

InfoSphere Information Server QualityStage

Updating and adding to the built-in rules



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This presentation will discuss how to update or add new QualityStage Postal validation rules to InfoSphere Information Server version 8.

Objectives

- Understand where to find QualityStage rule updates
- How to update already installed rule sets
- How to add new rule sets that are available

The objectives of this presentation are to understand how to locate new and updated InfoSphere Information Server QualityStage Postal Validation rules. It will explain how to update the already installed rules and how to add new rule sets as they become available.

Rule updates and additions

- Updates made to rules sets due to:
 - Issues found by customers
 - Regular updates to certain rule sets for countries whose postal rules are evolving:
 - Japan (updates are currently monthly)
- New rule sets are added
- Rules can be found on Passport Advantage®

InfoSphere Information Server QualityStage ships pre-existing postal validation rules for various countries. On occasion, outside of a release, updates are made to these rules. These updates can be due to several reasons. One reason is to address defects or enhancements requested by customers. Regular updates are made to the Japanese rule sets to address its evolving postal system. Currently, these updates are made monthly. To address the growing demand, new rule sets are made available for additional countries. Recently, rule sets have been added for several Latin American countries and Korea. Updates can be found on Passport Advantage.

Searching for rules on Passport Advantage

- Updates to QualityStage built in rules or new rules found on Passport Advantage
 - Link:
https://www-01.ibm.com/software/howtobuy/passportadvantage/pao_customers.htm
 - Search string “InfoSphere Information Server Postal Validation Rules”
 - Examine eAssembly for InfoSphere Information Server 8.1 Multiplatform Multilingual (CRCD6ML)
 - IBM InfoSphere Information Server V8.1 Postal Validation Rules For All Countries Multilingual (CZG5SML)
 - InfoSphere Information Server 8.1 Postal Validation Rules for Japan Japanese (CZW5TJA)
 - IBM InfoSphere Information Server V8.1 Postal Validation Rules For Korea Korean (CZG0RKO)
- For issues with Passport Advantage
 - Email paonline@us.ibm.com
 - Call 800-978-2246 - 8:00 a.m - 8:00 p.m EST (US and Canada only)

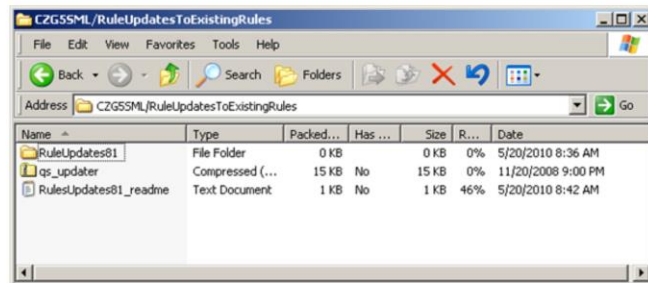
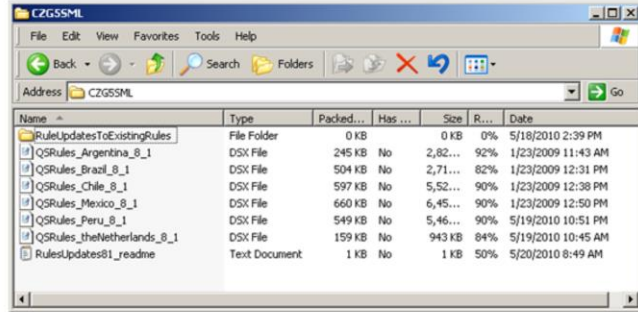
You can see if there are any updates to rules for a release of Information Server on Passport Advantage. Once it is determined that an update is available, download it from Passport Advantage.

The best way to search Passport Advantage for the QualityStage Postal Validation Rules is to enter the string “InfoSphere Information Server Postal Validation Rules” in the Search String box. This will bring up several eAssemblies. When the eAssembly for your Information Server version is opened, you will see the Postal Validation Rule updates for QualityStage rules that are available. In the example, there are three updates that can be downloaded and applied to Information Server.

