

InfoSphere Information Server QualityStage

Updating QualityStage jobs to the latest USPS cycle



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This presentation will discuss how to upgrade jobs to the latest United States Postal Service cycle, or USPS cycle, for QualityStage™ version 8.0 through version 8.5.

Objectives

- InfoSphere™ Information Server QualityStage U.S. Address Certification module and USPS CASS cycles
- When to upgrade
- Steps to upgrade jobs to latest USPS cycle

The objectives of this presentation are to discuss the InfoSphere Information Server QualityStage U.S. Address Certification module and how it relates to the USPS Coding Accuracy Support System cycle, referred to as CASS. It will also discuss when you need to upgrade your QualityStage jobs and the steps necessary to move your existing CASS stage jobs to the new version of InfoSphere Information Server QualityStage U.S. Address Certification module.

CASS certified solution

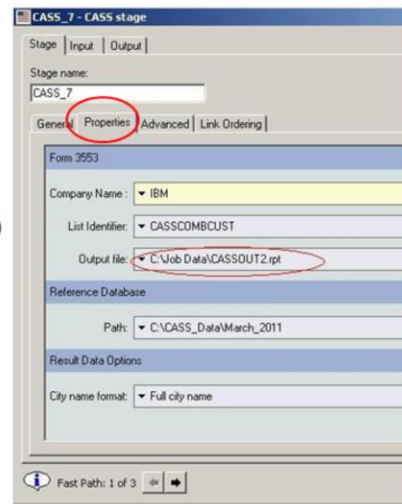
- USPS determines length of each CASS cycle
- Do not use QualityStage U.S. Address Certification product for expired cycle
- Upgrade before expiration of current CASS cycle

IBM provides a CASS certified solution with the InfoSphere Information Server QualityStage U.S. Address Certification module. Each version of the module is based upon a USPS CASS cycle. The USPS determines the time period for each CASS cycle. For instance, CASS Cycle M was from September 5, 2009 to July 31, 2011.

Per the license agreement with IBM and the USPS, all users of CASS certified software must only use the current CASS cycle software. This means that it is important for customers to upgrade to the latest cycle before the expiration of the current one. To receive USPS Postal discounts, the Form 3553 that is provided to the USPS must match the current CASS cycle.

Determining version

- Open CASS stage job in DataStage® Designer
 - Open properties tab of stage in stage editor
 - Output File shows location of Form 3553 (see right)
- Open rpt file in Crystal Reports or Word (see below)
 - Look at version
 - Last letter of version is USPS cycle



UNITED STATES POSTAL SERVICE CASS(TM) Summary Report

A. Software

1.Cass Certified Company Name	2.CASS Certified Software Name & Version	3.Configuration
IBM Corp.	IBM WebSphere QualityStage 8.11.00.M	CAS
4.Z4 Change Certified Company Name	5.Z4 Change Cert. Software Name & Version	6.Configuration

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If you want to determine what version of QualityStage U.S. Address Certification that you are using, the simplest way is to do so using DataStage Designer. Launch DataStage Designer using a project that contains your CASS stage jobs. Open a CASS stage job. Double-click CASS stage to launch the stage editor and go to the properties tab. The first section of the properties is for the Form 3553 and the Output file property points to the location and file name of the Form 3553 that is generated for the job. Every time the job is run, this report is created.

Now open the report using Crystal Reports or an editor such as Word. The image shows the top portion of the report generated. In the box with the number two, you will see the version circled in red. This shows that the USPS cycle that is being used is Cycle M. So the USPS cycle of IBM InfoSphere Information Server QualityStage U.S. Address Certification module that is installed is for Cycle M. This means that the next cycle is Cycle N. All jobs will be using the same version so you will only need to look at one job.

Before starting (1 of 2)

- In Passport Advantage®
 - Link: https://www-01.ibm.com/software/howtobuy/passportadvantage/pao_customers.htm
 - Obtain QualityStage U.S. Address Certification module
 - Obtain latest QualityStage U.S. Address Certification reference database for new cycle
 - NOTE: Use search string “U.S. Address Certification”
- IBM keeps two months of CASS reference database files
 - Download latest database and module
 - Be sure to get all download images for month
 - Previous month's left on PA

Before you can begin to move your jobs over to the latest version of InfoSphere Information Server QualityStage U.S. Address Certification module, also known as USAC, you should make sure that there is a version of the IBM USAC module available for your Information Server release and platform. You can go to Passport Advantage to check what the most current USAC version is available. If there is not a version available for the latest cycle, your version of Information Server and your platform, you should wait until there is one available to continue the upgrade. Once you have determined that it is available, download it from Passport Advantage.

