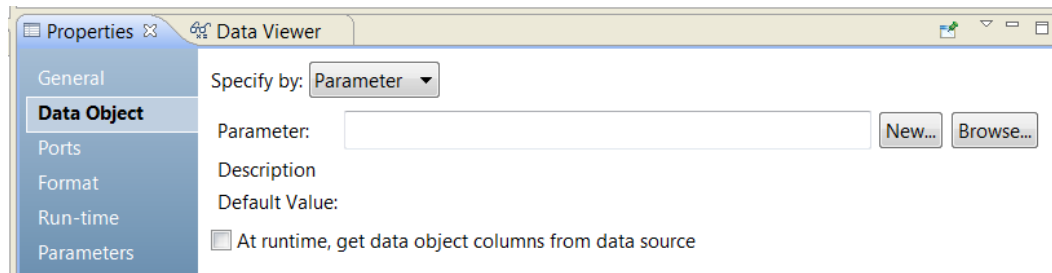
## Parameterize the Read Transformation

You can parameterize the Read transformation and change the data object at run time.

To parameterize a data object, choose **Specify by Parameter** in the **Data Object** tab. The properties in the **Data Object** tab change.

To parameterize the data object, create a resource type parameter or browse for a resource parameter that you already created. The parameter default value is the name of physical data object in the Model repository. When you create a default parameter value, you select a physical data object name from a list of data objects in the repository.

The following image shows the **Data Object** tab when you specify the data object by a parameter:



The **Data Object** tab has the following options by parameter:

**Parameter**

The name of a resource parameter that you configured as the data object. Read-only.

**Description**

The description of the parameter. Read-only.

**New**

Create a resource parameter. Browse for and select a data object in the Model repository for the parameter default value.

**Browse**

Browse for a resource parameter and select the parameter.

**Default value**

The default value of the resource parameter that you configured for the data object. The default value is a physical data object name and the path to the object in the Model repository. Read-only.

## Read Transformation Parameters

You can parameterize some of the properties of a Read transformation and some of the properties of the reusable physical data object that you create the Read transformation from.

When you create a physical data object, you configure the read and write properties. The parameters that you configure for read properties in a physical data object appear in the Read transformation **Data Object Parameters** tab when you add the data object to a mapping.

You can configure parameters for the following Read properties in the physical data object:

- Control file directory
- Control file name
- Default scale
- Delimiter
- Flat file delimiter
- Merge file directory
- Source file name
- Source file directory

After you add the physical data object to a mapping, you can view the parameters in the **Data Object Parameters** tab of the Read transformation. You can expose these parameters as mapping parameters to override the parameter values at run time.

You can configure the following mapping parameters for the Read transformation:

- Connection (relational)
- Data object
- Link resolution order
- Resource name (relational)
- Table owner name (relational)

You can view these parameters in the mapping **Data Object Parameters** tab.

## Constraints

A constraint is a conditional expression that the values on a data row must satisfy.

When you set a constraint, you enter an expression that evaluates to TRUE for each data row.

The Data Integration Service can read constraints from relational sources, logical data objects, physical data objects, or virtual tables. To set a constraint on a reusable physical data object, create a customized data object.

When the Data Integration Service reads constraints, it might drop the rows that do not evaluate to TRUE for the data rows based on the optimization method applied.

Before you set a constraint, you must verify that the source data satisfies the condition set by the constraint. For example, a source database has an AGE column that appears to have rows with AGE < 70. You can set a constraint with AGE < 70 on the source database. The Data Integration reads records from the source database with the constraint AGE < 70. If the Data Integration Service reads records with AGE >= 70, it might drop the rows with AGE >= 70.

In the database, you can use SQL commands to set constraints on the database environment when you connect to the database. The Data Integration Service runs the connection environment SQL each time it connects to the database.

## Create a Read Transformation

When you create a Read transformation, you choose one of the following methods based on the resource you create the transformation from:

### Create the transformation from a data object in the Model repository.

Perform the following steps to create a Read transformation from a data object in the Model repository:

1. Open the mapping in the editor.
2. Drag a data object from the **Object Explorer** to the editor view.
3. Select **Read** and click **OK**.

The Read transformation in the mapping contains the ports and properties of the data object.

### Create the transformation using the mapping editor.

Use this method if you want to configure detailed Read transformation settings. You can also use this method if you want to base a Read transformation on a parameter.

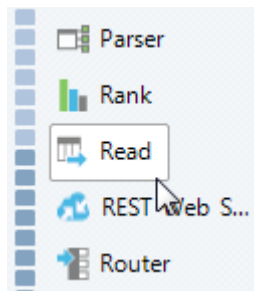
To create a Read transformation in the mapping editor, see [“Creating a Read Transformation in the Mapping Editor” on page 496](#).

## Creating a Read Transformation in the Mapping Editor

You can create a Read transformation to represent the source of data and column metadata and properties in a mapping.

Perform the following steps:

1. Choose one of the following methods to create a Read transformation:
  - Right-click in the mapping editor and select **Add Transformation**.  
The **Add Transformation** dialog box opens.  
Select Read transformation and click **Next**.
  - Scroll down in the mapping palette to locate and double-click the Read transformation icon.  
The following image shows the Read transformation icon:



The **New Read Transformation** dialog box opens.

2. To use a flat file, a relational resource, or a customized data object as the source, perform the following steps:
  - a. Select **Physical Data Object** as the data object type.
  - b. Click **Browse** to select a flat file, a relational resource, or a customized data object.  
The **Select Data Object** window opens.
  - c. Select a data object and click **OK**.
  - d. Optionally, configure the transformation to fetch data object columns from the source at run time.  
Select **At run-time, get data object columns from data source**.  
The Data Integration Service refreshes column metadata for the Read transformation when the mapping runs.
3. To use a parameter as the source, perform the following steps:
  - a. Select **Create using a parameter**.
  - b. Click **New** to create a new parameter, or click **Browse** to select an existing parameter.
  - c. Select a parameter and click **OK**.

- d. Optionally, configure the transformation to fetch data object columns from the source at run time. Select **At run-time, get data object columns from data source**.

The Data Integration Service refreshes column metadata for the Read transformation when the mapping runs.

4. To use a logical data object as the source, perform the following steps:
  - a. Select **Logical Data Object** as the data object type.
  - b. Click **Browse** to select a data object, and then click **OK**.
5. Optionally, type a name for the Read transformation.
6. Click **Finish**.

## CHAPTER 36

# Relational to Hierarchical Transformation

This chapter includes the following topics:

- [Relational to Hierarchical Transformation Overview, 498](#)
- [Example - Relational to Hierarchical Transformation, 499](#)
- [Input Relational Ports and the Overview View, 500](#)
- [Relational to Hierarchical Transformation Ports, 501](#)
- [Schema References, 501](#)
- [Relational to Hierarchical Transformation Development, 502](#)

## Relational to Hierarchical Transformation Overview

The Relational to Hierarchical transformation processes relational input and transforms it into hierarchical output. A Relational to Hierarchical transformation reads relational input from input ports and transforms the data to hierarchical output at the transformation output port. To transform relational input to hierarchical output, use a schema object to define the hierarchical structure.

You can use the Relational to Hierarchical transformation wizard to create a hierarchical structure that reflect the relational input ports. You can view the mapping for the hierarchical output ports in the transformation **Overview** view.

After you create the transformation, you can pass the data from the hierarchical output port to another transformation in a mapping.

In the relational model, each table schema identifies a column, called the primary key, to uniquely identify each row. You identify the relationship between each row in the table and a row in another table with a foreign key. The wizard generates keys when it creates the transformation. You can change an auto-generated transformation, and add, edit, or delete ports.

You can link an input relational port to a node in the hierarchy. Link a primary key from the relevant element or attribute in the hierarchy to a relational group in the input. The primary key identifies each row in the relational tables.

Link a foreign key from the relevant element or attribute in the hierarchy to a relational group in the input. A foreign key in the relational input is a column in one table that points to the primary key of another table.

The input relational port and the hierarchical node must have compatible data types.

# Example - Relational to Hierarchical Transformation

The Finance department of the Electronics Superstore company must process paychecks for company employees. They need to transform employee data stored in a relational database into a hierarchical format that their payment system can process.

The mapping needs to use a Relational to Hierarchical transformation that inputs employee details such as employee name, employee ID, employee address, and employee bank account data, and outputs the details in a usable hierarchical format.

In the relational input, the Bank\_ID element is a primary key in the Employee table, and a Foreign key in the Bank table:

| Employee_ID | Last_Name | First_Name | Address                | Bank_ID | Bank_Account |
|-------------|-----------|------------|------------------------|---------|--------------|
| 9173327437  | Sandrine  | Jacques    | 74 Mobile Avenue       | 74845   | 8723487234   |
| 9174562342  | Race      | Tom        | 266 Crouse St.         | 9234734 | 45324734     |
| 8484526471  | Jones     | Charles    | 3815 LaValle Boulevard | 389236  | 234638437    |
| 7023847265  | Smith     | Delilah    | 193 Short Drive        | 74845   | 8723463432   |
| 9174596725  | Frederick | George     | 17 Serenity Road       | 9234734 | 6342636699   |

| Bank_ID | Bank_Name          | SWIFT_Code |
|---------|--------------------|------------|
| 74845   | National Bank      | 9173327    |
| 9234734 | International Bank | 9174562    |
| 389236  | Star National Bank | 8484526    |

In the Payment output in hierarchical format, the elements are combined from the tables:

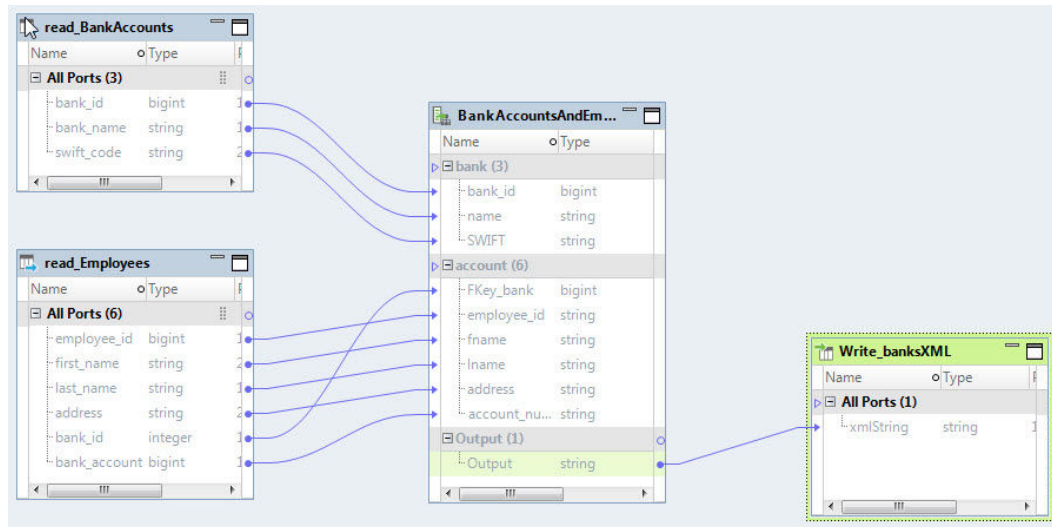
```
<banks>
  <bank name="National Bank" SWIFT="9173327">
    <account id="8723487234">
      <employee_id>9173327437</employee_id>
      <fname>Sandrine</fname>
      <lname>Jacques</lname>
      <address>74 Mobile Avenue</address>
    </account>
    <account id="8723463432">
      <employee_id>9082745558</employee_id>
      <fname>Delilah</fname>
      <lname>Smith</lname>
      <address>193 Short Drive</address>
    </account>
  </bank>
  <bank name="International Bank" SWIFT="9174562">
    <accounts>
      <account id="45324734">
        <employee_id>5534398889</employee_id>
        <fname>Race</fname>
        <lname>Tom</lname>
        <address>266 Crouse St.</address>
      </account>
      <account id="6342636699">
        <employee_id>9174596725</employee_id>
        <fname>Frederick</fname>
        <lname>George</lname>
        <address>17 Serenity Road</address>
      </account>
    </accounts>
  </bank>
  <bank name="Star National Bank" SWIFT="8484526">
    <accounts>
      <account id="234638437">
        <employee_id>8484526471</employee_id>
        <fname>Jones</fname>
        <lname>Charles</lname>
        <address>3815 LaValle Boulevard</address>
      </account>
    </accounts>
  </bank>
</banks>
```

```

        </accounts>
    </bank>
</banks>

```

The following image shows the mapping in this example:



The mapping contains the following objects:

#### Read\_BankAccounts

The source that contains the bank data.

#### Read\_Employees

The source that contains the employee data.

#### BankAccountsAndEmployees\_To\_PaymentsSystemXML

A Relational to Hierarchical transformation that transforms relational input that contains employee and bank account information into an XML format that the payment system consumes.

#### Write\_BanksXML

A target path to the file that stores the transformed data every time you run the mapping.

The mapping uses the Read\_BankAccount and Read\_Employees files to provide relational input. The mapping processes and transforms the data with the BankAccountsAndEmployees\_To\_PaymentsSystemXML transformation. Then the mapping stores the output in the target path listed in the Write\_BanksXML flat file.

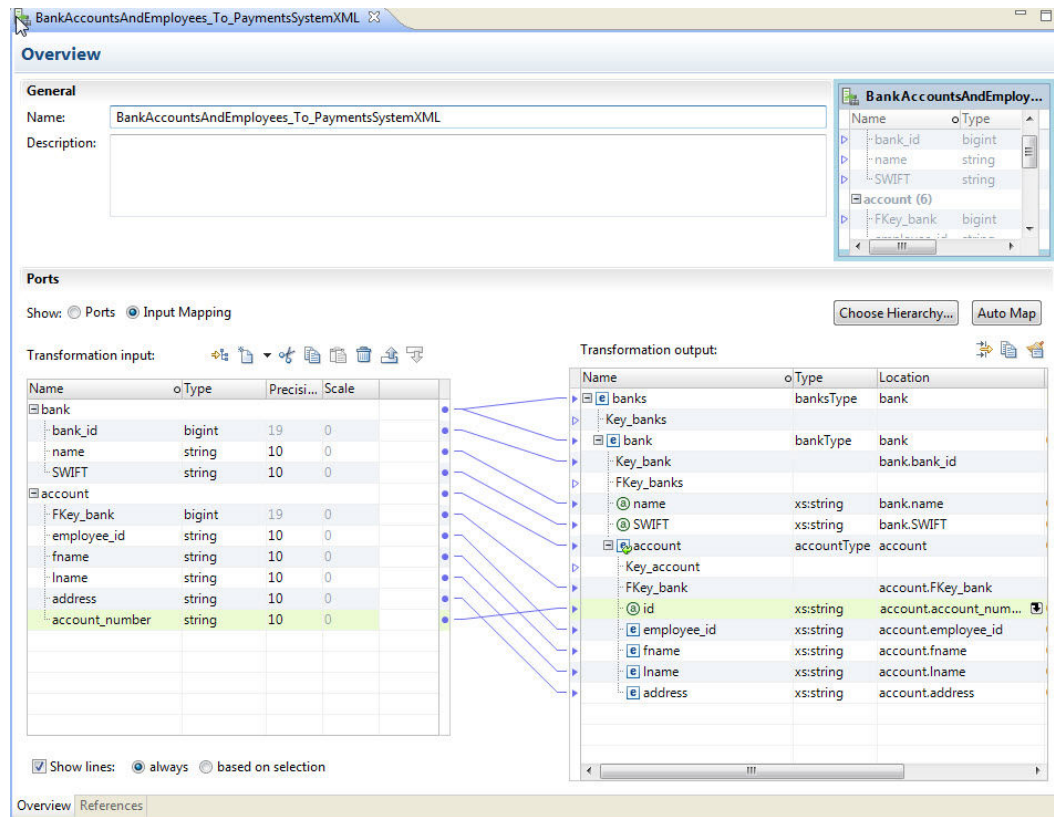
## Input Relational Ports and the Overview View

To transform relational data to hierarchical data, the wizard creates a hierarchical structure that reflects the relational input ports. You can use the **Overview** View to link relational ports to hierarchical ports.

To view the links between relational input to hierarchal output, use the **Overview** view. Select **Input Mapping**. The **Ports** panel appears in the **Overview** view.



The following image shows the **Ports** panel:



To the left of the **Ports** panel is the **Transformation input** area that contains the relational elements and groups. To the right is the **Transformation output** area that contains the hierarchical schema nodes.

You can create ports in the **Transformation input** area, and link relational elements to the schema nodes. You can also drag the pointer from a node in the schema to an empty field in the **Transformation input** area to create a port. When you connect a relational port to a schema node, the Developer tool shows a link between them.

## Relational to Hierarchical Transformation Ports

The Relational to Hierarchical transformation ports are defined on the transformation **Overview** view.

A Relational to Hierarchical transformation can read relational data output from a buffer. The output ports return hierarchical data to a buffer.

## Schema References

A Relational to Hierarchical transformation requires a hierarchical schema to define the output hierarchy in the transformation. To use the schema in the transformation, you define a schema reference.

You can define transformation schema references in the transformation **References** view.

The Relational to Hierarchical transformation references schema objects in the Model repository. The schema objects can exist in the repository before you create the transformation.

A schema can reference additional schemas. The **References** view shows the namespace and prefix for each schema that the Relational to Hierarchical transformation references.

## Relational to Hierarchical Transformation Development

Use the New Transformation wizard to auto-generate a Relational to Hierarchical transformation. Choose a schema or hierarchical sample file to define the output hierarchy.

### Creating the Relational to Hierarchical Transformation

1. In the Developer tool, click **File > New > Transformation**.
2. Select the Relational to Hierarchical transformation and click **Next**.
3. Enter a name for the transformation and browse for a Model repository location to put the transformation and click **Next**.
4. To select a schema, select one of the following methods:
  - To use a schema from the Model repository to define the output hierarchy, near the **Schema Object** field, browse to select the schema file from the repository.
  - To import a schema file, click **Create a new schema object**. In the **New schema object** window, you can browse to and select a schema file, or you can select to create a schema from a sample hierarchical file.
5. Choose the root for the output hierarchy. In the **Hierarchy root** dialog box, select the element in the schema that is the root element for the output hierarchical file. To help select the root object, you can add a sample hierarchical file. To add a sample file, near the **Sample File** field, browse for and select the file from the file system.
6. Click **Finish**.  
The wizard creates the transformation in the repository.

### Creating the Ports

Configure the ports in the **Overview** view.

1. To view the mapping, in the **Overview** view **Ports** area, select **Input Mapping**.
2. Select the input port type, precision and scale.
3. Expand the trees in the **Ports** grid. To the left, the **Transformation input** panel shows the relational input, and to the right, the **Transformation output** panel shows the expected hierarchical output.
4. To define a node as a root, click **Choose Hierarchy**.  
The Developer tool displays only the nodes from the root level and below the root level in the **Transformation input** area.
5. To view lines that connect the ports with the hierarchical nodes, click **Show Lines**. Select to view all the connection lines or just the lines for selected ports.

6. To add an input group or port to the **Transformation input** area, use one of the following methods:
  - Drag a simple or complex element in the **Transformation output** area to an empty column in the **Transformation input** area. If the node is a group node, the Developer tool adds a relational group without ports.
  - To add a relational group, select a row and right-click to select **New > Group**.
  - To add a relational port, right-click to select **New > Field**.
7. To clear the hierarchical node settings for locations of ports, use one of the following methods:
  - Select one or more nodes in the **Transformation output** area, right-click and select **Clear**.
  - Select one or more lines that connect the relational input ports to the hierarchical nodes, right-click and select **Delete**.
8. To display the output ports in a hierarchy, click **Show As Hierarchy**. Each child group appears underneath the parent group.

## CHAPTER 37

# REST Web Service Consumer Transformation

This chapter includes the following topics:

- [REST Web Service Consumer Transformation Overview, 504](#)
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- [REST Web Service Consumer Transformation Ports, 510](#)
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- [REST Web Service Consumer Transformation Output Mapping, 515](#)
- [REST Web Service Consumer Transformation Advanced Properties, 517](#)
- [REST Web Service Consumer Transformation Creation, 518](#)

## REST Web Service Consumer Transformation Overview

The REST Web Service Consumer Transformation is an active transformation that connects to a REST web service as a web service client to access or transform data. Use a REST Web Service Consumer transformation to connect to a REST web service. The REST Web Service Consumer transformation can send a request to a REST web service and receive a response from a REST web service.

The REST Web Service Consumer transformation connects to a web service through a URL that you define in the transformation or in an HTTP connection. You can also use an HTTPS connection. REST Web Service Consumer transformations can use TLS 1.2, TLS 1.1, or TLS 1.0.

A REST web service contains an HTTP method for each action that the web service supports. When the Data Integration Service connects to a REST web service, it can send a request to get, post, put, or delete data. The request can act upon individual resources or collections of resources. After the Data Integration Service sends a request message, it receives a response message from the web service.

The request and the response messages contain XML or JSON data with elements that can form a hierarchy. When a request or a response message contains multiple-occurring elements, groups of elements form levels in the XML or JSON hierarchy. Groups are related when one level is nested within another.

In the REST Web Service Consumer transformation, the method input and method output define the structure of the request and the response messages. The method input and method output include mappings that define how to map the message elements to the input and output ports.

The REST Web Service Consumer transformation supports proxy server. You can also connect to a Microsoft SharePoint application with the REST Web Service Consumer transformation.

## Example

An online store defines resources for a products database. The database identifies each product by part number.

Web service clients access the product details through a REST web service. The web service uses the following URL:

`http://www.HypoStores.com/products/ProductDetails`

You need to retrieve details about a specific product, such as the description and the unit price, and pass the details to a transformation downstream in a mapping. Create a REST Web Service Consumer transformation to retrieve details about a product and pass them to another transformation..

The following table shows the transformation details that you configure:

| Transformation Detail | Value  |
|-----------------------|--|
| HTTP method           | Get  |
| Base URL              | <code>http://www.HypoStores.com/products/ProductDetails</code> |
| Input argument port   | Part_No  |
| Output ports          | Description, Unit_Price  |
| Method output         | <The structure of the response message.>                       |

The method output includes an output mapping that defines how the elements in the response message map to the output ports.

When the Data Integration Service sends the request to the web service, it appends the value in the argument port to the base URL. For example, to retrieve details about part 0716, the Data Integration Service uses the following URL:

`http://www.HypoStores.com/products/ProductDetails?Part_No=0716`

When the Data Integration Service receives a response, it converts the product description and the unit price in the response message to data for the output ports.

You can also pass Part\_No as a parameter and substitute the value mid-stream when you run the mapping.

## REST Web Service Consumer Transformation Process

The REST Web Service Consumer transformation creates a request message based on the data in the input ports and the method input. It converts elements in the response message to data for the output ports based on the method output.

The input ports of the REST Web Service Consumer transformation contain relational data from upstream transformations in a mapping. The Data Integration Service uses the method input to convert data from the input ports to elements in the request message.

To connect to the web service, the Data Integration Service reads the base URL that you configure in the transformation properties or the HTTP connection. It identifies the resource that you want to get, post, put, or delete by appending values from the URL ports or argument ports to the base URL.

When the Data Integration Service receives a response, it passes the data in the response message to the output ports of the transformation. The Data Integration Service passes data based on how you configure the method output. The output ports contain relational data. The Data Integration Service sends the data in the output ports to downstream transformations in the mapping or to the target.

## REST Web Service Consumer Transformation Configuration

When you create a REST Web Service Consumer transformation, you select the HTTP method and define the method input and output. If you select the Get method, you do not define method input.

The input elements in the HTTP request message map to input ports. The output elements in the HTTP response message map to output ports. The Developer tool creates ports for the first level elements.

When you configure the transformation, you complete the following tasks:

1. Select the HTTP method.
2. Configure ports to represent elements in the header and body of the request and response messages.
3. Configure the input mapping.
4. Configure the output mapping.
5. Configure advanced properties such as the connection and the base URL for the web service.

If the REST web service requires authentication, create an HTTP connection object.

### Message Configuration

The Data Integration Service generates request messages and interprets response messages based on the method input and output and on the ports that you configure in the REST Web Service Consumer transformation.

Input ports represent different parts of the request message. You can add input ports that identify the resource that you want to retrieve or change. You can also add input ports that represent HTTP headers, cookie information, and elements in the request message.

Output ports represent elements in the response message that you want to send to downstream transformations or to the target in a mapping. You can add output ports that represent HTTP headers, cookie information, the response code, and elements in the response message.

### Resource Identification

To identify the resource in an HTTP request, the Data Integration Service appends values in specific input ports to the base URL. You define the base URL in the HTTP connection or in the transformation properties. Use URL or argument ports to identify a particular resource.

Use URL ports when the web service identifies a resource through a unique string of characters.

For example, the HypoStores REST web service identifies parts by the part number through the following URL:

```
http://www.HypoStores.com/products/ProductDetails/<Part_No>
```

To identify a part, define the following transformation details:

1. Set the base URL to the following URL:

```
http://www.HypoStores.com/products/ProductDetails
```

2. Define a URL port, and pass the part number to the transformation through the URL port.

If the mapping passes part number 500 to the URL port, the Data Integration Service uses the following URL in the request message:

```
http://www.HypoStores.com/products/ProductDetails/500
```

Use argument ports when the web service identifies the location of a resource through arguments.

For example, you want to pass a part number to the HypoStores REST web service through the "Part\_No" argument.

To identify a part, define the following transformation details:

1. Set the base URL to the following URL:

```
http://www.HypoStores.com/products/ProductDetails
```

2. Create an argument port with argument name "Part\_No," and pass the part number to the transformation through the argument port.

If the mapping passes part number 600 to the argument port, the Data Integration Service uses the following URL in the request message:

```
http://www.HypoStores.com/products/ProductDetails?Part_No=600
```

Create multiple argument ports to define multiple arguments. The Data Integration Service separates each argument with an ampersand character (&).

For example, you want to retrieve employee details from a REST web service and pass the employee first name and last name through the "First\_Name" and "Last\_Name" arguments. Create argument ports with the argument names "First\_Name" and "Last\_Name." If the mapping passes the name "John Smith" to the transformation, the Data Integration Service uses a URL like the following in the request message:

```
http://www.HypoStores.com/employees/EmpDetails?First_Name=John&Last_Name=Smith
```

If you do not specify a URL or an argument port, the Data Integration Service uses the base URL from the transformation properties or HTTP connection to identify the resource. The base URL in the HTTP connection overrides the base URL in the transformation.

## HTTP Methods

When you create a REST Web Service Consumer transformation, you select the HTTP method that the Data Integration Service uses in the request message. You cannot change the HTTP method after you create the transformation.

You configure the transformation to use one of the following HTTP methods:

### Get

Retrieves a resource or a collection of resources from the web service. For example, you can retrieve a table of products or retrieve information about one product.

### Post

Sends data to a web service. Use the Post method to create a resource or collection of resources. For example, you can add the details of a new store transaction.

### Put

Replaces a resource or a collection of resources. If the data does not exist, the Put method posts the data. For example, you can update a customer shipping address.

### Delete

Deletes a resource or a collection of resources. For example, you can delete the record of an employee that no longer works for an organization.

## HTTP Get Method

The Data Integration Service uses the HTTP Get method to retrieve data from a REST web service. Use the Get method to retrieve a resource or a collection of resources.

When you configure the REST Web Service Consumer transformation to use the Get method, you configure the input ports, the method output, and the output ports. You do not configure method input.

### Example

You want to retrieve the description and price for part number 500 in the HypoStores products database. The web service uses the following URL to identify a part:

```
http://www.HypoStores.com/products/ProductDetails?Part_No=<Part_No>
```

Enter the following base URL:

```
http://www.HypoStores.com/products/ProductDetails
```

The following table shows the input port that you might define:

| Port Type | Argument Name | Input Value |
|-----------|---------------|-------------|
| Argument  | Part_No       | 500         |

The following table shows the output ports that you might define:

| Port Type | Port Name | Return Value  |
|-----------|-----------|---|
| Output    | Part_Desc | ...<desc>ACME ball point pens, 12-pk, black, 0.7 mm</desc>... |
| Output    | Price_USD | ...<price>9.89</price>...                                     |

## HTTP Post Method

The Data Integration Service uses the HTTP Post method to send data to a REST web service. The web service determines the actual function that the Post method performs. You might use the Post method to create a resource or a collection of resources.

When you configure the REST Web Service Consumer transformation to use the Post method, you configure the input ports, the method input, the method output, and the output ports.

### Example

You want to post new part 501 to the HypoStores products database. The web service uses the following URL for part 501:

```
http://www.HypoStores.com/products/ProductDetails/501
```



Enter the following base URL:

`http://www.HypoStores.com/products/ProductDetails`

The following table shows the input ports that you might define:

| Port Type | Port Name   | Input Value                                |
|-----------|-------------|--|
| URL       | URL_Part_No | 501  |
| Input     | Part_Desc   | ACME ball point pens, 12-pk, black, 0.5 mm |
| Input     | Price_USD   | 9.89                                       |

The following table shows the output ports that you might define:

| Port Type | Port Name | Return Value                           |
|-----------|-----------|--|
| Output    | Response  | <Response returned by the web service> |

## HTTP Put Method

The Data Integration Service uses the HTTP Put method to update data through a REST web service. Use the Post method to update a resource or a collection of resources. If the data does not exist, the Data Integration Service creates the resource or collection of resources.

When you configure the REST Web Service Consumer transformation to use the Put method, you configure the input ports, the method input, the method output, and the output ports.

### Example

You want to update the unit price for part 501 in the HypoStores products database. The web service uses the following URL for part 501:

`http://www.HypoStores.com/products/ProductDetails/501`

Enter the following base URL:

`http://www.HypoStores.com/products/ProductDetails`

The following table shows the input ports that you might define:

| Port Type | Port Name   | Input Value |
|-----------|-------------|-------------|
| URL       | URL_Part_No | 501         |
| Input     | Price_USD   | 9.99        |

The following table shows the output ports that you might define:

| Port Type | Port Name | Return Value                           |
|-----------|-----------|--|
| Output    | Response  | <Response returned by the web service> |

## HTTP Delete Method

The Data Integration Service uses the HTTP Delete method to remove data through a REST web service. Use the Delete method to remove a resource or a collection of resources.

When you configure the REST Web Service Consumer transformation to use the Delete method, you configure the input ports, the method input, the method output, and the output ports.

### Example

You want to delete part number 502 from the HypoStores products database. The web service uses the following URL to identify a part:

```
http://www.HypoStores.com/products/ProductDetails?Part_No=<Part_No>
```

Enter the following base URL:

```
http://www.HypoStores.com/products/ProductDetails
```

The following table shows the input port that you might define:

| Port Type | Argument Name | Input Value |
|-----------|---------------|-------------|
| Argument  | Part_No       | 502         |

The following table shows output ports that you might define:

| Port Type | Port Name | Return Value                           |
|-----------|-----------|--|
| Output    | Response  | <Response returned by the web service> |

## REST Web Service Consumer Transformation Ports

A REST Web Service Consumer transformation can have multiple input ports and multiple output ports. You create ports in groups based on the structure of the XML or JSON hierarchy.

When you view the transformation ports, show the ports if you do not need to view the XML or JSON hierarchy. When you show the ports, you can define groups, define ports, and map elements from the method input and output to input and output ports.

A REST Web Service Consumer transformation can have multiple input groups and multiple output groups. When you create ports, create groups and add the ports to the groups. Define the ports in a group hierarchy based on the structure of the input or output hierarchy in the XML or JSON . Add a key to relate a child group to a parent group.

All groups except the lowest group in the hierarchy must have primary keys. All groups in the hierarchy except the root group must have foreign keys.

The transformation has a root input group named RequestInput. You must add a primary key to the root input group. The key must be string, bigint, or integer. You can configure any port in the root input group as a pass-through port.

To map an element to a port, click the field in the **Location** column and expand the hierarchy in the **Select Location** dialog box. Then, choose an element from the hierarchy.

## Input Ports

Input ports represent data from an upstream transformation or source that you want to pass to the web service. You can configure multiple input ports. Each input port maps to an element in the request message.

To add an input port, select an input group, click the arrow next to the **New** button, and select **Field**.

## Output Ports

Output ports represent elements in the response message that you want to pass to a downstream transformation or to the target. You can configure multiple output ports. Each output port maps to an element in the response message.

To add an output port, select an output group, click the arrow next to the **New** button, and select **Field**.

## Pass-through Ports

Pass-through ports pass data through the transformation without changing the data. You can configure any port in the root input group as a pass-through port.

To add a pass-through port, add a port to the root input group. Then right-click the port and select **Map**.

## Argument Ports

Argument ports allow you to identify a resource when the URL for the resource takes an argument. Add argument ports to the root input group.