If issues are encountered within Passport Advantage, send an email to paonline@us.ibm.com or in the US and Canada, call 800-978-2246 between the hours of 8:00 a.m - 8:00 p.m Eastern time.

What is available in Rules package download? (1 of 3)

- “Other Rules” or part number CZG5SML
- Clicking RulesUpdates folder displays additional folders
- Contains
 - Compressed file with QS Updater
 - Folder with updates



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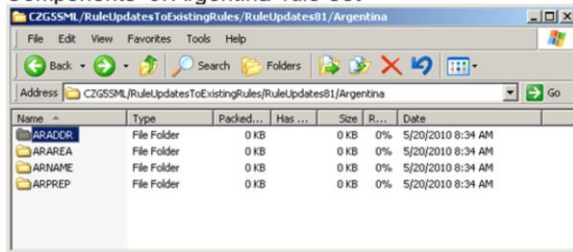
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In this example, when the part number CZG5SML is downloaded, it is a compressed, zipped file called InfoSrv_v81_postalrules. Upon opening this compressed, zipped file, there is a folder referencing the part number, in this case, CZG5SML. Under /CZG5SML, there are jobs that represent the new rule sets. You can import the dsx to bring in the rules into your project. If you have already received these rules and only want updates to them, then you go into the RuleUpdates81 folder to get the updates.

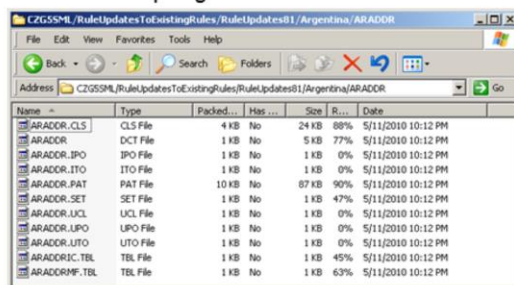
There is a readme file that will describe what is in the download package. The contents of the readme is described in detail in a couple of slides. There are several job designs that contain the actual rules. There is also a folder that contains updates, in the event that the rule sets are already installed in the QualityStage project.

What is available in Rules package downloaded? (2 of 3)

- Components of Argentina rule set



- Files that make up Argentina Address rule set



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Updating and adding to the built-in rules

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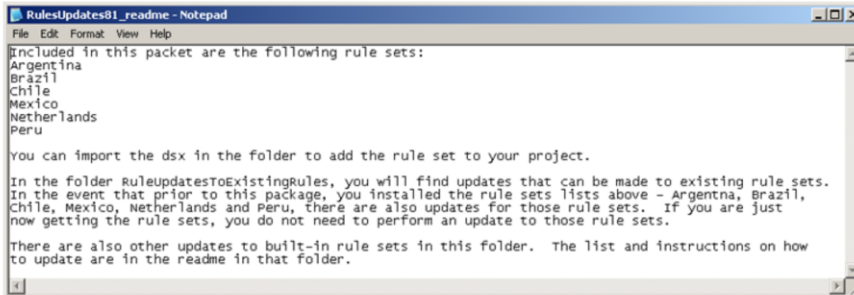
When the RulesUpdatesToExistingRules folder is opened, there is a folder for the rules updates, a zip file for the qs_updater and a readme file, that is discussed in the next slide. Upon opening the RulesUpdates81 folder, there are several folders for each of the Latin American country's rule sets that have been updated. There are also updates to other rules such components of the Argentina rule set, Address, Area, Name, and Prep.

Opening up the folder for Argentina will display the folders in the top image displayed on this slide. There are folders for each of the components of the Argentina rule set – Address, Area, Name and PREP.

The next image shows the individual files that comprise the address rule set component of the Argentina rules.