You can search in Passport Advantage for the InfoSphere Information Server QualityStage USAC module by entering the string “U.S. Address Certification” in the Search String box. This will bring up several options based on the version of Information Server that you are running.

When you open the eAssembly for your Information Server version, you will find two months worth of CASS reference database files in addition to the module itself. The new USAC module will not work without the CASS reference database created for it. Each month of reference database files has several download images. Be sure to download the most current month and all its associated images. If for some reason you have a problem with the latest one, use the previous month's database and image files.

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

Before starting (2 of 2)

- Uninstall previous cycle's module
 - On server
 - UNIX® or Linux® - InformationServer/_uninstall/QSExtensions/CASS
 - Windows® – Add/Remove Programs
 - On client machine (if installed)
 - Use Add/Remove Programs
- Install current module
- Install current CASS reference database for new cycle

The next step is to remove the current version of USAC. To do this, locate the uninstall executable program found in the home directory of the previous module. This can be found in `../InformationServer/_uninstall/QSExtensions/CASS`. On Windows, you also have the option of going to Add/Remove Programs and uninstalling from there.

On your Windows client that has the USAC Module client installed, go to Add/Remove Programs and uninstall the client also. If you have not previously installed the USAC client, there is no need to uninstall.

After removing the module for the previous cycle, you can install the new cycle's module on the server. You can also install the new cycle's client to get the USAC specific stage properties in the Designer Client.

Updating CASS stage – Step 1

- Review technote on changes for new CASS cycle
- Search www.ibm.com for string “Information Server CASS/USAC mandatory update”
- Do you need to modify Column Mappings?
- You must recompile your U.S. Address Certification jobs.
 - Update to point to CASS reference DB

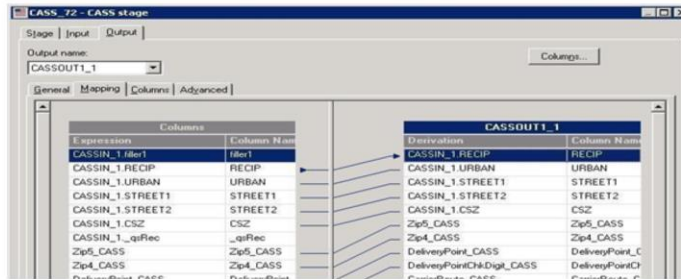
For each new CASS cycle, there is a technote that outlines any changes that are part of the new CASS cycle. Review the technote to understand the new USPS requirements and to gather an understanding of what changes existing jobs require to work with the new cycle. In particular, it is important to make sure to add the new output columns to your columns mapping on your CASS stage.

If you need to modify your column mappings, you will need to proceed to the next steps.

Regardless of whether there are new columns to map or not, you should update your jobs to point to the new CASS reference database and recompile your jobs.

Updating CASS stage – Step 2

- Edit CASS stage to map new column provided in current cycle to output source
 - In Designer client, open CASS job
 - Right-click CASS stage and click **Properties**
 - Click **Output -> Mapping** tab



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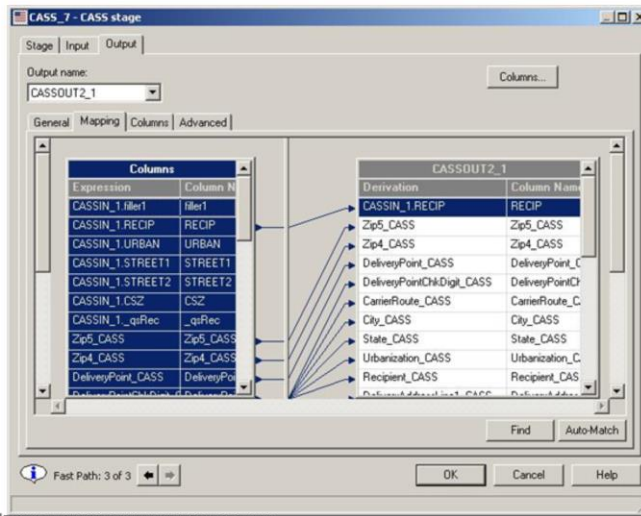
You can edit your existing CASS stage to map new columns provided in the current cycle to your output source. The layout of the column mappings for the QualityStage USAC module can be found in the “Guide to IBM InfoSphere QualityStage Module for U.S. Address Certification” for the new cycle. For instance, Cycle M added new columns that included SuiteReturnCode_CASS, RDIInd_CASS, VACInd_CASS and NoStatInd_CASS.

Each CASS job must be updated to map the new columns for the new cycle. To do this, in the Designer client, open the CASS job. Right click the CASS stage in the job and click Properties. Optionally, you can check the input mapping by clicking Input->Mapping.