An argument port has a port name and an argument name. If an argument name contains a character that is not allowed in a port name, enter an argument name that differs from the port name. For example, you want to pass the argument "Cust-ID" to the web service, but the Data Integration Service does not allow the dash character (-) in port names. Enter "Cust-ID" as the argument name, but enter "CustID" as the port name.

The Data Integration Service appends the argument names and values for each argument port to the base URL as name=value pairs. You can configure multiple argument ports. The Data Integration Service separates multiple arguments in the request with an ampersand character (&).

For example:

```
http://www.HypoStores.com/customers/CustDetails?Last_Name=Jones&First_Name=Mary
```

If you define argument ports and URL ports in the transformation, the Data Integration Service appends the URL port values to the base URL, followed by the argument names and values.

To add an argument port, right-click on the root input group and select **New > Argument Ports**. Enter the argument name and the port name.

## URL Ports

URL ports allow you to identify a resource through a static URL. To identify a resource, the Data Integration Service appends the value of the URL port to the base URL.

For example:

```
http://www.HypoStores.com/products/ProductDetails/<URL_port_value>
```

Add URL ports to the root input group.

You can configure multiple URL ports. The Data Integration Service separates the values in each URL port with a slash character (/). If you define URL ports and argument ports in the transformation, the Data

Integration Service appends the URL port values to the base URL, followed by the argument names and values.

To add a URL port, right-click on the root input group and select **New > URL Ports**.

## HTTP Header Ports

HTTP header ports represent HTTP headers in the request message. You can configure multiple HTTP header ports.

To pass header information to the web service in the request, add the port to the root input group. You can configure one HTTP header port for the root input group. If you add an HTTP header to the root input group, you can configure it as a pass-through port.

An HTTP header port has a port name and an HTTP header name. If an HTTP header name contains a character that is not allowed in a port name, enter an HTTP header name that differs from the port name. For example, you want to pass the header name "Content-Type" to the web service, but the Data Integration Service does not allow the dash character (-) in port names. Enter "Content-Type" as the HTTP header name, but enter "ContentType" as the port name.

To add an HTTP header port, right-click on the root input group and select **New > HTTP Header**. Enter a header name and port name.

## Cookie Ports

You can configure the REST Web Service Consumer transformation to use cookie authentication. The remote web server tracks the web service consumer users based on the cookies. You can increase performance when a mapping calls a web service multiple times.

To pass cookie information to the web service in the request, add the port to the root input group. You can configure one cookie port for the root input group. If you add a cookie port to the root input group, you can configure it as a pass-through port.

To extract cookie information from the response, add a cookie port to an output group. You can configure one cookie port for each output group.

When you project the cookie port to a web service request message, the web service provider returns a cookie value in the response message. You can pass the cookie value to another transformation downstream in the mapping, or you can save the cookie value in a file. When you save the cookie value in a file, you can configure the cookie as input to the REST Web Service Consumer transformation.

To add a cookie port, right-click on the root input group and select **New > Other Ports**. Then, select **Cookie**, and click **OK**.

## Output XML Ports

Output XML ports represent responses from the web service. Output XML ports are string ports.

Add an output XML port to an output group. You can configure one output XML port for each output group. right-click on the root input group and select **New > Other Ports**. Then, select **Output XML**, and click **OK**.

## Response Code Ports

Response code ports represent the HTTP response codes from the web service. Response code ports are integer ports.

Add a response code port to an output group. You can configure one response code port for each output group.

To add a response code port, select an output group, right-click on the root input group and select **New > Other Ports**. Then, select **Response Code**, and click **OK**.

## REST Web Service Consumer Transformation Input Mapping

When you view the transformation ports, show the input mapping to view the method input hierarchy. When you show the input mapping, you can define input groups, define input ports, and map input ports to method input elements.

The input mapping includes the following areas:

### Ports

Create the transformation input groups and input ports in the **Ports** area.

### Method Input

The **Method Input** area shows the elements in the request message that the REST Web Service Consumer transformation sends to the web service. If you use a schema object to create the transformation, the schema object defines the method input hierarchy.

After you create input ports, map the input ports from the **Ports** area to the elements in the **Method Input** area. When you map an input port to an element in the method input, the location of the port appears in the Location column in the **Method Input** area.

The Developer tool maps elements in the first level of the method input to input ports when you choose to map the first level of the input hierarchy. The Developer tool also creates the ports to perform the mapping. If the first level of the hierarchy contains a multiple occurring parent element with one or more multiple occurring child elements, the Developer tool does not map the first level of the hierarchy.

You can choose to view the lines that connect the input ports to the elements in the method input.

## Rules and Guidelines to Map Input Ports to Elements

Review the following rules when you map input ports to elements in the method input hierarchy:

- You can map an input port to one element in the hierarchy. You can map the same port to any number of keys in the hierarchy.
- The input port and the element must have compatible datatypes.
- You can map ports from one input group to multiple hierarchy levels in the method input.
- You must map input ports to the keys in the method input. Any port that you map to a key must be of string, integer, or bigint datatype. Map data to the keys in all levels in the method input above the hierarchy level that you are including in the request message. Include the foreign keys for all levels above and including the level you are mapping.

**Note:** You do not have to map input ports to keys if you are mapping only the lowest level of the method input hierarchy.

- You must map the RequestInput root element to the child element of Rest\_Consumer\_input group for method input definition.
- You can map multiple string, bigint, or integer input ports to a key in the **Method Input** area to create a composite key. When you click the **Location** field for a composite key, you can reorder the input ports or remove one of the ports.
- If the web service produces a JSON document, ensure that xmlRoot is the first node in the response hierarchy. If xmlRoot is not the first node for a web service with JSON response, null values may appear.

## Mapping Input Ports to the Method Input

When you show the transformation input mapping, you can define input groups, define input ports, and map input ports to method input elements.

1. Open a REST Web Service Consumer transformation.
2. In the **Ports** view, show the input mapping.
3. Define a primary key for the root input group.
4. To add an input group or port to the **Ports** area, use one of the following methods:

| Method                                       | Description   |
|--|---|
| Drag an element.                             | Drag a group or a child element from the <b>Method Input</b> area to an empty column in the <b>Ports</b> area. If you drag a group to the <b>Ports</b> area, the Developer tool adds a group without ports.   |
| Manually add a group or port.                | To add a group, click the arrow next to the <b>New</b> button, and then click <b>Group</b> . To add a port, click the arrow next to the <b>New</b> button, and then click <b>Field</b> .                      |
| Drag a port from another transformation.     | In the editor, drag a port from another transformation to the REST Web Service Consumer transformation.   |
| Copy a port.                                 | Select ports from another transformation and copy them to the <b>Ports</b> area. To copy ports, you can use keyboard shortcuts or you can use the <b>Copy</b> and <b>Paste</b> buttons in the Developer tool. |
| Select <b>Map first level of hierarchy</b> . | The Developer tool maps elements in the first level of the method input to input ports and groups. The Developer tool also creates the input ports and groups to perform the mapping.                         |

5. If you manually create a port or you copy a port from another transformation, click the **Location** column in the **Method Input** area and choose a port from the list.
6. To map input ports as a composite key, use one of the following methods:

| Method   | Description  |
|--|--|
| Drag input ports.  | Select two or more input ports, and drag them to a key in the method input hierarchy.                    |
| Select input ports from the <b>Select Location</b> dialog box. | Click the <b>Location</b> column of a key in the method input hierarchy and then select the input ports. |

7. To clear the locations of elements, use one of the following methods:

| Method   | Description  |
|--|--|
| Click <b>Clear</b> .                             | Select one or more elements in the <b>Method Input</b> area and click <b>Clear</b> .                                 |
| Delete the lines that connect ports to elements. | Select one or more lines that connect the input ports to the elements in the method input, and press <b>Delete</b> . |

## REST Web Service Consumer Transformation Output Mapping

When you view the transformation ports, show the output mapping to view the method output hierarchy. When you show the output mapping, you can define output groups, define output ports, and map method output elements to output ports.

The output mapping includes the following areas:

### Method Output

The **Method Output** area shows the elements in the response message that the web service returns to the REST Web Service Consumer transformation. If you use a schema object to create the transformation, the schema object defines the method output hierarchy.

### Ports

Create the transformation output groups and ports in the **Ports** area.

After you create output ports, map the elements from the **Method Output** area to the ports in the **Ports** area. When you map an element from the method output to an output port, the location of the element appears in the **Location** column in the **Ports** area.

The Developer tool maps elements in the first level of the method output to output ports when you choose to map the first level of the output hierarchy. The Developer tool also creates the ports to perform the mapping. If the first level of the hierarchy contains a multiple occurring parent element with one or more multiple occurring child elements, the Developer tool does not map the first level of the hierarchy.

You can choose to display the output ports in a hierarchy. Each child group appears under the parent group. You can also choose to view the lines that connect the elements in the method output to the output ports.

If the associated schema object is deleted from the repository, the Developer tool retains the location of the method elements in the output mapping. When you show the output mapping, the **Ports** area still displays the location of the method elements in the **Location** column for the output ports. If you associate another schema with the transformation, the Developer tool checks whether each location is valid. The Developer tool clears the location of method elements in the **Ports** area of the output mapping if the location is no longer valid.

## Rules and Guidelines to Map Elements to Output Ports

Review the following rules when you map elements in the method output hierarchy to output ports:

- The method output element and the output port must have compatible datatypes.
- You cannot map an element to more than one output port in a group.

- Each output port must have a valid location, unless the port is a pass-through port.
- If you drag a multiple-occurring child element to an empty output port, you must relate the group to other output groups. When you select a group, the Developer tool creates keys to relate the groups.
- When you drag a multiple-occurring element into a group that contains the parent element, you can configure the number of child element occurrences to include. Or, you can replace the parent group with the multiple-occurring child group in the transformation output.
- If the web service produces a JSON document, ensure that `xmlRoot` is the first node in the response hierarchy. If `xmlRoot` is not the first node for a web service with JSON response, null values may appear in the output ports.

## Customize View Options

You can change the method output hierarchy to show the cookie ports, pass-through ports, and keys in the **Method Output** area. You can also show grouping constructs that define how to order elements.

Click **Customize View** in the **Method Output** area. Enable any of the following options:

### Sequence, Choice, and All

Show a line that indicates whether an element definition is sequence, choice, or all.

Elements in a sequence group must be in the order specified in the hierarchy.

At least one element in a choice group must appear in the response message.

Elements in an all group must all be included in the response message.

### Keys

View the keys in the **Method Output** area. The **Method Output** area includes keys for each group. You can add a key to an output port in the **Ports** area.

### Pass-through Ports

The **Method Output** area shows the pass-through ports. Pass-through ports are ports that pass data through the transformation without changing the data. You can project pass-through ports from the method output to any of the REST Web Service Consumer transformation output groups. A pass-through port receives data one time, so the port is at the root level in the response messages.

## Mapping the Method Output to Output Ports

When you show the transformation output mapping, you can define output groups, define output ports, and map method output elements to output ports.

1. Open a REST Web Service Consumer transformation.
2. In the **Ports** view, show the output mapping.
3. To add an output group or port to the **Ports** area, use one of the following methods:

| Method           | Description  |
|------------------|--|
| Drag an element. | Drag a group or a child element in the <b>Method Output</b> area to an empty column in the <b>Ports</b> area. If you drag a group to the <b>Ports</b> area, the Developer tool adds a group without ports. |



| Method                                   | Description   |
|--|---|
| Manually add a group or port.            | To add a group, click the arrow next to the <b>New</b> button and then click <b>Group</b> . To add a port, click the arrow next to the <b>New</b> button, and then click <b>Field</b> .                       |
| Drag a port from another transformation. | In the editor, drag a port from another transformation to the REST Web Service Consumer transformation.   |
| Copy a port.                             | Select ports from another transformation and copy them to the <b>Ports</b> area. To copy ports, you can use keyboard shortcuts or you can use the <b>Copy</b> and <b>Paste</b> buttons in the Developer tool. |

- If you manually create a port or you copy a port from another transformation, click the **Location** column in the **Ports** area, and choose an element from the list.
- To clear the locations of ports, use one of the following methods:

| Method   | Description  |
|--|--|
| Click <b>Clear</b> .                             | Select one or more ports in the <b>Ports</b> area, and click <b>Clear</b> .  |
| Delete the lines that connect elements to ports. | Select one or more lines that connect the elements in the method output to the output ports, and press <b>Delete</b> . |

## REST Web Service Consumer Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the REST Web Service Consumer transformation.

Configure the following properties on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

### Connection

Identifies the HTTP connection object to connect to the web service. Create and edit the HTTP connection in the Developer tool. When you configure an HTTP connection, configure the base URL, the type of security that the web service requires, and a connection timeout period.

The REST Web Service Consumer transformation connects to a web service using a URL. You can define the URL in the transformation properties or in the HTTP connection.

Configure an HTTP connection in the following circumstances:

- You do not use a URL input port.
- The web service requires HTTP authentication or SSL certificates.
- You want to change the default connection timeout period.

### XML Schema Validation

Validates the response message at run time. **Select Error on Invalid XML** or **No Validation**.

**Sorted Input**

Enables the Data Integration Service to generate output without processing all of the input data. Enable sorted input when the input data is sorted by the keys in the XML input hierarchy.

**URL**

The base URL for the REST web service. The base URL in the HTTP connection overrides this value.

**Format**

The format of the web service response. Select **XML** or **JSON** depending on the web service response..

## REST Web Service Consumer Transformation Creation

You can create a reusable or non-reusable REST Web Service Consumer transformation. Reusable transformations can exist in multiple mappings. Non-reusable transformations exist within a single mapping.

When you create a REST Web Service Consumer transformation, you can define the elements and XML hierarchy manually or you can import the elements and hierarchy from a schema object. The schema object can be an XML file or a text file.

### Creating a REST Web Service Consumer Transformation

When you create a REST Web Service Consumer transformation, you select a method and define the method input and the method output based on the method that you choose.

1. To create a REST Web Service Consumer transformation, use one of the following methods:

| Method       | Description  |
|--------------|--|
| Reusable     | Select a project or folder in the Object Explorer view. Click <b>File &gt; New &gt; Transformation</b> . Select the REST Web Service Consumer transformation and click <b>Next</b> . |
| Non-reusable | In a mapping or maplet, drag a REST Web Service Consumer transformation from the transformation palette to the mapping or maplet editor.   |

2. Enter the transformation name, and select the location and the HTTP method.
3. Click **Next**.
4. To define the method input, use one of the following methods:

| Method                                    | Description   |
|---|---|
| Create as empty                           | Define the XML elements and hierarchy manually.             |
| Create from an element in a Schema Object | Import the XML elements and hierarchy from a schema object. |

The **Method input definition** area shows the transformation input groups and input ports. The **Input mapping** area shows the request message hierarchy.

5. Define the input groups and input ports, and map the input ports to input elements.
6. Click **Next**.

7. To define the method output, select **Create as empty** or **Create from an element in a Schema Object**.  
The **Method output definition** area shows the transformation input groups and input ports. The **Output mapping** area shows the request message hierarchy.
8. Define the output groups and output ports, and map the elements to output ports.
9. Click **Finish**.

## CHAPTER 38

# Router Transformation

This chapter includes the following topics:

- [Router Transformation Overview, 520](#)
- [Router Transformations in Dynamic Mappings, 521](#)
- [Working with Groups, 521](#)
- [Working with Ports, 525](#)
- [Connecting Router Transformations in a Mapping, 526](#)
- [Router Transformation Advanced Properties, 526](#)

## Router Transformation Overview

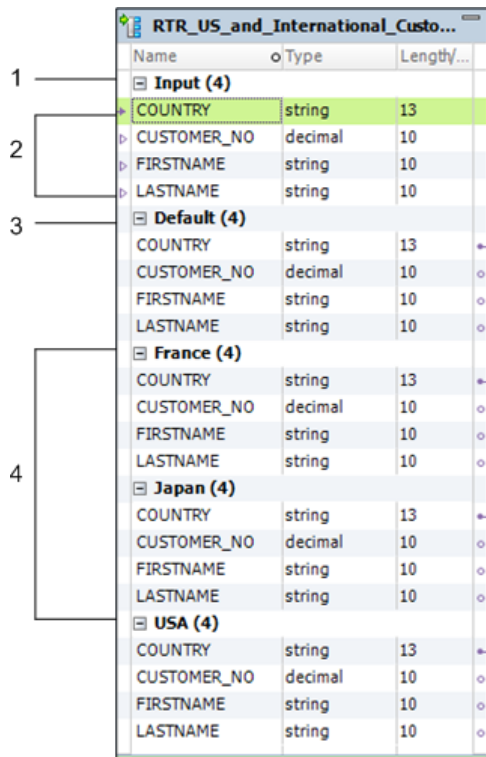
The Router transformation is an active transformation that routes data into multiple output groups based on one or more conditions. Route the output groups to different transformations or to different targets in the mapping.

A Router transformation is similar to a Filter transformation because both transformations use a condition to test data. A Filter transformation tests data for one condition and drops the rows of data that do not meet the condition. A Router transformation tests data for one or more conditions and can route rows of data that do not meet any of the conditions to a default output group.

If you need to test the same input data based on multiple conditions, use a Router transformation in a mapping instead of creating multiple Filter transformations to perform the same task. The Router transformation is more efficient. For example, to test data based on three conditions, you can use one Router transformation instead of three Filter transformations. When you use a Router transformation in a mapping, the Data Integration Service processes the incoming data once. When you use multiple Filter transformations in a mapping, the Data Integration Service processes the incoming data for each transformation.

A Router transformation consists of input and output groups, input and output ports, group filter conditions, and advanced properties that you configure in the Developer tool.

The following figure shows a sample Router transformation and its components:



1. Input group
2. Input ports
3. Default output group
4. User-defined output groups

## Router Transformations in Dynamic Mappings

You can use an Router transformation in a dynamic mapping. You can configure dynamic ports in the transformation and reference the generated ports in the group filter condition.

When you use a dynamic port in the group filter condition, the dynamic port might contain more than one generated port. The group filter condition expands to include each generated port. Each generated port must be a valid type for the expression.

You can parameterize the group filter condition. Use an expression type parameter to specify the filter.

## Working with Groups

A Router transformation has the following types of groups:

- Input
- Output

## Input Group

The Rank transformation includes a single input group. The input group includes all input ports that you add to the transformation.

## Output Groups

The Rank transformation includes the following types of output groups:

### User-Defined Groups

You create a user-defined group to test a condition based on incoming data. A user-defined group consists of output ports and a group filter condition. You can create and edit user-defined groups on the **Groups** tab with the Developer tool. Create one user-defined group for each condition that you want to specify.

The Data Integration Service uses the condition to evaluate each row of incoming data. It tests the conditions of each user-defined group before processing the default group. The Data Integration Service determines the order of evaluation for each condition based on the order of the connected output groups. The Data Integration Service processes user-defined groups that are connected to a transformation or a target in a mapping.

If a row meets more than one group filter condition, the Data Integration Service passes this row multiple times.

### The Default Group

The Developer tool creates the default group after you create one user-defined group. The Developer tool does not allow you to edit or delete the default group. This group does not have a group filter condition associated with it. If all of the group conditions evaluate to FALSE, the Data Integration Service passes the row to the default group. If you want the Data Integration Service to drop all rows in the default group, do not connect it to a transformation or a target in a mapping.

The Developer tool deletes the default group when you delete the last user-defined group from the list.

The Developer tool copies property information from the input ports of the input group to create a set of output ports for each output group. You cannot change or delete output ports or their properties.

## Using Group Filter Conditions

You can test data based on one or more group filter conditions. You create group filter conditions on the **Groups** tab using the Expression Editor.

You can enter any expression that returns a single value. You can also specify a constant for the condition. A group filter condition returns TRUE or FALSE for each row that passes through the transformation, based on whether a row satisfies the specified condition. Zero (0) is the equivalent of FALSE. Any non-zero value is the equivalent of TRUE. You can use a single numeric port as a filter condition. The Data Integration Service passes the rows of data that evaluate to TRUE to each transformation or target that is associated with each user-defined group.

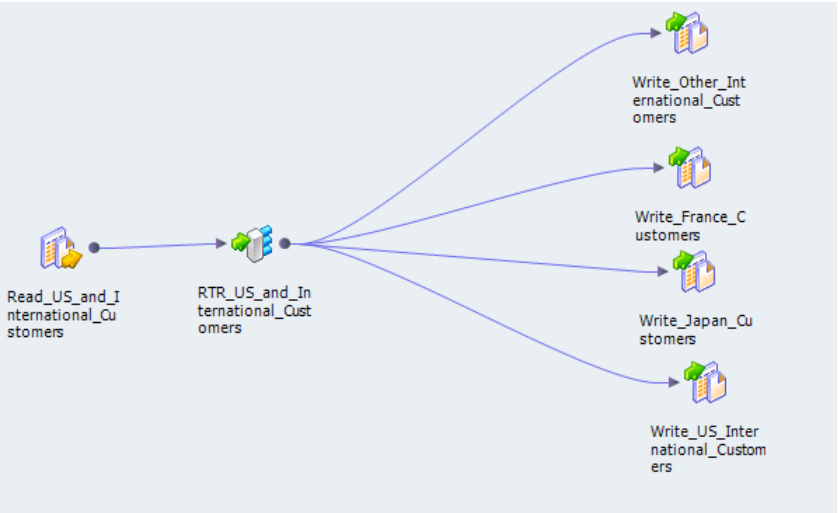
**Note:** You cannot use a single dynamic port to return a boolean value.

For example, you have customers from nine countries, and you want to perform different calculations on the data from three countries. You can use a Router transformation in a mapping to filter this data to three different Expression transformations.

You can use parameters as elements in the group filter condition. You can use system parameters or user-defined parameters. You can create parameters from the Expression Editor and add them to the expression.

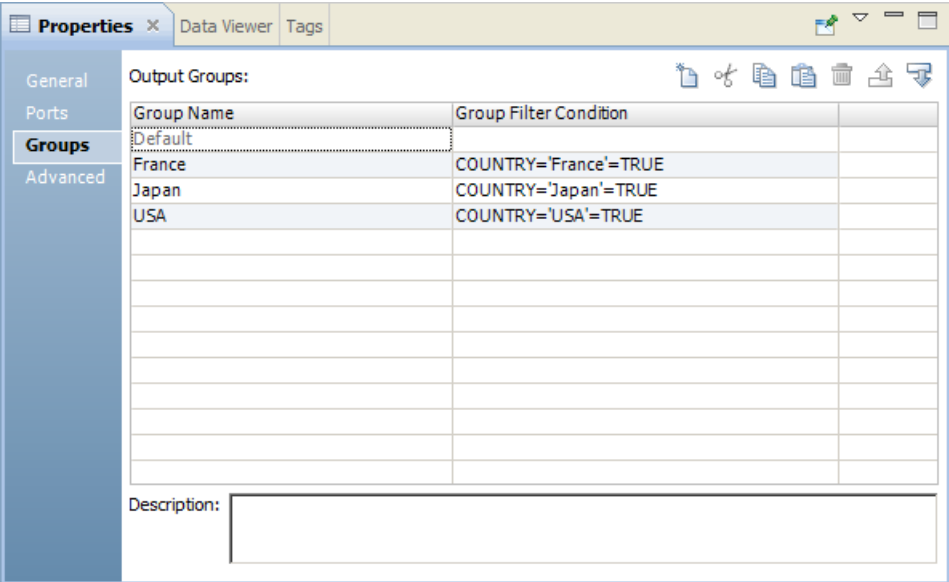
The default group does not have a group filter condition. However, you can create an Expression transformation to perform a calculation based on the data from the other six countries.

The following figure shows a mapping with a Router transformation that filters data based on multiple conditions:



To perform multiple calculations based on the data from three different countries, create three user-defined groups and specify three group filter conditions on the **Groups** tab.

The following figure shows group filter conditions that filter customer data:



The following table shows group filter conditions that filter customer data:

| Group Name | Group Filter Condition      |
|------------|-----------------------------|
| France     | customer_name='France'=TRUE |
| Japan      | customer_name='Japan'=TRUE  |
| USA        | customer_name='USA'=TRUE    |

In the mapping, the Data Integration Service passes the rows of data that evaluate to TRUE to each transformation or target associated with each user-defined group, such as Japan, France, and USA. The Data Integration Service passes the row to the default group if all of the conditions evaluate to FALSE. The Data Integration Service then passes the data of the other six countries to the transformation or target that is associated with the default group. If you want the Data Integration Service to drop all rows in the default group, do not connect it to a transformation or a target in a mapping.

The Router transformation passes data through each group that meets the condition. If data meets three output group conditions, the Router transformation passes the data through three output groups.

For example, you configure the following group conditions in a Router transformation:

| Group Name     | Group Filter Condition |
|----------------|------------------------|
| Output Group 1 | employee_salary > 1000 |
| Output Group 2 | employee_salary > 2000 |

When the Router transformation processes an input row data with employee\_salary=3000, it routes the data through output groups 1 and 2.

## Dynamic Ports in Group Filter Conditions

You can use a dynamic port in a group filter condition. The Data Integration Service applies the filter condition to each generated port in the dynamic port.

For example, a dynamic port, MyDynamicPort, contains three decimal ports:

```
Salary
Bonus
Stock
```

You might configure the following group filter condition:

```
MyDynamicPort > 100
```

The group filter condition expands to the following expression:

```
Salary > 100 AND Bonus > 100 AND Stock > 100
```

Each generated port must be a valid type for the expression.

## Parameterize the Group Filter

You can use an expression parameter to define a group filter. An expression parameter is a parameter that contains a complete expression.

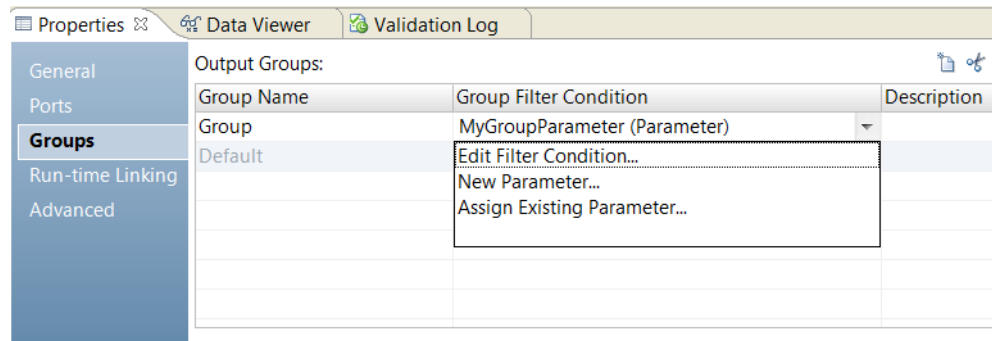
For example, an expression parameter might contain the expression

```
Employee_Salary > 1000.
```

To parameterize the group filter, choose **New Parameter** in the **Group Filter Condition** field of the **Groups** tab. Define the parameter and enter the expression on the Expression Editor. An expression parameter cannot contain other parameters.



The following image shows the **Groups** tab in the transformation properties:



When you use an expression parameter, the Developer tool cannot validate the expression. If the expression is not valid at run time, the mapping might fail.

## Adding Groups

When you add a group, the Developer tool copies property information from the input ports to the output ports.

1. Click the **Groups** tab.
2. Click the **New** button.
3. Enter a name for the group in the **Group Name** section.
4. Click the **Group Filter Condition** field to open the **Expression Editor**.
5. Enter the group filter condition.
6. Click **Validate** to check the syntax of the condition.
7. Click **OK**.

## Working with Ports

A Router transformation has input ports and output ports. Input ports are in the input group, and output ports are in the output groups.

You can create input ports by copying them from another transformation or by manually creating them on the **Ports** tab.

The Developer tool creates output ports by copying the following properties from the input ports:

- Port name
- Datatype
- Precision
- Scale
- Default value

When you make changes to the input ports, the Developer tool updates the output ports to reflect these changes. You cannot edit or delete output ports.

The Developer tool creates output port names based on the input port names. For each input port, the Developer tool creates a corresponding output port in each output group.

# Connecting Router Transformations in a Mapping

When you connect transformations to a Router transformation in a mapping, consider the following rules:

- You can connect one group to one transformation or target.
- You can connect one output port in a group to multiple transformations or targets.
- You can connect multiple output ports in one group to multiple transformations or targets.
- You cannot connect more than one group to one target or a single input group transformation.
- You can connect more than one group to a multiple input group transformation, except for Joiner transformations, when you connect each output group to a different input group.

## Router Transformation Advanced Properties

Configure advanced properties to help determine how the Data Integration Service processes data for the Router transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 39

# Sequence Generator Transformation

This chapter includes the following topics:

- [Sequence Generator Transformation Overview, 527](#)
- [Create Keys, 527](#)
- [Replace Missing Values, 528](#)
- [Cycle Through a Range of Values, 529](#)
- [Sequence Generator Ports, 529](#)
- [Sequence Generator Transformation Properties, 530](#)
- [Sequence Data Object, 531](#)
- [Frequently Asked Questions, 532](#)

## Sequence Generator Transformation Overview

The Sequence Generator transformation is a passive transformation that generates numeric values. Use the Sequence Generator transformation to create unique primary key values, replace missing primary keys, or cycle through a sequential range of numbers.

The Sequence Generator contains pass-through ports and an output port. You connect the NEXTVAL port to the input ports of other transformations. The Integration Service increments the sequence when the mapping runs.

All Sequence Generator transformations contain a sequence data object. A sequence data object is an object that creates and maintains a sequence of values.

## Create Keys

You can create primary or foreign key values with the Sequence Generator transformation by connecting the NEXTVAL port to a target or downstream transformation. You can use a range of values from 1 to 9,223,372,036,854,775,807 with the smallest interval of 1. You can also create composite keys to identify each row in the table.

To create a composite key, you can configure the Integration Service to cycle through a smaller set of values. For example, if three stores generate order numbers, configure a Sequence Generator transformation to cycle through values from 1 to 3, incrementing by 1. When you connect the ORDER\_NO port to the Sequence Generator transformation, the generated values create unique composite keys.

The following example shows composite keys and order numbers:

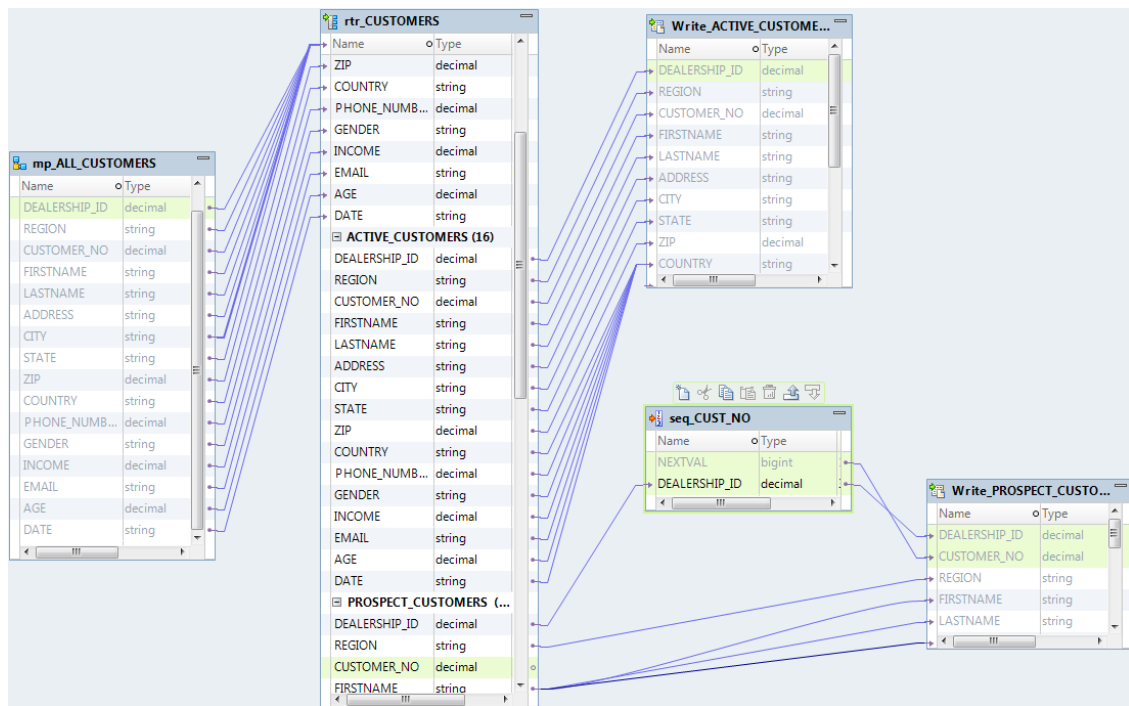
| COMPOSITE_KEY | ORDER_NO |
|---------------|----------|
| 1             | 12345    |
| 2             | 12345    |
| 3             | 12345    |
| 1             | 12346    |
| 2             | 12346    |
| 3             | 12346    |

## Replace Missing Values

When you use a Sequence Generator transformation to replace missing keys, you can also use a Router transformation to filter null values from columns that have values assigned. You connect the Router transformation to the Sequence Generator transformation, and use NEXTVAL to generate a sequence of numeric values to populate the null values.

