



Informatica® PowerExchange for Qlik
10.2 HotFix 1

User Guide

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Preface

The *PowerExchange® for Qlik User Guide* contains information about how to set up and use PowerExchange for Qlik. This guide is written for database administrators and developers who are responsible for developing mappings that extract data from source and load data to a QVX file. Then, you can use the QVX file to analyze and visualize using Qlik products, such as QlikView and Qlik Sense. This guide assumes you have knowledge of Qlik and Informatica Data Services.

Informatica Resources

Informatica Network

Informatica Network hosts Informatica Global Customer Support, the Informatica Knowledge Base, and other product resources. To access Informatica Network, visit <https://network.informatica.com>.

As a member, you can:

- Access all of your Informatica resources in one place.
- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
- Review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

Use the Informatica Knowledge Base to search Informatica Network for product resources such as documentation, how-to articles, best practices, and PAMs.

To access the Knowledge Base, visit <https://kb.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Documentation

To get the latest documentation for your product, browse the Informatica Knowledge Base at https://kb.informatica.com/_layouts/ProductDocumentation/Page/ProductDocumentSearch.aspx.

If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at infa_documentation@informatica.com.

Informatica Product Availability Matrixes

Product Availability Matrixes (PAMs) indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. If you are an Informatica Network member, you can access PAMs at

<https://network.informatica.com/community/informatica-network/product-availability-matrices>.

Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services. Developed from the real-world experience of hundreds of data management projects, Informatica Velocity represents the collective knowledge of our consultants who have worked with organizations from around the world to plan, develop, deploy, and maintain successful data management solutions.

If you are an Informatica Network member, you can access Informatica Velocity resources at <http://velocity.informatica.com>.

If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that augment, extend, or enhance your Informatica implementations. By leveraging any of the hundreds of solutions from Informatica developers and partners, you can improve your productivity and speed up time to implementation on your projects. You can access Informatica Marketplace at <https://marketplace.informatica.com>.

Informatica Global Customer Support

You can contact a Global Support Center by telephone or through Online Support on Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:

<http://www.informatica.com/us/services-and-training/support-services/global-support-centers>.

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

CHAPTER 1

Introduction to PowerExchange for Qlik

This chapter includes the following topics:

- [PowerExchange for Qlik Overview, 7](#)
- [Introduction to Qlik, 7](#)
- [PowerExchange for Qlik Example, 8](#)

PowerExchange for Qlik Overview

You can use PowerExchange for Qlik to connect to Qlik from Informatica.

You can integrate and transform data from sources, such as flat files, databases, or applications and write to a QVX output file. You can visualize the data and identify patterns and trends by using the QVX file in Qlik products, such as QlikView or Qlik Sense.

When you connect to sources from Qlik, you have to rely on the speed of the underlying data sources. To share data with multiple users, offline access, or faster turnaround, you can use the Qlikview Data Exchange (QVX) file instead of connecting to the data sources from Qlik. The QVX file contains data extracted from an external data source.

Use PowerExchange for Qlik to make the data available as a QVX file for analysis in Qlik. You can load the QVX file to Qlik Sense to create interactive, real-time dashboards. The visual representation helps you understand the profitability, with views presented by geography, product category, and customer segment.

Introduction to Qlik

Qlik is a software that delivers fast analytics and visualization business intelligence. Use the QVX file to input data into Qlik products.

Technical users, such as developers can use QlikView to build powerful data visualization and data discovery applications. Business users can use Qlik Sense to create interactive visualizations, reports, and dashboards without the need for programming.

A Qlikview Data Exchange (QVX) file contains data extracted from an external data source. The QVX file is a Qlik-specific file format with `.qvxx` extension that contains a well documented internal structure, optimized for streaming data from a database.

PowerExchange for Qlik Example

You are a sales analyst in an enterprise and you want to track the overall growth trend in sales, geographic distribution of sales, and top customers, and present a snapshot of the sales distribution to senior executives.

