IBM InfoSphere DataStage Balanced Optimization V8.1 enhances the delivery of trusted information across the enterprise

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At a glance

IBM® InfoSphere DataStage™ Balanced Optimization V8.1 facilitates the creation of scalable, flexible, and optimized data integration architectures that leverage investments in parallel databases while increasing the efficiency of integration developers. It enables users to express the logic of their data integration processes in current natural flow-oriented InfoSphere DataStage conventions and automatically or semi-automatically optimize their designs to achieve the benefits of extract, load, transform and SQL pushdown. Benefits of this approach:

• Increased performance of integration tasks by leveraging existing processing capacity in relational database management systems
• Ability to leverage existing skill sets and technology investments
• Ability to build logic of integration processes in current natural flow-oriented DataStage conventions
• Ability to automate optimization of processing without manual rework of integration logic

Overview

Companies today are dealing with massive amounts of corporate information, and they continue to face the challenges of managing, storing, and sorting rapidly expanding volumes of data. They need to gather all of their corporate data and deliver it to end users as quickly as possible to maximize its value and drive business optimization.

To address these challenges, organizations need to establish an information agenda -- an approach that leverages a scalable data integration architecture to maximize existing investments in database management systems and the applications they support. IBM InfoSphere Information Server helps organizations derive value from the complex information spread across systems. It is a revolutionary software platform that profiles, cleanses, and integrates information from heterogeneous sources to deliver trusted information when and where it is needed to derive greater business insight faster and at lower cost. InfoSphere Information Server is a foundational cornerstone of any information agenda.

InfoSphere DataStage Balanced Optimization, a new extension of the InfoSphere DataStage product module of InfoSphere Information Server, combines the data processing power of parallel databases like DB2® and Teradata with the hybrid extract, transform, load (ETL) and extract, load, transform (ELT) capabilities from IBM. This combination establishes a solution that is raising the bar for data integration technologies, and provides organizations with the flexibility to accelerate the value of their information agenda efforts. It provides users the flexibility to express the logic of their data integration processes in current natural flow-oriented InfoSphere DataStage conventions and automatically or semi-automatically optimize their designs to
achieve the benefits of ELT and SQL pushdown. Acquiring such powerful data integration capabilities can mean a very large paradigm shift for companies that are used to relying on a traditional ETL solution.

As a new extension to InfoSphere DataStage, InfoSphere DataStage Balanced Optimization leverages key capabilities of the InfoSphere Information Server platform:

- Optimal parallelism and pipelining to complete increasing volumes of work in decreasing windows of time
- A data flow architecture that allows data to be processed from input to output without landing on disk storage, in both batch and real-time scenarios
- Support for scalable hardware environments, including symmetric multiprocessing (SMP), clustering, grid, and massively parallel processing (MPP) platforms, without requiring modifications of the underlying data integration process
- Support for leading parallel databases, including IBM DB2 and Teradata, in parallel and partitioned configuration
- Data processing functionality, applicable to all industries

InfoSphere DataStage Balanced Optimization V8.1 accelerates the development of scalable, flexible, and optimized data integration architectures that align prior investments in parallel databases with your information agenda, simplifying the efforts of integration developers. These architectures:

- Align and simplify: Improve the performance of integration tasks by leveraging processing capacity in relational database management systems.
- Increase skills reuse: Leverage existing InfoSphere DataStage and database management system skill sets for greater consistency in data integration efforts.
- Enable flexibility: Build logic of integration processes in current natural flow-oriented InfoSphere DataStage convention and execute in the database management system.
- Accelerate value: Automate optimization of processing without manual rework of integration logic, thereby enhancing prior investment in parallel database management systems.

InfoSphere DataStage Balanced Optimization represents a new approach to data integration. It is a software tool that acts as an advisor, allowing a developer without extensive knowledge of advanced parallel processing and database optimization to produce scalable ETL jobs and database transformation code. The ability to create and compare scenarios inside InfoSphere DataStage Balanced Optimization is unique, and simplifies the complexity of using multiple servers, platforms, and technologies to handle ever-increasing data integration volumes.

**Key prerequisites**

Refer to the Hardware requirements and Software requirements sections.

**Planned availability date**

October 28, 2008 (electronic software delivery).