For example, to replace null values in a CUSTOMER\_NO column, you create a mapping with a source that contains customer data. You add a Router transformation to filter customers with customer numbers assigned from those with null values. You add a Sequence Generator transformation to generate unique CUSTOMER\_NO values. You add customer targets to write the data to.

The following image shows a mapping that replaces null values in the CUSTOMER\_NO column:



## Cycle Through a Range of Values

You can establish a range of values for the Sequence Generator transformation. If you use the cycle option, the Sequence Generator transformation repeats the range when it reaches the end value.

For example, if you set the sequence range to start at 10 and end at 50, and you set an increment value of 10, the Sequence Generator transformation creates the values 10, 20, 30, 40, 50. The sequence starts over again at 10.

## Sequence Generator Ports

The Sequence Generator transformation has pass-through ports and one output port, NEXTVAL. You cannot edit or delete the output port.

### Pass-Through Ports

You can add a port to the Sequence Generator transformation as a pass-through port. Pass-through ports are input and output ports that receive input data and return the same data to a mapping without changing it.

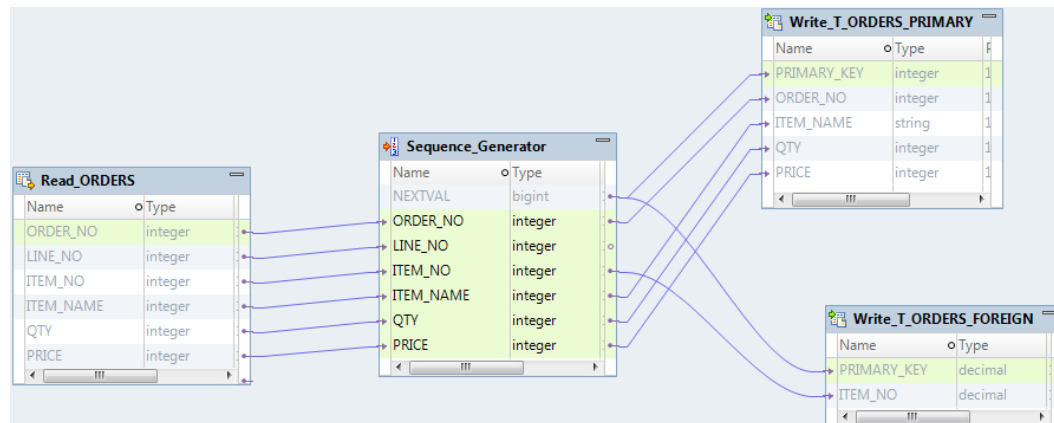
You must add at least one input port to the transformation and connect it to an upstream source or transformation before you link the NEXTVAL output port to targets. To add a pass-through port to the transformation, drag a port from an upstream source or transformation in the mapping to the Sequence Generator transformation.

## NEXTVAL Port

You can connect NEXTVAL to a transformation to generate unique values for each row in the transformation. Connect the NEXTVAL port to a downstream transformation or target to generate a sequence of numbers. If you connect NEXTVAL to multiple transformations, the Integration Service generates the same sequence of numbers for each transformation.

You connect the NEXTVAL port to generate the sequence based on the Start Value and Increment Value properties. If the Sequence Generator is not configured to cycle through the sequence, the NEXTVAL port generates sequence numbers up to the configured end value.

The following image shows a mapping with the Sequence Generator transformation NEXTVAL port connected to a source and two targets to generate primary and foreign key values:



When you configure the Sequence Generator transformation with a Start Value = 1 and an Increment Value = 1, the Integration Service generates the same primary key values for the T\_ORDERS\_PRIMARY and T\_ORDERS\_FOREIGN target tables.

## Sequence Generator Transformation Properties

Configure transformation properties that the Integration Service uses to generate sequential values.

The following list describes the Sequence Generator transformation properties you can configure:

### Reset

If enabled, the Integration service resets the sequence data object to the start value when the mapping run completes. If disabled, the Integration Service increments the current value after the mapping run completes, and uses that value in the next mapping run.

This property is disabled for reusable Sequence Generator transformations and for non-reusable Sequence Generator transformations that use a reusable sequence data object.

### Tracing Level

Level of detail about the transformation that the Integration Service writes into the mapping log. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

### Maintain Row Order

Maintain the row order of the input data to the transformation. Select this option if the Integration Service should not perform any optimization that can change the row order.

When the Integration Service performs optimizations, it might lose an order established earlier in the mapping. You can establish order in a mapping with a sorted flat file source, a sorted relational source, or a Sorter transformation. When you configure a transformation to maintain row order, the Integration Service considers this configuration when it performs optimizations for the mapping. The Integration Service performs optimizations for the transformation if it can maintain the order. The Integration Service does not perform optimizations for the transformation if the optimization would change the row order.

## Reset

If you configure a non-reusable Sequence Generator transformation to use the reset property, the Integration Service uses the original start value for each mapping run. Otherwise, the Integration Service increments the current value and uses that value in the next mapping run.

For example, you configure a Sequence Generator transformation to create values from 1 to 1,000 with an increment of 1, a start value of 1, and choose reset. During the first mapping run, the Integration Service generates numbers 1 through 234. In each subsequent mapping run, the Integration Service again generates numbers beginning with the start value of 1.

If you do not reset, the Integration Service updates the current value to 235 at the end of the first run. The next time it uses the Sequence Generator transformation, the first value generated is 235.

**Note:** Reset is disabled for reusable Sequence Generator transformations.

## Sequence Data Object

A sequence data object creates and maintains a sequence of numeric values. The Sequence Generator transformation uses the sequence data object to generate the values for the transformation.

You can use a reusable sequence data object in multiple Sequence Generator transformations. All Sequence Generator transformations that use the same sequence data object use the same sequence of values if they run on the same Integration Service. You can also use a reusable sequence data object in a non-reusable Sequence Generator transformation. You can use a non-reusable sequence data object a non-reusable Sequence Generator transformation.

For example, you create multiple mappings that write to the same primary key field in a relational table. Each mapping uses the same reusable Sequence Generator transformation, which uses the same reusable sequence data object and runs on the same Integration Service. Each mapping write unique values to the primary key field.

## Sequence Data Object Properties

The Sequence Data Object maintains a sequence of values in all Sequence Generator transformations where it is used, provided that they all use the same Integration Service.

The following list describes the sequence data object properties you can configure in the sequence data object:

### **Start Value**

Initial value of the sequence.

Maximum value is 9,223,372,036,854,775,806.

Default is 0.

#### **End Value**

Maximum value that the Integration Service generates. If the Integration Service reaches this value and the sequence is not configured to cycle, the mapping fails.

If you connect the NEXTVAL port to a downstream integer port, set the End Value to a value no larger than the integer maximum value. If the NEXTVAL exceeds the datatype maximum value for the downstream port, the mapping fails.

Maximum value is 9,223,372,036,854,775,807.

#### **Increment Value**

Difference between two consecutive values from the NEXTVAL port.

Maximum value is 2,147,483,647.

Must be a positive integer.

Default is 1.

#### **Cycle**

Repeat the sequence.

If enabled, the Integration Service cycles through the sequence range. When the sequence data object reaches the end of the range, it repeats the sequence.

If disabled, the Integration Service stops the sequence at the configured end value. The Integration Service fails the mapping run with overflow errors if it reaches the end value and still has rows to process.

## Frequently Asked Questions

### **Can I change a non-reusable Sequence Generator transformation to make it reusable?**

You cannot make the transformation reusable, but you can change the transformation to use a sequence data object. The sequence data object maintains the integrity of the sequence, regardless of the number of transformations that use it.

### **Can I place a non-reusable Sequence Generator transformation in a mapplet?**

No, you cannot. Mapplets are reusable objects, so all objects in the mapplet must also be reusable. Use a reusable Sequence Generator transformation instead.



## CHAPTER 40

# Sorter Transformation

This chapter includes the following topics:

- [Sorter Transformation Overview, 533](#)
- [Sorter Transformations in Dynamic Mappings, 534](#)
- [Developing a Sorter Transformation, 534](#)
- [Sorter Transformation Ports, 534](#)
- [Sort Tab, 535](#)
- [Configure Sort Keys, 535](#)
- [Sorter Transformation Advanced Properties, 537](#)
- [Sorter Cache, 538](#)
- [Creating a Sorter Transformation, 538](#)
- [Sorter Transformation Example, 539](#)

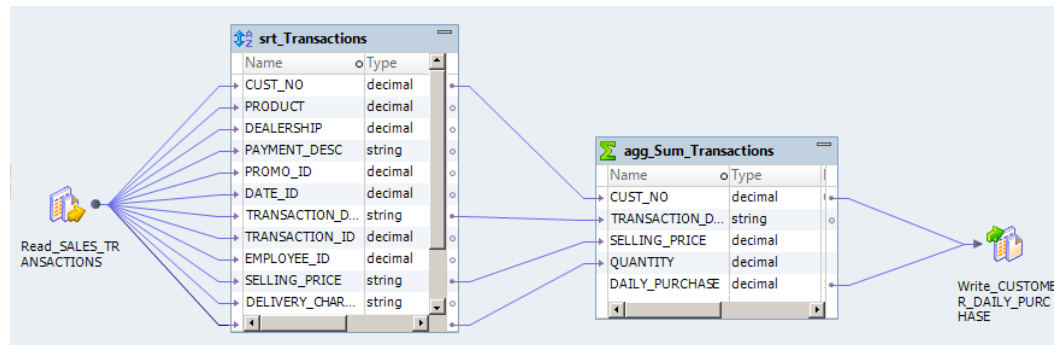
## Sorter Transformation Overview

Use a Sorter transformation to sort data in ascending or descending order according to a specified sort key. You can configure the Sorter transformation for case-sensitive sorting and for distinct output. The Sorter transformation is an active transformation.

When you create a Sorter transformation, you specify ports as sort keys and configure each sort key port to sort in ascending or descending order. The Data Integration Service sorts each port sequentially when you specify multiple ports for sort key.

For example, you need to create an invoice for the overall customer sales from a customer database. Use a Sorter transformation on the customer sales table to sort the data in descending order according to the customer number. Use the result of the Sorter transformation as an input to the Aggregator transformation. You can increase Aggregator transformation performance with the sorted input option.

The following figure shows the mapping:



## Sorter Transformations in Dynamic Mappings

You can use a Sorter transformation in a dynamic mapping. You can configure dynamic ports in the transformation and reference the generated ports.

You can reference a dynamic port or a generated port in the Sorter transformation. However, if the generated port does not exist at run time, the mapping fails.

If you use a dynamic port as a sort key, the Data Integration service considers all the generated ports in the dynamic port and the generated port order.

You can parameterize the sort keys. Use a sort list parameter for the sort key.

## Developing a Sorter Transformation

When you develop a Sorter transformation, you need to consider factors such as the sort key ports, distinct output rows, and the case-sensitive sort criteria.

Consider the following factors when you develop a Sorter transformation:

- The ports that you want to configure as sort keys and the sort direction.
- Whether you want a case-sensitive sort.
- Whether you want to consider null values as sort priority.
- Whether you want distinct output rows.
- The sorter cache size value you want to set.

## Sorter Transformation Ports

When you create ports in the Sorter transformation, you create input and output ports by default. The Sorter transformation returns the same output ports as input ports.

You can define dynamic ports in a Sorter transformation. A dynamic port can receive different columns of data from an upstream transformation in a mapping. This enables the Sorter transformation to sort rows that contain different columns.

Define the sort keys on the **Sort** tab of the **Properties** view.

# Sort Tab

Define the sort key on the **Sort** tab of the Sorter transformation **Properties** view. Choose one or more ports that you want to use as the sort criteria.

The Data Integration Service sorts data according to the order of the ports on the Sorter tab. Configure to sort data in ascending or descending order. The default is ascending.

If you configure the Sorter transformation for distinct output rows, the Developer tool configures all ports as part of the sort key. The Data Integration Service discards duplicate rows during the sort operation

# Configure Sort Keys

Define the sort key on the **Sort** tab of the transformation **Properties** view.

This is the start of the concept.

The following image shows the **Sort** tab:

Sort

Output:

☒ All rows ☐ Distinct rows only

Sort Keys

Specify by:

Value

Ports:

|            |               |
|------------|---------------|
| Department | Ascending (A) |
| Employee   | Ascending (A) |
|            |               |
|            |               |
|            |               |
|            |               |
|            |               |
|            |               |
|            |               |

Add

Choose...

Delete

Move Up

Move Down

The **Sort** tab contains the following options:

### Output

Choose whether to return all the sorted rows or to discard duplicate rows. Duplicate rows are rows where all the column values are the same.

### Specify by

Select **Value** or **Parameter**. Select **Value** to use port names. Choose **Parameter** to use a sort list parameter.

### Add

Accepts a port name that you type in manually. You must type a valid port name before you click **Add**.

### Choose

Click **Choose** to select ports to add to the sort key. The Developer tool provides a list of ports from the transformation to choose from.

### Move Up and Move Down

You can change the order of the ports in the group. Select the port name and then click one of the move buttons to move it up or down in the sort order.

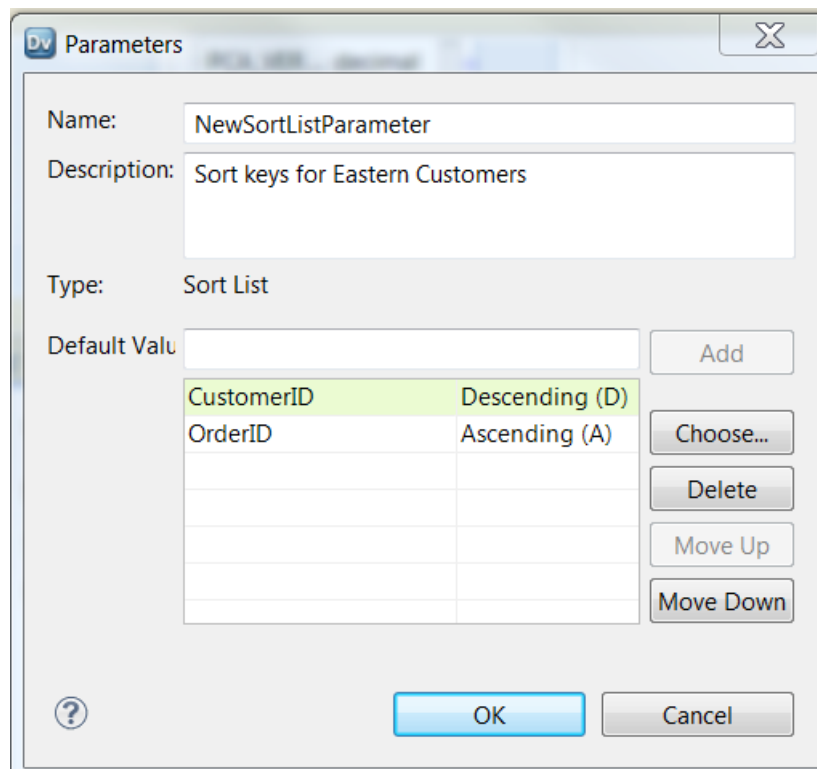
## Parameterize the Sort Keys

You can create a sort list parameter that contains a list of ports for the sort keys.

If the Sort transformation is in a dynamic mapping, the Sorter transformation might contain generated ports. You can parameterize the sort keys. Create a sort list parameter that contains a list of ports to sort by.

On the **Sort** tab of the transformation properties, choose **Specify by Parameter**. Click **New** to create a parameter.

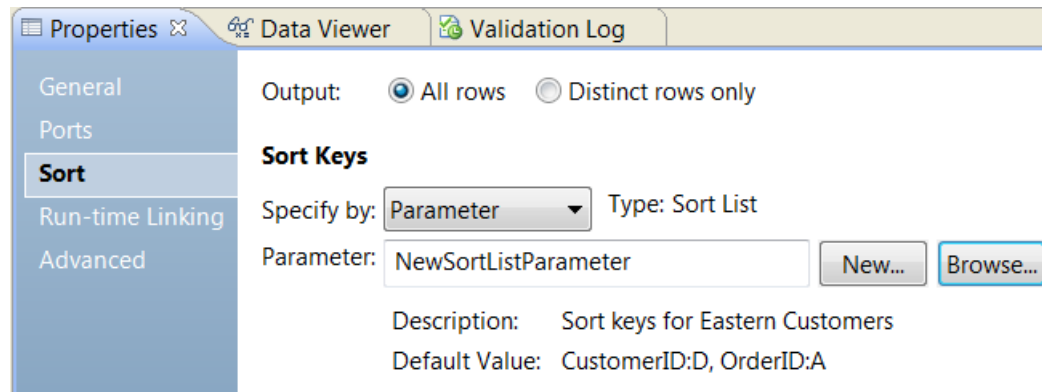
The following image shows the **Parameters** dialog box:



Choose ports or generated ports for the sort keys. You can choose an ascending or descending sort type.

You can manually enter port names. Type the port name in the **Default Value** field and click **Add**. The Developer tool adds the port name to the sort list.

The following image shows the **Sort** tab after you configure a parameter for the sort keys:



## Sorter Transformation Advanced Properties

You can specify additional sort criteria in the Sorter transformation advanced properties. The Data Integration Service applies the properties to all sort key ports. The Sorter transformation properties also determine the system resources that the Data Integration Service allocates when it sorts data.

The following section describes the advanced properties for a Sorter transformation:

### Case Sensitive

Determines whether the Data Integration Service considers case when sorting data. When you enable the Case Sensitive property, the Data Integration Service sorts uppercase characters higher than lowercase characters. The Developer tool sets the Case Sensitive by default.

### Null Treated Low

Treats a null value as lower than any other value. Enable the property if you want the Data Integration Service to treat a null value as lower than any other value when it performs the sort operation.

### Sorter Cache Size

Amount of memory that the Data Integration Service allocates at the start of the mapping run to perform the sort operation. The Data Integration Service passes all incoming data into the Sorter transformation before it performs the sort operation. Select Auto to have the Data Integration Service automatically calculate the memory requirements at run time. Enter a specific value in bytes when you tune the cache size. Default is Auto.

### Work Directory

Directory where the Data Integration Service temporarily stores data if the amount of incoming data is greater than the Sorter cache size. After the Data Integration Service sorts data, it deletes the temporary files.

Enter multiple directories separated by semicolons to increase performance during cache partitioning. Cache partitioning creates a separate cache for each partition that processes the transformation.

Default is the TempDir system parameter. You can configure another system parameter or user-defined parameter in this field.

#### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

#### RELATED TOPICS:

- [“Cache Size” on page 68](#)

## Sorter Cache

The Data Integration Service creates a cache in memory to run the Sorter transformation. The Data Integration Service passes all incoming data into the Sorter transformation before it performs the sort operation. If the Data Integration Service requires more space than available in the memory cache, it temporarily stores data in the Sorter transformation work directory.

If you do not configure the cache size to sort all of the data in memory, a warning appears in the session log stating that the Data Integration Service made multiple passes on the source data. The Data Integration Service makes multiple passes on the data when it has to page information to disk to complete the sort. The message specifies the amount of memory required for a single pass, which is when the Data Integration Service reads the data once and performs the sort in memory without paging to disk. To optimize mapping performance, configure the cache size so that the Data Integration Service makes one pass on the data.

If the amount of incoming data is greater than the Sorter cache size, the Data Integration Service temporarily stores data in the Sorter transformation work directory. The Data Integration Service requires disk space of at least twice the amount of incoming data when storing data in the work directory.

For best performance, configure the Sorter cache size with a value less than or equal to the amount of available physical memory on the machine that runs the mapping. To sort data using a Sorter transformation, allocate at least 16 MB (16,777,216 bytes) of physical memory. Sorter cache size is set to Auto by default.

## Creating a Sorter Transformation

You can create reusable or non-reusable sorter transformations.

### Creating a Reusable Sorter Transformation

Create a reusable Sorter transformation to use in multiple mappings or mapplets.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.  
The **New** dialog box appears.
3. Select the Sorter transformation.
4. Click **Next**.
5. Enter a name for the transformation.

6. Click **Finish**.  
The transformation appears in the editor.
7. Click **New** to add a port to the transformation.
8. Edit the port to set the name, datatype, and precision.
9. On the **Sort** tab, choose the ports to sort by or select a sort list parameter.
10. Click the **Advanced** view and edit the transformation properties.

## Creating a Non-Reusable Sorter Transformation

Create a non-reusable Sorter transformation in a mapping or mapplets.

1. In a mapping or mapplet, drag a Sorter transformation from the Transformation palette to the editor.  
The transformation appears in the editor.
2. In the **Properties** view, edit the transformation name and the description.
3. On the **Ports** tab, click **New** to add ports to the transformation.
4. Edit the ports to set the name, datatype, and precision.
5. Select **Key** to indicate the port as sort key.
6. Click the **Advanced** tab and edit the transformation properties.

## Sorter Transformation Example

You have a database table PRODUCT\_ORDERS that contains information about all the orders which were placed by the customer.

| ORDER_ID | ITEM_ID | ITEM  | QUANTITY | PRICE |
|----------|---------|-------|----------|-------|
| 43       | 123456  | ItemA | 3        | 3.04  |
| 41       | 456789  | ItemB | 2        | 12.02 |
| 43       | 000246  | ItemC | 6        | 34.55 |
| 45       | 000468  | ItemD | 5        | 0.56  |
| 41       | 123456  | ItemA | 4        | 3.04  |
| 45       | 123456  | ItemA | 5        | 3.04  |
| 45       | 456789  | ItemB | 3        | 12.02 |

Use the Sorter transformation on PRODUCT\_ORDERS and specify the ORDER\_ID as the sort key with direction as descending.

After sorting the data, the Data Integration Service passes the following rows out of the Sorter transformation:

| ORDER_ID | ITEM_ID | ITEM  | QUANTITY | PRICE |
|----------|---------|-------|----------|-------|
| 45       | 000468  | ItemD | 5        | 0.56  |

| ORDER_ID | ITEM_ID | ITEM  | QUANTITY | PRICE |
|----------|---------|-------|----------|-------|
| 45       | 123456  | ItemA | 5        | 3.04  |
| 45       | 456789  | ItemB | 3        | 12.02 |
| 43       | 123456  | ItemA | 3        | 3.04  |
| 43       | 000246  | ItemC | 6        | 34.55 |
| 41       | 456789  | ItemB | 2        | 12.02 |
| 41       | 123456  | ItemA | 4        | 3.04  |

You need to find out the total amount and item quantity for each order. You can use the result of the Sorter transformation as an input to an Aggregator transformation. Use sorted input in Aggregator transformation to improve performance.

When you do not use sorted input, the Data Integration Service performs aggregate calculations as it reads. The Data Integration Service stores data for each group until it reads the entire source to ensure that all aggregate calculations are accurate. If you use sorted input and do not presort data correctly, you receive unexpected results.

The Aggregator transformation has the ORDER\_ID group by port, with the sorted input option selected. When you pass the data from the Sorter transformation, the Aggregator transformation groups ORDER\_ID to calculate the total amount for each order.

| ORDER_ID | SUM    |
|----------|--------|
| 45       | 54.06  |
| 43       | 216.42 |
| 41       | 36.2   |



## CHAPTER 41

# SQL Transformation

This chapter includes the following topics:

- [SQL Transformation Overview, 541](#)
- [SQL Transformation Ports, 542](#)
- [SQL Transformation Advanced Properties, 546](#)
- [SQL Transformation Query, 548](#)
- [Input Row to Output Row Cardinality, 550](#)
- [Filter Optimization with the SQL Transformation, 553](#)
- [SQL Transformation Example with an SQL Query, 555](#)
- [Stored Procedures, 558](#)
- [SQL Transformation Connection, 563](#)
- [Manually Creating an SQL Transformation, 564](#)
- [Creating an SQL Transformation from a Stored Procedure, 565](#)

## SQL Transformation Overview

The SQL transformation processes SQL queries midstream in a mapping. You can run SQL queries from the SQL transformation or you can configure the SQL transformation to run stored procedures from a database.

You can pass input port values to parameters in the query or stored procedure. The transformation can insert, delete, update, and retrieve rows from a database. You can run SQL DDL statements to create a table or drop a table midstream in a mapping. The SQL transformation is an active transformation. The transformation can return multiple rows for each input row.

You can import a stored procedure from a database to the SQL transformation. When you import the stored procedure, the Developer tool creates the transformation ports that correspond to the parameters in the stored procedure. The Developer tool also creates the stored procedure call for you.

To configure an SQL transformation to run a stored procedure, perform the following tasks:

1. Define the transformation properties including the database type to connect to.
2. Import a stored procedure to define the ports and create the stored procedure call.
3. Manually define ports for result sets or additional stored procedures that you need to run.
4. Add the additional stored procedure calls in the SQL Editor.

You can configure an SQL query in the transformation SQL Editor. When you run the SQL transformation, the transformation processes the query, returns rows, and returns any database error.

To configure an SQL transformation to run a query, perform the following tasks:

1. Define the transformation properties including the database type to connect to.
2. Define the input and output ports.
3. Create an SQL query in the SQL Editor.

After you configure the transformation, configure the SQL transformation in a mapping and connect the upstream ports. Preview the data to verify the results.

## SQL Transformation Ports

When you create an SQL transformation, the Developer tool creates the **SQLException** port by default. Add input ports, output ports, and pass-through ports in the **Ports** view.

The SQL transformation has the following types of ports:

### Input

Receives source data that you can use in an SQL query.

### Output

Returns database data from an SQL SELECT query.

### Pass-through

Input-output ports that pass source data through the transformation without changing it.

### SQLException

Returns SQL errors from the database. If no errors occur, returns NULL.

### NumRowsAffected

Returns the total number of database rows affected by INSERT, DELETE, and UPDATE query statements for an input row. The Developer tool creates this port when you choose to include the update statistics in the output row.

### Return Value

Receives the return value from a stored procedure.

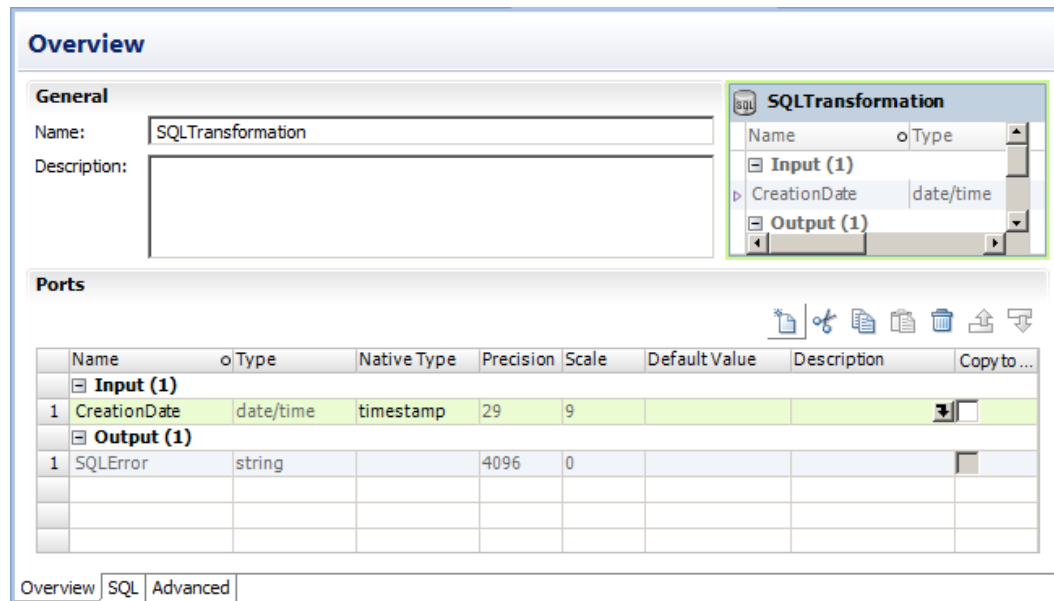
## Input Ports

You can reference SQL transformation input ports with parameter binding in any type of SQL statement or stored procedure. You can create input ports in the SQL transformation for data that you do not intend to pass to output ports.

You must manually add ports if you are configuring an SQL query that has input parameters. When you import a stored procedure to the SQL transformation, the SQL transformation creates the input ports. You can add pass-through ports to pass data through the transformation without changing it.

You can add ports in the **Overview** view. When you add a port, enter the native datatype for the port. The native datatype is a datatype that is valid for the database that you are connecting to. When you configure a native datatype, a transformation datatype appears. If you drag rows to the SQL transformation, the Developer tool sets the native datatype based on datatypes that are valid for the database you are connecting to. Verify that the datatypes for columns that you use in the query are the same datatypes as the columns in the database.

The following figure shows the **CreationDate** input port in a reusable SQL transformation:



To add input ports, click **Input** in the **Ports** panel. Click **New**.

**Note:** If you select **Copy to Output** for a port, the input port becomes a pass-through port. Pass-through ports appear in the **Input** and **Output** sections of the **Ports** view.

## Output Ports

SQL transformation output ports return values from a query statement or from a stored procedure.

You must define the output ports when you manually configure a SQL transformation. Define an output port for each stored procedure output parameter or for each port that a SELECT statement returns.

When you import a stored procedure, the Developer tool creates an output port for each output parameter that the procedure returns. If the procedure returns a result set, you must manually define the output ports in the result set. A stored procedure can return a result set and it can return output parameters that are not part of the result set in the same run. You must define the output ports for the result set fields and for the output parameters.

When you configure an output port, choose the native datatype for the port. The output port native datatype must match the datatype of the corresponding column in the database. When you configure the native datatype, the Developer tool defines the transformation datatype for the port.

For example, the SQL transformation contains the following SQL query for an Oracle database:

```
SELECT FirstName, LastName, Age FROM EMPLOYEES
```

You might configure the following output ports and the native datatypes in the SQL transformation:

| Output Port | Native Datatype | Transformation Datatype |
|-------------|-----------------|-------------------------|
| FirstNm     | varchar2        | string                  |
| LastNm      | varchar2        | string                  |
| Age         | number          | double                  |

The number of the output ports and the order of the output ports must match the number and the order of the columns that the query or stored procedure returns. When the number of output ports is more than the number of columns in the query or stored procedure, the extra ports return a null value. When the number of output ports is less than the number of columns in the SQL, the Data Integration Service generates a row error.

If you change the database type that the transformation connects to, the Developer tool changes the native types of the output ports. The Developer tool might not choose the correct datatype for all the ports. If you change the database type, verify that the native datatype for each output port is the same datatype as the column in the database. For example, the Developer tool might choose nVarchar2 for a Oracle database column. You might need to change the datatype to varchar2.

Configure output ports in the SQL transformation **Overview** view.

## Pass-through Ports

Pass-through ports are input-output ports that pass data through the transformation without changing the data. The SQL transformation returns data in the pass-through ports whether an SQL query returns rows or not.

When the input row contains a SELECT query statement, the SQL transformation returns the data in the pass-through port for each row it returns from the database. If the query result contains multiple rows, the SQL transformation repeats the pass-through data in each row.

When a query returns no rows, the SQL transformation returns the pass-through column data with null values in the output columns. For example, queries that contain INSERT, UPDATE, and DELETE statements return no rows. When the query has errors, the SQL transformation returns the pass-through column data, the SQLError message, and null values in the output ports.

You cannot configure a pass-through port to return data from a SELECT query.

To create a pass-through port, create an input port and select **Copy to Output**. The Developer tool creates an output port and adds an "\_output" suffix to the port name. You cannot change the output port that the Developer tool creates for a pass-through port. You cannot create an output port with the "\_output" suffix.

The following figure shows a Name pass-through port in a reusable SQL transformation:

The screenshot shows the 'Overview' tab of a reusable SQL transformation. The 'General' section has 'Name: SQLTransformation' and an empty 'Description' field. The 'Ports' section contains a table with the following data:

|                   | Name         | Type      | Native Type | Precision | Scale | Default Value | Description | Copy to ...                         |
|-------------------|--------------|-----------|-------------|-----------|-------|---------------|-------------|-------------------------------------|
| <b>Input (2)</b>  |              |           |             |           |       |               |             |                                     |
| 1                 | Name         | string    | varchar2    | 29        | 0     |               |             | <input checked="" type="checkbox"/> |
| 2                 | CreationDate | date/time | timestamp   | 29        | 9     |               |             | <input type="checkbox"/>            |
| <b>Output (2)</b> |              |           |             |           |       |               |             |                                     |
| 1                 | SQLError     | string    |             | 4096      | 0     |               |             | <input type="checkbox"/>            |
| 2                 | Name_output  | string    | varchar2    | 29        | 0     |               |             | <input type="checkbox"/>            |

The 'SQLTransformation' preview on the right shows the 'Input (2)' section with 'Name' (string) and 'CreationDate' (date/time) ports.