You can integrate data from multiple sources, filter the data, and make the data available as a QVX file for analysis in Qlik products through PowerExchange for Qlik. You can import the QVX file in Qlik to create interactive, real-time dashboards. The visual representation helps you understand the growth trend in sales, with views presented by geography, product category, and customer segment. You can also publish the QVX file to Qlik to share a live and interactive dashboard with all the executives in the organization.

CHAPTER 2

Power Exchange for Qlik Configuration Overview

This chapter includes the following topics:

- [PowerExchange for Qlik Configuration Overview, 9](#)
- [Prerequisites, 9](#)
- [Installing the Server Component, 10](#)
- [Installing the Client Component, 12](#)

PowerExchange for Qlik Configuration Overview

You must configure PowerExchange for Qlik before you can extract data from the source and load data to the QVX file.

Prerequisites

You must perform the following prerequisites before you can use PowerExchange for Qlik:

- Back up the domain configuration repository.
- Back up the Model repository in the domain.
- Identify the gateway node that you want to serve as the master gateway node when the domain starts again.
- Shut down the domain.
- Install and configure the Informatica services.
- Install and configure the Developer tool. You can install the Developer tool when you install Informatica clients.

For more information about product requirements and supported platforms, see the Product Availability Matrix on Informatica Network:

<https://network.informatica.com/community/informatica-network/product-availability-matrices>

Installing the Server Component

You can install the server component on Windows, Linux, Solaris, or on AIX machines.

Installing the Server Component on Windows

If multiple nodes exist in your environment, you must first install the server component on the master gateway node. You can then install the server component on the other nodes in the domain.

Before you install, shut down the Informatica domain.

1. Delete the contents from the following directories:

- `$INFA_HOME\services\work_dir`
- `$INFA_HOME\tomcat\bin\workspace`

2. Navigate to the root directory of the extracted installer files.

3. Run the `install.bat` script file.

The **Welcome** page appears.

4. Click **Next**.

The **Installation Directory** page appears.

5. Enter the absolute path to the Informatica installation directory. Click **Browse** to find the directory or use the default directory.

By default, the server components are installed in the following location:

`C:\Informatica\<version folder>\`

If you did not shut down the domain, a message appears asking you to shut down the domain.

6. Click **Next**.

The **Pre-Installation Summary** page appears.

7. Verify that all installation requirements are met and click **Install**.

The **Domain Information Panel** page appears.

8. View or enter the domain information.

| Property | Description |
|------------------|---|
| Domain Name | Name of the domain where Informatica services are installed. This field is read-only. |
| Node Name | Name of the node on which you are installing the PowerExchange for Qlik server component. This field is read-only. |
| Domain User Name | User name of the administrator for the domain. |

| Property | Description |
|---------------------|---|
| Domain Password | Password for the domain administrator. |
| Master Gateway Node | Indicates whether the node on which you are installing the server component is the master gateway node. Select the option for the master gateway node. Clear the option for all other nodes on which you install the server component. |

- Click **Next**.

The installer shows the progress of the installation. When the installation is complete, the **Post-Installation Summary** page displays the status of the installation.

- Click **Done** to close the installer.

For more information about the tasks performed by the installer, view the installation log files.

Installing the Server Component on UNIX

If multiple nodes exist in your environment, you must first install the server component on the master gateway node. You can then install the server component on the other nodes in the domain.

Before you install, shut down the Informatica domain.

- Delete the contents, including the hidden files and directories, from the following directories:

- \$INFA_HOME/services/work_dir
- \$INFA_HOME/tomcat/bin/workspace

- Navigate to the root directory of the extracted installer files.
- Enter `./install.sh` at the command prompt.

Note: The `./install.sh` file must have executable permissions.

- Enter the path to the Informatica installation directory.

By default, the server components are installed in the following location: <User Home Directory>/Informatica/<version folder>

If you did not shut down the domain, a message appears asking you to shut down the domain.