What is available in Rules package downloaded? (3 of 3)

- Contents of RulesUpdates81_readme in folder for part number, like CZG5SML



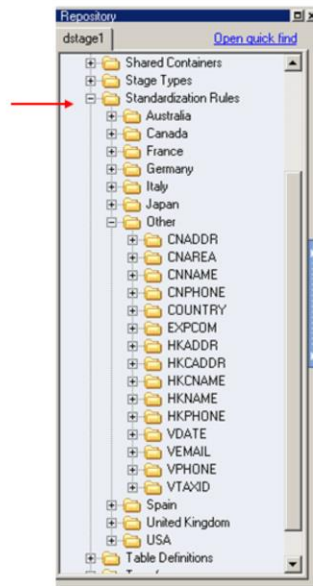
- RulesUpdates81_readme in RulesUpdatesToExistingRules provides instructions for using qs_updater tool

To better understand all that is in the Rules package that was downloaded, review the readme file. This file discusses what updates and additions can be found in the package. The image displayed on this slide indicates that there are Latin American rule sets that can be added to a QualityStage project, if they have not already been added. If the Latin American rule sets have been previously added, there are updates to these rule sets. Also, there are updates to some of the rule sets that ship with QualityStage 8.1.

There is also a readme file in the Updates folder. This readme file provides instructions on how to use the qs_updater tool to update rule sets that are already existing in the QualityStage project.

Check for existing rule sets

- Determine if rule set already exists
 - Open DataStage® and Quality Stage Designer
 - Open Standardization Rules folder
 - View standardization rules already in DataStage project



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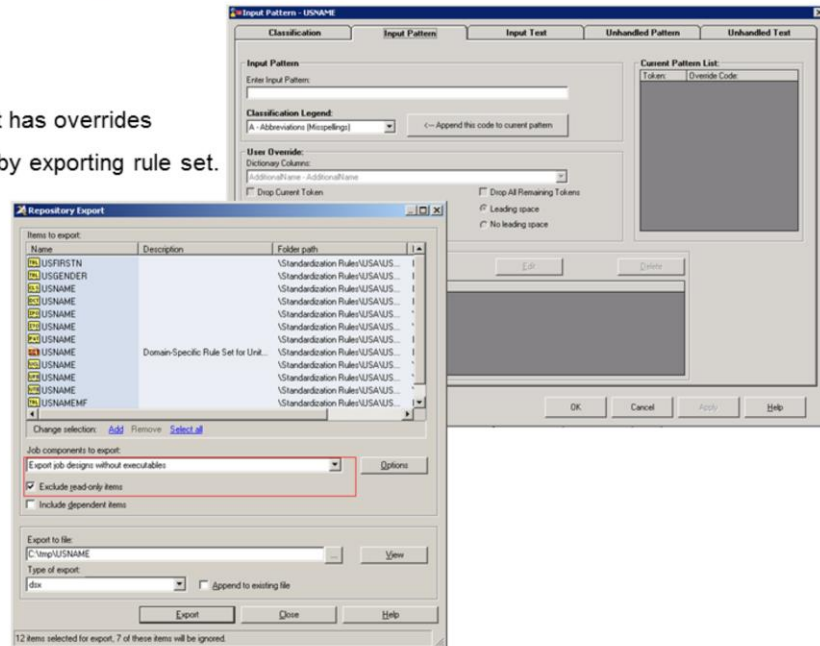
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The easiest way to determine if a rule set already exists in a QualityStage project is to log into the project using IBM InfoSphere DataStage and QualityStage Designer.

In the project tree view, open the Standardization Rules folder. In this example, there are rules for Australia, Canada, France, Germany, Italy, Japan, Spain, United Kingdom and the USA. You will also see that the folder “Other” contains rules for China – both Mainland and Hong Kong and some other rules.

Update rules already available (1 of 2)

- Check if rule set has overrides
- Save overrides by exporting rule set.