## SQLError Port

The SQLError port returns SQL errors from the database from stored procedures or SQL queries.

The following figure shows the SQLError port in a reusable SQL transformation:

The screenshot shows the 'Overview' tab of a reusable SQL transformation. The 'General' section has 'Name: SQLTransformation' and an empty 'Description' field. The 'Ports' section contains a table with the following data:

|                   | Name     | Type   | Native Type | Precision | Scale | Default Value | Description | Copy to ...              |
|-------------------|----------|--------|-------------|-----------|-------|---------------|-------------|--------------------------|
| <b>Input (0)</b>  |          |        |             |           |       |               |             |                          |
| <b>Output (1)</b> |          |        |             |           |       |               |             |                          |
| 1                 | SQLError | string |             | 4096      | 0     |               |             | <input type="checkbox"/> |

The 'SQLTransformation' preview on the right shows the 'Output (1)' section with 'SQLError' (string) port.

When the SQL query contains syntax errors, the SQLError port contains the error text from the database. For example, the following SQL query generates a row error from an Oracle database:

```
SELECT Product_ID FROM Employees
```

The Employees table does not contain Product\_ID. The Data Integration Service generates one row. The SQL\_Error port contains the error text in one line:

```
ORA-0094: "Product ID": invalid identifier Database driver error... Function Name:
Execute SQL Stmt: SELECT Product_ID from Employees Oracle Fatal Error
```

You can configure multiple query statements in the SQL query or you can call multiple stored procedures. When you configure the SQL transformation to continue on SQL error, the SQL transformation might return rows for one query statement, but return database errors for another query statement. The SQL transformation returns any database error in a separate row.

## Number of Rows Affected

Enable the NumRowsAffected output port to return the number of rows that the INSERT, UPDATE, or DELETE query statements change for each input row. You can configure the NumRowsAffected output port for SQL queries.

The Data Integration Service returns the NumRowsAffected for each statement in the query. NumRowsAffected is disabled by default.

When you enable NumRowsAffected and the SQL query does not contain an INSERT, UPDATE, or DELETE statement, NumRowsAffected is zero in each output row.

When the SQL query contains multiple statements, the Data Integration Service returns the NumRowsAffected for each statement. NumRowsAffected contains the sum of the rows that the INSERT, UPDATE, and DELETE statements change for an input row.

For example, a query contains the following statements:

```
DELETE from Employees WHERE Employee_ID = '101';
SELECT Employee_ID, LastName from Employees WHERE Employee_ID = '103';
INSERT into Employees (Employee_ID, LastName, Address) VALUES ('102', 'Gein', '38 Beach Rd')
```

The DELETE statement affects one row. The SELECT statement does not affect any row. The INSERT statement affects one row.

The Data Integration Service returns one row from the DELETE statement. NumRowsAffected is equal to one. The Data Integration Service returns one row from the SELECT statement, NumRowsAffected is zero. The Data Integration Service returns one row from the INSERT statement with NumRowsAffected equal to one.

## SQL Transformation Advanced Properties

You can change the SQL transformation properties at any time. The default database type is Oracle. If the database you need to connect to is another database type, change the database type before you add ports to the transformation.

Configure the following properties on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal. When you configure the SQL transformation tracing level to Verbose Data, the Data Integration Service writes each SQL query it prepares to the mapping log.

**Connection type**

Describes how the Data Integration Service connects to the database. The connection type is static. The Data Integration Service connects one time to the database. Select a database connection object in the SQL transformation. Read only.

**DB Type**

Type of database that the SQL transformation connects to. Choose a database type from the list. You can choose Oracle, Microsoft SQL Server, IBM DB2, or ODBC. The database type affects the datatypes that you can assign on the **Ports** tab. When you change the database type, the Developer tool changes the port datatypes for input, output, and pass-through ports.

**Continue on Error Within Row**

Continues processing the remaining SQL statements in a query after an SQL error occurs.

**Include Statistics as Output**

Adds a NumRowsAffected output port. The port returns the total number of database rows that INSERT, DELETE, and UPDATE query statements update for an input row.

**Max Output Row Count**

Defines the maximum number of rows the SQL transformation can output from a SELECT query. To configure unlimited rows, set Max Output Row Count to zero.

**Query Description**

Description of the SQL query that you define in the transformation.

**SQL Mode**

Determines whether the SQL query is an external script or whether the query is defined in the transformation. The SQL Mode is Query. The SQL transformation runs a query that you define in the SQL Editor. Read only.

**SQL Query**

Displays the SQL query that you configure in the SQL Editor.

**Has Side Effects**

Indicates that the SQL transformation performs a function besides returning rows. The SQL transformation has a side effect when the SQL query updates a database. Enable **Has Side Effects** when the SQL query contains a statement such as as CREATE, DROP, INSERT, UPDATE, GRANT, or REVOKE.

The SQL transformation also has a side effect if the transformation returns NULL rows for SELECT statements that return no results. The rows might contain pass-through port values, SQL error information, or the NUMRowsAffected field.

Disable the **Has Side Effects** property in order to allow push-into optimization or early selection optimization. Default is enabled.

**Return Database Output Only**

The SQL transformation does not generate rows for SELECT statements that return 0 results, rows for other statements such as INSERT, UPDATE, DELETE, or COMMIT, or null rows.

**Enable Push-Into Optimization**

Enables the Data Integration Service to push the logic from a Filter transformation in the mapping to the SQL in the SQL transformation.

**Maintain Row Order**

Maintain the row order of the input data to the transformation. Select this option if the Data Integration Service should not perform any optimization that can change the row order.

When the Data Integration Service performs optimizations, it might lose an order established earlier in the mapping. You can establish order in a mapping with a sorted flat file source, a sorted relational source, or a Sorter transformation. When you configure a transformation to maintain row order, the Data Integration Service considers this configuration when it performs optimizations for the mapping. The Data Integration Service performs optimizations for the transformation if it can maintain the order. The Data Integration Service does not perform optimizations for the transformation if the optimization would change the row order.

#### Partitionable

The transformation can be processed with multiple threads. Clear this option if you want the Data Integration Service to use one thread to process the transformation. The Data Integration Service can use multiple threads to process the remaining mapping pipeline stages.

Disable partitioning for an SQL transformation when the SQL queries require that the transformation be processed with one thread. Or, you might want to disable partitioning for an SQL transformation so that only one connection is made to the database.

## SQL Transformation Query

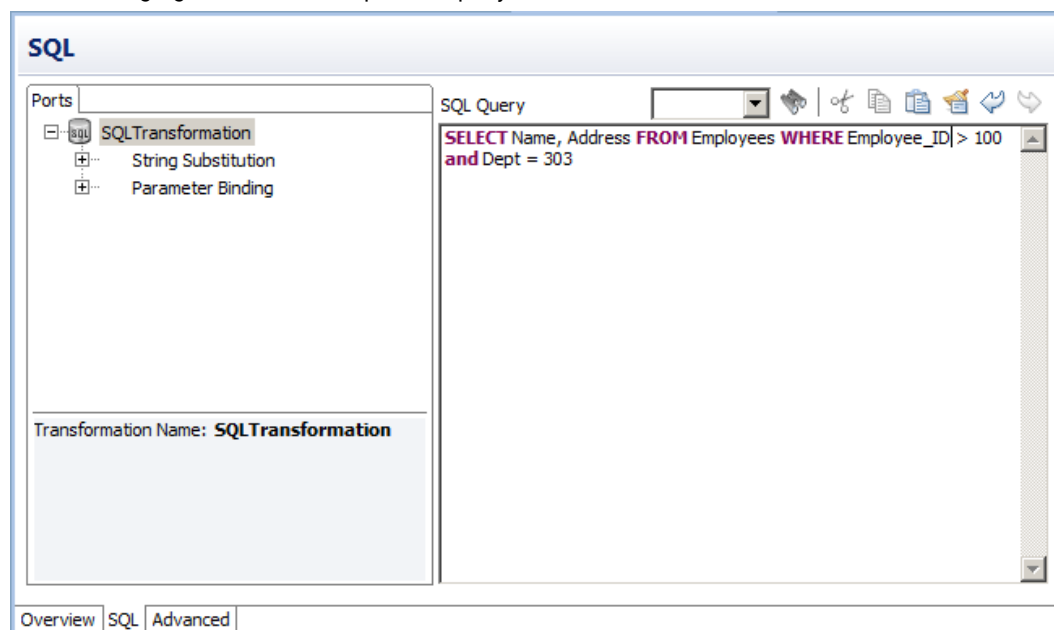
Create an SQL query in the SQL Editor to retrieve rows from a database or to update the database.

To create a query, type the query statement in the SQL Editor in the SQL view. The SQL Editor provides a list of the transformation ports that you can reference in the query. You can double-click a port name to add it as a query parameter.

When you create a query, the SQL Editor validates the port names in the query. It also verifies that the ports you use for string substitution are string datatypes. The SQL Editor does not validate the syntax of the SQL query.

You can use constants in the SQL query. Enclose each string in a single quote (').

The following figure shows a sample SQL query:





You can create a static SQL query. The query statement does not change, but you can include parameters to change values. The Data Integration Service runs the query for each input row.

## Define the SQL Query

Define an SQL query that runs the same query statements for each input row. You can change the query columns or table based on input port values in the row. You can also change the values in the WHERE clause based on input port values.

To change the data values in the WHERE clause for each input row, configure parameter binding.

To change the query columns or to change the table based on input port values, use string substitution.

## Parameter Binding

To change the data in the query, configure the query parameters and bind the query parameters to input ports in the transformation. When you bind a parameter to an input port, identify the port by name in the query. The SQL Editor encloses the port name in question marks (?). The query data changes based on the value of the data in the port.

The following queries use parameter binding:

```
DELETE FROM Employee WHERE Dept = ?Dept?
INSERT INTO Employee(Employee_ID, Dept) VALUES (?Employee_ID?, ?Dept?)
UPDATE Employee SET Dept = ?Dept? WHERE Employee_ID > 100
```

The following SQL query has query parameters that bind to the Employee\_ID and Dept input ports of an SQL transformation:

```
SELECT Name, Address FROM Employees WHERE Employee_Num =?Employee_ID? and Dept = ?Dept?
```

The source might have the following rows:

| Employee_ID | Dept       |
|-------------|------------|
| 100         | Products   |
| 123         | HR         |
| 130         | Accounting |

The Data Integration Service generates the following query statements from the rows:

```
SELECT Name, Address FROM Employees WHERE Employee_ID = '100' and DEPT = 'Products'
SELECT Name, Address FROM Employees WHERE Employee_ID = '123' and DEPT = 'HR'
SELECT Name, Address FROM Employees WHERE Employee_ID = '130' and DEPT = 'Accounting'
```

## String Substitution

Use string variables to replace components of query statements. For example, you can use the string variable to replace the table name in a query. Or, you can substitute the column names in a SELECT statement.

To substitute the table name, configure an input port to receive the table name from each input row. In the SQL Editor, select the port from the **String Substitution** list of ports. The Developer tool identifies the input port by name in the query and encloses the name with the tilde (~).

The following query contains a string variable, ~Table\_Port~:

```
SELECT Emp_ID, Address from ~Table_Port~ where Dept = 'HR'
```

The source might pass the following values to the **Table\_Port** column:

**Table\_Port**

Employees\_USA

Employees\_England

Employees\_Australia

The Data Integration Service replaces the ~Table\_Port~ variable with the table name value in the input port:

```
SELECT Emp_ID, Address from Employees_USA where Dept = 'HR'
SELECT Emp_ID, Address from Employees_England where Dept = 'HR'
SELECT Emp_ID, Address from Employees_Australia where Dept = 'HR'
```

## Input Row to Output Row Cardinality

When the Data Integration Service runs a SELECT query, the SQL transformation returns a row for each row it retrieves. When the query does not retrieve data, the SQL transformation returns zero or one row for each input row.

### Query statement processing

When a SELECT query is successful, the SQL transformation might retrieve multiple rows. When the query contains other statements, the Data Integration Service might generate a row that contains SQL errors or the number of rows affected.

### Port configuration

The NumRowsAffected output port contains the number of rows that an UPDATE, INSERT, or DELETE statement changes for one input row. The SQL transformation returns the number of rows affected for each statement in a query. When the SQL transformation contains pass-through ports, the transformation returns the column data at least one time for each source row.

### The maximum row count configuration

The Max Output Row Count limits the number of rows the SQL transformation returns from SELECT queries.

### Error rows

The Data Integration Service returns row errors when it encounters connection errors or syntax errors. The SQL transformation returns errors to the SQLError port.

### Continue on SQL Error

You can configure the SQL transformation to continue processing when there is an error in an SQL statement. The SQL transformation does not generate a row error.

## Query Statement Processing

The type of SQL query determines how many rows the SQL transformation returns. The SQL transformation can return zero, one, or multiple rows. When the query contains a SELECT statement, the SQL transformation returns each column from the database to an output port. The transformation returns all qualifying rows.

The following table lists the output rows that the SQL transformation generates for different types of query statements when no errors occur in query mode:

| Query Statement                            | Output Rows                              |
|--|--|
| UPDATE, INSERT, DELETE only                | One row for each statement in the query. |
| One or more SELECT statements              | Total number of database rows retrieved. |
| DDL queries such as CREATE, DROP, TRUNCATE | One row for each statement in the query. |

## Port Configuration

When you enable Include Statistics as Output, the Developer tool creates the NumRowsAffected port. The Data Integration Service returns at least one row with the NumRowsAffected based on the statements in the SQL query.

The following table lists the output rows the SQL transformation generates if you enable NumRowsAffected:

| Query Statement                            | Output Rows  |
|--|--|
| UPDATE, INSERT, DELETE only                | One row for each statement with the NumRowsAffected for the statement.           |
| One or more SELECT statements              | Total number of database rows retrieved.<br>NumRowsAffected is zero in each row. |
| DDL queries such as CREATE, DROP, TRUNCATE | One row with zero NumRowsAffected.   |

## Maximum Output Row Count

You can limit the number of rows that the SQL transformation returns for SELECT queries. Configure the **Max Output Row Count** property to limit number of rows. When a query contains multiple SELECT statements, the SQL transformation limits total rows from all the SELECT statements.

For example, you set **Max Output Row Count** to 100. The query contains two SELECT statements:

```
SELECT * FROM table1; SELECT * FROM table2;
```

If the first SELECT statement returns 200 rows, and the second SELECT statement returns 50 rows, the SQL transformation returns 100 rows from the first SELECT statement. The SQL transformation returns no rows from the second statement.

To configure unlimited output rows, set **Max Output Row Count** to zero.

## Error Rows

The Data Integration Service returns row errors when it encounters a connection error or syntax error. The SQL transformation returns SQL errors to the SQLError port.

When you configure a pass-through port or the NumRowsAffected port, the SQL transformation returns at least one row for each source row. When a query returns no data, the SQL transformation returns the pass-through data and the NumRowsAffected values, but it returns null values in the output ports. You can remove rows with null values by passing the output rows through a Filter transformation.

The following table describes the rows that the SQL transformation generates for UPDATE, INSERT, or DELETE query statements:

| <b>NumRowsAffected Port or Pass-Through Port Configured</b> | <b>SQLError</b> | <b>Rows Output</b>  |
|---|-----------------|---|
| Neither port configured                                     | No              | One row with NULL in the SQLError port.   |
| Neither port configured                                     | Yes             | One row with the error in the SQLError port.  |
| Either port configured                                      | No              | One row for each query statement with the NumRowsAffected or the pass-through column data.            |
| Either port configured                                      | Yes             | One row with the error in the SQLError port, the NumRowsAffected port, or the pass-through port data. |

The following table describes the number of output rows that the SQL transformation generates for SELECT statements:

| <b>NumRowsAffected Port or Pass-Through Port Configured</b> | <b>SQLError</b> | <b>Rows Output</b>   |
|---|-----------------|--|
| Neither port configured                                     | No              | One or more rows, based on the rows returned from each SELECT statement.   |
| Neither port configured                                     | Yes             | One row greater than the sum of the output rows for the successful statements. The last row contains the error in the SQLError port.   |
| Either port configured                                      | No              | One or more rows, based on the rows returned for each SELECT statement: <ul style="list-style-type: none"><li>- If NumRowsAffected is enabled, each row contains a NumRowsAffected column with a value zero.</li><li>- If a pass-through port is configured, each row contains the pass-through column data. When the query returns multiple rows, the pass-through column data is duplicated in each row.</li></ul>   |
| Either port configured                                      | Yes             | One or more rows, based on the rows returned for each SELECT statement. The last row contains the error in the SQLError port: <ul style="list-style-type: none"><li>- When NumRowsAffected is enabled, each row contains a NumRowsAffected column with value zero.</li><li>- If a pass-through port is configured, each row contains the pass-through column data. When the query returns multiple rows, the pass-through column data is duplicated in each row.</li></ul> |

The following table describes the number of output rows that the SQL transformation generates for DDL queries such as CREATE, DROP, or TRUNCATE:

| NumRowsAffected Port or Pass-Through Port Configured | SQLError | Rows Output  |
|--|----------|--|
| Neither port configured                              | No       | One row with NULL in the SQLError port.  |
| Neither port configured                              | Yes      | One row that contains the error in the SQLError port.  |
| Either port configured                               | No       | One row that includes the NumRowsAffected column with value zero and the pass-through column data.                         |
| Either port configured                               | Yes      | One row with the error in the SQLError port, the NumRowsAffected column with value zero, and the pass-through column data. |

## Continue on SQL Error

You can choose to ignore an SQL error that occurs in a query statement. Enable **Continue on SQL Error within a Row**. The Data Integration Service continues to run the rest of the SQL statements for the row.

The Data Integration Service does not generate a row error. However, the SQLError port contains the failed SQL statement and error messages.

For example, a query might have the following statements:

```
DELETE FROM Persons WHERE FirstName = 'Ed';  
INSERT INTO Persons (LastName, Address) VALUES ('Gein', '38 Beach Rd')
```

If the DELETE statement fails, the SQL transformation returns an error message from the database. The Data Integration Service continues processing the INSERT statement.

Disable the **Continue on SQL Error** option to troubleshoot database errors and to associate errors with the query statements that caused the errors.

## Filter Optimization with the SQL Transformation

The Data Integration Service can apply filter optimization with an SQL transformation if the filter condition references only pass-through ports and the SQL transformation does not have side effects.

The SQL transformation has side effects under the following circumstances:

- The SQL query updates a database. The SQL query contains a statement such as as CREATE, DROP, INSERT, UPDATE, GRANT, or REVOKE.
- The transformation returns NULL rows for SELECT statements that return no results. The rows might contain pass-through port values, SQL error information, or the NUMRowsAffected field.

The Data Integration Service can apply the early selection and push-into optimization methods with the SQL transformation.

## Early Selection Optimization with the SQL Transformation

The Data Integration Service can perform early selection optimization with an SQL transformation if the filter condition references only pass-through ports and the SQL transformation does not have side effects.

The SQL transformation has side effects under the following circumstances:

- The SQL query updates a database. The SQL query contains a statement such as CREATE, DROP, INSERT, UPDATE, GRANT, or REVOKE.
- The transformation returns NULL rows for SELECT statements that return no results. The rows might contain pass-through port values, SQL error information, or the NUMRowsAffected field.

### Enabling Early Selection Optimization with the SQL Transformation

Enable early selection optimization in the SQL transformation if the SQL transformation has no side effects.

1. Enable the **Return Database Output Only** option in the SQL transformation **Advanced Properties**.
2. Clear **Has Side Effects** in the transformation **Advanced Properties**.
3. If the transformation has a **NumAffectedRows** port, remove the port.

## Push-Into Optimization with the SQL Transformation

With push-into optimization, the Data Integration Service pushes the filter logic from a Filter transformation in the mapping to the query in the SQL transformation.

Use the following rules and guidelines when you enable push-into optimization with the SQL transformation:

- The transformation SQL query must only contain SELECT statements.
- The transformation SQL query must be a valid subquery.
- The filter condition cannot refer to the SQL Error or NumRowsAffected fields.
- The names of the output ports must match the names of the columns in the SQL SELECT statement. When you reference an output port in a filter condition, the Data Integration Service pushes the corresponding port name to the SQL query. You can add aliases to the SQL if the columns in the query do not match the output port names. For example, `SELECT mycolname1 AS portname1, mycolname2 AS portname2`.
- The transformation cannot have side effects.

### Push-Into Optimization with the SQL Transformation Example

An SQL transformation retrieves orders by customer ID. A Filter transformation that appears after the SQL transformation returns only the rows where the order amount is greater than 1000.

The Data Integration Service pushes the following filter into a SELECT statement in the SQL transformation:

```
orderAmount > 1000
```

Each statement in the SQL query becomes a separate subquery of the SELECT statement that contains the filter.

The following query statement shows the original query statement as a subquery in the SELECT statement:

```
SELECT <customerID>, <orderAmount>, ... FROM (original query statements) ALIAS WHERE  
<orderAmount> > 1000
```

If the SQL query has multiple statements, each statement is included in a separate subquery. The subquery has the same syntax, including the WHERE clause.

The ports *customerID* and *orderAmount*, are the names of the output ports in the SQL transformation. The subquery does not include pass-through ports, the SQL error, or the SQL statistics ports. If you push multiple filters into the SQL transformation, the WHERE clause contains all the filters.

## Enabling Push-Into Optimization with the SQL Transformation

Enable push-into optimization by configuring properties on the SQL transformation **Advanced Properties** tab.

1. Clear **Has Side Effects**.
2. Enable **Return Database Output Only**.
3. Set **Max Out Row Count** to zero.
4. Enable push-into optimization.

# SQL Transformation Example with an SQL Query

You are a developer in the HR department of Hypostores corporation. Hypostores maintains employee payroll information in a separate database from the human resources employee data. The Human Resources department needs to query a single view of the employees and salaries across regions.

You want to create a logical data object mapping that shows a single view of the employee data and salary data in an employee logical data object.

Create a logical data object mapping with the employee data source. Include an SQL transformation to retrieve the salary and hire date from the payroll database.

## Logical Data Object Mapping

The logical data object mapping contains the following objects:

### Employee table

Input relational table of employee data from the Human Resources database.

### Salary table

A table in the Payroll database that contains the employee salary and hire date. The database is an Oracle database.

### SQL transformation

Transformation that retrieves the hire date and salary for each employee row. The transformation connects to a Payroll database and runs an SQL query against the Salary table in the database.

### Logical data object

Contains the combined view of the employee and the salary data. The logical data object receives the output from the SQL transformation.

### SQLErrors file

The SQLErrors file is flat file that contains any SQL error from the database. The Data Integration Service writes at least one row to the SQLErrors file for each input row. If no SQL errors occur, the SQLError column contains NULL. Review the SQLErrors file to troubleshoot errors.

## Salary Table

The Salary table is a relational table in the Payroll database. The table contains employee data that the Payroll department maintains. The SQL transformation retrieves the hire date and the employee salary from the Salary table.

The following table shows some rows from the Salary table:

| Employee_Num | HireDate  | Salary |
|--------------|-----------|--------|
| 10           | 3-May-97  | 232000 |
| 11           | 11-Sep-01 | 444000 |
| 12           | 17-Oct-89 | 656000 |
| 13           | 13-Aug-07 | 332100 |

## Employee Table

The source is the Employee table from the Human Resources database.

The following table shows sample rows from the Employee table:

| EmpID | LastName | FirstName | DeptId | Phone          |
|-------|----------|-----------|--------|----------------|
| 10    | Smith    | Martha    | FIN    | (415) 552-1623 |
| 11    | Jones    | Cynthia   | ENG    | (415) 552-1744 |
| 12    | Russell  | Cissy     | SLS    | (415) 552-1656 |
| 13    | Goyal    | Girish    | FIN    | (415) 552-1656 |

## SQL Transformation

The SQL transformation retrieves the employee hire date and salary from the Salary table of the Payroll database. The Salary table is in an Oracle database.

Use the following steps to configure the SQL transformation:

1. Configure the SQL transformation properties.
2. Define the ports.
3. Create the SQL query.
4. Configure the database connection for the SQL transformation.

### Define SQL Transformation Properties

Configure the SQL transformation properties in the **Advanced Properties** view.

Configure the following properties:



### Database type

The database type is Oracle. When you define the ports, you can choose port datatypes that are applicable for Oracle.

### Continue on Error Within Row

Disable. Stop processing if an SQL error occurs in the row.

### Include Statistics as Output

Disable. Do not create the NumRowsAffected output port.

## Define the Ports

Define input ports for each column in the employee source table. Select **Copy to Output** to change the input ports to pass-through ports for the columns. When you select **Copy to Output**, the Developer tool creates the corresponding output port for each port that you copy.

Create the following input pass-through ports:

| Name      | Type    | Native Type | Precision | Scale | Copy to Output |
|-----------|---------|-------------|-----------|-------|----------------|
| EmpID     | decimal | number(p,2) | 4         | 0     | x              |
| LastName  | string  | varchar2    | 30        | 0     | x              |
| FirstName | string  | varchar2    | 20        | 0     | x              |
| DeptID    | string  | varchar2    | 4         | 0     | x              |
| Phone     | string  | varchar2    | 16        | 0     | x              |

The SQL transformation has the following output ports:

| Name      | Type      | Native Type | Precision | Scale |
|-----------|-----------|-------------|-----------|-------|
| EmpID     | decimal   | number(p,s) | 4         | 0     |
| LastName  | string    | varchar2    | 30        | 0     |
| FirstName | string    | varchar2    | 20        | 0     |
| DeptID    | string    | varchar2    | 4         | 0     |
| Phone     | string    | varchar2    | 16        | 0     |
| HireDate  | date/time | timestamp   | 29        | 0     |
| Salary    | decimal   | number(p,s) | 8         | 2     |

The Developer tool adds the "\_output" suffix to each output port that it creates when you select **Copy to Output**.

Manually define the output ports for the hire date and salary columns. The SQL transformation returns the hire date and salary columns from the Salary table in the ports.

## Define the SQL Query

Create an SQL query to select the hiredate and salary for each employee from the Salary table.

Define the query in the SQL transformation SQL view.

Enter the following query in the SQL Editor:

```
select HIREDATE,SALARY,from Salary where EMPLOYEE_NUM =?EmpID?
```

Hiredate, Salary, and Employee\_Num are column names in the Salary table.

?EMPID? is a parameter that contains the value of the EmpID port.

## Define the Database Connection

In the **Runtime** view, select a database connection object for the database that the SQL transformation connects to. Select an Oracle database connection object.

## Output

Connect the SQLError port and the EmpID\_output port to the SQLErrors flat file. The SQLError port contains null values unless an SQL error occurs.

Connect EmpID and the other output ports to the logical data object.

The SQL transformation returns a row that contains data from the Employee table and includes the hire date and salary from the Salary table.

The following table shows some rows from the logical data object:

| EmpID | LastName | FirstName | DeptId | Phone          | HireDate          | Salary  |
|-------|----------|-----------|--------|----------------|-------------------|---------|
| 10    | Smith    | Martha    | FIN    | (415) 552-1623 | 19970303 00:00:00 | 2320.00 |
| 11    | Jones    | Cynthia   | ENG    | (415) 552-1744 | 20010911 00:00:00 | 4440.00 |
| 12    | Russell  | Cissy     | SLS    | (415) 552-1656 | 19891017 00:00:00 | 6560.00 |
| 13    | Goyal    | Girish    | FIN    | (415) 552-1660 | 20070813 00:00:00 | 3210.00 |

## Stored Procedures

You can call a stored procedure from an SQL transformation. You can use a stored procedure to automate tasks in a relational database. Stored procedures accept user-defined variables, conditional statements, and other features that standard SQL statements do not support.

The SQL transformation connects to a relational database to run the stored procedure. The SQL transformation can call stored procedures from Oracle, IBM DB2, Microsoft SQL Server, Sybase, and ODBC. A stored procedure is kept in the database, and it runs in the database.

Create an ODBC connection to call a stored procedure from a Sybase database. You must also create an ODBC connection to call a stored procedure from a Microsoft SQL Server database on non-Windows operating systems.

A stored procedure is a pre-compiled collection of Transact-SQL, PL-SQL, or other database procedural statements. Stored procedure syntax varies based on the database.

You might use stored procedures to complete the following tasks:

- Check the status of a target database before loading data into it.
- Determine if enough space exists in a database.
- Perform a specialized calculation.
- Retrieve data by a value.
- Drop and re-create indexes.

You can use a stored procedure to perform a query or calculation that you would otherwise include in a transformation. For example, if you have a well-tested stored procedure for calculating sales tax, you can perform that calculation with the stored procedure instead of recreating the same calculation in an Expression transformation.

A stored procedure can accept input and then return a result set of rows. A stored procedure can run a DDL task that requires no input and then returns no output.

You can configure the SQL transformation to run more than one stored procedure. For each stored procedure that you configure, configure transformation ports to match the stored procedure parameters. Each stored procedure can pass data back to output ports.

The database that contains the stored procedure has user permissions. You must have permissions to run the stored procedure on the database.

**Note:** A stored function is similar to a stored procedure, except that a function returns a single value. The SQL transformation can run stored functions.

## SQL Transformation Ports for Stored Procedures

The SQL transformation input and output ports correspond to the input and output parameters in the stored procedure.

When you import a stored procedure, the Developer tool determines the database type from the database connection. It generates input and output ports in the SQL transformation from the parameters in the stored procedure. The Developer tool determines the native datatype of each port from the parameter of the stored procedure.

When you manually configure the SQL transformation, you need to configure the input and the output ports in the transformation. When you configure the database type, the SQL transformation changes the native datatype for each port based on the database type that you enter.

The following types of data can pass between the SQL transformation and the stored procedure:

### Input and output parameters

The SQL transformation sends parameters to the stored procedure and the SQL transformation receives parameters from the stored procedure in the input and output ports.

### Return value

If the stored procedure passes a return value, the Developer tool creates a Return Value port.

### SQL errors

The SQL transformation returns errors from the stored procedure in the SQLError port.

## Input and Output Parameters

When you call a stored procedure from an SQL transformation, each field that the call statement references identifies an input or output port. When you import a stored procedure, the Developer tool generates the stored procedure call statement. Otherwise, you need to manually configure the call statement.

You can edit the call statement in the **SQL** view of the transformation.

The call statement has the following format:

```
?RETURN_VALUE? = call <stored proc name>(?Field1?, ?Field2?, . . . )
```

Enclose the port names in question marks. The port names do not have to match the parameter names in the stored procedure. The output ports must be in the same order as parameters in a SELECT query.

You can use a stored procedure that contains INOUT parameters. The SQL transformation identifies INOUT parameters by the input port name. The output port has the prefix `output_`. The Data Integration service binds the input port and output port to the same parameter.

You can configure an SQL transformation to return a result set. When the stored procedure returns a result set, the Developer tool cannot create output ports for the columns in the result set. When you import the stored procedure, you must manually enter the ports and configure the stored procedure call.

## Return Value

A return value is a code or text string that defines that status of the stored procedure. When the stored procedure has a return value, the SQL transformation has a **Return Value** port.

Most databases can pass a return value after running a stored procedure. The return value can contain an integer value, or it can contain a value that you define in the stored procedure. For example, a stored procedure might return "Success" when the procedure succeeds.

If a stored procedure returns a result set instead of a single return value, the SQL transformation receives the first return value from the procedure.

## Stored Procedure Result Sets

You can configure a SQL transformation to receive a result set from a stored procedure. A stored procedure returns multiple rows in a result set. The SQL transformation can return each row to the mapping.

The following stored procedure returns a result set:

```
CREATE OR REPLACE FUNCTION fetchEMPinfo
(p_State IN VARCHAR2 )
return types.cursor_type
AS
my_cursor types.cursor_type;
BEGIN
OPEN my_cursor FOR SELECT EMP_ID, NAME, CITY FROM EMP WHERE STATE = p_State ORDER BY
EMP_ID;
RETURN my_cursor;
END;
```

When you import the stored procedure, the Developer tool creates a stored procedure call statement similar to the following syntax:

```
call FETCHEMPINFO (?P_STATE?)
```

The input parameter is `p_state`. The Developer tool does not create the output ports for you. You must manually create the output ports with the same datatypes as the stored procedure parameters.

For example, the `resultSet` contains the `EMP_ID`, `EMPNAME`, and `CITY` columns. Create output ports for these columns.

You must also manually update the SQL call with the output columns using the following syntax:

```
(?EMP_ID?,?EMPNAME?,?CITY?) = call FETCHEMPINFO (?P_STATE?)
```

## Result Sets with Different Databases

Configure stored procedures to return result sets using different syntax based on the database type.