November 21, 2008 (media and documentation).

See the complete letter for globalization details.

**Description**

Traditional data integration platforms have long provided very robust connectivity capabilities to enterprise applications, and nonrelational data sources such as complex flat files and mainframe data repositories. A key component in data integration platforms is the ETL engine, a high-performance, scalable engine to first extract data from one or more sources and then perform data transformation and enrichment of the data before loading it into one or more targets. This
provides the benefit of the high-performance, scalable engine but also reduces the system impact on data sources and targets.

ELT platforms rely on the underlying database to provide connectivity and data transformations. Because relational database systems do not provide native SQL or procedures to navigate through the hierarchy or data layers of enterprise applications, outside processes must be provided by the ELT vendor. This negates the advantage of utilizing the database engine for extracting or replicating data from other data sources. A complete data integration platform provides not only data replication and change data capture capabilities but the functionality to navigate enterprise applications, automatically generate the most efficient data extraction method, and manage the metadata.

Users today want not only ETL and ELT, but also transform, extract, load, transform (TELT), and ultimately transform, extract, transform, load, transform (TETLT). The goal of IBM InfoSphere DataStage Balanced Optimization is to make it possible to specify processing in terms of sources, the engine, and the target.

InfoSphere DataStage Balanced Optimization provides the flexibility to leverage the most effective processing capabilities available, regardless of whether it exists in the target database, the source database, or the transformation engine for faster integration and delivery of information. It facilitates the creation of scalable, flexible, and optimized data integration architectures that leverage prior investments in parallel databases while increasing the efficiency of integration developers.

With InfoSphere DataStage Balanced Optimization, users are able to express the logic of their integration processes in natural flow-oriented DataStage convention, and then automatically or semi-automatically optimize their designs to achieve the benefits of ELT and SQL pushdown. InfoSphere DataStage Balanced Optimization does not require users to manually rewrite their queries and processing to achieve these benefits. It instead allows users to choose the benefits of ETL, ELT, and even TETLT without sacrificing the benefits of the Information Server platform.

Improved job performance through optimization

Minimizing I/O is a primary way to help improve performance of data integration tasks. Moving processing to the sources of data may reduce the amount of source data that is extracted; similarly, moving part of the processing to the target may help avoid target extractions. Minimizing data copying can further improve performance, as can the use of indices, native optimizations, and database-specific features in conjunction with the InfoSphere DataStage parallel engine.

InfoSphere DataStage Balanced Optimization gives users several levels of control over which optimizations are performed:

- Database-specific optimization packages
- Overall control options such as push to source and push to target
- Specific options such as whether to use target staging tables

The key is maximizing parallelism in all aspects of a data integration flow: in the I/O to and from the databases, in the InfoSphere DataStage parallel engine, and inside the databases. IBM InfoSphere DataStage Balanced Optimization helps users achieve an optimal data integration flow by enabling parallel processing in all of these areas.

Ease of use: Reusing existing skills

Optimizing jobs with InfoSphere DataStage Balanced Optimization is an automated process that leverages the existing skills of InfoSphere DataStage developers. The developer begins the process as usual by designing the job using InfoSphere DataStage Designer. Compared with the use of complex SQL designer tools, this process offers a much simpler way of writing ETL flows. InfoSphere DataStage translates the semantics expressed in the job into the appropriate database-specific SQL.

Once the job is designed, the developer optimizes it. The basic choices are:

- Pushing processing to the sources and targets
- Pushing joins, lookups, and other functions to the source and target
• Bulk loading, where possible
• Use of temporary staging tables
• Other database-specific options

InfoSphere DataStage Balanced Optimization rewrites the job based on options selected by the developer. IBM algorithms rewrite the job to push as much functionality as possible into database sources and targets. The developer can iterate through the choices and run the optimization until satisfied with the results.

Based on the databases and specific functions of the databases the developer wants to leverage, InfoSphere DataStage can help create an optimal job that leverages the InfoSphere Information Server parallel engine, parallel I/O, and the databases that may be involved.

Powerful, flexible data integration optimization tools can help organizations maximize the value of corporate information while leveraging investment in the processing capacity of the relational database management system. InfoSphere DataStage Balanced Optimization facilitates the creation of scalable, flexible, optimized, data integration architectures while increasing the efficiency of integration developers.