The next step is to map the output columns. Click Output->Mapping. The image shows the CASS stage output mapping tab.

Updating CASS stage – Step 3

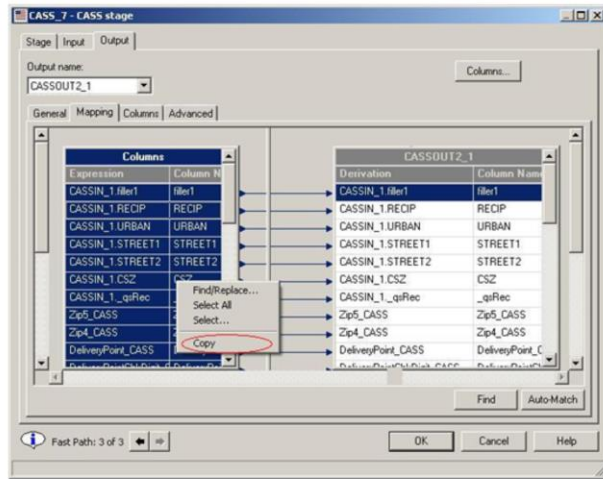
- In left columns pane, right-click and click **Select All**



You can now map all of the input columns to the output columns. To do this, go to the left columns pane, right-click and click **Select All**. The image shows all of the columns in the left columns pane selected.

Updating CASS stage – Step 4

- Right-click selection
- Click **Copy**



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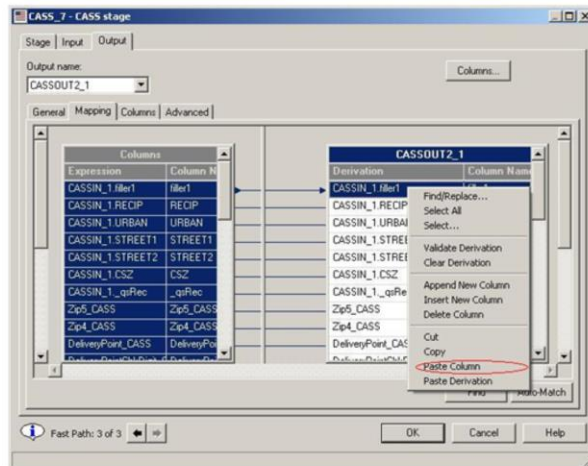
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The goal is to move all of the input columns over to the CASS stage output, so you want to copy all of the selected columns. To do this, right-click the selection and click Copy.

Updating CASS stage – Step 5

- Right-click right columns pane
- Click **Paste Column**



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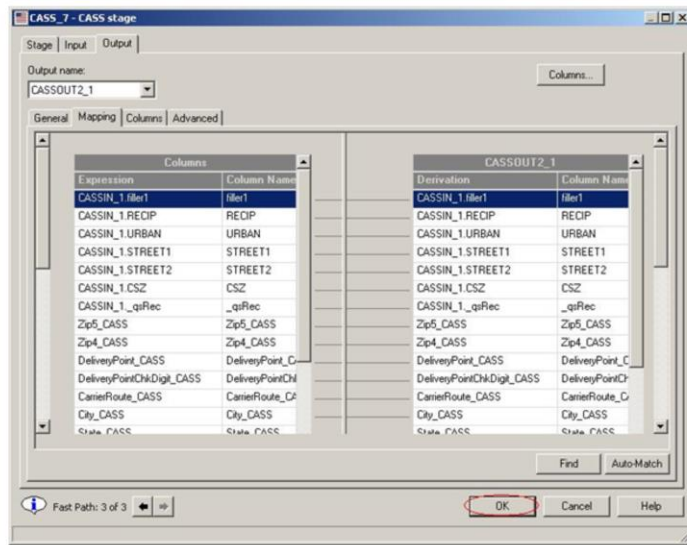
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Now that you have all of the input columns, you need to paste them over to the right columns pane. To do this, click in the right pane, right-click the column and click Paste Column.

Updating CASS stage – Step 6

- Click **OK** to save changes
- Close CASS stage



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Once you have the new CASS cycle columns mapped, click OK to save the changes and close the CASS stage as shown in the image on this slide. These output mapping changes need to be repeated for all CASS stages in the job. Compile your job to ensure it is correct.

These updates should also be made for all jobs that contain CASS stages in all projects.

Updating CASS stage – Final step

- Recompile all CASS stage jobs
- Confirm you are at latest cycle

Regardless of whether the column mappings to the CASS stage required updating, all CASS stage jobs must be recompiled when the new cycle software is installed. You can run a job and check the resulting Form 3553 report that is output to ensure that you are now using the latest USPS cycle as discussed earlier in this presentation.

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