### Oracle

An Oracle stored function returns results with a cursor:

```
create or replace function sp_ListEmp return types.cursorType
as
    l_cursor    types.cursorType;
begin
    open l_cursor for select ename, empno from emp order by ename;
    return l_cursor;
end;
```

Oracle also accepts cursors as input parameters. You cannot configure cursors as input parameters with the SQL transformation.

### Microsoft SQL Server

A Microsoft SQL Server stored procedure returns a result set stored procedure with a select statement in the procedure body or with the return type explicitly declared as a table.

```
Create  PROCEDURE InOut(
@inout varchar(100) OUT
)
AS
BEGIN
set @inout = concat(@inout, '___')
select * from mytable;
END
```

### IBM DB2

An IBM DB2 stored procedure can return a resultset with an open cursor. The number of result sets it returns are declared in the RESULT SET clause. The stored procedure opens a cursor and returns it. The below example returns 2 open cursors.

```
CREATE PROCEDURE TESTMULTIRS
    (IN i_cmact CHARACTER(5))
RESULT SETS 2
LANGUAGE SQL
BEGIN

DECLARE csnum INTEGER;

--Declare serial cursors to consume less resources
--You do not need a rollable cursor.

DECLARE getDeptNo CHAR(50); --Be careful with the estimated length.
DECLARE getDeptName CHAR(200);
DECLARE c1 CURSOR WITH RETURN FOR s1;
SET getDeptNo = 'SELECT DEPTNO FROM DEPT';
SET getDeptName = 'SELECT DEPTNAME FROM DEPT';

PREPARE s1 FROM getDeptNo;
OPEN c1;

END;
```

## Sybase

A Sybase stored procedure returns a result set stored procedure with a select statement in the procedure body or with the return type explicitly declared as a table.

```
CREATE PROCEDURE FETCHEMPINFO
(
    @p_State VARCHAR(5),
    @e_id INT OUTPUT,
    @e_name VARCHAR(50) OUTPUT
)
AS
BEGIN
    SET NOCOUNT ON
    SELECT EMP_ID, NAME FROM EMP WHERE STATE = @p_State ORDER BY EMP_ID
    SET NOCOUNT OFF
    SELECT @e_id AS EMP_ID, @e_name AS NAME
    RETURN
END
GO

--Configure the following variables to execute the procedure.

DECLARE @p_State VARCHAR(5)
DECLARE @EMPID int
DECLARE @EMPNAME varchar(50)

SET @p_State = 'CA'
exec FETCHEMPINFO @p_State, @e_id = @EMPID, @e_name = @EMPNAME
GO
```

## Result Set Rows

Some stored procedures return output parameters in addition to the result set rows. The SQL transformation returns output parameters in the last row. It does not include the single-occurring output parameters in the result set rows.

For example, you write a stored procedure that receives an employee ID and returns the employee name in output parameter 1 and department in output parameter 2. The stored procedure also returns a row for each sick day that the employee took throughout the year. The row contains the date, the number of hours, and the reason for the absence.

The result set contains a different number of rows for each employee. Each row in the result set contains an empty employee name and department. The SQL transformation returns the employee name and department after the result set. The employee name and department appear in the last row.

## Stored Procedure Example

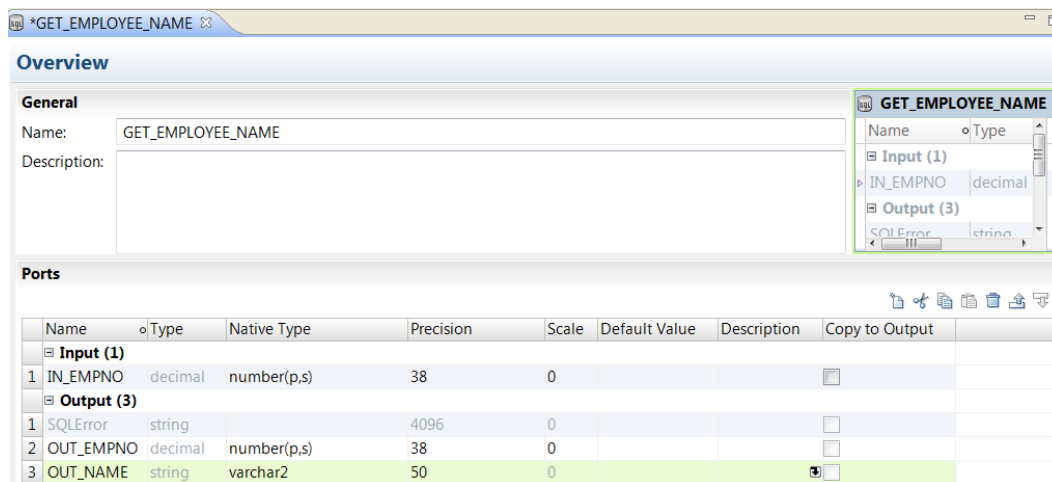
You can call a stored procedure that returns data to the SQL transformation.

The following stored procedure receives an employee number and returns one row with the employee number and the employee name:

```
CREATE OR REPLACE PROCEDURE SP_GETNAME
(IN_EMPNO IN NUMBER, OUT_EMPNO NUMBER, OUT_NAME OUT STRING)
AS
BEGIN
    SELECT EMP_KEY, EMP_NAME into OUT_EMPNO , OUT_NAME from EMP_TABLE where EMP_KEY=IN_EMPNO;
END;/"
```

To create the SQL transformation, import the stored procedure. The Developer tool creates the input ports and the output ports. The port names are the same as the parameter names in the stored procedure.

The following figure shows the ports for the SQL transformation:



The Developer tool creates the following stored procedure call to retrieve the employee name:

```
call SP_GETNAME (?IN_EMPNO?, ?OUT_EMPNO?, ?OUT_NAME?)
```

You can view the stored procedure call in the SQL Editor. Any SQL errors appear in the SQLError port.

## SQL Transformation Connection

Configure the SQL transformation connection in the transformation run-time properties. You might need to configure a run-time connection if you did not specify a connection when you created the transformation.

You can define a different connection name than the connection that you selected to create the SQL transformation. You must select a connection of the same database type as the database type in the SQL transformation **Advanced** properties.

You can configure a parameter for the SQL transformation connection name. You must define the parameter in the **Parameters** view of the mapping before you assign it to a run-time connection.

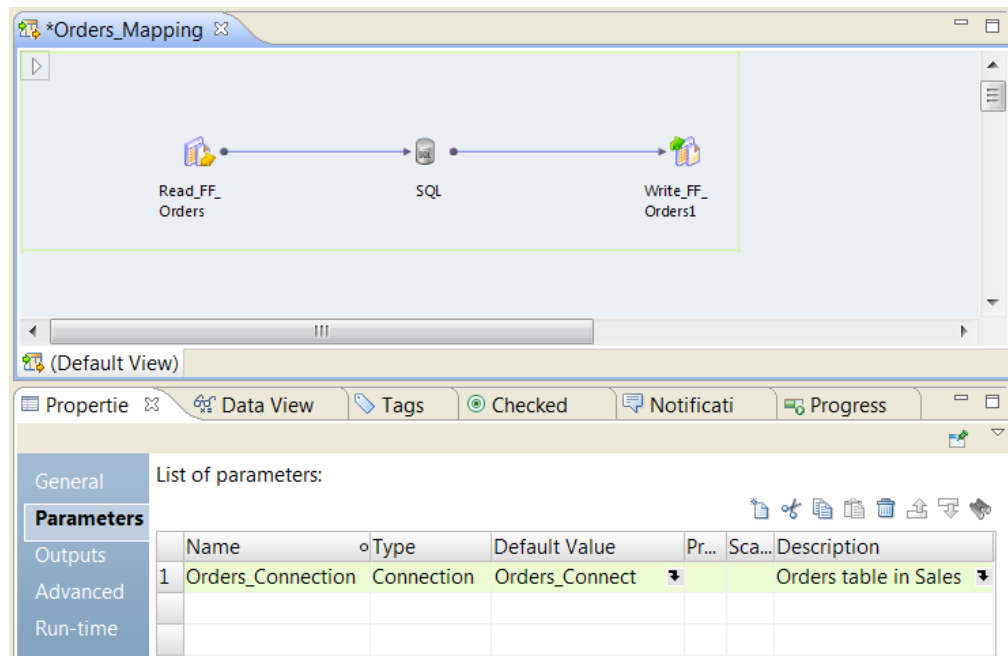
### Creating a Connection Name Parameter

You can specify a user-defined parameter in the run-time connection name for an SQL transformation. The Developer tool creates a mapping parameter for the connection instead of a transformation parameter.

1. Create a mapping that includes the SQL transformation.
2. Click the SQL transformation **Run-time** tab.
3. In the **Connection Name**, click the selection arrow and choose **Assign Parameters**.
4. In the **Assign Parameter** dialog box, click **New**.
5. In the **Parameters** dialog box, enter a connection parameter name and a description for the parameter. The parameter type defaults to connection.
6. Click **OK** in the Parameters dialog box and in the **Assign Parameters** dialog box.

The Developer tool creates a mapping parameter and assigns it to the Connection Name. The parameter name appears in the Run-time properties.

- To view a list of the mapping parameters, click inside the editor and then click the mapping **Parameters** tab.



## Manually Creating an SQL Transformation

You can manually create an SQL transformation. Manually create the transformation when you configure a transformation that runs an SQL query. You might also manually create a transformation that calls a stored procedure when the procedure is not available to import. When you manually create the transformation, you configure the input and output ports and type the SQL statements in the SQL Editor.

- Select a project or a folder in the **Object Explorer** view.
- Click **File > New > Transformation**.  
The **New** dialog box appears.
- Select the SQL transformation.
- Click **Next**.
- Select **Create as Empty**.
- Enter a name for the transformation and enter the repository location for the transformation.
- Click **Finish**
- Click the **Overview** view to add ports to the transformation.
- To add an input port, click **Input** in the **Ports** panel to indicate where to add the port. Click the **New** button and enter the port name, the native type, and the precision.  
The default database type is Oracle. The Developer tool shows native types for Oracle databases unless you change the database type on the **Advanced** view.
- To add an output port, click **Output** in the **Ports** panel before you add the port. Click the **New** button and enter the port name, the native type, and the precision.



The **SQLException** port is the first output port by default.

11. In the **Advanced** view, select the database type that the SQL transformation connects to. Configure other advanced properties for error handling and other optional properties.

When you choose the database type, the Developer tool changes the native datatypes of the ports on the **Overview** view.

12. Type the SQL query or stored procedure call on the **SQL** view. Select ports for parameter binding or string substitution in the **SQL Editor**.

If the stored procedure returns a result set, you must enter the stored procedure call with a syntax similar to the following syntax: (?Field1?,?Field2?,?Field3?) = **call** Stored\_Procedure\_Name (?Input\_Parm?).

## RELATED TOPICS:

- [“Define the SQL Query” on page 558](#)

# Creating an SQL Transformation from a Stored Procedure

You can configure an SQL transformation by importing a stored procedure from a database connection.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.  
The **New** dialog box appears.
3. Select the SQL transformation.
4. Click **Next**.
5. Select **Create from an existing stored procedure**.
6. Browse for and select a database connection.
7. Browse for and select the stored procedure to import.
8. Enter a name and location for the transformation.
9. Click **Finish**.

The Developer tool creates the ports and the stored procedure call.

10. If the stored procedure returns a result set, you must manually add the output ports and then reconfigure the stored procedure call.
  - a. In the **Overview** view, click **Output** in the **Ports** panel. Click the **New** button and enter the output port name, the native type, and the precision.
  - b. In the **SQL** view, change the stored procedure call to use the following syntax: (?Field1?,?Field2?,?Field3?) = **call** Stored\_Procedure\_Name (?Input\_Parm?)

You can select the input and the output parameters from the **Parameter Binding** list of ports in the SQL Editor.

## CHAPTER 42

# Standardizer Transformation

This chapter includes the following topics:

- [Standardizer Transformation Overview, 566](#)
- [Standardization Strategies, 566](#)
- [Standardization Properties, 567](#)
- [Configuring a Standardization Strategy, 568](#)
- [Standardizer Transformation Advanced Properties, 568](#)

## Standardizer Transformation Overview

The Standardizer transformation is a passive transformation that examines input strings and creates standardized versions of those strings.

The Standardizer transformation creates columns that contain standardized versions of input strings. The transformation can replace or remove strings in the input data when creating these columns.

For example, you can use the Standardizer transformation to examine a column of address data that contains the strings Street, St., and STR. You can replace all instances of these strings with the string St.

Within a Standardizer transformation, you can create multiple standardization strategies. Each strategy can contain multiple standardization operations. The Standardizer transformation provides a wizard that you use to create strategies.

## Standardization Strategies

Use standardization strategies to create columns with standardized versions of input strings.

When you configure a standardization strategy, you add one or more operations. Each operation implements a specific standardization task.

You can add the following types of operations to a standardization strategy:

### **Replace Reference Table Matches With Valid Values**

Replace strings that match reference table values with the "Valid" value from the reference table.

### **Replace Reference Table Matches With Custom Strings**

Replace strings that match reference table values with a user-defined replacement string.

**Remove Reference Table Matches**

Remove strings that match reference table values.

**Replace Custom Strings**

Replace user-defined strings with a user-defined replacement string.

**Remove Custom Strings**

Remove user-defined strings.

**Important:** You can change the order of operations. The order of operations can change the output of a strategy because each operation reads the results of the preceding operation.

## Standardization Properties

To configure properties for standardization strategies and operations, select the **Strategies** view in the Standardizer transformation.

### Strategy Properties

Strategy properties apply to all the operations within a strategy. You can configure the following strategy properties:

**Remove multiple spaces**

Replaces multiple consecutive spaces with one space.

**Remove trailing and leading spaces**

Removes spaces from the beginning and end of data strings.

**Delimiters**

Determines the delimiters that define search tokens. For example, if you choose "Semicolon," the Standardizer transformation searches the string "oranges;apples;" and finds the strings "oranges" and "apples." The transformation uses the space delimiter by default.

### Operation Properties

You can configure properties for the following types of standardization operations.

**Reference Table Operations**

Reference table operations include the following properties:

- **Reference table.** Determines the reference table you use to standardize data. Click **Browse** to select a reference table.
- **Case Sensitive.** Determines whether input strings must match the case of reference table entries.
- **Replace With.** Replaces input strings that match reference table entries with the text you provide. Applies to replacement operations only.
- **Scope.** Specifies the part of the input string that contains the reference table value.

**Custom String Operations**

Custom string operations include the following properties:

- **Match Tokens With.** Defines the search strings to find within input data.

- **Replace With.** Replaces input strings that match the search strings you specify. Applies to replacement operations only.
- **Scope.** Specifies the part of the input string to search.

## Configuring a Standardization Strategy

To configure a standardization strategy, edit the settings in the **Strategies** view of the Standardizer transformation.

1. Select the **Strategies** view.
2. Click **New**.  
The **New Strategy** wizard opens.
3. Click the **Inputs** field to select ports for the strategy.
4. Configure the strategy properties and click **Next**.
5. Choose an operation and click **Next**.
6. Configure the operation properties.
7. Optionally, click **Next** to add more operations to the strategy.
8. After you add all operations to the strategy, click **Finish**.
9. Optionally, add more strategies to the transformation.
10. Optionally, change the order that the transformation processes strategies or operations. Select an strategy or operation and click **Move Up** or **Move Down**.

## Standardizer Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Standardizer transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 43

# Union Transformation

This chapter includes the following topics:

- [Union Transformation Overview, 569](#)
- [Groups and Ports, 570](#)
- [Union Transformation Advanced Properties, 570](#)
- [Union Transformation Processing, 571](#)
- [Creating a Union Transformation, 571](#)

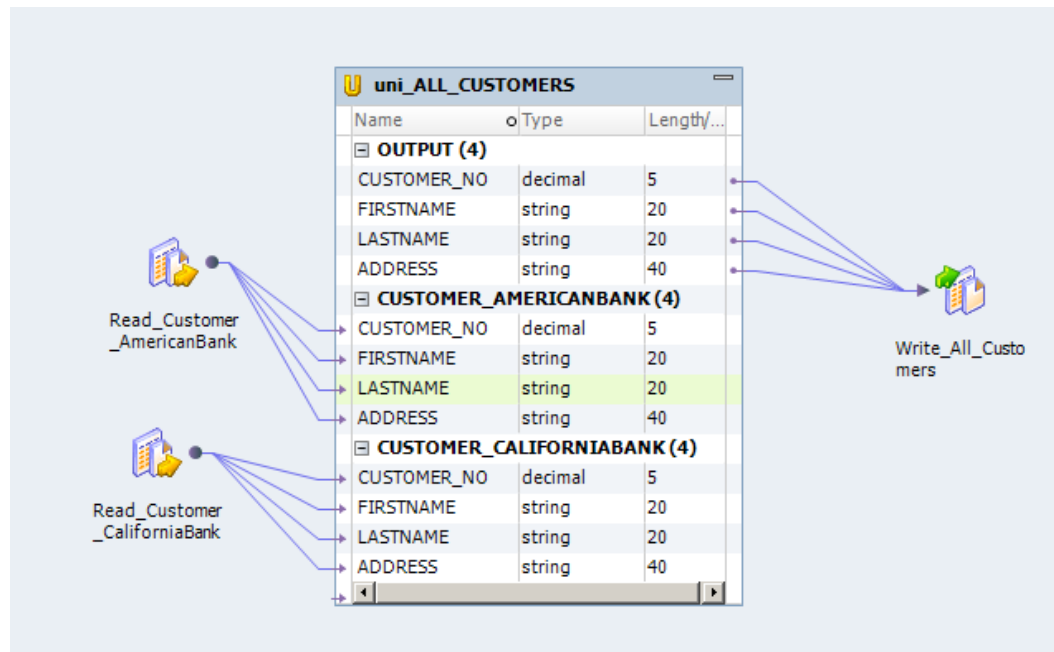
## Union Transformation Overview

Use the Union transformation to merge data from multiple pipelines or pipeline branches into one pipeline branch.

The Union transformation is an active transformation with multiple input groups and one output group. It merges sources with matching ports, and it passes data through an output group that has the same port structure as the input groups. Use a Union transformation in the Developer tool to merge data from multiple sources without removing the duplicate rows.

For example, you want to combine customer account data from American Bank and California Bank. You can create a mapping that contains a Union transformation to merge data from the source objects and write to a target object.

The following figure shows a mapping with a Union transformation:



## Groups and Ports

A Union transformation has multiple input groups and one output group. You can create one or more input groups. The Developer tool creates one output group. You cannot create, edit, or delete the output group. Each group must have matching ports.

To create ports, you can copy ports from a transformation, or you can manually create them. When you create ports, the Developer tool creates input ports in each input group and output ports in the output group. The Developer tool uses the output port names you specify for each input and output port. The Developer tool also uses the same metadata for each port, such as datatype, precision, and scale.

You can connect the input groups from different branches in a single pipeline or from different source pipelines. When you add a Union transformation to a mapping, you must verify that you connect the same ports in all input groups. If you connect a port in one input group, but do not connect the same port in another input group, the Data Integration Service passes NULLs to the unconnected port.

## Union Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service displays log details for the Union transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Union Transformation Processing

Use the Union transformation to merge data from multiple pipelines or pipeline branches into one pipeline branch. The Data Integration Service processes all input groups in parallel. It concurrently reads sources connected to the Union transformation and passes blocks of data to the input groups of the transformation. The Union transformation processes the blocks of data based on the order it receives the blocks from the Data Integration Service. The Union transformation does not block input data on the input groups.

## Creating a Union Transformation

You can create a reusable or non-reusable Union transformation.

### Creating a Reusable Union Transformation

Create a reusable Union transformation to use in multiple mappings or mapplets.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Transformation**.  
The **New** dialog box appears.
3. Select the Union transformation.
4. Click **Next**.
5. Enter a name for the transformation.
6. Click **Finish**.  
The transformation appears in the editor.
7. Click the **New** button to add a port to the transformation.
8. Edit the port to set the name, datatype, and precision.
9. Select the **Groups** view.
10. Click the **New** button to add an input group.
11. Click the **Advanced** view and edit the transformation properties.

### Creating a Non-Reusable Union Transformation

Create a non-reusable Union transformation in a mapping or mapplet.

1. In a mapping or mapplet, drag a Union transformation from the Transformation palette to the editor.  
The transformation appears in the editor.
2. On the **General** tab, edit the transformation name and the description.

3. Select all the ports from the upstream transformation and drag them to the Union transformation. The ports appear as ports in an input group and output group of the Union transformation.
4. Click **New** on the **Groups** tab in the **Properties** view to add an input group.  
Another input group appears which has similar ports as the existing input group.
5. Select the ports in the output group of the Union transformation and drag them to the downstream transformation in the mapping.



## CHAPTER 44

# Update Strategy Transformation

This chapter includes the following topics:

- [Update Strategy Transformation Overview, 573](#)
- [Update Strategy Transformations in Dynamic Mappings, 574](#)
- [Flagging Rows Within a Mapping, 574](#)
- [Specifying Update Options for Individual Targets, 575](#)

## Update Strategy Transformation Overview

The Update Strategy transformation is an active transformation that flags a row for insert, update, delete, or reject. Use an Update Strategy transformation to control changes to existing rows in a target based on a condition that you apply.

As an active transformation, the Update Strategy transformation might change the number of rows passed through it. The Update Strategy transformation tests each row to see if it meets a particular condition, and then flags the row accordingly. The transformation passes rows that it flags for insert, update, or delete to the next transformation. You can configure the transformation to pass rows flagged for reject to the next transformation or to drop rows flagged for reject.

For example, you might use the Update Strategy transformation to flag all customer rows for update when the mailing address has changed. Or, you might flag all employee rows for reject for people who no longer work for the organization.

## Setting the Update Strategy

To define an update strategy, complete the following steps:

1. To control how rows are flagged for insert, update, delete, or reject within a mapping, add an Update Strategy transformation to the mapping. Use an Update Strategy transformation to flag rows destined for the same target for different database operations, or to reject rows.
2. Define insert, update, and delete options for individual targets when you configure the mapping. On a target-by-target basis, you can allow or disallow inserts and deletes for all rows flagged for insert or delete. You can choose different ways to handle updates for all rows flagged for update.

# Update Strategy Transformations in Dynamic Mappings

You can use an Update Strategy transformation in a dynamic mapping. You can configure dynamic ports in the transformation and reference the generated ports.

You can reference a dynamic port or a generated port in the Update Strategy transformation. However, if the generated port does not exist at run time, the mapping fails.

If you use a dynamic port in the update strategy expression, the dynamic port can have no more than one generated port.

You can parameterize the update strategy expression. Use an expression type parameter and enter the entire expression as the default parameter value.

## Flagging Rows Within a Mapping

Add an Update Strategy transformation to a mapping to flag individual rows for insert, update, delete, or reject.

Define an update strategy expression to test each row to see if it meets a particular condition. Then, assign each row a numeric code to flag the row for a particular database operation.

The following table lists the constants for each database operation and their numeric equivalent:

| Operation | Constant  | Numeric Value |
|-----------|-----------|---------------|
| Insert    | DD_INSERT | 0             |
| Update    | DD_UPDATE | 1             |
| Delete    | DD_DELETE | 2             |
| Reject    | DD_REJECT | 3             |

The Data Integration Service treats any other value as an insert.

## Update Strategy Expressions

Enter an update strategy expression in the Expression Editor.

The update strategy expression uses the IIF or DECODE function from the transformation language to test each row. For example, the following IIF statement flags a row for reject if the entry date is after the apply date. Otherwise, the statement flags the row for update:

```
IIF( ( ENTRY_DATE > APPLY_DATE), DD_REJECT, DD_UPDATE)
```

You can configure parameters in an update strategy expression. Create parameters or browse parameters in the Expression Editor.

If the transformation is in a dynamic mapping, the generated fields in the transformation might change. You can parameterize the complete update strategy expression. If you use a parameter to define the expression,

the Developer tool cannot validate the expression. An expression parameter cannot contain another parameter.

## Update Strategy Transformation Advanced Properties

Configure advanced properties to help determine how the Data Integration Service processes data for the Update Strategy transformation.

You can define the following advanced properties for the Update Strategy transformation on the Advanced tab:

### **Forward Rejected Rows**

Determines whether the Update Strategy transformation passes rejected rows to the next transformation or drops rejected rows. By default, the Data Integration Service forwards rejected rows to the next transformation. The Data Integration Service flags the rows for reject and writes them to the reject file. If you do not select Forward Rejected Rows, the Data Integration Service drops rejected rows and writes them to the mapping log file.

### **Tracing Level**

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## Aggregator and Update Strategy Transformations

When you connect Aggregator and Update Strategy transformations as part of the same pipeline, put the Aggregator before the Update Strategy transformation. In this order, the Data Integration Service performs the aggregate calculation, and then flags rows that contain the results of this calculation for insert, update, delete, or reject.

If you put the Update Strategy before the Aggregator transformation, you must consider how the Aggregator transformation handles rows flagged for different operations. In this order, the Data Integration Service flags rows for insert, update, delete, or reject before it performs the aggregate calculation. How you flag a row determines how the Aggregator transformation treats values in that row used in the calculation. For example, if you flag a row for delete and then use the row to calculate the sum, the Data Integration Service subtracts the value in this row. If you flag a row for reject and then use the row to calculate the sum, the Data Integration Service does not include the value in this row. If you flag a row for insert or update and then use the row to calculate the sum, the Data Integration Service adds the value in this row to the sum.

## Specifying Update Options for Individual Targets

After you use an Update Strategy transformation to flag each row for a particular database operation, define insert, update, and delete options for each target in the mapping. You can disallow inserts or deletes for rows flagged for insert or delete. You can choose different ways to handle updates for all rows flagged for update.

Define the update strategy options in the Advanced properties of a target data object in a mapping. You can set the following update strategy options:

### **Insert**

Inserts all rows flagged for insert into a target. Default is enabled.

### **Delete**

Deletes all rows flagged for delete from a target. Default is enabled.

**Update Strategy**

Update strategy for existing rows. Select one of the following strategies:

- **Update as Update.** Updates all rows flagged for update. This is the default value.
- **Update as Insert.** Inserts all rows flagged for update.
- **Update else Insert.** Updates all rows flagged for update if they exist in the target and then inserts any remaining rows marked for insert.

**Truncate Table**

Truncates the target before loading data. Default is disabled.

## CHAPTER 45

# Web Service Consumer Transformation

This chapter includes the following topics:

- [Web Service Consumer Transformation Overview, 577](#)
- [WSDL Selection, 580](#)
- [Web Service Consumer Transformation Ports, 580](#)
- [Web Service Consumer Transformation Input Mapping, 582](#)
- [Web Service Consumer Transformation Output Mapping, 585](#)
- [Web Service Consumer Transformation Advanced Properties, 588](#)
- [Filter Optimizations, 592](#)
- [Creating a Web Service Consumer Transformation, 594](#)
- [Web Service Consumer Transformation Example, 595](#)

## Web Service Consumer Transformation Overview

The Web Service Consumer transformation connects to a web service as a web service client to access or transform data. The Web Service Consumer transformation is a multiple-group transformation.

A web service uses open standards, such as SOAP, WSDL, and XML. SOAP is the communications protocol for web services. The web service client request and the web service response are SOAP messages. A WSDL is an XML schema that describes the protocols, formats, and signatures of the web service operations.

Web service operations include requests for information, requests to update data, or requests to perform tasks. For example, the Web Service Consumer transformation sends a SOAP request to run a web service operation called `getCustomerOrders`. The transformation passes a customer ID in the request. The web service retrieves the customer and order information. The web service returns the information to the transformation in a SOAP response.

The Web Service Consumer transformation connects to a web service using an endpoint URL defined in the WSDL, in a web services connection, or in an endpoint URL input port. You enable security for web services in a web services connection.

## SOAP Messages

The Web Service Consumer transformation uses Simple Object Access Protocol (SOAP) to exchange information with the web services provider and to request web services. SOAP defines the format for web service request and response messages.

When you transform data with a Web Service Consumer transformation, the transformation generates a SOAP request and connects to the web service. The transformation connects to the web service using an endpoint URL defined in the WSDL object, in a web services connection, or in an endpoint URL input port. The SOAP request contains the information that the web service requires to run the requested operation. The web service operation returns data to the transformation in a SOAP response. The transformation maps data from the SOAP response and returns the data in output ports.

The Web Service Consumer transformation encodes the SOAP message headers in ISO-8859-1.

The transformation can process SOAP messages with document/literal encoding. The document/literal style requires an XML schema to describe the SOAP message. SOAP messages are formed from the XML. When a SOAP message contains multiple-occurring elements, the groups of elements form levels in the XML hierarchy. The groups are related when one level is nested within another.

A SOAP request message can contain hierarchical data. For example, the Web Service Consumer transformation sends a request to add customer orders to a sales database. The transformation passes two groups of data in a SOAP request message. One group contains a customer ID and name, and the other group contains order information. The order information occurs multiple times.

A SOAP response message can contain hierarchical data. For example, the Web Service Consumer transformation generates a SOAP request for customer orders. The web service returns an order header and multiple-occurring order detail elements in the SOAP response.

## WSDL Files

A WSDL file contains a description of the data to be passed to the web service so that the sender and the receiver understand the data to exchange. You must import a WSDL file to the repository before you can create a Web Service Consumer transformation.

The WSDL describes the operations to perform on the data and a binding to a protocol or transport, so that the web service consumer can send the request message in the correct format. The WSDL describes the network address to connect to the web service.

The WSDL includes information about how to encode SOAP request and response messages. SOAP encoding determines the format of the SOAP message body. It describes the format for request and response messages that the web service uses to communicate to the web service consumer. Web service developers can use a variety of toolkits to create web services. Toolkits support different ways of encoding SOAP messages.

The Web Service Consumer transformation supports the document/literal SOAP encoding style. You can use WSDL 1.1 with the Web Service Consumer transformation. You cannot use WSDL attachments such as MIME, DIME, and MTOM messages.

## Operations

A web service contains an operation for each action supported by the web service.

For example, a web service can have an operation named `getcustomerid` that receives a customer name and responds with the customer details. The operation input includes an element for the customer name. The operation output includes elements for customer details based on the customer name.

When you configure a Web Service Consumer transformation, you define how the transformation maps data to the operation input and how the transformation maps data from the operation output. You configure the following information in the transformation:

**Input mapping**

Define how to map the transformation input ports to the web service operation input nodes. The operation input defines the elements in the SOAP request for the operation.

**Output mapping**

Define how to map the web service operation output nodes to the transformation output ports. The operation output defines the elements in a SOAP response for the operation.

## Web Service Security

You enable security for web services in a web services connection. You can configure the following types of security:

**Web Service Security**

The Data Integration Service can include a web service security header when it sends a SOAP request to the web service provider. The web service security header contains authentication information so the web service provider can authenticate the Data Integration Service.

The Web Service Consumer transformation supplies the user name token. The Data Integration Service creates a separate security SOAP header in the SOAP request and passes the request to the web service provider.

You can use the following types of web service security in a web services connection:

- **PasswordText.** The Data Integration Service does not change the password in the WS-Security SOAP header.
- **PasswordDigest.** The Data Integration Service combines the password with a nonce and a time stamp. The Data Integration Service applies a SHA hash on the password, encodes it in base64 encoding, and uses the encoded password in the SOAP header.

**Transport layer security**

Security implemented on top of the transport layer (TCP layer) of TCP/IP using Secure Sockets Layer (SSL). Web services use Hypertext Transfer Protocol over SSL (HTTPS) as a web address for secure message transport. Web Service Consumer transformations can use TLS 1.2, TLS 1.1, or TLS 1.0. You can use the following authentication with transport layer security: HTTP authentication, proxy server authentication, and SSL certificates.

**SSL authentication**

You can use SSL authentication when you connect through the HTTPS protocol.

You can use the following types of SSL authentication:

- One-way SSL authentication
- Two-way SSL authentication

**HTTP authentication**

You can use HTTP authentication when you connect through the HTTP protocol.

You can use the following HTTP authentication methods:

- Basic authentication
- Digest authentication

- NT LAN Manager (NTLM) authentication

## WSDL Selection

Before you create a Web Service Consumer transformation, you must import a WSDL file into the model repository. The WSDL defines the operation signature of the web service you want to run. When you import a WSDL, the Developer tool creates a physical data object that you can reuse for other transformations.

A WSDL can define multiple operations. When you create a Web Service Consumer transformation, select which operation you want to run. You can view the operation input and the operation output hierarchies in the Web Service Consumer transformation. The hierarchies define the structure of the SOAP request message and the SOAP response message.

You can also import a WSDL with one-way input operation. You must create dummy output ports when you import a WSDL with one-way input operation.

## Web Service Consumer Transformation Ports

When you view the transformation ports, show the ports if you do not need to view the operation hierarchy. When you show the ports, you can define groups, define ports, and map nodes from the operation output to the output ports.

