



Informatica®

Informatica® Cloud Data Profiling  
Spring 2020 April

# Asset Management

Informatica Cloud Data Profiling Asset Management  
Spring 2020 April  
April 2024

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# Preface

Use *Asset Management* to understand Informatica Cloud Data Profiling projects, folders, and assets. *Asset Management* explains how to tag assets, manage and migrate assets, and configure asset permissions.

## Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

### Informatica Network

The Informatica Network is the gateway to many resources, including the Informatica Knowledge Base and Informatica Global Customer Support. To enter the Informatica Network, visit <https://network.informatica.com>.

As an Informatica Network member, you have the following options:

- Search the Knowledge Base for product resources.
- View product availability information.
- Create and 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 find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at [KB\\_Feedback@informatica.com](mailto:KB_Feedback@informatica.com).

### Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit <https://docs.informatica.com>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at [infa\\_documentation@informatica.com](mailto:infa_documentation@informatica.com).

## Informatica Product Availability Matrices

Product Availability Matrices (PAMs) indicate the versions of the operating systems, databases, and types of data sources and targets that a product release supports. You can browse the Informatica 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 and based on real-world experiences from hundreds of data management projects. Informatica Velocity represents the collective knowledge of Informatica consultants who work with organizations around the world to plan, develop, deploy, and maintain successful data management solutions.

You can find 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](mailto:ips@informatica.com).

## Informatica Marketplace

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

## Informatica Global Customer Support

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

To find online support resources on the Informatica Network, click **Contact Support** in the Informatica Intelligent Cloud Services Help menu to go to the **Cloud Support** page. The **Cloud Support** page includes system status information and community discussions. Log in to Informatica Network and click **Need Help** to find additional resources and to contact Informatica Global Customer Support through email.

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <https://www.informatica.com/services-and-training/support-services/contact-us.html>.

# CHAPTER 1

## Project and asset management

You can manage projects and assets on the **Explore** page. The **Explore** page is an Informatica Intelligent Cloud Services feature that is available for most services. If you use multiple services, you might see projects, folders, and assets for all of your services on the **Explore** page.

You can manage your Informatica Intelligent Cloud Services projects and assets in the following ways:

- Copy projects, folders, or assets to create new versions of them.
- Move folders or assets to other locations.
- Rename projects, folders, or assets.
- Delete projects, folders, or assets.
- Apply tags so you can filter for related assets on the **Explore** page.
- Configure permissions for projects, folders, or assets.
- Use source control to manage versions of projects, folders, and assets.
- Migrate assets between organizations.

## Copying projects, folders, and assets

You can copy projects, folders, and assets on the **Explore** page. You might want to copy an object to use as a template, or you might want to create a backup copy.

When you copy objects, Informatica Intelligent Cloud Services retains child elements in the following instances:

- When you copy a project, the new project contains all of the folders and assets that were in the original project. Similarly, when you copy a folder, the new folder contains all of the assets that were in the original folder.
- When you copy assets or a folder containing assets to another location, the assets retain their references to dependent objects.  
For example, a folder in the Customers project contains the m\_cust and the mt\_ca\_cust assets. The mt\_ca\_cust asset requires the m\_cust asset. If you copy the mt\_ca\_cust asset to a folder in the Customers\_ca\_upsell project, the mt\_ca\_cust asset in the Customers\_ca\_upsell project still references the m\_cust asset in the Customers project.

When you copy an asset within a folder, you can keep both assets. When you copy an asset into a different folder that contains an asset with the same name, you can overwrite the asset in the folder or keep both. If you choose to overwrite the asset, you can merge the asset tags. If you choose to keep both assets, Informatica Intelligent Cloud Services appends the new asset name with "Copy x" where x is the sequential copy number.

**Note:** To avoid naming conflicts with duplicate assets, rename assets with a "Copy x" suffix.

When you copy an asset with a schedule, the schedule is removed from the copied asset.

Perform the following steps to copy an object:

1. On the **Explore** page, navigate to the object that you want to copy.
2. In the row that contains the object that you want to copy, click **Actions** and select **Copy To**.
3. Browse to the new location and click **Select**.