- Review the installation information and press **Enter** to begin the installation.
- View or enter the domain information.

| Property | Description |
|------------------|---|
| Domain Name | Name of the domain where Informatica services are installed. This field is read-only. |
| Node Name | Name of the node on which you are installing the PowerExchange for Qlik server component. This field is read-only. |
| Domain User Name | User name of the administrator for the domain. |

| Property | Description |
|---------------------|---|
| Domain Password | Password for the domain administrator. |
| Master Gateway Node | Indicates whether the node on which you are installing the server component is the master gateway node. Select from the following options: - Select Yes if the node is the master gateway node. - Select No for all other nodes on which you install the server component. |

For more information about the tasks performed by the installer, view the installation log files.

Installing the Client Component

Install the client component on every Informatica Developer client machine that connects to the domain.

1. Delete the contents from the following directory: `$INFA_HOME\clients\DeveloperClient\workspace`
2. Delete the configuration files and retain the `config.ini` file from the following directory: `$INFA_HOME\clients\DeveloperClient\configuration`
3. Unzip the client installation archive and navigate to the root directory of the extracted installer files.
4. Run the `install.bat` script file.
The **Welcome** page appears.
5. Click **Next**.
The **Installation Directory** page appears.
6. Enter the absolute path to the Informatica installation directory.
7. Click **Browse** to find the directory or use the default directory.
8. Click **Next**.
The **Pre-Installation Summary** page appears.
9. Verify that all installation requirements are met and click **Install**.
The installer shows the progress of the installation. When the installation is complete, the **Post-Installation Summary** page displays the status of the installation.
10. Click **Done** to close the installer.

For more information about the tasks performed by the installer, view the installation log files.

CHAPTER 3

Qlik Connections

This chapter includes the following topics:

- [Qlik Connections Overview, 13](#)
- [Qlik Connection Properties, 13](#)
- [Creating a Qlik Connection, 14](#)

Qlik Connections Overview

Create a Qlik connection to create a QVX file in a directory on the machine where you run the Data Integration Service.

Qlik Connection Properties

When you set up a Qlik connection, you must configure the connection properties.

The following table describes the Qlik connection properties:

| Property | Description |
|--------------------|--|
| Name | Name of the Qlik connection. |
| ID | String that the Data Integration Service uses to identify the connection. The ID is not case sensitive. The ID must be 255 characters or less and must be unique in the domain. You cannot change this property after you create the connection. Default value is the connection name. |
| Description | Description of the connection. The description cannot exceed 765 characters. |
| Location | The Informatica domain where you want to create the connection. |
| Type | Type of connection. Select Qlik . |
| Template File Path | The directory path to a sample QVX file from where the Data Integration Service imports the Qlik metadata. |

Template File Path

When you create a Qlik connection, you can specify the directory that contains the QVX files.

When you configure a session, the QVX files that are available in the specified directory appears in the target object list. Select a template QVX file to fetch the metadata from that file.

The Data Integration Service generates the target object QVX file from the source object based on the data representation in the specified Qlik template file. The path you specify for the template file in the connection properties becomes the default path for the generated target QVX file.

Creating a Qlik Connection

Before you create a Qlik data object, create a connection in the Developer tool.

1. Click **Window > Preferences**.
2. Select **Informatica > Connections**.
3. Expand the domain in the **Available Connections**.
4. Select **Enterprise Applications > Qlik** and click **Add**.
5. Enter a connection name.
6. Enter an ID for the connection.
7. Optionally, enter a connection description.
8. Select the domain on which you want to create the connection.
9. Select a Qlik connection type.
10. Click **Next**.
11. Configure the connection properties.
12. Click **Test Connection** to verify the connection to Qlik.
13. Click **Finish**.

CHAPTER 4

PowerExchange for Qlik Data Objects

This chapter includes the following topics:

- [Qlik Data Objects Overview, 15](#)
- [Qlik Data Object Properties, 16](#)
- [Creating a Qlik Data Object, 16](#)
- [Qlik Data Object Write Operation Properties, 17](#)
- [Creating a Qlik Target, 18](#)

Qlik Data Objects Overview

A Qlik data object is a physical data object that represents data based on a Qlik resource. The Data Integration Service generates the QVX file based on the data representation in the Qlik data object.