The following figure shows the ports for a non-reusable Web Service Consumer transformation:

| Name                          | Type      | Precision | Scale | Location                     | Default Value |
|-------------------------------|-----------|-----------|-------|------------------------------|---------------|
| <b>ConversionRateResponse</b> |           |           |       |                              |               |
| ConversionRateR...            | double    | 15        | 0     | (Response)/tns:Conversion... |               |
| <b>Passthrough</b>            |           |           |       |                              |               |
| <b>RequestInput</b>           |           |           |       |                              |               |
| FromCurrency                  | string    | 10        | 0     |                              |               |
| ToCurrency                    | string    | 10        | 0     |                              |               |
| CUSTOMER_NO                   | string    | 4         | 0     |                              |               |
| FIRSTNAME                     | string    | 30        | 0     |                              |               |
| LASTNAME                      | string    | 30        | 0     |                              |               |
| ADDRESS                       | string    | 94        | 0     |                              |               |
| SystemDateTime                | date/time | 29        | 9     |                              |               |

A Web Service Consumer transformation can have multiple input groups and multiple output groups. When you create ports, create groups and add the ports to the groups. Define the ports in a group hierarchy based on the structure of the operation input or operation output hierarchy. Add a key to relate a child group to a parent group. All groups except the lowest group in the hierarchy must have primary keys. All groups in the hierarchy except the root group must have foreign keys.



The transformation has a root input group named RequestInput. You must add a primary key to the root input group. The key must be string, bigint, or integer.

You can add additional pass-through ports to the root input group. Pass-through ports pass data through the transformation without modifying the data. The pass-through port can occur one time in the input data. You can add the pass-through port to any output group. Associate the output port to the input port. The input value that you pass through a SOAP request repeats in the output rows from the SOAP response.

You can also add HTTP headers, cookie ports, a dynamic URL port, and ports for web service security authentication to the root input group. Data in the root group occurs one time.

To map an operation output node to an output port, click the field in the **Location** column and expand the hierarchy in the **Select Location** dialog box. Then, choose a node from the hierarchy.

## HTTP Header Input Ports

A web service might require additional HTTP headers. You can create input ports in the root input group to pass the additional header information to the web service provider.

To add an HTTP header and an HTTP port, select the root input group and click the arrow next to the **New** button. Then, click **HTTP Header**. Enter a header name and port name.

You can create multiple HTTP headers.

## Other Input Ports

You can add predefined input ports to the Web Service Consumer transformation.

You can add the following predefined input ports:

### Cookie port

You can configure the Web Service Consumer transformation to use cookie authentication. The remote web service server tracks the web service consumer users based on the cookies. You can increase performance when a mapping calls a web service multiple times.

When you project the cookie port to a web service request message, the web service provider returns a cookie value in the response message. You can pass the cookie value to another transformation downstream in the mapping or you can save the cookie value in a file. When you save the cookie value in a file, you can configure the cookie as input to the Web Service Consumer transformation.

You can project the cookie output port to any of the Web Service Consumer transformation output groups.

### Endpoint URL port

The Web Service Consumer transformation connects to a web service using an endpoint URL. You can define the endpoint URL in the WSDL file, in a web services connection, or in an endpoint URL input port. When the transformation receives the URL dynamically in a port, the Data Integration Service overrides the URL defined in the WSDL file or in the web services connection.

The Web Service Consumer transformation can have one URL port value for each web service request. Add an Endpoint URL port to the root input group.

### WS-Security ports

You enable web service security in a web services connection. When you enable web service security, you must define the user name and password in a web services connection or in WS-Security input ports.

When you add WS-Security ports, you pass the user name and the password through input ports in the transformation. When the transformation receives the user name and password dynamically in ports, the Data Integration Service overrides the values defined in the web services connection.

**Note:** A web services connection has one user name and password for HTTP and WS-Security authentication.

To add predefined input ports, click the root input group in the **Ports** area. Click the arrow next to the **New** button and then click **Other Ports**. Choose the ports to add.

## Web Service Consumer Transformation Input Mapping

When you view the transformation ports, show the input mapping to view the operation input hierarchy. When you show the input mapping, you can define input groups, define input ports, and map input ports to operation input nodes.

The input mapping includes the following areas:

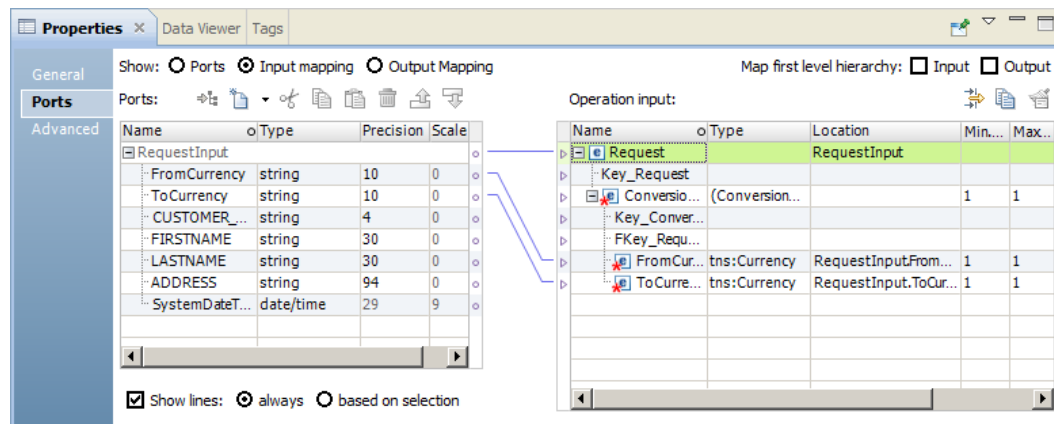
### Ports

Create the transformation input groups and input ports in the **Ports** area.

### Operation Input

The **Operation Input** area shows the nodes in the SOAP request message that the Web Service Consumer transformation sends to the web service. The WSDL data object that you use to create the transformation defines the operation input hierarchy.

The following figure shows the input mapping for a non-reusable Web Service Consumer transformation:



After you create input ports, map the input ports from the **Ports** area to the nodes in the **Operation Input** area. When you map an input port to a node in the operation input, the location of the port appears in the **Location** column in the **Operation Input** area.

The Developer tool maps nodes in the first level of the operation input to input ports when you choose to map the first level of the input hierarchy. The Developer tool also creates the ports to perform the mapping. If the first level of the hierarchy contains a multi-occurring parent node with one or more multi-occurring child nodes, the Developer tool does not map the first level of the hierarchy.

You can map XML data from one string or text input port to the entire SOAP request message. When you map XML data to the entire SOAP request, you cannot map ports to nodes in the operation input.

You can choose to view the lines that connect the input ports to the nodes in the operation input.

## RELATED TOPICS:

- [“Generating Web Service SOAP Messages Overview” on page 607](#)

## Rules and Guidelines to Map Input Ports to Nodes

Review the following rules when you map input ports to nodes in the operation input hierarchy:

- You can map an input port to one node in the hierarchy. You can map the same port to any number of keys in the hierarchy.
- The input port and the node must have compatible data types.
- You can map ports from one input group to multiple hierarchy levels in the operation input.
- You must map input ports to the keys in the operation input. Any port that you map to a key must be a string, integer, or bigint datatype. Map data to the keys in all levels in the operation input above the hierarchy level that you are including in the SOAP message. Include the foreign keys for all levels above and including the level you are mapping.

**Note:** You do not have to map input ports to keys if you are mapping only the lowest level of the operation input hierarchy.

- You can map multiple string, bigint, or integer input ports to a key in the **Operation Input** area to create a composite key. When you click the **Location** field for a composite key, you can reorder the input ports or remove one of the ports.

## Customize View Options

You can change the operation input hierarchy to show keys in the **Operation Input** area. You can also show grouping constructs that define how to order nodes.

Click the **Customize View** button (  ) in the **Operation Input** area. Enable any of the following options:

### Sequence, Choice, and All

Show a line that indicates whether an element definition is sequence, choice, or all.

Nodes in an all group must all be included in the SOAP message.

Nodes in a sequence group must be in the order specified in the WSDL.

At least one node in a choice group must appear in the SOAP message.

### Keys

View the keys in the **Operation Input** area. The **Operation Input** area includes keys for each group. You can add a key to an input port in the **Ports** area.

## Mapping Input Ports to the Operation Input

When you show the transformation input mapping, you can define input groups, define input ports, and map input ports to operation input nodes.

1. Open a Web Service Consumer transformation.
2. To show the transformation input mapping, use one of the following methods:

- For a reusable transformation, click the **Overview** view. Choose to show the input mapping.
  - For a non-reusable transformation, click the **Ports** tab in the **Properties** view. Choose to show the input mapping.
3. Define a primary key for the root input group.
  4. To add an input group or port to the **Ports** area, use one of the following methods:

| Option                                     | Description  |
|--|--|
| Drag a node                                | Drag a group node or a child node in the <b>Operation Input</b> area to an empty column in the <b>Ports</b> area. If the node is a group node, the Developer tool adds a group without ports.                                      |
| Manually add a group or port               | To add a group, click the arrow next to the <b>New</b> button and then click <b>Group</b> . To add a port, click the arrow next to the <b>New</b> button and then click <b>Field</b> .   |
| Drag a port from another transformation    | In the editor, drag a port from another transformation to the Web Service Consumer transformation.   |
| Copy a port                                | Select ports from another transformation and copy them to the <b>Ports</b> area. To copy ports, you can use keyboard shortcuts or you can use the copy and paste buttons in the Developer tool.                                    |
| Select <b>Map first level of hierarchy</b> | Select <b>Map first level of hierarchy</b> . The Developer tool maps nodes in the first level of the operation input to input ports and groups. The Developer tool also creates the input ports and groups to perform the mapping. |

5. If you manually create a port or you copy a port from another transformation, click the **Location** column in the **Operation Input** area and choose a port from the list.
6. To map input ports as a composite key, use one of the following methods:

| Option  | Description   |
|---|---|
| Drag input ports  | Select two or more input ports and drag them to a key in the operation input hierarchy.                     |
| Select input ports from the <b>Select Location</b> dialog box | Click the <b>Location</b> column of a key in the operation input hierarchy and then select the input ports. |

7. To clear the locations of nodes, use one of the following methods:

| Option                                       | Description   |
|--|---|
| Click <b>Clear</b>                           | Select one or more nodes in the <b>Operation Input</b> area and click <b>Clear</b> .                                |
| Delete the lines that connect ports to nodes | Select one or more lines that connect the input ports to the nodes in the operation input and press <b>Delete</b> . |

8. If the associated WSDL data object includes anyType elements, any elements, anyAttribute attributes, derived type elements, or substitution groups, choose objects in the **Operation Input** area. In the **Type** column for a node, click **Choose** and then choose one or more types, elements, or attributes from the list.
9. To map XML data from a string or text input port to the complete SOAP request, right-click the port and select **Map as XML**.

# Web Service Consumer Transformation Output Mapping

When you view the transformation ports, show the output mapping to view the operation output hierarchy. When you show the output mapping, you can define output groups, define output ports, and map operation output nodes to output ports.

The output mapping includes the following areas:

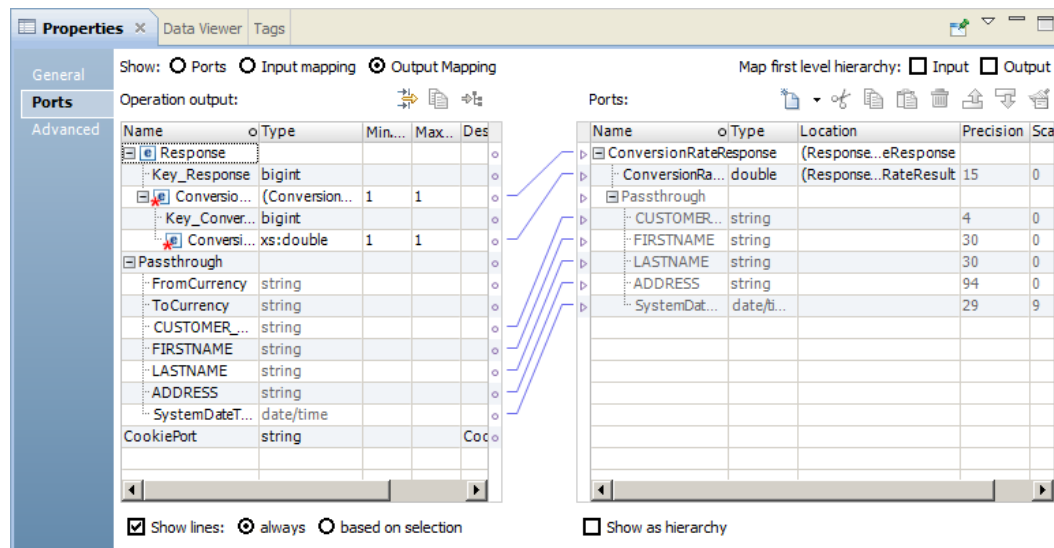
## Operation Output

The **Operation Output** area shows the nodes in the SOAP response message that the web service returns to the Web Service Consumer transformation. The WSDL data object that you use to create the transformation defines the operation output hierarchy.

## Ports

Create the transformation output groups and ports in the **Ports** area.

The following figure shows the output mapping for a non-reusable Web Service Consumer transformation:



After you create output ports, map the nodes from the **Operation Output** area to the ports in the **Ports** area. When you map a node from the operation output to an output port, the location of the node appears in the **Location** column in the **Ports** area.

The Developer tool maps nodes in the first level of the operation output to output ports when you choose to map the first level of the output hierarchy. The Developer tool also creates the ports to perform the mapping. If the first level of the hierarchy contains a multi-occurring parent node with one or more multi-occurring child nodes, the Developer tool does not map the first level of the hierarchy.

You can choose to display the output ports in a hierarchy. Each child group appears under the parent group. You can also choose to view the lines that connect the nodes in the operation output to the output ports.

If the associated WSDL data object is deleted from the repository, the Developer tool retains the location of the operation nodes in the output mapping. When you show the output mapping, the **Ports** area still displays the location of the operation nodes in the **Location** column for the output ports. If you associate another WSDL with the transformation, the Developer tool checks whether each location is valid. The Developer tool clears the location of operation nodes in the **Ports** area of the output mapping if the location is no longer valid.

## RELATED TOPICS:

- [“Parsing Web Service SOAP Message Overview” on page 599](#)

## Rules and Guidelines to Map Nodes to Output Ports

Review the following rules when you map nodes in the operation output hierarchy to output ports:

- The operation output node and the output port must have compatible datatypes.
- You cannot map a node to more than one output port in a group.
- Each output port must have a valid location, unless the port is a pass-through port.
- If you drag a multiple-occurring child node to an empty output port, you must relate the group to other output groups. When you select a group, the Developer tool creates keys to relate the groups.
- When you drag a multiple-occurring element into a group that contains the parent element, you can configure the number of child element occurrences to include. Or, you can replace the parent group with the multiple-occurring child group in the transformation output.

## Mapping the SOAP Message as XML

You can map the complete SOAP message as XML instead of returning the data to separate output ports.

When you map the SOAP message as XML, the Data Integration Service returns the complete SOAP message in one port. Do not create output ports.

To map the complete message, right-click the root group in the **Operation Output** area. Select **Map as XML**.

The Developer tool creates a string output port. The precision is 65535 bytes.

## Customize View Options

You can change the operation output hierarchy to show the cookie ports, pass-through ports, and keys in the **Operation Output** area. You can also show grouping constructs that define how to order nodes.

Click the **Customize View** button in the **Operation Output** area. Enable any of the following options:

### Sequence, Choice, and All

Show a line that indicates whether an element definition is sequence, choice, or all.

Nodes in an all group must all be included in the SOAP message.

Nodes in a sequence group must be in the order specified in the WSDL.

At least one node in a choice group must appear in the SOAP message.

### Keys

View the keys in the **Operation Output** area. The **Operation Output** area includes keys for each group. You can add a key to an output port in the **Ports** area.

### Pass-through Ports

The **Operation Output** area shows the pass-through ports. Pass-through ports are ports that pass data through the transformation without changing the data. You can project pass-through ports from the operation output to any of the Web Service Consumer transformation output groups. A pass-through port receives data one time, so the port is at the root level in the SOAP messages.

## Cookie Ports

Shows the cookie port. When you configure cookie authentication, the remote web service server tracks the web service consumer users based on the cookies. When you project a web service cookie in the request message, the web service returns a cookie in the response message. You can project the cookie from the operation output to any of the Web Service Consumer transformation output groups.

## Mapping the Operation Output to Output Ports

When you show the transformation output mapping, you can define output groups, define output ports, and map operation output nodes to output ports.

1. Open a Web Service Consumer transformation.
2. To show the transformation output mapping, use one of the following methods:
  - For a reusable transformation, click the **Overview** view. Choose to show the output mapping.
  - For a non-reusable transformation, click the **Ports** tab in the **Properties** view. Choose to show the output mapping.
3. To add an output group or port to the **Ports** area, use one of the following methods:

| Option                                     | Description   |
|--|---|
| Drag a node                                | Drag a group node or a child node in the <b>Operation Output</b> area to an empty column in the <b>Ports</b> area. If the node is a group node, the Developer tool adds a group without ports.  |
| Manually add a group or port               | To add a group, click the arrow next to the <b>New</b> button and then click <b>Group</b> . To add a port, click the arrow next to the <b>New</b> button and then click <b>Field</b> .  |
| Drag a port from another transformation    | In the editor, drag a port from another transformation to the Web Service Consumer transformation.  |
| Copy a port                                | Select ports from another transformation and copy them to the <b>Ports</b> area. To copy ports, you can use keyboard shortcuts or you can use the copy and paste buttons in the Developer tool.                                       |
| Select <b>Map first level of hierarchy</b> | Select <b>Map first level of hierarchy</b> . The Developer tool maps nodes in the first level of the operation output to output ports and groups. The Developer tool also creates the output ports and groups to perform the mapping. |

4. If you manually create a port or you copy a port from another transformation, click the **Location** column in the **Ports** area and choose a node from the list.
5. To clear the locations of ports, use one of the following methods:

| Option                                       | Description   |
|--|---|
| Click <b>Clear</b>                           | Select one or more ports in the <b>Ports</b> area and click <b>Clear</b> .  |
| Delete the lines that connect nodes to ports | Select one or more lines that connect the nodes in the operation output to the output ports and press <b>Delete</b> . |

6. If the associated WSDL data object includes anyType elements, any elements, anyAttribute attributes, derived type elements, or substitution groups, choose objects in the **Operation Output** area. In the **Type** column for a node, click **Choose** and then choose one or more types, elements, or attributes from the list.

7. To map the complete SOAP response message as XML, right-click the root group in the **Operation Output** area and select **Map as XML**.

## Web Service Consumer Transformation Advanced Properties

The Web Service Consumer transformation advanced properties include the tracing level, generic fault ports, web services connection, and concurrent web service request messages.

You can define the following advanced properties for the Web Service Consumer transformation on the Advanced tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

### SOAP Action

Overrides the SOAP action value defined in the WSDL with a constant value for the Web Service Consumer transformation.

### Enable Generic SOAP Fault Handling

Returns fault messages that are not defined in the WSDL. Creates output ports in a GenericFault output group to handle fault codes and messages.

The following table describes the fault output ports for SOAP 1.1 and SOAP 1.2:

| Fault Output Port for SOAP 1.1                       | Fault Output Port for SOAP 1.2 | Description  |
|--|--------------------------------|--|
| Fault Code   | Code*                          | Returns a fault identification code.   |
| Fault String   | Reason*                        | Returns an explanation of the error in a fault message.  |
| Fault Detail   | Detail                         | Returns custom information that the web service provider passes to the Web Service Consumer transformation in a generic fault message. |
| Fault Actor  | Role                           | Returns information about the object that caused the fault to happen.  |
| -  | Node                           | Returns the URI of the SOAP node that generated the fault.   |
| * The Code and Reason output ports are hierarchical. |                                |  |

**Note:** You can expand the Code fault output port to extract the SubCode fault output port up to one level.

### Enable HTTP Error Handling

Returns any HTTP error from the web service. Creates an HTTP error output port in the GenericFault output group.



### Treat Fault as Error

Adds fault messages to the mapping log. When a fault occurs, the Data Integration Service increments the error count for the mapping. Disable this property to allow early selection and push-into optimization. Default is enabled.

### Connection

Identifies the web services connection object to connect to the web service. Create the web services connection in the Developer tool. Edit the web services connection in the Developer tool or the Administrator tool. When you configure a web services connection, configure the endpoint URL, the type of security that the web service requires, and a connection timeout period.

The Web Service Consumer transformation connects to a web service using an endpoint URL. You can define the endpoint URL in the WSDL file, in a web services connection, or in an endpoint URL input port.

Use the following guidelines to determine when to configure a web services connection:

- Configure a connection if you want to use an endpoint URL that differs from the URL in the WSDL file and if you are not using an endpoint URL input port.
- Configure a connection if the web service you connect to requires web service security, HTTP authentication, or SSL certificates.
- Configure a connection if you want to change the default connection timeout period.

**Note:** You can associate a WSDL data object in the repository with a web services connection. The associated connection becomes the default connection for each Web Service Consumer transformation that you create from that WSDL.

### Enable Compression

Enables coding of SOAP requests with the GZIP compression method and enables decoding of SOAP responses with GZIP or deflate.

### XML Schema Validation

Validates the SOAP response message at run time. Select **Error on Invalid XML** or **No Validation**.

### Sorted Input

Enables the Data Integration Service to generate output without processing all of the input data. Enable sorted input when the input data is sorted by the keys in the operation input hierarchy.

### Push-into Optimization

Enables push-into optimization. Click the **Open** button in the **Push-Into Optimization** property to select filter ports that receive filter values. For each filter port, choose the output port that contains the filtered column in the web service response.

### Has Side Effects

Checkbox that indicates that the web service performs any function besides returning rows. The Web Service Consumer transformation has a side effect if the web service, in addition to returning a rows, modifies an object or interacts with other objects or functions. The web service might modify a database, add to a total, raise an exception, write an email, or call other web services with side effects. Disable the **Has Side Effects** property in order to allow push-into optimization or early selection optimization. Default is enabled.

### Enable Concurrency

Enables the Web Service Consumer transformation to create multiple concurrent connections to a web service so that it can send multiple web service requests in parallel. When you enable the Web Service Consumer transformation to create multiple concurrent connections to the web service, you can set the total memory consumption limit and the number of concurrent connection limits.

The following table describes the options:

| Options                                | Description  |
|--|--|
| Enable concurrency                     | Creates multiple concurrent connections to a web service.                                |
| Concurrency Connection Limit           | The number of concurrent web service connections. Default is 20.                         |
| Total Concurrency Memory Limit (in MB) | The total memory allocation limit for all the concurrent connections. Default is 100 MB. |

## Web Service Error Handling

You can configure the Web Service Consumer transformation to pass SOAP faults and HTTP errors downstream in a mapping. You can increment the error count when a fault occurs. Configure web service error handling in the transformation advanced properties.

A web service returns either a response message or it returns a fault. A fault is an error. The web service can generate different faults based on the errors that occur.

The Web Service Consumer transformation can return the following types of faults:

### SOAP faults

SOAP errors that the WSDL defines. Configure output error ports that return the faults in the web service response message. For a SOAP 1.1 binding, the Data Integration Service returns the fault message, fault code, fault string, and fault actor elements for the fault. For a SOAP 1.2 binding, the Data Integration Service returns the fault message, code, reason, node, and role elements for the fault.

### Generic SOAP faults

The web service generates generic SOAP faults at run time. The fault elements are different for a SOAP 1.1 binding and a SOAP 1.2 binding. The WSDL does not define generic SOAP faults. Generic SOAP faults include authentication failures and SOAP request errors.

### HTTP errors

The Developer tool adds the HTTP fault output port when you enable HTTP error handling in the transformation. The Data Integration Service returns HTTP errors from the web service in a single string port. An HTTP error includes an error code and a message.

If the SOAP response from the web service has XML data that is not valid, the Web Service Consumer transformation returns an error.

You can configure whether to treat SOAP faults as errors. When you enable Treat Fault as Error and a SOAP fault occurs, the Data Integration Service increments the error count for the mapping. The fault appears in the message log.

## Message Compression

When you enable SOAP message compression, the Web Service Consumer transformation compresses web service request messages and receives compressed web service response messages.

The Web Service Consumer transformation encodes the SOAP request with GZip compression. The transformation accepts a response message encoded with the GZip or the deflate compression.

When the Data Integration Service receives the response from the web service, it checks the Content-Encoding HTTP header in the SOAP message and it decodes the message.

The default is no compression encoding. The web service does not compress the SOAP response.

The following table shows the headers in the request and response messages when compression is on or off:

| Compression | Header   |
|-------------|--|
| On          | Content-Encoding header: GZip<br>Accept-Encoding header: GZip, deflate |
| Off         | Empty Content-Encoding header<br>Empty Accept-Encoding header          |

Sometimes a web service encodes a response message with a default compression. The Web Service Consumer transformation decodes the message if it is GZip or deflate encoded. The Web Service Consumer transformation logs a message to the mapping log if the web service encodes the response message unexpectedly.

Enable compression in the transformation advanced properties.

## Concurrency

You can enable the Web Service Consumer transformation to create multiple concurrent connections to a web service so that it can send multiple web service requests in parallel.

For example, while querying bank information, you can configure the Web Service Consumer transformation for concurrency so that multiple rows are sent in parallel. If there are 20 input rows, you can send 20 requests concurrently for faster processing.

When you enable concurrency in the Web Service Consumer transformation, you can configure the total memory consumption limit.

When you enable concurrency in the Web Service Consumer transformation, you can configure the number of concurrent web service connections.

### Rules and Guidelines for Concurrency

Use the following rules and guidelines while using concurrency:

- Concurrency supports sorted input rows as multiple concurrent connections to a web service. Ordered output rows are not supported.
- Use concurrency if the data set is more than 100 rows.
- It is advisable not to increase the number of concurrent web service connections. The number of concurrent web service connections is linked to the number of sockets used by the operating system. Increasing the number of sockets is expensive.
- Use systems that have multi-core processors with a minimum of 100 MB of RAM for optimal performance while using the concurrency feature.
- Concurrency memory limit represents the memory consumed by concurrent work flows while invoking web services.
- When you enable concurrency in the Web Service Consumer transformation, you can configure the memory consumption limit. Ensure that the memory consumption is not more than the physical RAM on the server.

## Best Practices for Concurrency

For optimal performance while using concurrency, adhere to the following best practices:

- Avoid changing the default values of the total concurrency memory limit and concurrency connection limit.
- Avoid using concurrency for data sets of less than 100 rows.
- Avoid pass-through ports in the mapping while using concurrency.

## Filter Optimizations

Filter optimization increases performance by reducing the number of rows that pass through the mapping. The Data Integration Service can apply the early selection optimization or push-into optimization.

When the Data Integration Service applies a filter optimization method, it moves a filter as close to the source as possible in a mapping. If the Data Integration Service cannot move a filter before a transformation in a mapping, it might be able to push the filter logic into a transformation.

### Enabling Early Selection Optimization with the Web Service Consumer Transformation

Enable early selection optimization for the Web Service Consumer transformation if the transformation does not have side effects and it does not treat faults as errors.

1. Open the Web Service Consumer transformation **Advanced Properties** view.
2. Clear **Treat Fault as Error**.
3. Clear **Has Side Effects**.

### Push-Into Optimization with the Web Service Consumer Transformation

With push-into optimization, the Web Service Consumer transformation receives the filter value in a filter port. The filter port is an unconnected input port that you identify as a filter port when you configure push-into optimization. The filter port has a default value that ensures that the web service returns all rows if the end-user query contains no filter. The filter port is not a pass-through port.

**Note:** The filter field must be part of the root group in the web service request.

The filter field cannot be a pass-through port. When you configure a filter port, the default value of the port changes to the value of the filter condition, so the pass-through output port value changes. A filter based on the output pass-through port returns unexpected results.

You can push multiple filter expressions to the Web Service Consumer transformation. Each filter condition must be the following format:

```
<Field> = <Constant>
```

The filter conditions must be joined by AND. You cannot join the conditions with an OR.

## Push-Into Optimization with Web Service Consumer Transformation Example

An SQL data service returns orders for all customers or it returns orders for a specific customer based on the SQL query it receives from the user.

The data service contains a logical data object with the following components:

### Customer table

An Oracle database table that contains customer information.

### Web Service Consumer transformation

A transformation that calls a web service to retrieve the latest orders for customers. The Web Service Consumer transformation has input ports for customerID and orderNum. The transformation has pass-through ports that contain customer data that it receives from the Customer table. The orderNum port is the filter port and is not connected. orderNum has the default value "\*". When the web service receives this value in the web service request, it returns all orders.

### Orders virtual table

A virtual table that receives the customer and order data from the web service. The end-user queries this table. Orders contains a customer column, orderID column, and customer and order data.

The end-user passes the following SQL query to the SQL data service:

```
SELECT * from OrdersID where customer = 23 and orderID = 56
```

The Data Integration Service splits the query to optimize the mapping. The Data Integration Service uses early selection optimization and moves the filter logic, `customer = 23`, to the Customer table read. The Data Integration Service uses push-into optimization and pushes the filter logic, `orderID = 56`, into the Web Service Consumer transformation filter port. The Web Service Consumer transformation retrieves ordersID 56 for customer 23.

## Enabling Push-Into Optimization with the Web Service Consumer Transformation

Enable push-into optimization for the Web Service Consumer transformation if the transformation does not have side effects and it does not treat faults as errors.

1. Open the Web Service Consumer transformation **Advanced Properties** view.
2. Clear **Treat Fault as Error**.
3. Clear **Has Side Effects**.
4. Click the **Open** button in the **Push-Into Optimization** property.
5. Choose the filter port name in the Optimized Input dialog box.  
You can choose multiple filter ports.
6. Click the **Output** column.
7. For each filter port, choose the output port that contains the filtered column in the web service response.
8. Enter a default value for each filter port.

**Note:** You cannot configure a default value for a Web Service Consumer port unless it is a filter port.

# Creating a Web Service Consumer Transformation

You can create a reusable or non-reusable Web Service Consumer transformation. Reusable transformations can exist in multiple mappings. Non-reusable transformations exist within a single mapping.

You can create Web Service Consumer transformations for a SOAP 1.1 binding and a SOAP 1.2 binding from a single WSDL object.

1. To create a transformation, use one of the following methods:

| Option       | Description  |
|--------------|--|
| Reusable     | Select a project or folder in the <b>Object Explorer</b> view. Click <b>File &gt; New &gt; Transformation</b> . Select the Web Service Consumer transformation and click <b>Next</b> . |
| Non-reusable | In a mapping or maplet, drag a Web Service Consumer transformation from the Transformation palette to the editor.  |

The **New Web Service Consumer Transformation** dialog box appears.

2. Browse and select a WSDL data object to define the web service request and response messages.

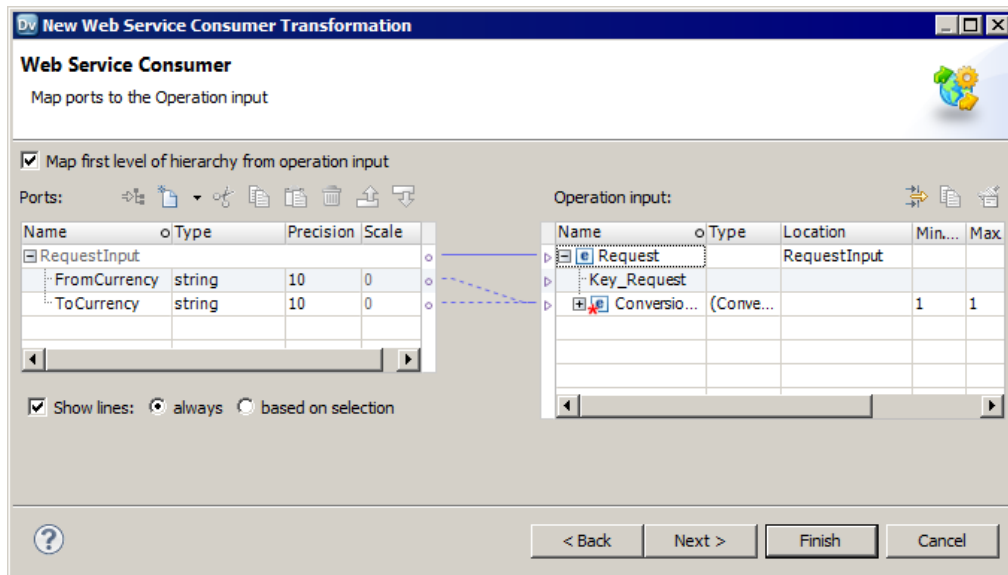
If the WSDL is not in the repository, you can import the WSDL from the New Web Service Consumer Transformation dialog box.