**Accessibility by people with disabilities**

A US Section 508 Voluntary Product Accessibility Template (VPAT) can be requested via the IBM Web site


**IPLA and Subscription and Support considerations**

IPLA licenses can be transferred from one machine to another within, but not limited to an enterprise. You may aggregate the capacity for all the processors the product is operated on to achieve a more economic price. This will result in a single Proof of Entitlement (PoE). It is your responsibility to manage the distribution of Value Units within the limits of the entitlement of the product license.

Subscription and Support must cover the same capacity as the product license entitlement. Subscription and Support will be available in the country in which the agreement is made.

**Statement of direction**

The next release of InfoSphere DataStage Balanced Optimization is planned to include Oracle support.

All statements regarding IBM’s plans, directions, and intent are subject to change or withdrawal without notice.

**Availability of national languages**

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**Program number**

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Offering Information

Product information is available via the Offering Information Web site

http://www.ibm.com/common/ssi

Also, visit the Passport Advantage® Web site

http://www.ibm.com/software/passportadvantage

Publications

Publications provided with the product

A printed Quick Start Guide is provided in the product package. The Quick Start Guide is also available from the product's Support page on ibm.com (using the Product documentation link).

The IBM Publications Center

Publications for IBM InfoSphere Information Server products are provided on a CD in the product package. Publications can also be obtained from the IBM Publications Center at

http://www.ibm.com/shop/publications/order

The Publications Center is a worldwide central repository for IBM product publications and marketing material with a catalog of 70,000 items. Extensive search facilities are provided. Printed publications can be ordered from the IBM Publications Center; payment options for orders are via credit card (in the U.S.) or customer number for 20 countries. A large number of publications are available online in various file formats, and those with order numbers that begin with SC or GC can be downloaded by all countries free of charge. Books with order numbers that begin with LC can be purchased by customers with an active product license for the related product.

The following table includes the title and order number that can be used to locate the applicable publications on the IBM Publications Center.

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Technical information

Specified operating environment

**Hardware requirements**

This offering is a client-only installation and includes the following requirements with Windows®:

- 300 MB of memory (minimum); 400 MB of memory (recommended)
- 200 MB of disk space (minimum)

**Software requirements**

Key prerequisites for this offering:

- IBM InfoSphere Information Server 8.1.
- The metadata repository and domain layer of IBM Information Server are mandatory.
- IBM InfoSphere DataStage must be installed.

This offering is a client-only installation that is supported on 32-bit versions of the following operating systems:
• Windows XP SP 2
• Windows Vista
• Windows Server 2003 SP 2 (verification has not been done with SP 1)

Planning information

Software Subscription and Support (also referred to as Software Maintenance) is included with licenses purchased through Passport Advantage and Passport Advantage Express. Product upgrades and technical support are provided by the Software Subscription and Support (also referred to as Software Maintenance) offering as described in the Agreements. Product upgrades provide the latest versions and releases to entitled software, and technical support provides voice and electronic access to IBM support organizations, worldwide.

IBM includes one year of Software Subscription and Support (also referred to as Software Maintenance) with each program license acquired. The initial period of Software Subscription and Support (also referred to as Software Maintenance) can be extended by the purchase of a renewal option, if available.

Packaging

The InfoSphere DataStage Balanced Optimization V8.1 offering is contained on a single CD.

Security, auditability, and control

These products use the security and auditability features of the host hardware or software.

The customer is responsible for evaluation, selection, and implementation of security features, administrative procedures, and appropriate controls in application systems and communication facilities.

Software Services

Services from IBM InfoSphere Professional Services complement the IBM Information Server platform. You can leverage the deep technical skills and proven methodologies based on years of accumulated knowledge and experience, gained through hundreds of successful implementations. The IBM InfoSphere Professional Services team offers a wide range of services-related packages that are designed to help you achieve success in the design, implementation, and rollout of your information integration projects.

To learn more about IBM InfoSphere Professional Services or to contact a services representative, visit

http://www.ibm.com/software/data/ips/services/professional.html

We also extend our IBM Software Services reach through IBM Business Partners to provide an unmatched portfolio of capabilities. Together we provide the global reach, intellectual capital, industry insight, and technology leadership to support any critical business need.