## Moving folders and assets

You can move folders and assets on the **Explore** page.

1. On the **Explore** page, navigate to the folder or assets that you want to move.
2. If your organization uses source control, check out the folder or assets that you want to move.  
If you want to move a folder, be sure to check out the folder and each of the assets within the folder.
3. To move a folder or a single asset, in the row that contains the folder or asset, click **Actions** and select **Move To**, and then browse to the new location and click **Select**.

## Renaming projects, folders, and assets

You can rename projects, folders, and assets without losing any references to objects that they use.

For example, if an asset named mt\_ResolveClientList uses an asset named m\_RegionToMainList, you can rename the mt\_ResolveClientList asset to mt\_ClientList and it will still reference the m\_RegionToMainList asset.

The **Explore** page does not support the following characters:

# ? ` | { } " ^ & [ ] / \

Do not use these characters in project, folder, asset, or tag names.

1. On the **Explore** page, navigate to the object that you want to rename.
2. To rename an asset, in the row that contains the asset, click **Actions** and select **Rename**.
3. To rename a project or folder, in the row that contains the project or folder, click **Actions** and select **Properties**.
4. Enter the new name and click **Save**.

You cannot use special characters in a name or use the same name as another object that is in the same folder.

# Deleting projects, folders, and assets

You can delete a project, folder, or asset if you no longer need it. However, before you delete it, verify that no users in the organization plan to use it. You cannot retrieve projects, folders, or assets after you delete them.

You cannot delete an asset in the following situations:

- The asset is a task that is currently running.
- The asset is a mapping that is currently running.
- The asset is used by another asset. You must first delete the dependencies of the asset before you can delete the asset.

For information about viewing asset dependencies, see [“Asset dependencies” on page 12](#).

Delete a project, folder, or asset from the **Explore** page, as shown in the following image:

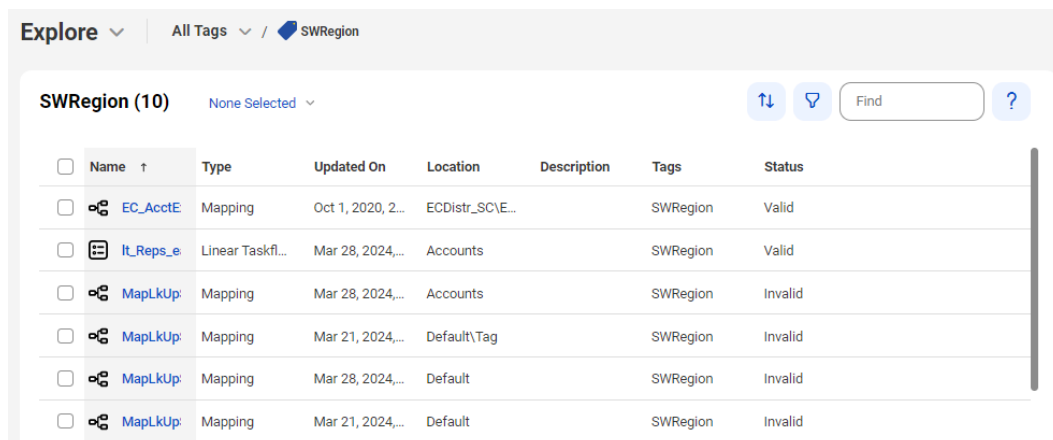
1. On the **Explore** page, navigate to the object that you want to delete.
2. If your organization enabled source control, check out the object that you want to delete.
3. In the row that contains the project, folder, or asset, click **Actions** and select **Delete**.
4. If the object was checked out, check in the object so that the change is reflected in the Git repository.

# Tags

A tag is an asset property that you can use to group assets. Create tags to filter for assets that share a common attribute on the **Explore** page.

For example, each of your organization's assets includes a tag that identifies the regional office that manages the asset. You want to view all of the assets that the Southwest regional office manages. On the **Explore** page, you explore by tag and then click the SWRegion tag.