You can choose to create a Qlik data object or fetch metadata from an existing QVX file.

The Developer tool adds a default column named `Qlik_sample` when you create the Qlik data object. Based on the columns in the source data, you can add the required columns to the data object.

If you update a QVX file, you can either overwrite the file or append data to the existing file. When you append data to an extract file, ensure that the column metadata in the extract file and the Qlik data object are the same. After you create the Qlik data object, create a Qlik data object write operation and specify the properties for the write operation.

Qlik Data Object Properties

Specify the data object properties when you create a Qlik data object.

The following table describes the properties that you configure for a Qlik data object:

| Property | Description |
|-------------------|--|
| Name | Name of the Qlik data object. |
| Location | The project or folder in the Model repository where you want to store the Qlik data object. |
| Access Type | You can choose one of the following options: Create an empty metadata object Creates a Qlik data object with a sample port. Fetch metadata from file Imports metadata from the specified QVX file. |
| Resource Location | Location of the QVX file. Required when you specify the access method as File . Note: Applicable if you select the Fetch metadata from file access type. |

Creating a Qlik Data Object

Create a Qlik data object to specify a Qlik resource.

1. Select a project or folder in the **Object Explorer** view.
2. Click **File > New > Data Object**.
3. Select **Qlik Data Object** and click **Next**.
The **New Qlik Data Object** dialog box appears.
4. Enter a name for the data object.
5. Click **Browse** next to the **Location** option and select the target project or folder.
6. To create a Qlik data object, select the value of the **Access Method** as **Create an Empty Metadata Object**.
7. To fetch data from an existing QVX file, select value of the **Access Method** as **Fetch Metadata from File** and perform the following tasks:
 - a. Click **Browse** next to the **Resource Location** option. The Windows **Open** dialog box appears.
 - b. Navigate to the location of the QVX file with `.qvx` extension and click **Open**.
 - c. Optionally, select the table in the QVX file and click **View** to review the column details.
8. Click **Finish**.
The data object appears under the **Physical Data Object** category in the project or folder in the **Object Explorer** view.

Qlik Data Object Write Operation Properties

Qlik data object write operation properties include run time and advanced properties that apply to the Qlik data object.

The Data Integration Service writes data to an QVX output file based on the data object write operation properties. The Developer tool displays the data object write operation properties for the Qlik data object in the **Data Object Operation** section.

You can view or configure the data object write operation from the input and target properties. The Developer tool displays advanced properties for the Qlik data object operation in the **Advanced** view.

The following table describes the advanced properties that you can configure for a Qlik data object write operation:

| Property | Description |
|-------------------------------------|--|
| Write Strategy | <p>The operation type to write data to the QVX file.</p> <p>You can choose one of the following operation types to write data to the QVX file:</p> <p>Append</p> <p>Adds data to an existing QVX file.</p> <p>Note: You must use PowerExchange for Qlik to create the QVX file to which you want to append data.</p> <p>Overwrite</p> <p>Deletes existing data in the QVX file and inserts newly read data.</p> |
| Target File Directory | <p>The path to the QVX file to which you want append or overwrite data. Ensure that the directory is located on the machine that hosts the Data Integration Services.</p> <p>Note: If you specified the template file path in the Qlik connection properties, the Data Integration Service ignores the value you specify in the Target File Directory field and considers the template file path for the QVX file.</p> |
| Target File Name | The name of the QVX file without the .qvx extension. |
| Create or Replace Table at Run time | This property is not applicable for PowerExchange for Qlik. |

Creating a Qlik Data Object Write Operation

You can create a data object write operation for a Qlik data object. You can then add the Qlik data object operation to a mapping.

Before you create a data object operation, you must create the data object with the resource.