3. Browse and select an operation from the WSDL.

You can choose an operation that has a SOAP 1.1 binding or SOAP 1.2 binding.

4. Click **Next**.

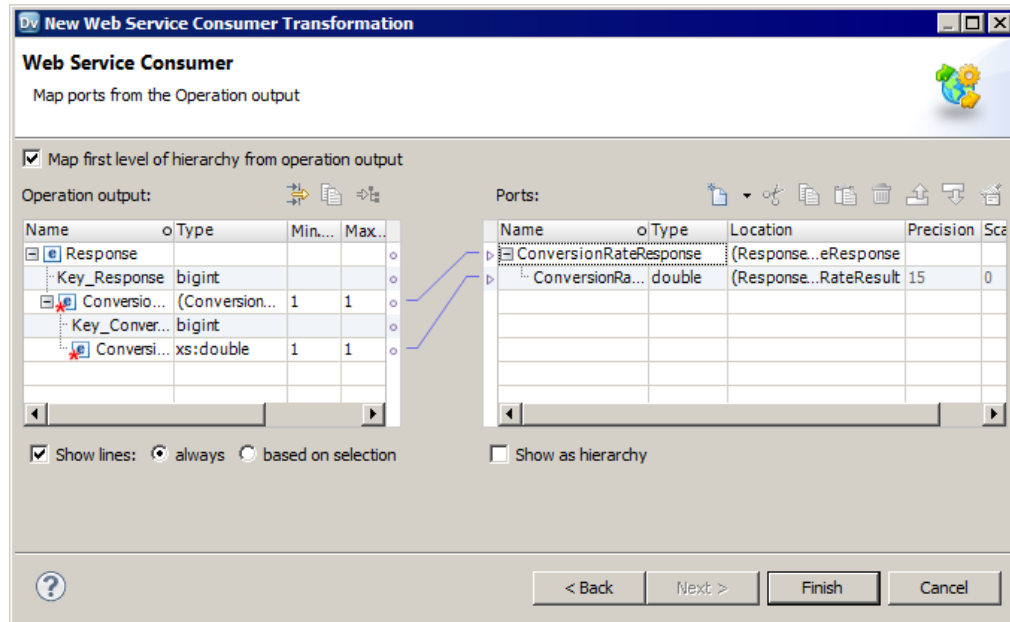
The **Map Ports to the Operation Input** screen appears. The **Ports** area shows the transformation input groups and input ports. The **Operation Input** area shows the request message hierarchy.



5. Define the input groups and input ports and map the input ports to operation input nodes.

6. Click **Next**.

The **Map Ports from the Operation Output** screen appears. The **Operation Output** area shows the response message hierarchy. The **Ports** area shows the transformation output groups and output ports.



7. Define the output groups and output ports, and map the operation output nodes to the output ports.
8. Click **Finish**.
9. Click the **Advanced** view to configure the transformation properties and the web services connection.

#### RELATED TOPICS:

- [“Mapping Input Ports to the Operation Input” on page 583](#)
- [“Mapping the Operation Output to Output Ports” on page 587](#)
- [“Web Service Consumer Transformation Advanced Properties” on page 588](#)

## Web Service Consumer Transformation Example

Your organization needs to expose order information for the RT100 product line to the sales organization. The sales team needs to query the order summary and order details on a daily basis.

Create a logical data object that exposes the daily order information in virtual tables. The read mapping contains a Web Service Consumer transformation that returns the latest RT100 orders. The Web Service Consumer transformation consumes a web service that returns the daily order summary and order detail information for the RT100 product line.

### Input File

The input file is a flat file that contains the product line number.

Create a physical data object to define the input file. The file has one field, Product\_Line. The field value is RT100. Define the location of the physical data object in the **Runtime Properties** view.

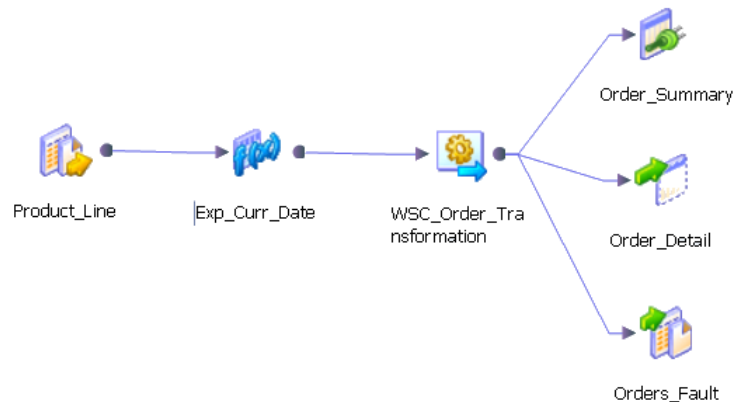
## Logical Data Object Model

A business analyst in your organization creates a logical data model that describes the order summary and order detail table structures. The logical data model contains the Order\_Summary and Order\_Detail logical data objects.

The analyst creates a schema in a modeling tool that defines the logical data model. You import the logical data model from the schema and create the Order\_Summary and Order\_Detail logical data objects.

## Logical Data Object Mapping

The logical data object mapping describes how to access data through the logical data object.



The read mapping contains the following objects:

### Product\_Line

Input flat file that contains the product line number.

### Exp\_Curr\_Date transformation

Expression transformation that returns the current date and a primary key for the Web Service Consumer transformation root level input group.

### WSC\_Order transformation

Web Service Consumer transformation that consumes a web service to retrieve order information. The transformation passes the product line and current date to the web service in the request message. The transformation receives order information from the web service in the response message.

### Order\_Summary table

A logical data object that contains order information such as Order\_No, Customer\_Id, Qty, and Order\_Date.

### Order\_Detail table

A logical data object that contains order detail information such as Order\_No, Product\_Id, Qty, and Status.

### Orders\_Fault

Output flat file that receives generic fault messages.



## Web Service Consumer Transformation

The Web Service Consumer transformation receives a product line, date, and a sequence number as input. The transformation consumes the Get\_Order\_Info web service operation to retrieve the order information.

When you create the Web Service Consumer transformation, choose a WSDL data object that describes the request and response web service messages. A web service message contains hierarchical groups of XML elements. An element can contain other elements. Some elements occur multiple times. Create the transformation from the Order\_Info WSDL object in the repository.

Configure the transformation input ports and map the ports to the operation input hierarchy. Map nodes from the operation output hierarchy to the output ports. Define the web services connection and run-time properties.

### Transformation Input Mapping

When you show the input mapping on the **Ports** view, you can define input ports and map them to nodes in the operation input.

The transformation **Ports** area has a root group and an Order group. The root group is the Request input group. Add one port to the Request input group to represent the primary key.

The Order group has the **Select\_Date** and **Select\_Product\_Line** input ports.

Map the input ports to the **Order\_Date** and **Product\_Line** nodes in the **Operation Input** area.

The **Operation Input** area defines the request message that the Web Service Consumer transformation passes to the web service. The nodes appear in the **Operation Input** area by default.

### Transformation Output Mapping

When you show the output mapping on the **Ports** view, you can define the output ports by mapping nodes from the operation output to the transformation output groups.

The web service returns the following hierarchy in a web service response message:

```
Response
  Orders
    Order
      Key_Order
      Order_ID
      Order_Date
      Customer_ID
      Total_Qty
      Order_Details
        Order_Detail
          Product_ID
          Description
          Qty
          Status
```

The web service returns multiple orders. Order is a multiple-occurring node in the Orders level. For each order, the web service can return multiple order details. Order\_Detail is a multiple-occurring node in the Order\_Details level.

**Note:** The Developer tool adds the Key\_Order node in the user interface. You can map the key to output groups to define relationships between groups. For this example, the Order\_ID is the primary key in Order, and it is the foreign key in Order\_Details.

Create the following output groups in the **Ports** area:

```
Order
  Order_ID
  Order_Date
  Customer_ID
  Total_Qty

Order_Detail
  Order_ID
  Product_ID
  Description
  Qty
  Status
```

The Data Integration Service writes a row from the Order group whenever the value of Order\_ID changes.

The Data Integration Service writes a row from the Order\_Detail group whenever the values of Order\_ID and Product\_ID change.

## Transformation Advanced Properties

Configure the following advanced properties for the Web Service Consumer transformation:

### Enable Generic SOAP Fault Handling

Adds output ports that receive SOAP fault messages.

### Connection

Choose a web services connection to access the web service.

### Enable Compression

The Web Service Consumer transformation compresses the web messages with GZIP.

## CHAPTER 46

# Parsing Web Service SOAP Messages

This chapter includes the following topics:

- [Parsing Web Service SOAP Message Overview, 599](#)
- [Transformation User Interface, 600](#)
- [Multiple-Occurring Output Configuration, 601](#)
- [Parsing anyType Elements, 603](#)
- [Parsing Derived Types, 604](#)
- [Parsing QName Elements, 605](#)
- [Parsing Substitution Groups, 605](#)
- [Parsing XML Constructs in SOAP Messages, 605](#)

## Parsing Web Service SOAP Message Overview

The Data Integration Service generates row data when it parses a SOAP message in a web service transformation.

The web service Input transformation and the Web Service Consumer transformation are web service transformations that parse SOAP messages.

To configure a transformation to parse a SOAP message, create output ports in a structure similar to the SOAP message hierarchy. Map the nodes in the SOAP message hierarchy to the ports.

You can configure normalized groups of output ports, denormalized groups, and pivoted groups of ports. When the SOAP message contains derived types, anyType elements, or substitution groups, you can configure different output groups based on what types might occur in the SOAP message instance.

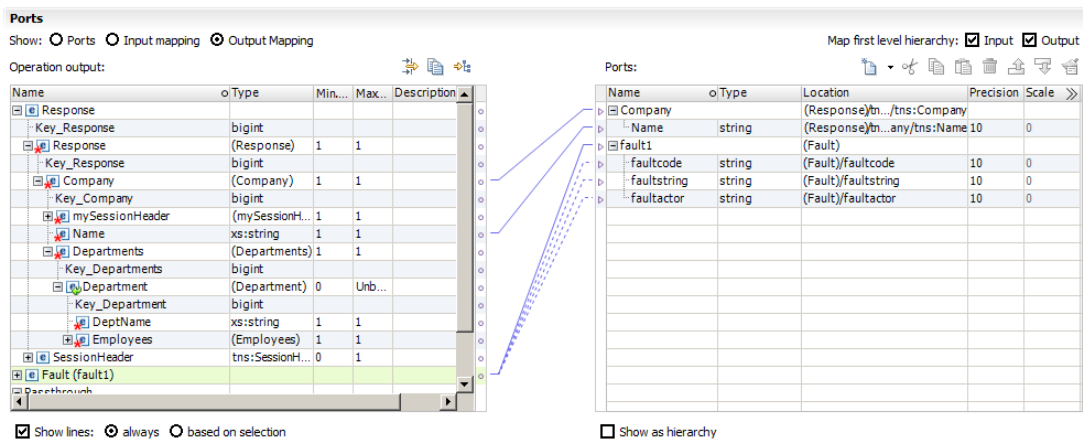
RELATED TOPICS:

- [“Web Service Consumer Transformation Output Mapping” on page 585](#)

# Transformation User Interface

The Web Service Consumer transformation and the web services Input transformation provide a user interface that you can use to map data from the SOAP message to the transformation output ports.

The following figure shows a mapping between SOAP 1.1 message nodes and output ports in a Web Service Consumer transformation:



## Operation Area

The Operation area contains the SOAP message hierarchy. Complex nodes or multiple-occurring nodes define hierarchy levels in the structure. The Developer tool adds keys to the levels that define the parent-child relationships between them.

In the preceding figure, the SOAP message hierarchy has the following levels:

**Response or Request**

Level that represents the root of the response or request message.

**Company**

Top level of the request data.

**Departments**

Multiple-occurring departments within the company.

**Employees**

Employee is a complex element within a department.

**Fault Group**

Fault message group that receives error messages.

## Ports Area

You can map data from levels of the SOAP message to output ports. Each group of output ports can be related to other output groups with primary foreign-key relationships.

In the preceding figure, the transformation has groups of output ports that correspond to the groups of nodes in the SOAP message.

## Multiple-Occurring Output Configuration

When an Input transformation or Web Service Consumer transformation returns multiple-occurring data, you can configure the output ports in different configurations.

You can configure normalized output data, pivoted output data, or denormalized output data.

For example, a SOAP message contains Departments and Employees complex elements. Each department contains multiple employees. Departments is the parent of Employees.

The SOAP message contains the following element hierarchy:

```
Departments
  Department_ID
  Department_Name
  Employees
    Employee_ID
    Employee_Name
```

## Normalized Relational Output

When you create normalized output data, the data values do not repeat in an output group. You create a one-to-one relationship between the hierarchy levels in the SOAP message and the output groups of ports.

When the SOAP message contains a Departments parent hierarchy level and an Employees child hierarchy level, you might create the following groups of ports:

```
Departments
  Department_Key
  Department_ID
  Department_Name

Employees
  Department_Key
  Employee_ID
  Employee_Name
```

The Department\_Key is a generated key that relates the Employees output group to a Department group.

## Generated Keys

When you add an output group, the Developer tool relates the output group to another output group with a generated key. The Developer tool adds a bigint key to the parent group and to the child group. At run time, the Data Integration Service creates the key values for the generated keys.

### Example

The SOAP hierarchy has the following nodes:

```
Departments
  Dept_Key
  Dept_Num
  Dept_Name

Employees
```

```
Dept_FK
Employee_Num
Employee_Name
```

When you create an output group of ports for Departments, you map the Departments node to an empty field in the Ports area. The Developer tool creates the following output group:

```
Departments
Dept_Num
Dept_Name
```

When you map the Employees node to an empty field in the Ports area, the Developer tool prompts you to relate the Employees group to the Departments group. You can relate the Employees group to more than one group. The Developer tool adds a key to the each group.

The Developer tool creates the following groups and generated keys:

```
Departments
Key_Departments
Dept_Num
Dept_Name

Employees
Key_Departments
Employee_Num
Employee_Name
```

**Note:** You do not have to map nodes to the generated keys. The Data Integration Service creates the key values at run time.

The Developer tool can create generated keys to multiple levels in one output group. The Employees group might contain the following ports:

```
Employees
Key_Employees
Key_Departments
Key_Managers
Employee_Num
Employee_Name
```

Key\_Departments and Key\_Managers are the generated keys that point to parent groups. Key\_Employees is a generated key for the Employees group. Key\_Employees appears when you relate a child group to the Employees group.

## Denormalized Relational Output

You can denormalize relational output. When you denormalize the output data, the element values from the parent group repeat for each child element.

To denormalize output data, map nodes from the parent hierarchy level to the child group of output ports.

The following example shows the Department\_ID and the Department\_Name in the Employees output group:

```
Employees
  Department_ID
  Department_Name
  Employee_ID
  Employee_Name
```

Department\_ID and Department\_Name repeat for each employee in the department:

| Department_ID | Department_Name | Employee_ID | Employee_Name |
|---------------|-----------------|-------------|---------------|
| 100           | Accounting      | 56500       | Kathy Jones   |
| 100           | Accounting      | 56501       | Tom Lyons     |
| 100           | Accounting      | 56509       | Bob Smith     |

## Pivoted Relational Output

You can include a specific number of multiple-occurring elements in an output group.

To pivot multiple-occurring elements, map the multiple-occurring child element to the parent group of output ports. The Developer tool prompts you to define the number of child elements to include in the parent.

The following example shows two instances of Employee\_ID in the Departments parent group:

```
Departments
  Department_ID
  Department Name
  Employee_ID1
  Employee_ID2
```

## Parsing anyType Elements

The anyType element represents a choice of all global types in a WSDL or schema. When you map nodes to ports in the Developer tool, you choose which types to appear in the SOAP message for the anyType element. You must replace an anyType element in the SOAP message with a complex type or xs:string. Create groups of ports for each type that you choose.

You must choose a type to map data to output ports. If the WSDL or schema does not contain a global type, the Developer tool replaces the anyType element with xs:string.

To choose an element type in the Operation area, click **Choose** in the **Type** column for the anyType element. A list of available complex types and xs:string appears.

When you replace an anyType element with derived types, the Data Integration Service populates elements for one type at a time. The SOAP message does not contain data for the base type and the derived type at the same time.

### Derived Types Example

The WSDL contains an anyType element. You replace the element with AddressType and a derived type called USAddressType. The SOAP message hierarchy has the following groups:

```
Address:AddressType (base type)
  Address: AddressType
    Street
    City

Address:USAddressType (derived type)
  Street
  City
  State
  ZipCode
```

The SOAP message contains the following data:

```
<address xsi: type ="AddressType">
<street>1002 Mission St.</street>
<city>san jose</city>
</address>

<address xsi:type="USAddressType">
<street>234 Fremont Blvd</street>
<city>Fremont</city>
<zip>94556</zip>
<state>CA</state>
```

```
</address>
```

The Data Integration Service returns one row for xsi: AddressType:

| Street           | City     |
|------------------|----------|
| 1002 Mission St. | San Jose |

The Data Integration Service returns one row for the derived type xsi: USAddressType:

| Street            | City      | State | Zip   |
|-------------------|-----------|-------|-------|
| 234 Fremont Blvd. | Sunnyvale | CA    | 94556 |

The Data Integration Service does not populate the AddressType if the type is xsi: USAddressType.

## Parsing Derived Types

You can parse SOAP messages that contain derived types. When you define the ports that receive the data from the SOAP message, choose which types might appear in a SOAP message. The elements in the types you choose determine the ports that you need to create.

For example, the WSDL might contain an AddressType and a derived type called USAddressType. You can create the following groups in the Developer tool Operation area:

```
Address
  Address: AddressType
    Street
    City

  Address:USAddressType
    Street
    City
    State
    ZipCode
```

The SOAP message might contain the following data:

```
<address>
<street>1002 Mission St.</street>
<city>san jose</city>
</address>

<address xsi:type="USAddressType">
<street>234 Fremont Blvd</street>
<city>Fremont</city>
<zip>94556</zip>
<state>CA</state>
</address>

<address xsi:type="USAddressType">
<street>100 Cardinal Way</street>
<city>Redwood City</city>
<zip>94536</zip>
<state>CA</state>
</address>

<address>
<street>100 El Camino Real</street>
<city>Sunnyvale</city>
</address>
```



The Data Integration Service returns the following rows for the base type, Address:

| Street             | City         |
|--------------------|--------------|
| 1002 Mission St.   | San Jose     |
| 234 Fremont Blvd   | Sunnyvale    |
| 100 Cardinal Way   | Redwood City |
| 100 El Camino Real | Sunnyvale    |

The Data Integration Service returns the following rows for the derived type, USAddress:

| Street            | City         | State | Zip   |
|-------------------|--------------|-------|-------|
| 234 Fremont Blvd. | Sunnyvale    | CA    | 94556 |
| 100 Cardinal Way  | Redwood City | CA    | 94536 |

The Data Integration Service returns all addresses in the base type. The Data Integration Service returns US Addresses in the derived type. The derived type includes the Street and City elements that the USAddressType inherits from the base type.

## Parsing QName Elements

When Data Integration Service parses QName elements in the SOAP message, it updates QName values that belong to the namespace of the schema to use the namespace prefix defined in the schema. Otherwise, Data Integration Service does not update the value of the element.

For example, the schema has the namespace prefix `tns` defined for namespace `"http://user/test"`. The SOAP message has namespace prefix `mytns` defined for the same namespace. When the Data Integration Service parses QName value `mytns:myelement` it changes the value to `tns:myElement`.

When Data Integration Service generates QName elements in the SOAP message, it does not update the value of the element.

## Parsing Substitution Groups

A substitution group replaces one element with another element from the same group. Substitution groups are similar to derived types, except that each element definition includes a substitution group name.

You can configure an output group of ports that receives elements from a specific type in a substitution group. You can create a different output group of ports that receives an element from another type in the substitution group.

## Parsing XML Constructs in SOAP Messages

A SOAP message might contain XML constructs such as choice, list, and union elements.

Web service transformations can parse SOAP messages with these constructs with some limitations.

## Choice Element

A choice element restricts a child element to one of the elements in the <choice> declaration.

The following text shows a person element that is an employee or a contractor:

```
<xs:element name="person">
  <xs:complexType>
    <xs:choice>
      <xs:element name="employee" type="employee"/>
      <xs:element name="contractor" type="contractor"/>
    </xs:choice>
  </xs:complexType>
</xs:element>
```

You can map choice elements using the following methods:

- Create output ports for each choice element in an output group. Some elements will have null values in the output row.
- Create an output group for each choice. For the above example, create an employee group and a contractor group. The Data Integration Service generates a row based on which element appears in the SOAP message.

## List Element

A list is an XML element that can contain multiple simple type values, such as "Monday Tuesday Wednesday".

The Data Integration Service can return a list as a string value. When the SOAP message contains a list, you cannot map items from the list to separate output rows. You can configure an Expression transformation to separate the elements in the list if you need them separated in a mapping.

## Union Element

The union element is a simple type that is a union of more than one type.

The following text shows an element Size that is a union of two simple types, size\_no and size\_string:

```
<xs:element name="Size">
  <xs:simpleType>
    <xs:union memberTypes="size_no size_string" />
  </xs:simpleType>
</xs:element>
```

To map the size to an output port, create one port for the size. Configure the output port as a string. You can configure another transformation in the mapping to convert the data to another type.

## CHAPTER 47

# Generating Web Service SOAP Messages

This chapter includes the following topics:

- [Generating Web Service SOAP Messages Overview, 607](#)
- [Transformation User Interface, 608](#)
- [Port and Hierarchy Level Relationships , 609](#)
- [Keys, 610](#)
- [Map Ports, 611](#)
- [Pivoting Multiple-Occurring Ports , 613](#)
- [Map Denormalized Data, 615](#)
- [Derived Types and Element Substitution, 616](#)
- [Generating XML Constructs in SOAP Messages, 617](#)

## Generating Web Service SOAP Messages Overview

The Data Integration Service generates XML data from groups of input data when it generates a SOAP message. When you create a Web Service Consumer transformation, a web service Output transformation, or a Fault transformation, you configure which input ports to map to the SOAP message hierarchy.

To configure a transformation to generate a SOAP message, create groups of input ports and map each group to a group in the SOAP message hierarchy. A WSDL or schema defines the structure of the SOAP message.

You can configure groups of data in the SOAP message from denormalized input data. You can also pivot multiple-occurring input data to multiple-occurring nodes in the SOAP message.

You can map data to derived types, anyType elements, or substitution groups in a SOAP message. You must choose which types can occur in the SOAP message when you define a transformation. The types that you choose determine the input ports that you need to create.

When you view the SOAP message hierarchy in the Developer tool, the hierarchy contains keys. The keys do not appear in the SOAP message. The Data Integration Service uses keys to define parent-child relationships between groups in the SOAP message. To configure key values, map input data to keys in the SOAP message.

## RELATED TOPICS:

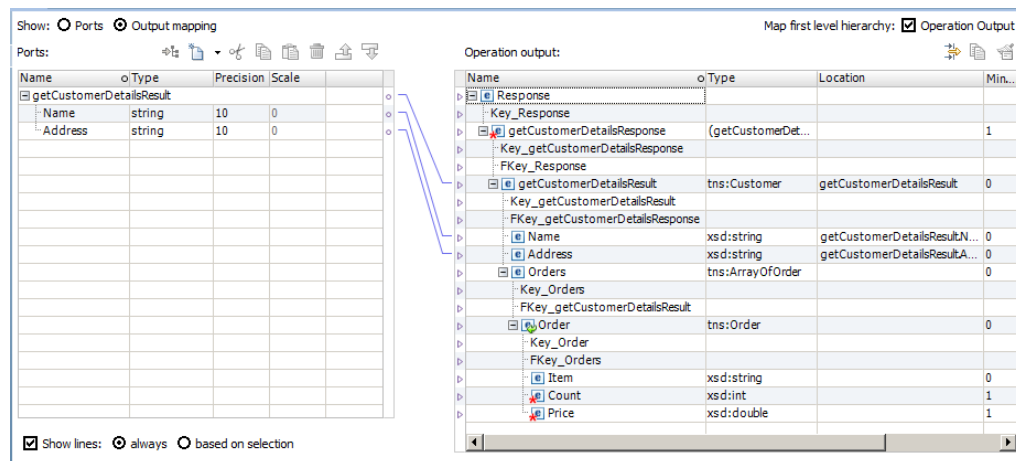
- [“Web Service Consumer Transformation Input Mapping” on page 582](#)

# Transformation User Interface

The web services Output transformation, the Fault transformation, and the Web Service Consumer transformation contain a user interface that you use to configure the SOAP message.

To configure a transformation to generate a SOAP message, create input ports in a structure similar to the SOAP message hierarchy. The WSDL or schema determines the structure of the hierarchy. Map each input port to a node in the SOAP message.

The following figure shows a mapping between the input ports and the SOAP message nodes in a web service Output transformation:



## Input Ports Area

Create groups of input ports in the **Input Ports** area. Include input ports for each level in the SOAP message hierarchy that you need to map.

You must create a Response or Request input group and the child groups that receive the data.

When you create input port groups, define a primary key in each parent group. Define a foreign key in each child group. The foreign key relates the group to a parent group.

You do not have to define keys for the Response level or the WSDL root level unless you are passing data at the WSDL root level. For example, the root level might contain HTTP headers.

You might create groups of ports similar to the following groups for customers and orders:

```
Response
  Response_Key

Customer_Details_Root
  Key_Cust_Det
  FK_Response_Key

Customer
  Customer_ID
```

```

FK_Cust_Det
  Name
  Address

Orders
  Order_Num
  FK_Cust_ID

Order_Items
  Order_Num
  Item
  Count
  Price

```

## Operation Area

The **Operation** area shows the elements in the SOAP message hierarchy as defined by the WSDL or schema. The SOAP message does not have to contain all the elements from the WSDL or schema. The message contains the data that you map from the input ports.

Multiple-occurring nodes and complex nodes define hierarchy levels in the SOAP message structure. The Developer tool adds keys to the levels to create parent-child relationships between them. All levels in the hierarchy, except for the leaf levels, have a primary key. Each child level has a foreign key to a parent level. The keys that appear in the SOAP message hierarchy do not appear in a SOAP message instance. The Data Integration Service requires values in the keys to relate levels of the data when it generates the SOAP message.

The **Location** column contains the group name and input port that contains the data for an element in the SOAP message. The **Location** column is empty until you map an input port to the node.

In the preceding figure, the SOAP message contains a single instance of customer details and orders. The Orders group contains a multiple-occurring element called Order. The SOAP message hierarchy has the following levels related by key:

```

Response
  GetCustomerDetailsResponse
    GetCustomerDetailsResult
      Orders
        Order

```

The Response level represents the root of the response message. The Data Integration Service requires this level to attach headers to the SOAP message.

The GetCustomerDetailsResponse level is the root of the message.

## Port and Hierarchy Level Relationships

When you map input ports to the SOAP message hierarchy, you maintain a relationship between an input group and a SOAP message hierarchy level. For example, you might have two input groups, Department and Employee.

The Department input group receives the following rows:

| Dept_num | Name    | Location   |
|----------|---------|------------|
| 101      | HR      | New York   |
| 102      | Product | California |

The Employee input group receives the following rows:

| Dept_num | Employee |
|----------|----------|
| 101      | Alice    |
| 101      | Bob      |
| 102      | Carol    |
| 102      | Dave     |

Map the department number in the Employee group as a foreign key that establishes the relationship between the Department and the Employee group. The department number occurs in the department hierarchy level, but not the employee level.

The SOAP message contains the following XML structure:

```
<department>
  <dept_num>101</dept_num>
  <name>HR</name>
  <location>New York</location>

  <employee>
    <name>Alice</name>
  </employee>

  <employee>
    <name>Bob</name>
  </employee>
</department>

<department>
  <dept_num>102</dept_num>
  <name>Product</name>
  <location>California</location>

  <employee>
    <name>Carol</name>
  </employee>

  <employee>
    <name>Dave</name>
  </employee>
</department>
```

## Keys

A SOAP message hierarchy includes keys. The Data Integration Service requires key values to construct the XML hierarchy in the SOAP message.

You must map input port data to the keys in the SOAP message hierarchy. Map data to the keys in each level that you are providing data. When you have a multiple-occurring node, you need to relate the node to a parent.

The keys appear in the SOAP message without types. Any port that you map to a key must be a string, integer, or bigint datatype. The primary key in the parent group and the foreign key in each child group must have the same datatype, precision, and scale. You can map generated keys to the SOAP message keys.

You can map a port to a node and to a key in the same hierarchy level. For example, you map Employee\_ID to a node in the SOAP message and you map it to a key in the Employee level.

If two group nodes in the hierarchy have a parent-child relationship, complete the following tasks:

- Map a port to the primary key in the parent node group.

- Map a port to the foreign key in the child node group.

You can also map primary keys to input ports to remove rows with a primary key of null or with duplicate primary keys.

You can create a composite key in a SOAP message by mapping multiple ports to the same key. Use composite keys when you need to denormalize data and maintain unique keys for some multiple-occurring combinations of values. You can create composite keys that contain strings, bigint, or integer values.

**Note:** You can include an Expression transformation in the operation mapping to generate key values.

### Composite Key Example

Configure a unique division-department key from the following groups of ports:

```
Company
  Company_Num
  Company_Name

  Division
    Company_Num
    Division_Num
    Division_Name

    Department
      Division_Num
      Dept_Num
      Dept_Name
      Location
```

The Dept\_Num is unique within a division, but Dept\_Num is not unique for all divisions in the Company.

You might configure a Department group that contains the division and the department information. Configure the division number and the department number as part of the composite key:

```
Department
  Division_Num + Dept_Num (key)
  Dept_Name
  Location
```

The order that you map the ports determines the key value.

## Map Ports

After you create input ports, map each input port to the SOAP message hierarchy. The location of the port appears next to the node in the **Operation** area.

You can map ports to the following types of nodes:

#### Atomic node

A simple element or an attribute that has no children and is not divisible.

#### Multiple-occurring atomic node

A simple element or an attribute that occurs multiple times at the same location in the hierarchy.

#### Complex node

An element that contains other elements.

If the parent node does not have a location, the parent node receives the input group name as the location. When the parent node has a location, each node in the hierarchy level must have an output location from the same location.

You can map an input group name to a parent node in a hierarchy level. The Developer tool updates the location field for the parent node in the hierarchy. The Developer tool does not update the child nodes that belong to the group in the hierarchy. When you map input ports to the child nodes, each input port location must be the same location as the location parent node.

After you map an input group to a hierarchy level, you can change it later. You can click **Clear** or you can delete the lines between the Ports and the Operation area. To delete the lines, drag the pointer of the lines to select them. Click **Delete**.

## Map a Port

When you map a port to a node in the SOAP message, the Developer tool provides different results based on the type of node to which you map the port.

The following table describes the results when you map a single port to different target nodes in the **Operation** area:

| Target Node   | Results  |
|---|--|
| Atomic node   | When you map a single port to a node and the parent node does not have a location, the node receives the location of the port. The parent node location receives the location of the input group for the single port. When you map a single port to a node and the parent node already has a location, you can change the location for the parent node and clear the location for the other child nodes in the same level. The hierarchy level location changes to the group name of the port. |
| Multiple-occurring atomic node or the primary key of the multiple-occurring atomic node | When you map a single port to the multiple-occurring atomic node, the Developer tool sets the location for the atomic node to the group of the selected port.  |
| Complex node  | When you map a single port to a complex node, the Developer tool sets the location of the complex node to the location of the group that contains the port. The Developer tool prompts you for the single occurring atomic node to assign the port to.<br>If all single-occurring atomic nodes have a location, you cannot map the complex node.   |



## Map a Group

When you map an input group to a node in the SOAP message, the Developer tool provides different results based on the type of node that you map the port to.

The following table describes the results when you map a group to a node in the **Operation** area:

| Target Node                     | Results   |
|---------------------------------|---|
| Atomic node                     | You cannot map a group to an atomic node.   |
| Multiple-occurring atomic node  | You are prompted to choose a port in the input group to update the location for the node and primary key. |
| Multiple-occurring complex node | The Developer tool sets the location for the complex node to the location of the group.                   |

## Map Multiple Ports

When you map multiple ports to a node in the SOAP message, the Developer tool provides different results based on the type of node you map the ports to. You can map multiple ports at the same time if you map them from the same group.