The following image shows this configuration:



You can assign tags to all asset types. An asset can have up to 64 tags.

You can find all of the assets that have a particular tag using one of the following methods:

- Click the name of the tag in the **Tags** column, in any row.



- Explore by tag, and then in the list of tags that shows on the page, click the name of the tag.

The following image shows an **Explore** page that lists all the tags created for the organization:

<input type="checkbox"/>	Name	Asset Count	Updated On
<input type="checkbox"/>	east	10	2021-04-02T17:50:49Z
<input type="checkbox"/>	local	13	2020-10-02T18:27:08Z
<input type="checkbox"/>	map	3	2019-09-16T18:49:54Z
<input type="checkbox"/>	map, east, local	2	2021-05-27T21:14:12Z
<input type="checkbox"/>	north	1	2024-03-28T19:20:00Z
<input type="checkbox"/>	northeast	1	2024-03-28T19:20:54Z

## Creating tags

Use an asset's **Properties** dialog box to create and assign tags for that asset or to create tags to be available for future use.

Perform the following steps to create multiple tags without assigning them to an asset:

1. On the **Explore** page, browse by asset type.
2. In a row that contains an asset, click **Actions** and select **Properties**.
3. In the **Tags** field, enter the name of a tag that you want to create, and then press Enter.

A tag can have a maximum of 255 characters.

You can't use the following characters in project, folder, asset, or tag names:

# ? ' | { } " ^ & [ ] / \

- Continue to enter the desired tags. Press Enter after each tag name to add it to the tag list.

**Properties: m\_TrimEmployeeNames\_Parameterized-Advanced**



**Name:** m\_TrimEmployeeNames\_Parameterized-  
Advanced

**Description:**

**Tags:**

The image shows a tag selection interface. It consists of a rounded rectangular container with a light blue border. On the left side, there are two tags: 'local' and 'SWRegion', each enclosed in a rounded rectangle with a small 'x' icon to its right. On the right side, there is a vertical line and a small downward-pointing chevron icon, indicating a dropdown menu.

Save

Cancel

- After you have entered the tags, delete the tags from the **Tags** field so that the asset does not become associated with the tags. The tags will still appear in the list of available tags.
- Click **Save**.

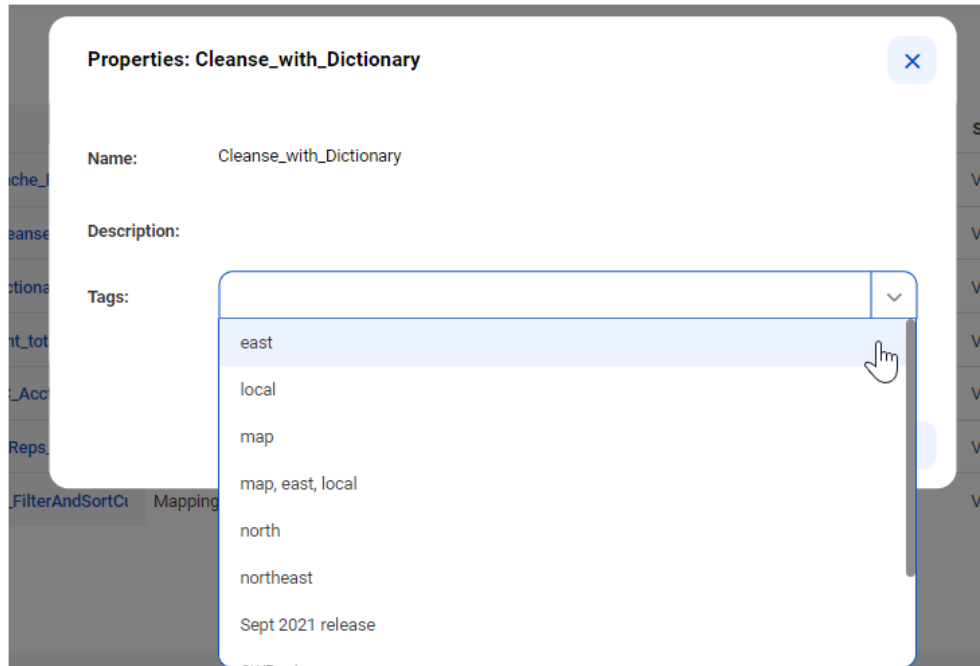
## Assigning tags

You can assign a tag to one asset at a time or assign a tag to multiple assets at the same time. You can also assign multiple tags to one asset.