To locate an IBM Business Partner, visit

http://www.ibm.com/software/solutions/isv

Ordering information

For ordering information, consult your IBM representative or authorized IBM Business Partner, or visit


This product is only available via Passport Advantage. It is not available as shrinkwrap.
### Product information

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|                                                              |                 | Processor Value   |
|                                                              |                 | Unit (PVU)       |

| IBM InfoSphere DataStage Balanced Optimization               | 5724-Q36        | Processor Value   |
|                                                              |                 | Unit (PVU)       |

| IBM InfoSphere DataStage Balanced Optimization for Non-Prod  | 5724-Q36        | SubCapacity      |
| Environments                                                |                 | Processor Value   |
|                                                              |                 | Unit (PVU)       |

| IBM InfoSphere DataStage Balanced Optimization for Non-Prod  | 5724-Q36        | Processor value   |
| Environments                                                |                 | Unit (PVU)       |

### Charge metrics definitions

**Processor Value Unit (PVU)**

PVU is the unit of measure by which this program is licensed. PVU entitlements are based on processor families (vendors and brands). A Proof of Entitlement (PoE) must be obtained for the appropriate number of PVUs based on the level or tier of all processor cores activated and available for use by the program on the server. Some programs allow licensing to less than the full capacity of the server’s activated processor cores, sometimes referred to as sub-capacity licensing. For programs which offer sub-capacity licensing, if a server is partitioned utilizing eligible partitioning technologies, then a PoE must be obtained for the appropriate number of PVUs based on all activated processor cores available for use in each partition where the program runs or is managed by the program. Refer to the International Passport Advantage Agreement Attachment for Sub-Capacity Terms or the program’s License Information to determine applicable sub-capacity terms. The PVU entitlements are specific to the program and may not be exchanged, interchanged, or aggregated with PVU entitlements of another program.

For a general overview of PVUs for processor families (vendors and brands), visit


To calculate the exact PVU entitlements required for the program, visit

https://www-112.ibm.com/software/howtobuy/passportadvantage/valueunitcalculator/vucalc.wss

### Passport Advantage program licenses

**IBM InfoSphere Information Server**

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**Passport Advantage customer: Media pack entitlement details**

Customers with active maintenance or subscription for the products listed are entitled to receive the corresponding media pack.

**IS DS Balanced Optimization V8.1.0**

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**Sub capacity**

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Sub-capacity for selected middleware products

For information regarding Passport Advantage sub-capacity licensing, refer to


IBM License Metric Tool V7.1 supports IBM Processor Value Unit software and includes revisions to the Passport Advantage sub-capacity licensing offering. For more information, refer to Software Announcement ZP08-0263, dated July 01, 2008.


Terms and conditions

The information provided in this announcement letter is for reference and convenience purposes only. The terms and conditions that govern any transaction with IBM are contained in the applicable contract documents such as the IBM International Program License Agreement, IBM International Passport Advantage Agreement, and the IBM Agreement for Acquisition of Software Maintenance.

Licensing

IBM International Program License Agreement including the License Information document and Proof of Entitlement (PoE) govern your use of the program. PoEs are required for all authorized use.

Part number products only, offered outside of Passport Advantage, where applicable, are license only and do not include Software Maintenance.

This software license includes Software Subscription and Support (also referred to as Software Maintenance).

License Information form number

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The program's License Information will be available for review on the IBM Software License Agreement Web site


Limited warranty applies

Yes

Warranty

IBM warrants that when the program is used in the specified operating environment, it will conform to its specifications. The warranty applies only to the unmodified portion of the program. IBM does not warrant uninterrupted or error-free operation of the program or that IBM will correct all program defects. You are responsible for the results obtained from the use of the program.

IBM provides you with access to IBM databases containing information on known program defects, defect corrections, restrictions, and bypasses at no additional charge. Consult the IBM Software Support Handbook for further information at

http://www.ibm.com/support/handbook

IBM will maintain this information for at least one year after the original licensee acquires the program (warranty period).
Money-back guarantee
If for any reason you are dissatisfied with the program and you are the original licensee, you may obtain a refund of the amount you paid for it, if within 30 days of your invoice date you return the program and its PoE to the party from whom you obtained it. If you downloaded the program, you may contact the party from whom you acquired it for instructions on how to obtain the refund.