The following table describes the results for the node when you map multiple ports to nodes:

| Target Node                     | Results  |
|---------------------------------|--|
| Single atomic node              | When you map multiple ports to a single node, you update the location for more than one single atomic node in the <b>Operation</b> area. If the hierarchy does not have enough nodes in the level to update, the Developer tool maps ports just for the available nodes.             |
| Multiple-occurring atomic node  | When you map multiple ports to multiple-occurring atomic node, you pivot the ports into multiple occurrences of the node. The Developer tool creates instances of the node based on how many ports you map. A message appears that describes the number of ports that you projected. |
| Multiple-occurring complex node | When you map multiple ports to a complex node, you must select which single-occurring nodes atomic nodes to update. You pivot the ports into multiple occurrences of the node. The Developer tool creates instances of the node based on how many ports you map.                     |

## Pivoting Multiple-Occurring Ports

You can map multiple input ports to a multiple-occurring node in the SOAP message. The Developer tool pivots the input data into multiple nodes in the SOAP message.

To change the number of elements to pivot, choose **Override existing pivoting** in the **Map Options** dialog box.

If you remove one of the pivoted port instances from the **Ports** area, the Developer tool removes all instances from the **Operation** area.

## Pivoting Example

An input group might have the following rows:

| Num | Name    | Location   | emp_name1 | emp_name2 | emp_name3 |
|-----|---------|------------|-----------|-----------|-----------|
| 101 | HR      | New York   | Alice     | Tom       | Bob       |
| 102 | Product | California | Carol     | Tim       | Dave      |

Each row contains a department number and three employees names.

Employee is a multiple-occurring node in the SOAP message hierarchy. You can map all instances of Employee from the input row to the SOAP message hierarchy. Select all occurrences of Employee. Click **Map**. The **Map Options** dialog box prompts you to choose a node from the list.

The Developer tool changes the Employee node to include the multiple name nodes in the SOAP message hierarchy:

```
Department
  num
  name
  location
  Employee (unbounded)
    emp_name1
    emp_name2
    emp_name3
```

The SOAP message returns the following hierarchy:

```
<department>
  <num>101</num>
  <name>HR</name>
  <location>New York</location>
  <employee>
    <emp_name>Alice</name>
  </employee>
  <employee>
    <emp_name>Tom</name>
  </employee>
  <employee>
    <emp_name>Bob</name>
  </employee>
</department>

<department>
  <num>102</num>
  <name>Product</name>
  <location>California</location>
  <employee>
    <emp_name>Carol</name>
  </employee>
  <employee>
    <emp_name>Tim</name>
  </employee>
  <employee>
    <emp_name>Dave</name>
  </employee>
</department>
```

# Map Denormalized Data

You can map denormalized data and pass it to normalized nodes in a SOAP message.

When you map denormalized data, you pass data from one input group to multiple nodes in the SOAP message hierarchy. You can create group relationships in the SOAP message similar to the following types of relationships:

## Linear Node Relationship

Node A is parent to Node B. Node B is a parent to Node C. Node C is the parent of Node D.

## Hierarchical Node Relationship

Node A is a parent to Node B. Node A is also a parent to Node C. Node B and Node C are not related.

The following table shows input rows that contain denormalized division and department data:

| Division | Dept_Num | Dept_Name   | Phone | Employee_Num | Employee_Name |
|----------|----------|-------------|-------|--------------|---------------|
| 01       | 100      | Accounting  | 3580  | 2110         | Amir          |
| 01       | 100      | Accounting  | 3580  | 2113         | Robert        |
| 01       | 101      | Engineering | 3582  | 2114         | Stan          |
| 01       | 101      | Engineering | 3582  | 2115         | Jim           |
| 02       | 102      | Facilities  | 3583  | 2116         | Jose          |

The input data contains unique employee numbers and names. The division and department data repeat for each employee in the same department and division.

## Linear Group Relationship

When you configure ports, you can configure a separate group for Division, Department, and Employee. Division is a parent of Department, and Department is the parent of Employee. You can configure groups in the following linear structure:

```
Division
  Division_Key
  Division_Num
  Division Name

  Department
    Department_Key
    Division_FKey
    Dept_Num
    Dept_Name
    Phone

    Employee
      Department_Fkey
      Employee_Num
      Employee_Name
```

The SOAP message contains unique instances of Division and Department although Division\_Num and Dept\_Num repeat in the input data. Define the Division\_Num as the primary key in the Division group. Define Dept\_Num as the primary key in the Department group.

## Hierarchical Group Relationship

You can create a group hierarchy that contains the Division parent group and Department and Employee child groups. Department and Employee do not have a primary key-foreign key relationship. Department and Employee are children of Division. You can configure the groups in the following structure:

```
Division
  Division_Key
  Division_Num
```

```

Division_Name

Department
  Division_FKey
  Dept_Num
  Dept_Name

Employee
  Division_FKey
  Employee_Num
  Employee_Name

```

## Derived Types and Element Substitution

You can map input ports to derived complex types, anyType elements, and substitution groups in a SOAP message. The SOAP message can include elements for the base type and the derived types.

In a type relationship, the base type is the type from which you derive another type. A derived type inherits elements from the base type. An extended complex type is a derived type that inherits elements from a base type and includes additional elements. A restricted complex type is a derived type that restricts some elements from the base type.

### Generating Derived Types

When a WSDL or schema includes derived types, you must choose the types that you want to include in the SOAP message.

For example, the WSDL defines a base type AddressType. The WSDL also contains a USAddressType and a UKAddressType that are the derived AddressTypes.

Each type contains the following elements:

- AddressType: street, city
- USAddressType (extends AddressType): state, zipCode
- UKAddressType (extends AddressType): postalCode, country

When you choose a USAddressType in the Operation area, the Developer tool creates a group for the USAddressType element in the SOAP message. The group includes the street and city from the base address and the state and zipCode for the USAddress. Derived types that extend base types always include the elements from the base type.

If you choose all of the available derived types for the SOAP message, the Developer tool creates groups similar to the following in the SOAP hierarchy:

```

Address
  Address: Address
    Street
    City

Address:USAddressType
  Street
  City
  State
  ZipCode

Address: UKAddressType
  Street
  City

```

PostalCode  
Country

You need to define input port groups for Address, USAddress, and UKAddress.

## Generating anyType Elements and Attributes

Some schema elements and attributes allow any type of data in a SOAP message.

The anytype element represents a choice of all globally known types. Before you map a port to an anyType element in a SOAP message, choose an available complex type or xs:string. If the WSDL or schema does not contain a complex type, the Developer tool replaces the anyType element type with xs:string.

To choose an element type in the Operation area, click **Choose** in the **Type** column for the anyType element. A list of available complex types and xs:string appears.

The following element and attributes allow any type of data:

### **anyType element**

Allows an element to be any datatype in the associated XML file.

### **anySimpleType element**

Allows an element to be any simpleType in the associated XML file.

### **ANY content element**

Allows an element to be any global element defined in the schema.

### **anyAttribute attribute**

Allows an element to be any attribute already defined in the schema.

## Generating Substitution Groups

Use substitution groups to replace one element with another in a SOAP message. Substitution groups work similarly to derived types, except that the element definitions include a substitution group name.

For example, you might have a base type Address and the derived types USAddress and UKAddress:

```
xs:element name="Address" type="xs:string"/>
<xs:element name="USAddress" substitutionGroup="Address"/>
<xs:element name="UKAddress" substitutionGroup="Address"/>
```

When you configure the SOAP message hierarchy, you can choose which element to substitute for Address in the SOAP message.

## Generating XML Constructs in SOAP Messages

A WSDL or schema can contain choice, list, or union elements. Web service transformations can generate SOAP messages that contain these elements.

## Choice Element

A choice element restricts a child element to one of the elements in the <choice> declaration.

To map ports to a SOAP message that contains choice elements, create one input group that includes all the elements in the choice construct. For example, an item description might be a dimension or a weight:

```
item: description, choice {dimension, weight}
```

When the description is a dimension, the description is a complex type that contains, length, width, and height.

When the description is a weight, the description is a simple string type.

The input data has the following columns and rows:

| description | length | width | height | weight |
|-------------|--------|-------|--------|--------|
| box         | 20cm   | 18cm  | 15cm   | NULL   |
| coffee      | NULL   | NULL  | NULL   | 500g   |

The SOAP message contains an Item group that contains dimensions or weight descriptions:

```
Item
  Description
    Dimension
      Length
      Width
      Height
    Weight
```

The NULL values in the input data become missing elements in the XML output.

The SOAP message contains the following data:

```
<item>
  <desc>box</desc>
  <dimension>
    <length>20cm</length>
    <width>18cm</width>
    <height>15cm</height>
  </dimension>
</item>

<item>
  <desc>coffee</desc>
  <weight>500g</weight>
</item>
```

## List Element

A list is an XML element that can contain multiple simple type values in the same element or attribute. The Data Integration Service can process a list in the input data if the list is represented as consolidated string of data.

If each item in the list is a separate element, such as ClassDates1, ClassDates2, and ClassDates3, the Data Integration Service cannot process the items as a list. You can use an Expression transformation to combine them into a string if you need to return a list in a SOAP message.

The following input rows contain a list element called ClassDates that contains days of the week:

| CourseID  | Name              | ClassDates  |
|-----------|-------------------|-------------|
| Math 1    | Beginning Algebra | Mon Wed Fri |
| History 1 | World History     | Tue Thu     |

The Data Integration Service can return a SOAP message with the following XML structure:

```
<class>
  <courseId>Math 1</courseId>
  <name>Beginning Algebra</name>
  <classDates>Mon Wed Fri</classDates>
</class>
<class>
  <courseId>History 1</courseId>
  <name>World History</name>
  <classDates>Tue Thu</classDates>
</class>
```

## Union Element

The union element is a simple type that is a union of more than one type. When a SOAP message contains a union element, you must map a single input port that contains the data in a string.

For example, the SOAP message contains an element called size. Size is a union of integer and string:

```
<xs:element name="size">
  <xs:simpleType>
    <xs:union memberTypes="size_no size_string" />
  </xs:simpleType>
</xs:element>
```

The input rows contain items with a description and size. An item can have a numeric size, such as 42. Or, an item can have a size that is a string value, such as large, medium, or small.

The following table shows input rows with a numeric size and a string size:

| Desc  | Size  |
|-------|-------|
| shoes | 42    |
| shirt | large |

Create one port for the item size. Map the port as a string. The SOAP message contains the following elements:

```
<item>
  <desc>shoes</desc>
  <size>42</size>
</item>

<item>
  <desc>shirt</desc>
  <size>large</size>
</item>
```

## CHAPTER 48

# Weighted Average Transformation

This chapter includes the following topics:

- [Weighted Average Transformation Overview, 620](#)
- [Configuring a Weighted Average Transformation, 620](#)
- [Weighted Match Scores Example, 621](#)
- [Weighted Average Transformation Advanced Properties, 621](#)

## Weighted Average Transformation Overview

The Weighted Average transformation is a passive transformation that reads match scores from multiple matching operations and produces single match score.

You can apply a numerical weight to each score that enters the Weighted Average Transformation. A weight is a value between zero and 1. You can edit the weight applied to each input score to increase or decrease its contribution to the output score. Apply weights that reflect the relative importance of each data column in the duplicate analysis.

Use the Weighted Average transformation when you add Comparison transformations to a mapping or mapplet.

**Note:** You also can assign weights in a Match transformation. Use the Match transformation to configure matching strategies and assign weights in a single transformation. You can embed a matching mapplet in a Match transformation.

## Configuring a Weighted Average Transformation

You use the Weighted Average transformation to adjust the overall match score that a mapping generates for a series of match analysis operations. You edit the relative weights of each input port to reflect the priorities



of the data comparisons that you defined for the source data set. Each input port on the Weighted Average transformation represents a match score output from a Comparison transformation strategy.

The following steps describe the process to configure a non-reusable Weighted Average transformation in a mapplet or mapping that uses Comparison transformations.

1. Open a match analysis mapplet or mapping, and add a Weighted Average transformation downstream of the Comparison transformations.
2. Connect the score output from a Comparison transformation to a Weighted Average input port. Repeat this step for other Comparison transformations in the mapplet or mapping.
3. Select the **Ports** tab on the Weighted Average transformation.
4. Double-click the **Weight** field for each input, and enter a weight value between 0.001 and 1. The weight value should reflect the relative importance of the input score when compared to other inputs on the transformation.
5. Save the mapplet or mapping.

## Weighted Match Scores Example

You create a match analysis mapping to determine the number of duplicate customer names in a customer database. You add two Comparison transformations to generate match scores for the `ZIP code` and `Surname` columns in the data set.

Many records have matching ZIP codes, but a much smaller number of records have matching surnames. When averaging these match scores, you need to emphasize the importance of the more unique matches.

To emphasize the importance of the surname match scores, you apply a higher weight to the `Surname` match score.

For example, you set the **Weight** value of the Surname score input to 0.8, and you set the value of the **Weight** value of the ZIP Code score input to 0.4.

## Weighted Average Transformation Advanced Properties

Configure properties that help determine how the Data Integration Service processes data for the Weighted Average transformation.

You can configure tracing levels for logs.

Configure the following property on the **Advanced** tab:

### Tracing Level

Amount of detail that appears in the log for this transformation. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

## CHAPTER 49

# Write Transformation

This chapter includes the following topics:

- [Write Transformation Overview, 622](#)
- [Write Transformation Properties , 622](#)
- [Create a Write Transformation, 627](#)

## Write Transformation Overview

A Write transformation is a passive transformation. It represents a target that the mapping writes data to. You can create a Write transformation from a physical data object, a logical data object, or a parameter. The Write transformation is nonreusable.

The properties that you can configure for a Write transformation depend on the type of data object that you used to create the transformation.

Write transformations can represent dynamic targets. You can configure a Write transformation to dynamically update its ports, metadata, and other properties. For information about configuring dynamic targets, see the *Informatica Developer Mapping Guide*.

## Write Transformation Properties

After you create a Write transformation, you can configure properties for the transformation.

Configure Write transformation properties on tabs in the **Properties** view of the transformation. The tabs that you can configure depend on the type of target that the Write transformation represents.

The following table describes each property tab and identifies the target type that you use the tab for:

| Property Tab           | Description  | Target Type  |
|------------------------|--|--|
| General                | Specify transformation properties and behavior.<br>For relational and customized data object sources, synchronize transformation input ports with source.  | All  |
| Data Object            | Specify the transformation data source.<br>For relational and customized data object sources, get data object columns from data source at run time.  | Flat file<br>Relational<br>Customized data object                          |
| Format                 | Input settings for a flat file data source   | Flat file  |
| Ports                  | Set port definition by the associated data object or by mapping flow.  | All  |
| Run-time               | Properties that the Data Integration Service uses when writing data to the target at run time, such as where to send reject files.<br>For a flat file target, reject file names and directories. | Flat file<br>Relational  |
| Data Object Parameters | View the data object parameters. Configure parameter values for the mapping or bind the parameters to a mapping parameters.  | Flat file<br>Customized data object<br>Logical data objects                |
| Run-time Linking       | Create new run-time links and view link properties.  | All  |
| Advanced               | Set tracing level and row order.<br>For a relational target, create or replace the target table at run time.   | Flat file<br>Relational<br>Customized data objects<br>Logical data objects |

## General Properties

You can configure the name and description of the Write transformation. You can also configure the following properties:

### When Column Metadata Changes

Available for relational and customized targets. Select one of the following options:

- Synchronize input ports. The Developer tool updates Write transformation input ports with metadata changes that the Model repository stores for the data object.
- Do not synchronize. The Developer tool does not show metadata changes in the data object.

Default is the Synchronize input ports option.

### Physical Data Object

Available for flat file and customized targets. The object used to create the transformation.

You can select the data object name and configure its properties.

## Data Object Properties

On the Data Object tab, you can specify or change the Write transformation target, and make relational and customized data object targets dynamic.

You can configure the following properties:

### Specify By

To specify target columns and metadata for the Write transformation, select one of the following options:

- **Value.** The Write transformation uses the associated data object to specify target columns and metadata.
- **Parameter.** The Write transformation uses a parameter to specify target columns and metadata.

Default is the Value option.

### Data Object

If you created the Write transformation from an existing data object, the field displays the name of the object. Click **Browse** to change the data object to associate with the Write transformation.

### Parameter

Choose or create a parameter to associate with the Write transformation.

### At runtime, get data object columns from data source

When you enable this option, the Data Integration Service fetches metadata and data definition changes from target tables to the Write transformation.

## Ports Properties

On the Ports tab, you can configure the following properties:

### Columns defined by

Select one of the following options to define Write transformation columns:

- **Associated data object.** Use column names, metadata, and other properties from the data object in the Data Object tab.
- **Mapping flow.** The mapping fetches column names, metadata, and other properties from the upstream objects in the mapping.

Default is the Associated data object option.

### Column resource properties

Available for flat file and customized targets. The resource for each column is the data object from which the column fetches its name, metadata, and other properties. Select the resource name to change resource properties.

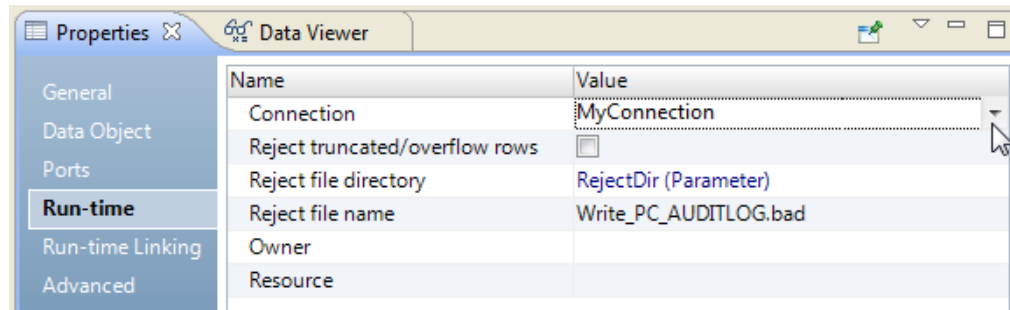
## Run-Time Properties

You can configure the following Write transaction properties on the Run-time tab:

### Connection

Available for relational targets. Connection used by the transformation. Click in the right side of the field to change the connection.

The following image shows the location of the dropdown button to click:



#### Reject truncated/overflow rows

Available for relational and customized targets.

The Developer tool lets you convert data by passing it from port to port. Sometimes a conversion causes an overflow of numeric data or truncation of strings in columns that contain characters. For example, passing data from a Decimal (28, 2) to a Decimal (19, 2) port causes a numeric overflow. Likewise, if you pass data from a String(28) port to a String(10) port, the Data Integration Service truncates the strings to 10 characters.

When a conversion causes an overflow, the Data Integration Service, by default, skips the row. The Data Integration Service does not write the data to the reject file. For strings, the Data Integration Service truncates the string and passes it to the next transformation.

Select this option to include all truncated and overflow data between the last transformation and target in the session reject file. The Data Integration Service sends all truncated rows and any overflow rows to the session reject file or to the row error logs, depending on how you configure the session.

#### Reject file directory

Directory where the reject file exists. Default is the RejectDir system parameter.

#### Reject file name

File name of the reject file. Default is <output\_file\_name>.bad.

If multiple partitions write to the flat file target, each partition writes to a separate reject file named <output\_file\_name><partition\_number>.bad.

## Run-time Linking Properties

Create and configure a run-time link on the **Run-time Linking** tab. A run-time link is a group-to-group link between transformations that uses a parameter, a link policy, or both to determine which ports to link at run time. Run-time links appear as thick lines in the mapping editor.

Create and configure run-time links to a Write transformation in the following cases:

- The target data object in the Write transformation uses a parameter.
- Ports from the upstream transformation can change at run time.

**Note:** Do not create a run-time link to a Write transformation when you define the target columns based on the mapping flow.

You can perform the following tasks on the **Run-time Linking** tab:

#### Create a run-time link.

In the **Links** area, click the **New** button and select the transformation from which you want to link the ports to the Write transformation at run time in the New Link dialog box.

### Configure the run-time link properties.

In the **Link Properties** area, configure the following run-time link properties:

#### Parameter

Select this option when the port names can change between mapping runs and you know the port name values. Use a parameter of type Input Link Set to connect ports by name values between mapping runs. The syntax for the Input Link Set mapping parameter consists of comma-separated pairs of ports: Afield1->Bfield2, Afield3->Bfield4 .

#### Link Policy

Select this option when you want to automatically link ports that have matching names. For example, when both of the mapping objects contain a port called SALARY, the Data Integration Service links them. You can ignore prefixes and suffixes in the port names.

At run time, the Data Integration Service establishes and resolves links between the ports in the following order:

- Links that you manually create in the mapping editor.
- Links based on the parameter that you configured for a run-time link.
- Links based on the link policy that you configured for a run-time link.

For more information on run-time links, see the *Informatica Developer Mapping Guide*.

## Advanced Properties

The Data Integration Service can run SQL commands.

The Data Integration Service runs pre-mapping SQL commands against the source database before it reads the source. It runs post-mapping SQL commands against the source database after it writes to the target. You can configure the following Write transaction properties on the Advanced tab:

#### Tracing level

Control the amount of detail in the mapping log file.

#### Target load type

Type of target loading. Select Normal or Bulk. You can set the target load type for relational resources or customized data objects.

If you select Normal, the Data Integration Service loads targets normally. You can choose Bulk when you load to DB2, Sybase, Oracle, or Microsoft SQL Server. If you specify Bulk for other database types, the Data Integration Service reverts to a normal load. Bulk loading can increase mapping performance, but it limits the ability to recover because no database logging occurs.

Choose Normal mode if the mapping contains an Update Strategy transformation. If you choose Normal and the Microsoft SQL Server target name includes spaces, configure the following environment SQL in the connection object:

```
SET QUOTED_IDENTIFIER ON
```

#### Update override

Overrides the default UPDATE statement for the target.

#### Delete

Deletes all rows flagged for delete.

Default is enabled.

**Insert**

Inserts all rows flagged for insert.

Default is enabled.

**Create or replace table at run time**

The Data Integration Service drops the target table at run time and replaces it with a table based on a target table that you identify.

**Truncate target table**

Truncates the target before it loads data.

Default is enabled.

**Update strategy**

Update strategy for existing rows. You can select one of the following strategies:

- Update as update. The Data Integration Service updates all rows flagged for update.
- Update as insert. The Data Integration Service inserts all rows flagged for update. You must also select the **Insert** target option.
- Update else insert. The Data Integration Service updates rows flagged for update if they exist in the target and then inserts any remaining rows marked for insert. You must also select the **Insert** target option.

**PreSQL**

SQL command the Data Integration Service runs against the source database before it reads the source.

The Developer tool does not validate the SQL.

**PostSQL**

SQL command that the Data Integration Service runs against the source database after it writes to the target.

The Developer tool does not validate the SQL.

**Maintain row order**

Maintain the row order of the input data to the target. Select this option if the Data Integration Service should not perform any optimization that can change the row order.

When the Data Integration Service performs optimizations, it might lose the row order that was established earlier in the mapping. You can establish row order in a mapping with a sorted flat file source, a sorted relational source, or a Sorter transformation. When you configure a target to maintain row order, the Data Integration Service does not perform optimizations for the target.

**Constraints**

SQL statements for table-level referential integrity constraints. Applies to relational targets only.

## Create a Write Transformation

When you create a Write transformation, you choose one of the following methods based on the resource you create the transformation from:

**Create the transformation from a data object in the Model repository.**

Use this method if you want to base the Write transformation metadata on a data object.

To create a Write transformation in the mapping editor, use the **New Write Transformation** wizard, or drag a data object from the **Object Explorer** view and select Write as the transformation type.

**Create the transformation from the flow of mapping objects.**

Use this method to base the ports in the Write transformation on the flow of metadata from upstream mapping transformations.

**Create the transformation using a parameter.**

Use this method if you want the Write transformation to inherit ports from the object that the parameter represents.

**Create the transformation using another transformation in the mapping.**

Use this method if you want the Write transformation to have the same ports as the source transformation.

## Creating a Write Transformation from a Data Object

You can create and configure a Write transformation in the mapping editor.

You might want to use this method if you want to configure specific properties for the transformation. For example, you can create the transformation, and then configure it to get column metadata from the data source at run time.

1. Right-click in the mapping editor and select **Add Transformation**.  
The **Add Transformation** dialog box opens.
2. Select **Write** and click **OK**.  
The **New Write Transformation** wizard opens.
3. Select **Physical Data Object** or **Logical Data Object**, and then click **Browse**.  
The **Select Data Object** dialog box opens.
4. Select a data source, and then click **OK**.
5. To define Write transformation columns by the associated data object, select **Associated data object**.  
The Write transformation ports are the same as the columns of the associated data object.
6. To dynamically update target object columns at run time with changes from the target file, select **At run-time, get data object columns from data source**.  
The Data Integration Service refreshes the column metadata for the Write transformation when the mapping runs.
7. Click **Finish**.

## Creating a Write Transformation from Mapping Flow

You can create and configure a Write transformation in the mapping editor.

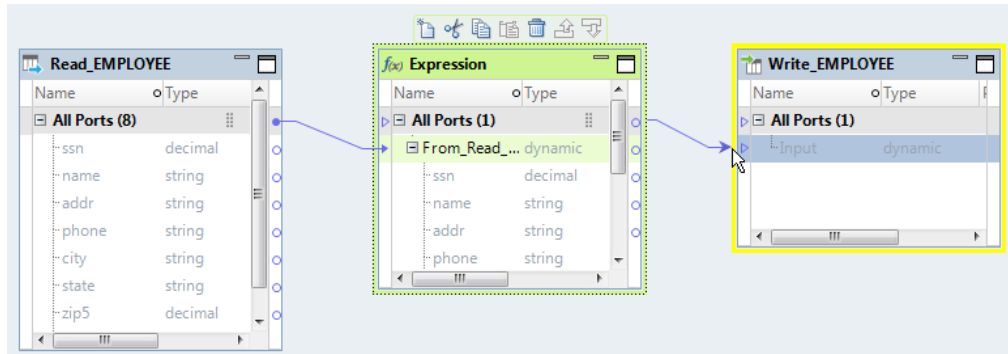
You might want to use this method if you want to configure specific properties for the transformation. For example, you can create the transformation, and then configure it to define columns based on mapping flow and to get column metadata from the data source at run time.

1. Right-click in the mapping editor and select **Add Transformation**.  
The **Add Transformation** dialog box opens.
2. Select **Write** and click **OK**.  
The **New Write Transformation** wizard opens.



3. Select **Physical Data Object** or **Logical Data Object**, and then click **Browse**.  
The **Select Data Object** dialog box opens.
4. Select a data source, click **OK**.
5. Select **Mapping flow**, and then click **Finish**.
6. Drag ports from the All Ports port of the upstream to the **Input** port of the Write transformation.

The following image shows how to connect upstream ports to the **Input** port of the Write transformation:



The Write transformation receives column definitions from upstream mapping objects.

7. To dynamically update target object columns at run time with changes from the target file, select **At run-time, get data object columns from data source**.

The Data Integration Service refreshes the column metadata for the Write transformation when the mapping runs.

## Creating a Write Transformation from a Parameter

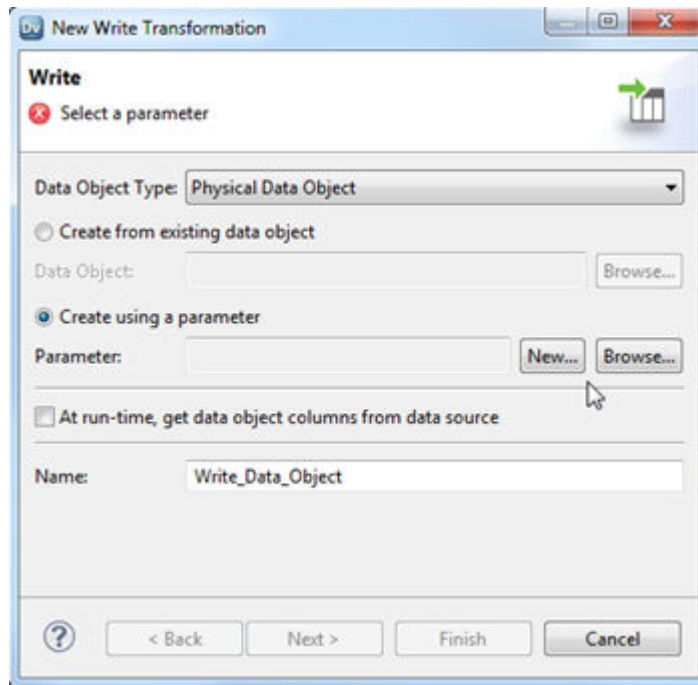
A parameter is a constant value that you can change between mapping runs.

In a dynamic mapping, you can use parameters to change sources and targets. You can also use parameters for input rules, selection rules, run-time links, and transformation properties. When you change the value of the parameter, the Data Integration Service creates or recreates the target according to the value specified in the parameter.

1. Right-click in the editor and select **Add Transformation**.
2. Select Write from the list of transformations, and then click **OK**.

**Tip:** Type the first letter of the transformation to filter the list.

The New Write Transformation dialog box opens.



3. Select **Create using a parameter**.
4. Browse to select the parameter, or click **New** to create a new parameter, and then browse to select a data object to create the parameter from.
5. Optionally, select the option **At run time, get data object columns from data source** to refresh the transformation columns at run time.
6. Optionally, click **Next** to choose how to define transformation columns.
7. Click **Finish**.

## Creating a Write Transformation from an Existing Transformation

When you create a Write transformation from a transformation already in the mapping, the Write transformation is created with the same ports as the Read transformation.

1. Open a mapping in the editor.
2. Right-click a transformation in the mapping editor and select **Add Target**.

The **Create Target** window opens.

3. Choose a flat file or relational data object type.

**Note:** You can base a target only on flat files or relational resources.

4. Choose a link type.

You can choose from the following link types:

### Link ports by name

Ports in the Write transformation correspond to those in the source and have the same names.

### Link dynamic port based on the mapping flow

The Write transformation contains dynamic ports based on upstream objects in the mapping flow.

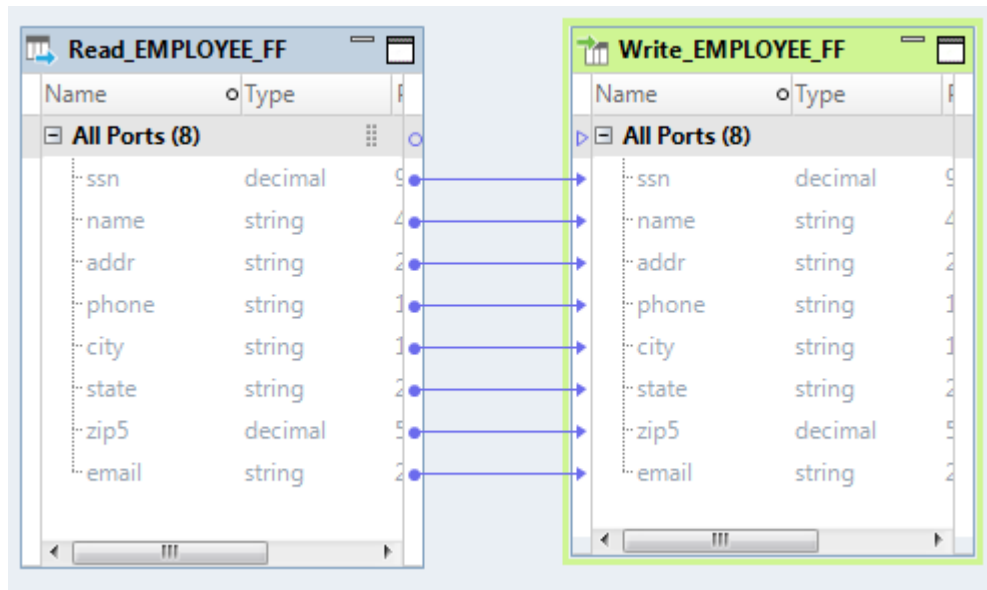
### Link ports at run time based on link policy

Ports are created in the target at run time based on the link policy that you configure on the Run Time Linking tab of the Write transformation.

For more information about dynamic ports and run-time link configuration, see the *Informatica 10.1.1 Developer Mapping Guide*.

5. Name the new data object.
6. Optionally, click **Browse** to select a location for the data object.
7. Click **Finish**.

The following image shows a Write transformation created from a Read transformation, with the same columns:



# APPENDIX A

## Transformation Delimiters

This appendix includes the following topic:

- [Transformation Delimiters Overview, 632](#)

### Transformation Delimiters Overview

Transformation delimiters specify divisions between data strings.

The following table lists the delimiters that transformations use to parse and write data strings:

| Delimiter Name | Delimiter Symbol |
|----------------|------------------|
| at symbol      | @                |
| comma          | ,                |
| dash           | -                |
| double quote   | "                |
| forward slash  | /                |
| full stop      | .                |
| hash           | #                |
| pipe           |                  |
| semi-colon     | ;                |
| single quote   | '                |
| space          | [Spacebar]       |
| tab            | [Tab key]        |
| underscore     | _                |

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