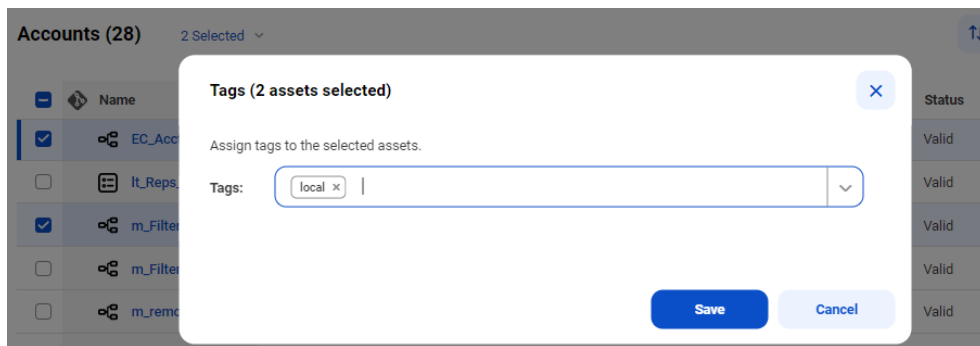
When you assign tags to an asset, you can choose an existing tag or create a new one.

- On the **Explore** page, navigate to the asset or assets.

2. Perform one of the following tasks depending on whether you want to assign tags to one asset or assign tags to multiple assets at the same time.
  - To assign tags to one asset, in the row that contains the asset, click **Actions** and select **Properties**.



- To assign tags to multiple assets at the same time, in the row for each asset, select the check box. After you have selected all of the assets, from the Selection menu, select **Tags**.



3. Select an existing tag or enter the name of a new tag.  
Continue adding tags or creating new tags until you have assigned all of the desired tags.
4. Click **Save**.

## Editing and deleting tags

You can edit or delete a tag on the **Explore** page.

Edit a tag name or description in the tag properties. When you edit a tag, the properties for associated assets update as well. For example, if your m\_sales asset has the NorthWest tag and you change the name of the tag to NW, the name of the tag changes to NW in the m\_sales asset properties.

If you delete a tag, the tag no longer appears in the asset properties.

1. On the **Explore** page, browse by tags.

2. In the row that contains the tag, perform one of the following tasks:
  - To edit a tag, click **Actions** and select **Edit**. After you make your changes, click **Save**.
  - To delete a tag, click **Actions** and select **Delete**.

## Asset dependencies

You can view object dependencies for an asset. You might want to view object dependencies before performing certain operations on an asset.

For example, you can't delete an asset if another object depends on the asset. You must first delete the dependent objects and then delete the asset. You can find the dependent objects by viewing the asset dependencies.

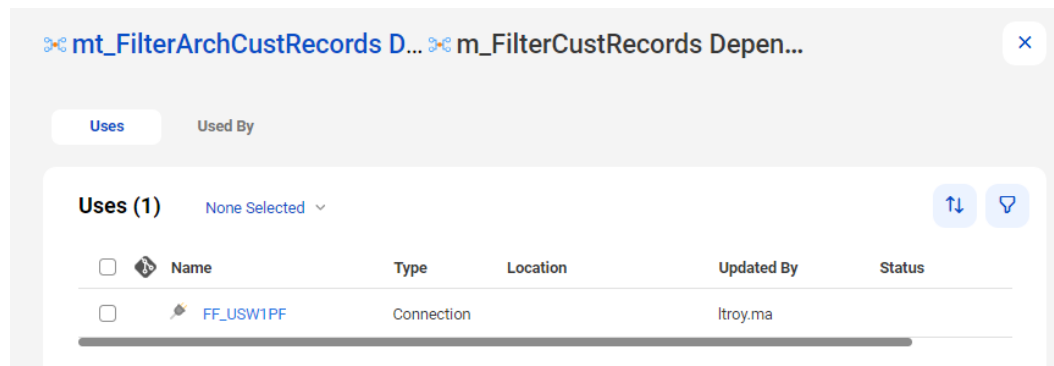
You can view object dependencies for an asset on the **Explore** page. To view object dependencies for an asset, in the row that contains the asset, click **Actions** and select **Show Dependencies**. The **Dependencies** page opens showing the **Uses** tab by default.