- For programs acquired under the IBM International Passport Advantage Agreement, this term applies only to your first acquisition of the program.

Authorization for use on home/portable computer
The program may be stored on the primary machine and another machine, provided that the program is not in active use on both machines at the same time. You may not copy and use this program on another computer without paying additional license fees.

Product name
IBM InfoSphere Information Server

Volume orders (IVO)
No

Passport Advantage applies
Yes, and through the Passport Advantage Web site at

http://www.ibm.com/software/passportadvantage

This product is only available via Passport Advantage. It is not available as shrinkwrap.

Usage restriction
Yes

Refer to the License Information Document that is available on the IBM Software License Agreement Web site


Software Subscription and Support (also referred to as Software Maintenance) applies
Yes. Software Subscription and Support (also referred to as Software Maintenance) is included with licenses purchased through Passport Advantage and Passport Advantage Express. Product upgrades and technical support are provided by the Software Subscription and Support (also referred to as Software Maintenance) offering as described in the Agreements. Product upgrades provide the latest versions and releases to entitled software and Technical Support provides voice and electronic access to IBM support organizations, worldwide.

IBM includes one year of Software Subscription and Support (also referred to as Software Maintenance) with each program license acquired. The initial period of Software Subscription and Support (also referred to as Software Maintenance) can be extended by the purchase of a renewal option, if available.

While your Software Subscription and Support (also referred to as Software Maintenance) is in effect, IBM provides you assistance for your routine, short duration installation and usage (how-to) questions, and code-related questions. IBM provides assistance via telephone and, if available, electronic access, to your information systems (IS) technical support personnel during the normal business hours (published prime shift hours) of your IBM support center. (This assistance is not available to your end users.) IBM provides Severity 1 assistance 24 hours a day, 7 days a week. For additional details, consult your IBM Software Support Handbook at

http://www.ibm.com/support/handbook

Software Subscription and Support (also referred to as Software Maintenance) does not include assistance for the design and development of applications, your use of programs in other
than their specified operating environment, or failures caused by products for which IBM is not responsible under the applicable agreements.

For additional information about the International Passport Advantage Agreement and the IBM International Passport Advantage Express Agreement, visit the Passport Advantage Web site at

http://www.ibm.com/software/passportadvantage

**System i Software Maintenance applies**
No

**Educational allowance available**
Education allowance does not apply.
Education software allowance does not apply.
Special education prices are available for qualified customers through Passport Advantage.

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**IBM Electronic Services**

IBM has transformed its delivery of hardware and software support services to help you achieve higher system availability. Electronic Services is a Web-enabled solution that offers an exclusive, no-additional-charge enhancement to the service and support available for IBM servers. These services are designed to provide the opportunity for greater system availability with faster problem resolution and preemptive monitoring. Electronic Services comprises two separate, but complementary, elements: Electronic Services news page and Electronic Services Agent.

The Electronic Services news page is a single Internet entry point that replaces the multiple entry points traditionally used to access IBM Internet services and support. The news page enables you to gain easier access to IBM resources for assistance in resolving technical problems.

The Electronic Service Agent™ is no-additional-charge software that resides on your server. It monitors events and transmits system inventory information to IBM on a periodic, client-defined timetable. The Electronic Service Agent automatically reports hardware problems to IBM. Early knowledge about potential problems enables IBM to deliver proactive service that may result in higher system availability and performance. In addition, information collected through the Service Agent is made available to IBM service support representatives when they help answer your questions or diagnose problems. Installation and use of IBM Electronic Service Agent for problem reporting enables IBM to provide better support and service for your IBM server.

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**Prices**

**Passport Advantage**

For Passport Advantage information and charges, contact your IBM representative or authorized IBM Business Partner. Additional information is also available at

http://www.ibm.com/software/passportadvantage

**Business Partner information**

If you are an IBM Business Partner -- Distributor for Workstation Software acquiring products from IBM, you may link to Passport Advantage Online for resellers where you can obtain Business Partner pricing information. An IBM ID and password are required.

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