If the latest rule set updates are to be applied to a project, there are a couple areas of consideration. Any enhancements made to an existing, pre-built, rule set will only be made through overrides. You can look to see if there are any overrides for a rule set with DataStage Designer. Open the SET file of the rule set and click Overrides in the Rules Management window. It will launch the dialog box for overrides. If there are any overrides defined, you will see it on one of the tabs of this window. This example shows the USERNAME rule set Input Pattern with no overrides.

Save any overrides that may have been created out to a file. This is a good back-up measure and should not be necessary for most updates.

To save the overrides, export the rule set. For instance, to export the USERNAME rule set and save the overrides, right click the folder in the repository view and select Export. Be sure to select in the Job Components to export section, "Export job designs without executables". Check the option "Exclude read-only items" as shown in the red rectangle in the image displayed on this slide. This will export only those items of the rule set that are editable.

Update rules already available (2 of 2)

- Run `qs_updater` to bring updates into project
 - Copy `dsqsutils.jar` into `InformationServer/ASBNode/lib/java`
 - Copy `qs_updater.bat/sh` to temp folder
 - 8.0.1 - `qs_updater.bat/sh`
 - 8.1 - `qs_updater81.bat/sh`
 - Copy QS rule files to temp folder
 - Update `qs_updater` file to reflect your environment

```

qs_updater81.bat - Notepad
File Edit Format View Help
@echo off

set ASB_XMETA_HOME=C:\IBM\InformationServer\ASBNode
set DSQS_ADMIN_USER=user
set DSQS_ADMIN_PASSWORD=password
set QS_NEWFILES_DIR=C:\scratch\qs

if not exist "%ASB_XMETA_HOME%" goto noAsbHome
set ASB_XMETA_LIBS=%ASB_XMETA_HOME%\lib\java
set ASB_XMETA_PLUGS=%ASB_XMETA_HOME%\eclipse\plugins
set JAVA_HOME=%ASB_XMETA_HOME%\apps\jre
if not exist "%JAVA_HOME%\bin\java.exe" goto noJavaHome
if "%JAVACMD%" == "" set JAVACMD=%ASB_XMETA_HOME%\apps\jre\bin\java.exe
if not exist "%ASB_XMETA_HOME%\lib\java\dsqsutils.jar" goto nojar

set CLASSPATH=%ASB_XMETA_HOME%\conf;%ASB_XMETA_PLUGS%\com.ibm.isf.client.
ASB_XMETA_PLUGS%\com.ibm.isf.acs_common_8.1.0.0.jar;%ASB_XMETA_PLUGS%\com
\com.ibm.isf.asb_utils_8.1.0.0.jar;%ASB_XMETA_PLUGS%\com.ibm.websphere.wa
\EditServ_api_gen_ecore.jar;%ASB_XMETA_LIBS%\datastage_common.jar;%ASB_XM
"%JAVACMD%" "-djava.security.auth.login.config=%ASB_XMETA_PLUGS%\com.ibm
  
```

- Run `qs_updater`
- Confirm that pre-existing overrides are still available to the rule set

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Next, import the updated rule set into the project. Each of the downloads provides documentation for how to update the rule set. For the part number CZG5SML discussed earlier, there is the folder `RuleUpdatesToExistingRules`. Within that folder is a `qs_updater.zip`. When this folder is extracted, the `qs_updater_readme.txt` contains all of the information necessary to update the rule sets.

The steps are to copy the `dsqsutils.jar` file into the `InformationServer/ASBNode/lib/java` directory. Copy `qs_updater` into a temporary folder. For Information Server 8.0.1, use `qs_updater.bat` for Windows® and `qs_updater.sh` for UNIX®. For Information Server 8.1, use `qs_updater81.bat` for Windows and `qs_updater81.sh` for UNIX. Copy the QS rules files to the temporary folder. Update the `qs_updater` file to reflect your environment. The section necessary to be edited is displayed in red on this slide. Finally, run the `qs_updater` to update the rule sets.