The **Uses** tab lists the objects that the selected asset uses.

The **Used By** tab lists the objects that use the selected asset.

To drill down to the lowest level dependency, you can continue to show dependencies for each asset that appears on the **Dependencies** page. At the top of the **Dependencies** page, a breadcrumb shows the chain of dependencies.

The following image shows that the asset `mt_FilterArchCustRecords` is dependent on `m_FilterCustRecords`, which is dependent on `FF_USW1PF`:



If you have the appropriate permissions, you can perform actions on the **Dependencies** page such as viewing or deleting assets. To view or delete an asset, in the row that contains the asset, click **Actions** and select the action.

If you work with source controlled assets, you can view source control information such as the last pull time and the last check-in. To view source control information, you can add the following source control columns to the table:

- Last Pull Time
- Checked Out By
- Last Check in
- Git Hash

# Permissions

Permissions determine the access rights that a user has for a Secure Agent, Secure Agent group, connection, schedule, or asset. Permissions add additional or custom security for an object. Permissions define which users and groups can read, update, delete, execute, and change permissions on the object.

To configure permissions on an object, you need the following licenses and privileges:

- To configure permissions at the project level for all assets in a project, your organization must have the Set/Unset Security Permissions at Project Level license.
- To configure permissions at the folder level for all assets in a folder, your organization must have the Set/Unset Security Permissions at Folder Level license.
- To configure permissions on individual assets, your organization must have the Fine Grained Security license.
- The role assigned to your user account or to a group in which you are a member must have the Set Permission privilege for the object type. For example, to configure permissions on a Secure Agent, you must be assigned a role that has the Set Permission privilege for Secure Agents.

To configure permissions on an object, navigate to the object and set the appropriate permissions. For example, you want only users in the Development Team user group to have access to assets in the Development Data folder. Navigate to the folder, edit the permissions, and grant the Development Team user group permissions on the folder.

Permissions apply to the objects that you configure but not to copies of the object. Therefore, when you copy or export an asset, the permissions are not copied or exported with the asset. For example, you export a mapping task in which only user rjones has execute permission. When you import the mapping task, the imported mapping has no permissions assigned to it. Therefore, any user with privileges to run mapping tasks can run the imported task.

You can configure the following permissions on an object:

Permission	Description
Read	Open and view the object. If the object is source controlled, this permission allows the user or group to pull or check out the object from the source control repository. You must have the read permission to access the integration hub connection to perform any operations. If you select a task, this permission also allows the user or group to use a connection or schedule in the task.
Update	Edit the object. If the object is source controlled, this permission allows the user or group to check in, check out, pull, unlink, or roll back the object. Requires read permission, which is automatically granted.
Delete	Delete the object.
Execute	Run the object. Applies to mappings, tasks, taskflows, and Cloud Integration Hub assets. Monitor, stop, and restart instances of the mapping, task, or taskflow.
Change permissions	Change the permissions that are assigned to the object.

**Note:** These permissions control permissions within Informatica Intelligent Cloud Services. They do not control operating system permissions, such as the ability to start, stop, or configure the Secure Agent on Windows or Linux.

