3. Why matching and mapping?

- **Problem: Schema Heterogeneity**
  - Sources with different schemas store overlapping information
  - Want to be able to translate data from one schema into a different schema
    - Datawarehousing
    - Data exchange
  - Want to be able to translate queries against one schema into queries against another schema
    - Virtual data integration

- **Why both mapping and matching**
  - Split complex problem into simpler subproblems
    - Determine matches and then correlate with constraint information into mappings
  - Some tasks only require matches
    - E.g., matches can be used to determine attributes storing the same information in data fusion
  - Mappings are naturally a generalization of matchings

3. Overview

- **Topics covered in this part**
  - Schema Matching
  - Schema Mappings and Mapping Languages
3.1 Schema Matching

- Problem: Schema Matching
  - Given two (or more schemas)
  - For now called source and target
  - Determine how elements are related
    - Attributes are representing the same information
      - name = lastname
    - Attribute can be translated into an attribute
      - MonthlySalary * 12 = Yearly Salary
    - 1-1 matches vs. M-N matches
      - name to lastname
      - name to concat(firstname, lastname)

- Why is this hard?
  - Insufficient information: schema does not capture full semantics of a domain
  - Schemas can be misleading:
    - E.g., attributes are not necessarily descriptive
    - E.g., finding the right way to translate attributes not obvious

- What information to consider?
  - Attribute names
    - or more generally element names
  - Structure
    - e.g., belonging to the same relation
  - Data
    - Not always available
  - Need to consider multiple types to get reasonable matching quality
    - Single types of information not predictable enough

- Typical Matching System Architecture
  - Determine actual matches
  - Use constraints to modify similarity matrix
  - Combine individual similarity matrices
  - Each matcher uses one type of information to compute similarity matrix
3.1 Schema Matching

- Matcher
  - Input: Schemas
    - Maybe also data, documentation
  - Output: Similarity matrix
    - Storing value [0,1] for each pair of elements from the source and the target schema

3.1 Schema Mapping

Example: Types of Matching

<table>
<thead>
<tr>
<th>Name</th>
<th>Address</th>
<th>Office-phone</th>
<th>Office-address</th>
<th>Home-phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0.4</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>0.5</td>
<td>0.5</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

3.1 Schema Matching

- Name-Based Matchers
  - String similarities measures
    - E.g., Jaccard and other measure we have discussed
  - Preprocessing
    - Tokenization?
    - Normalization
      - Expand abbreviations and replace synonyms
    - Remove stop words
      - In, and, the

3.1 Schema Matching

- Data-Based Matchers
  - Determine how similar the values of two attributes are
  - Some techniques
    - Recognizers
      - Dictionaries, regular expressions, rules
    - Overlap matcher
      - Compute overlap of values in the two attributes
    - Classifiers

3.1 Schema Matching

- Recognizers
  - Dictionaries
    - Countries, states, person names
  - Regular expression matchers
    - Phone numbers: (+\d(2)?)? \(\d(3)\) \d(4)
3.1 Schema Matching

• **Combiner**
  - **Input**: Similarity matrices
  - **Output**: Output of the individual matchers
  - **Output**: Single Similarity matrix

  Typical strategies
  - Average, Minimum, Max
  - Weighted combinations
  - Some script

• **Constraint Enforcer**
  - **Input**: Similarity matrix
  - **Output**: Output of Combiner
  - **Output**: Similarity matrix

  Hard constraints: Only consider match combinations that fulfill constraints
  Soft constraints: violating constraints results in penalty of scores
  - Assign cost for each constraint
  - Return combination that has the maximal score

Example: Constraints

Constraint 1: An attribute matched to `source.cust-phone` has to get a score of 1 from the phone regexp matcher
Constraint 2: Any attribute matched to `source.fax` has to have fax in its name
Constraint 3: If an attribute is matched to `source.firstname` with score > 0.9 then there has to be another attribute from the same target table that is matched to `source.lastname` with score > 0.9

• **How to search match combinations**
  - Full search
    - Exponentially many combinations potentially
  - Informed search approaches
    - A* search
  - Local propagation
    - Only local optimizations
3.1 Schema Matching

- **A* search**
  - Given a search problem
  - Set of states: start state, goal states
  - Transitions about states
  - Costs associated with transitions
  - Find cheapest path from start to goal states
  - Need admissible heuristics **h**
    - For a path **p**, **h** computes lower bound for any path from start to goal with prefix **p**
  - Backtracking best-first search
    - Choose next state with lowest estimated cost
    - Expand it in all possible ways

```markdown
\[ f(n) = g(n) + h(n) \]
```

- **Algorithm**
  - Data structures
  - Keep a priority queue **q** of states sorted on **f(n)**
    - Initialize with start state
  - Keep set **v** of already visited nodes
    - Initially empty
  - While **q** is not empty
    - pop state **s** from head of **q**
    - If **s** is goal state return
    - Foreach **s'** that is direct neighbor of **s**
      - If **s'** not in **v**
        - Compute **f(s')** and insert **s'** into **q**