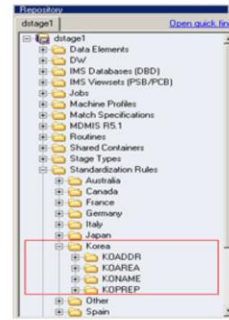
The `qs_updater` tool will update the read-only files that have been updated and should leave the overrides intact. Open the rule set in DataStage Designer and confirm that the original overrides are intact. If they no longer exist, import the `dsx` that was created and it will add the overrides back to the rule set.

Adding new rules (1 of 2)

- Adding new rules
 - 8.5
 - Rule sets in .isx format
 - Import with istool
 - Pre-8.5
 - Rule sets in .dsx format
 - Import with DataStage Designer
 - Example: Import Korea rule set

```
C:\IBM\InformationServer\Clients\istools\cli\istool.bat import --domain domServer:9080 --
username dsadm --password dsadm --archive
"C:\IBM\InformationServer\Clients\Classic\QSRules\QSRules_Korea_8_5.isx" --ds
"DSServer/dstage1"
```

- New rule set now in repository tree



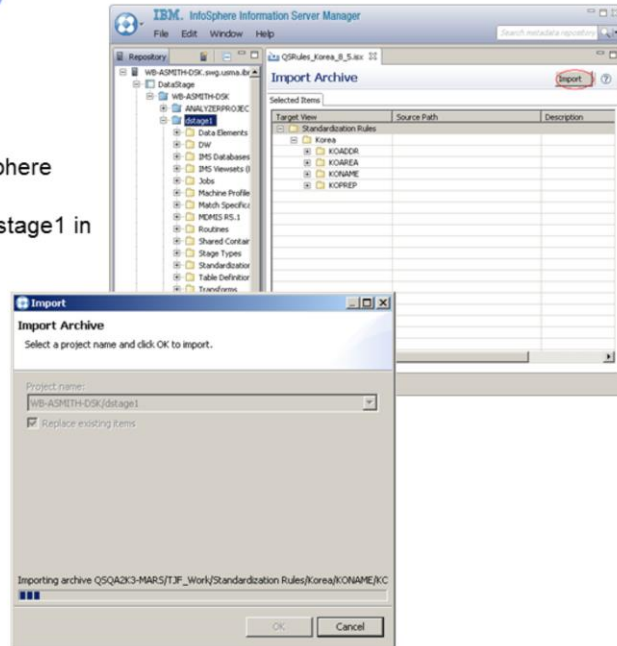
The new rule sets or updates to rule sets are provided in either a dsx or isx format. For release 8.5 and later, an isx is used. For earlier releases, a dsx is used.

For example, to import the Korea rule set into a project in Information Server 8.5, find an isx file for the rule set. For an isx file, use the istool command to import the rule set. The rule sets for Information Server 8.5 that are included but not in the pre-built list, can be found with the Information Server install under Clients/Classic/QSRules. The istool can be found in Clients/istools/cli. The command displayed on this slide will import the Korea rule set into the dstage1 project on the Information Server server DSServer.

If the rule set is in a dsx format, import the rule set using DataStage Designer to get the rule set into the project. Once the rule set is imported, look to the repository tree under Standardization Rules to find the new rule set.

Adding new rules (2 of 2)

- 8.5
 - Imported isx file using InfoSphere Information Server Manager
 - Import archive into project dstage1 in domain WB-ASMITH-DSK



- Importing into project dstage1

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In 8.5, the new rules can also be imported with the InfoSphere Information Server Manager. Launch InfoSphere Information Server Manager and expand your domain and project that you want the rules added to. Right click the Project and select Import. When the import dialog appears, find the isx file that contains the rule set and click Open.

The screen capture displayed on this slide shows the Import Archive for the Korea rule set. Click the Import button to import the rule set into the project. It will bring up an Import dialog to confirm the project name in which to import the archive. Click OK after selecting the project for your domain. The bottom screen capture shows this dialog after the OK button has been clicked.

Once the rule set is imported, look to the repository tree under Standardization Rules to find the new rule set.

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