## Rules and guidelines for permissions

Use the following rules and guidelines for permissions:

- When you configure permissions on an object, verify that the user or group to which you grant permissions is assigned a role with the appropriate privileges for the object type. For example, if you grant a user with the Service Consumer role Update privilege on a particular folder, the user cannot update the folder because the Service Consumer role does not have update privileges for folders.
- To edit an asset, the user must have read permission on all assets used within the asset. For example, when you assign a user Read and Update permissions on a synchronization task, verify that the user also has Read permission on the connections, mapplets, schedules, and saved queries that are used in the task.
- When a user edits a task, assets without Read permission are not displayed. To avoid unexpected results, the user should cancel all changes and avoid editing the task until the user is granted the appropriate Read permissions.
- When configuring a taskflow, a user needs Execute permission on all tasks to be added to the taskflow.
- To edit a taskflow, a user needs Execute permission on all tasks in the taskflow. Without Execute permission on all tasks, the user cannot save changes to the taskflow.
- To run a taskflow, a user needs Read and Execute permissions on taskflows.
- To monitor jobs or to stop a running job, a user needs Execute permission on the mapping, task, or taskflow.
- If you assign custom permissions to a Data Integration task and invoke the Data Integration task through an Application Integration process or a guide, you must complete either of the following tasks:
  - Give the Application Integration anonymous user permission to run the associated Data Integration asset.
  - Add the Application Integration anonymous user to a user group that has permission to run the associated Data Integration asset.

## Configuring permissions

You can configure permissions on an object if you are assigned a role with the Set Permission privilege for the object type. For example, to configure permissions on a folder, you must be assigned a role that has the Set Permission privilege for folders.

1. Navigate to the object for which you want to configure permissions.



For example:

- To configure permissions on a Secure Agent or Secure Agent group, in Administrator, select **Runtime Environments**.
  - To configure permissions on a connection, in Administrator, select **Connections**.
  - To configure permissions on a mapping, in Data Integration, open the project and folder that contain the mapping.
2. In the row that contains the object, either click **Actions** and select **Permissions**, or click the **Change Permission** icon.

The **Permissions** dialog box lists the users and groups that have permissions on the object.

If the **Permissions** dialog box lists no users or groups, then no permissions are configured for the object. Any user with appropriate privileges for the object type can access the object.


The following image shows the **Permissions** dialog box for a mapping:

**Permissions: m\_FilterAndSortCustRecords**  

Users and Groups with permissions on the asset are listed here. Other Users have no access to the asset. If no Users or Groups are listed, then this asset has no permissions restrictions.


**Users** Groups

---



<input type="checkbox"/>	User Name	First Name	Last Name	Read	Update	Delete	Execute	Change Per...
<input type="checkbox"/>	jsmith	John	Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	jrandolp	Jane	Randolph	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Add** Remove

 **Save** Cancel

3. To configure user permissions on the object:

- Select **Users**.
- If the user does not appear in the **Users** list, click **Add**, and select a user.
- Enable or disable the appropriate permissions on the user.

**Note:** When you grant any user permissions on the object, Informatica Intelligent Cloud Services also adds you as a user with permissions on the object. This prevents you from losing access to the object when you configure permissions.

4. To configure user group permissions on the object:

- Select **Groups**.
- If the group does not appear in the **Groups** list, click **Add**, and select a group.
- Enable or disable the appropriate permissions on the group.

**Note:** When you grant any group permissions on the object, Informatica Intelligent Cloud Services also adds you as a user with permissions on the object. This prevents you from losing access to the object when you configure permissions.

5. To remove all permissions restrictions for the object, remove all users and groups from the **Permissions** dialog box.

When you remove all users and groups, any user with appropriate privileges for the object type can access the object.

6. Click **Save**.

## CHAPTER 2

# Asset Migration

You can migrate Informatica Intelligent Cloud Services assets from one organization to another organization. To migrate assets, you export the assets from the source organization and then import the assets into the target organization.

You can export single assets, groups of assets, or export all of the assets in a project. If you export a project or folder, the file structure remains intact so that when you perform the import in the target organization, you can duplicate the original structure. When you export data profiling tasks, Data Profiling exports only the task definitions. For information about exporting the profile results, see *Data Profiling*.

Before you migrate an asset from one organization to another, ensure that you meet the following requirements:

- The source and target organizations must have the required license to import and export assets.
- The target organization must have the required licenses for the assets that you want to import.
- You must have a user account in the source and target organizations with a role that has import and export privileges, such as the Admin or Designer role.