1. Select the data object in the **Object Explorer** view.
2. Right-click and select **New > Data Object Operation**.
The **Data Object Operation** dialog box appears.
3. Enter a name for the data object operation.
4. Select the type of data object operation. Select **extracts Write** to create a write operation.
5. Click **Add**.

The **Select a resource** dialog box appears.

6. Select the Qlik data object for which you want to create the data object operation and click **OK**.
7. Click **Finish**.

The Developer tool creates the data object operation for the selected data object.

Creating a Qlik Target

You can create a Qlik target by using the **Create Target** option.

1. Select a project or folder in the **Object Explorer** view.
2. Click **New > Physical Data Object**.
The **Physical Data Object** wizard appears.
3. Enter **Qlik** in the search field and click **Qlik Data Object**.
4. Click **Next**.
The **Qlik Data Object** dialog box appears.
5. Specify the following properties:
 - a. **Name:** Name of the Qlik data object.
 - b. **Location:** The project or folder in the Model repository where you want to store the Qlik data object.
 - c. **Access Type:** Select **Create an empty metadata object** to create a Qlik data object with a sample port.
6. Click **Finish**.
7. Navigate to the Qlik target object name that you created in the **Object Explorer** view.
8. Add the data object in the Mapping Designer.
The **Qlik Data Object Access** page.
9. Select **New Operation**.
The **Data Object Operation** dialog box appears.
10. Specify the following properties:
 - a. **Name:** Enter the name of the target object operation.
 - b. **Location:** Enter the repository where you created the target object operation.
 - c. **Capabilities:** Select the capability of the target object operation. By default, **QlikNMOWrite** is selected.
 - d. **Select Resource:** Select the resource file. Required when you specify the access method as **File**.
11. Click **Add** to add the resource.
A dialog box with the resource names appears.
12. Select the **QlikView** option.
13. Click **OK**.
The dialog box with the resource names closes.
14. Click **Finish**.
The **Data Object Operation** dialog box closes.
15. Click **OK**.
The **Qlik Data Object Access** page closes.

The Qlik target definition appears under the **Physical Data Objects** category in the project or folder in the **Object Explorer** view.

Customizing the Qlik Target

After you create a Qlik target, you must customize the Qlik target based on the source data to use the same structure as the source.

Perform the following steps to customize the Qlik target:

1. Navigate to the Qlik target from the **Physical Data Objects** category in the project or folder in the **Object Explorer** view.
2. Click the Target transformation in the Mapping Designer.
3. Click **Properties > General**.
4. Click the value of the **Physical Data Object** property.
A tab appears with the data object operation name.
5. Select the Target transformation and click **Properties**.
6. Click the value of the **Physical Data Object** property in the **General** property category.
The **Input** and **target object** properties appear in the Mapping Designer.
7. Click **Data Object Operations**.
The **Data Object Operations Details** tab appears.
8. Click **Port**.
9. Click the **New** icon to add the required ports for the Qlik target.
10. Click **Advanced**.
11. Select the value of the **Write Strategy** as **Overwrite**.
12. Provide the path to the QVX file to which you want to overwrite the data in the **Target File Directory** property.
13. Click **Overview**.
The **Object Details** tab appears.
14. Click **Columns**.
15. Click the **New** icon to add the required columns for the Qlik target.
16. In the **General** tab, provide the name of the QVX file in the **Name** field.
Note: If you provide the name of the QVX file in the **Target File Name** advanced target property, the Data Integration Service considers the name that you specify in the advanced target property.
17. Click the target **Physical Data Object** tab and map all the fields in the **Input** target operations to the **target object** target operations.
18. Save the mapping.
19. Click the **Mapping** tab and map the Source transformation to the Target transformation.
20. Validate and run the mapping.

CHAPTER 5

PowerExchange for Qlik Mappings

This chapter includes the following topics:

- [Qlik Mappings Overview, 20](#)
- [Mapping Validation and Run-time Environments, 20](#)
- [Qlik Mapping Example, 21](#)

Qlik Mappings Overview

After you create a Qlik data object operation, you can develop a mapping.