- **Application to constraint enforcing**
  - Source attributes: \( A_1 \) to \( A_n \)
  - Target attributes: \( B_1 \) to \( B_m \)
  - States
    - Vector of length \( n \) with values \( B_i \) or \( * \) indicating that no choice has not been taken
    - \( [B_1, * , *, B_3] \)
  - Initial state
    - \( [*, *, *, *] \)
  - Goal states
    - All states without \( * \)

- **Match Selector**
  - **Input:** Similarity matrix
    - Output of the individual matchers
  - **Output:** Matches

- **Match Selection**
  - Merge similarity matrices produced by the matchers into single matrix
  - Typical strategies
    - Average, Minimum, Max
    - Weighted combinations
    - Some script
3.1 Schema Matching

- **Many-to-many matchers**
  - Combine multiple columns using a set of functions
  - E.g., `concat`, `+`, currency exchange, unit exchange
  - Large or even unlimited search space
  - Need method that explores interesting part of the search space
  - Specific searchers
    - Only concatenation of columns (limit number of combinations, e.g., 2)

3. Overview

- **Topics covered in this part**
  - Schema Matching
  - Schema Mappings and Mapping Languages

3.2 Schema Mapping

**Example: Matching Result**

Assume: We have data in the source as shown above

What data should we create in the target? Copy values based on matches?

```
Name  Address 
Peter  Chicago  (312)123-4567
Alice  New York  (465)123-4567
Bob   Boston    (312)789-0123
```

```
Id   City          Office-phone
1    Chicago       (312)123-4567
2    Chicago       (321)123-4567
3    New York      (465)123-4567
```

3.2 Schema Mapping

- **Matches do not determine completely how to create the target instance data! (Data Exchange)**
  - How do we choose values for attributes that do not have a match?
  - How do we combine data from different source tables?
  - Matches do not determine completely what the answers to queries over a mediated schema should be! (Virtual Data Integration)

3.2 Schema Mapping

- **Schema mappings**
  - Generalize matches
  - Describe relationship between instances of schemas
  - Mapping languages
    - LAV, GAV, GLAV
    - Mapping as Dependencies: tuple-generating dependencies
  - **Mapping generation**
    - Input: Matches, Schema constraints
    - Output: Schema mappings
3.2 Schema Mapping

- **Instance-based definition of mappings**
  - Global schema \( G \)
  - Local schemas \( S_1, \ldots, S_n \)
  - Mapping \( M \) can be expressed as for each set of instances of the local schemas what are allowed instances of the global schema:
    - Subset of \( (I_G \times I_1 \times \ldots \times I_n) \)
    - Useful as a different way to think about mappings, but not a practical way to define mappings

3.2 Schema Mapping

- **Certain answers**
  - Given mapping \( M \) and \( Q \)
  - Instances \( I_1, \ldots, I_n \) for \( S_1, \ldots, S_n \)
  - Tuple \( t \) is a certain answer for \( Q \) over \( I_1, \ldots, I_n \)
    - If for every instance \( I_G \) so that \( (I_G \times I_1 \times \ldots \times I_n) \) in \( M \) then \( t \in Q(I_G) \)

3.2 Schema Mapping

- **Languages for Specifying Mappings**
  - Describing mappings as inclusion relationships between views:
    - Global as View (GAV)
    - Local as View (LAV)
    - Global and Local as View (GLAV)
  - Describing mappings as dependencies
    - Source-to-target tuple-generating dependencies (st-tgds)

3.2 Schema Mapping

- **Excursion Virtual Data Integration**
  - More in next section of the course

3.2 Schema Mapping

- **Global-as-view (GAV)**
  - Express the global schema as views over the local schemata
  - What query language do we support?
    - CQ, UCQ, SQL, …?
  - Closed vs. open world assumption
    - Closed world: \( R = Q(S_1, \ldots, S_n) \)
      - Content of global relation \( R \) is defined as the result of query \( Q \) over the sources
    - Open world: \( R \supseteq Q(S_1, \ldots, S_n) \)
      - Relation \( R \) has to contain the result of query \( Q \), but may contain additional tuples
3.2 Schema Mapping

Example: Types of Matching

<table>
<thead>
<tr>
<th>Local Schema</th>
<th>Global Schema</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person</td>
<td>Person</td>
</tr>
<tr>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Address</td>
<td>Address</td>
</tr>
<tr>
<td>Id</td>
<td>Id</td>
</tr>
<tr>
<td>City</td>
<td>City</td>
</tr>
<tr>
<td>Office-contact</td>
<td>Office-contact</td>
</tr>
</tbody>
</table>

Consider switching local and global schema

Person(X, NULL) = Person(X, Y, Z, A, B)
Address(NULL, Y, Z) = Person(X, Y, Z, A, B)

Example: Types of Matching

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Example: Types of Matching

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<td>Address</td>
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Consider switching local and global schema

Person(X, NULL) = Person(X, Y, Z, A, B)
Address(NULL, Y, Z) = Person(X, Y, Z, A, B)