To export or import assets in a sub-organization, log in to the sub-organization. If you have administrator privileges in the parent organization, you can also switch to the sub-organization and export or import assets.

## Dependent objects

Dependent objects are assets that are required by other assets.

When you set up an export, you have the option to include or exclude dependent objects in the export file. The dependent objects must exist either in the export file or in the target organization, else the import fails.

You might want to include dependent objects if they do not exist in the target organization. Or, you might want to include dependent objects if you want to replace the dependent objects in the target organization with updated versions from the source organization. If you choose to include dependent objects, the export file includes dependent objects for all of the assets that you include in the export. When you configure the import, you can choose which dependent assets to import.

You might want to exclude an asset's dependent objects if the objects exist in the target organization and you do not want to replace them.

**Note:** Schedules are not dependent objects and are not included when you export assets that use them.



# Export files

The export file retains the file structure of the source organization's **Explore** page for projects, folders, and assets. Connections and runtime environments are located in the SYS folder. The export file includes a spreadsheet that lists the objects within the file.

Each asset is contained in a ZIP file along with its associated metadata and JSON file. The zip file includes the data profiling task name appended with the asset type PROFILE.

## Exporting assets

You can select a single asset, multiple assets, or a project to export.

To include multiple assets, you can either select each asset within a folder or select a project or folder to export all of its assets. If you export a project, during import you can import the entire project or import only the assets that you select.

1. Log in to the source organization.
2. On the **Explore** page, navigate to the assets that you want to export.
3. Select the assets that you want to export.

To export a single asset or project, select the asset or project, and then click **Actions** and select **Export**.

To export multiple assets, select the check box to the left of each asset to export. Or, select the check box for each project or folder that contains the assets to export. From the Actions menu, select **Export**.

The following image shows the selection menu with multiple assets selected:

4. On the **Export Assets** page, change the job name or leave the default.
5. Select whether to include dependent objects for the assets.
6. Click **Export**.
7. To see the progress of the job, select **My Import/Export Logs** from the navigation bar and then select **Export** from the menu at the top of the page. Click the name of the log to open the log details page.

# Asset import

You can import all of the assets in an export file or select the assets that you want to import.

When you import assets, you specify the assets in the export file that you want to import and the projects in which to import them.

To import an asset, you need the following privileges and permissions:

- Your user role must have privileges to import assets.
- If you import an asset into the target project as a new asset, you must have create, update, and read permissions on the asset.

The **Import Assets** page lists the assets that are in the export file. You can select which assets you want to import, and then specify which project to import the assets to. You can accept the default project, which is the same project name as the source project, or you can select a different project. If the project does not exist in the target organization, Informatica Intelligent Cloud Services creates it.

You can specify how Informatica Intelligent Cloud Services handles asset name conflicts when the export file contains assets with the same name as assets in the target project. You cannot overwrite the data profiling tasks in the target project.

## Importing assets

Import assets from a Informatica Intelligent Cloud Services export file.

1. Log in to the target organization.
2. On the **Explore** page, navigate to **All Projects** and click **Import**.
3. On the **Import Assets** page, navigate to the export file and click **Open**, or drag the zip file from the Downloads folder in Windows.

The **Import Assets** page lists the assets in the file.

4. Optionally, change the job name.
5. Do not choose the **Overwrite existing assets** option.
6. Select the assets that you want to import.

If the export file contains a project and you want to import the entire project, select all of the assets. Informatica Intelligent Cloud Services creates the project in the source organization.

7. Select the target project or accept the default.
8. If required, revise your selections to resolve any issues in the test results, and then click **Import**.

You can see the progress of the job on the **My Import/Export Logs** page. When the import process is complete, a message appears in **Notifications**. Click the link in the message to open the log details page and see the results of the import.

## Post-import tasks

To complete the migration process you need to perform certain tasks based on the types of assets that you imported.

After you import the assets, you can configure the connection passwords and security tokens. Informatica Intelligent Cloud Services does not include connection passwords and security tokens in imports for security reasons.

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