You can add a Qlik data object operation to a Qlik mapping as a target. Validate and run the mapping to integrate and transform source data and generate the QVX file. You can edit the Qlik data object operation run time properties to modify the default values.

Mapping Validation and Run-time Environments

You can validate and run mappings in the native environment.

The Data Integration Service validates whether the mapping can run in the selected environment. You must validate the mapping for an environment before you run the mapping in that environment.

Native environment

You can configure the mappings to run in the native or Hadoop environment. When you run mappings in the native environment, the Data Integration Service processes and runs the mapping.

For more information about the Hadoop environment, see the Informatica Big Data Management™ Administrator Guide.

Qlik Mapping Example

You work in the retail industry, and business analysts in your enterprise need to analyze product sales trends based on region.

The sales record files contain columns with information about products that are sold in multiple outlets and regions. Consolidate the data in the sales record files that you receive through the day. You can then perform transformations based on your requirements.

You use the following objects in the Qlik mapping:

Flat file data object

The source for the mapping is a flat file data object that contains the product sales data.

Create a flat file data object and specify the sales record as the resource for the data object. The source columns in the flat file data object include Region ID, Product ID, Quantity, and Cost. Configure the read properties of the data object.

Transformations

Add transformations to get aggregate data about the product sales in a particular region.

- The Filter transformation filters the data in the sales record files based on the value you specify for the region ID column.
The Data Integration Service returns the rows that meet the filter condition.
- The Sorter transformation sorts the data in ascending order based on the region ID.
- The Aggregator transformation collects statistics about product sales for a particular region.
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.

Qlik data object write operation

The target of the mapping is a Qlik data object write operation. Create a Qlik data object and then create a Qlik data object write operation to generate the QVX file.

When you run the mapping, the Data Integration Service writes the sales information to a target QVX file. You can then visualize the sales data categorized by region in Qlik.

CHAPTER 6

Qlik Datatype Reference

This chapter includes the following topics:

- [Data Type Reference Overview, 22](#)
- [Qlik and Transformation Data Types, 22](#)

Data Type Reference Overview

Informatica Developer uses the following data types in Qlik mappings:

Qlik native data types

Qlik data types appear in the physical data object column properties.

Transformation data types

Set of data types that appear in the transformations. They are internal data types based on ANSI SQL-92 generic data types, which the Data Integration Service uses to move data across platforms.

Transformation data types appear in all transformations in a mapping.

When the Data Integration Service writes to a target, it converts the transformation data types to the comparable native data types.

Qlik and Transformation Data Types

The following table lists the Qlik data types that the Data Integration Service supports and the corresponding transformation data types:

| Data Type | Transformation Datatype | Description |
|-----------|-------------------------|---|
| ASCII | String | Maximum length of 52,428,800 characters, default length of 255 characters Note: PowerExchange for Qlik reads string data from the data source with precision set to 255 characters. Hence, PowerExchange for Qlik writes only 255 characters of data read from the data source to the QVX file. |
| DATE | Date | Scale of 12 |

| Data Type | Transformation Datatype | Description |
|-----------|-------------------------|---|
| FIX | Double | Double-precision floating-point numeric value. Precision of 15 |
| INTEGER | Integer(Signed) | -2,147,483,648 (-2^{31}) to 2,147,483,647(inclusive) ($2^{31} - 1$) Precision of 10 |
| INTERVAL | Double | Double-precision floating-point numeric value. Precision of 15 |
| MONEY | Double | Double-precision floating-point numeric value. Precision of 15 |
| REAL | Double | Double-precision floating-point numeric value. Precision of 15 |
| TIME | Date | Scale of 20 |
| UNKOWN | String | Maximum length of 52,428,800 characters, default length of 255 characters Note: PowerExchange for Qlik reads string data from the data source with precision set to 255 characters. Hence, PowerExchange for Qlik writes only 255 characters of data read from the data source to the QVX file. |

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