3.2 Schema Mapping

- **Global-as-view (GAV)**
- **Solutions (mapping M)**
  - Unique solutions (1 solution!)
  - Intuitively, execute queries over local instance that produced global instance

3.2 Schema Mapping

- **Global-as-view (GAV)**
- **Answering Queries**
  - Simply replace references to global tables with the view definition
  - Mapping \( R(X,Y) = S(X,Y), T(Y,Z) \)
  - \( Q(X) :- R(X,Y) \)
  - Rewrite into
  - \( Q(X) :- S(X,Y), T(Y,Z) \)

3.2 Schema Mapping

- **Local-as-view (LAV)**
  - Express the local schema as views over the global schemata
  - What query language do we support?
    - \( CQ, U CQ, SQL, \ldots \)?
  - **Closed vs. open world** assumption
    - Closed world: \( S_q = Q(G) \)
      - Content of local relation \( S_q \) is defined as the result of query \( Q \) over the sources
    - Open world: \( S_q \supseteq Q(G) \)
      - Local relation \( S_q \) has to contain the result of query \( Q \), but may contain additional tuples
3.2 Schema Mapping

Example: Types of Matching

- **Local-as-view (LAV)**
- **Solutions (mapping M)**
  - May be many solutions

- **Local-as-view (GAV)**
- **Answering Queries**
  - Need to find equivalent query using only the views (this is a hard problem, more in next course section)
  - Mapping $S(X,Z) = R(X,Y), T(Y,Z)$
  - $Q(X) : - R(X,Y)$
  - Rewrite into ???
    - Need to come up with missing values
    - Give up query equivalence?

- **Global-Local-as-view (GLAV)**
  - Express both sides of the constraint as queries
  - What query language do we support?
    - CQ, UCQ, SQL, …?
  - Closed vs. open world assumption
    - Closed world: $Q'(G) = Q(S)$
    - Open world: $Q'(G) \n Q(S)$
3.2 Schema Mapping

- **Local-as-view (GLAV) Discussion**
  - Kind of best of both worlds (almost)
  - Complexity of query answering is the same as for LAV
  - Can address the lost correlation and missing values problems we observed using GAV and LAV

- **Source-to-target tuple-generating dependencies (st-tgds)**
  - Local way of expressing GLAV mappings
  \[ \forall x : \phi(x) \rightarrow \exists y : \psi(x, y) \]
  - Equivalence to a containment constraint:
  \[ Q'(G) \supseteq Q(S) \]

3.2 Schema Mapping

- **Matching and Mapping**
  - **Generating Schema Mappings**
    - **Input**: Schemas (Constraints), matches
    - **Output**: Schema mappings
    - **Ideas**:
      - Schema matches tell us which source attributes should be copied to which target attributes
      - Foreign key constraints tell us how to join in the source and target to not loose information

3.2 Schema Mapping

- **Clio**
  - Clio is a data exchange system prototype developed by IBM and University of Toronto researchers
  - The concepts developed for Clio have been implemented in IBM InfoSphere Data Architect
  - Clio does matching, mapping generation, and data exchange
    - For now let us focus on the mapping generation

- **Clio Mapping Generation Algorithm**
  - **Inputs**: Source and Target schemas, matches
  - **Output**: Mapping from source to target schema
  - Note, Clio works for nested schemas such as XML too not just for relational data.
    - Here we will look at the relational model part only
3.2 Schema Mapping

- **Clio Algorithm Steps**
  - 1) Use foreign keys to determine all reasonable ways of joining data within the source and the target schema
    - Each alternative of joining tables in the source/target is called a logical association
  - 2) For each pair of source-target logical associations: Correlate this information with the matches to determine candidate mappings

- **Clio Algorithm: 1) Find logical associations**
  - This part relies on the chase procedure that first introduced to test implication of functional dependencies ('77)
  - The idea is that we start use a representation of foreign keys are inclusion dependencies (tgds)
    - There are also chase procedures that consider edges (e.g., PKs)
  - Starting point are all single relational atoms
    - E.g., R(X,Y)

- **Chase step**
  - Works on tableau: set of relational atoms
  - A chase step takes one tgd t where the LHS is fulfilled and the RHS is not fulfilled
    - We fulfill the tgd t by adding new atoms to the tableau and mapping variables from t to the actually occurring variables from the current tableau
  - **Chase**
    - Applying the chase until no more changes
    - Note: if there are cyclic constraints this may not terminate

- **Clio Algorithm: 2) Generate Candidate Mappings**
  - For each pair of logical association $A_S$ in the source and $A_T$ in the target produced in step 1
  - Find the matches that are covered by $A_S$ and $A_T$
    - Matches that lead from an element of $A_S$ to an element from $A_T$
  - If there is at least one such match then create mapping by equating variables as indicated by the matches and create st-tgd with $A_S$ in LHS and $A_T$ in RHS

---

**Outline**

0) Course Info
1) Introduction
2) Data Preparation and Cleaning
3) Schema matching and mapping
4) Virtual Data Integration
5) Data Exchange
6) Data Warehousing
7) Big Data Analytics
8) Data Provenance