



Informatica® Metadata Command Center
November 2025

IBM Cognos Sources

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Table of Contents

Preface	4
Chapter 1: Introduction to IBM Cognos catalog sources.....	5
Extraction and view process.	6
About the IBM Cognos catalog source	6
Extracted metadata.	7
Chapter 2: Before you begin.....	8
Verify permissions.	8
Permissions for metadata extraction.	8
Permissions to run data classification.	8
Permissions to run glossary association.	8
Get IBM Cognos source information.	9
Create endpoint catalog sources for connection assignment.	9
Chapter 3: Create catalog sources in Metadata Command Center.....	10
Step 1. Register a catalog source.	10
Step 2. Configure capabilities.	13
Configure metadata extraction.	13
Configure lineage discovery.	16
Configure data classification.	17
Configure glossary association.	18
Step 3. Associate stakeholders and asset groups.	19
Step 4. Run or schedule the job.	21
Step 5. Assign reference catalog source connections to endpoint catalog source objects.	22
Chapter 4: View results in Data Governance and Catalog.....	24
View metadata extraction results.	24
View data lineage.	26
View lineage at the catalog source level.	26
View lineage at data set level and data element level.	26
View classified data.	28
View glossary associations.	29

Preface

Read *IBM Cognos Sources* to learn how to register and configure IBM Cognos source systems as catalog sources in Metadata Command Center. After you configure a catalog source, you extract metadata and then view the results in Data Governance and Catalog.

CHAPTER 1

Introduction to IBM Cognos catalog sources

You can use Metadata Command Center to extract metadata from a source system.

A source system is any system that contains data. For example, IBM Cognos is a source system from which you can extract metadata through an IBM Cognos catalog source with Metadata Command Center. A catalog source is an object that represents and contains metadata from the source system.

Before you extract metadata from a source system, you first create and register a catalog source that represents the source system. Then you configure capabilities for the catalog source. A capability is a task that Metadata Command Center can perform, such as metadata extraction, lineage discovery, data profiling, data classification, or glossary association.

When Metadata Command Center extracts metadata, Data Governance and Catalog displays the extracted metadata and its attributes as technical assets. You can then perform tasks such as analyzing the assets, viewing lineage, and creating links between those assets and their business context.

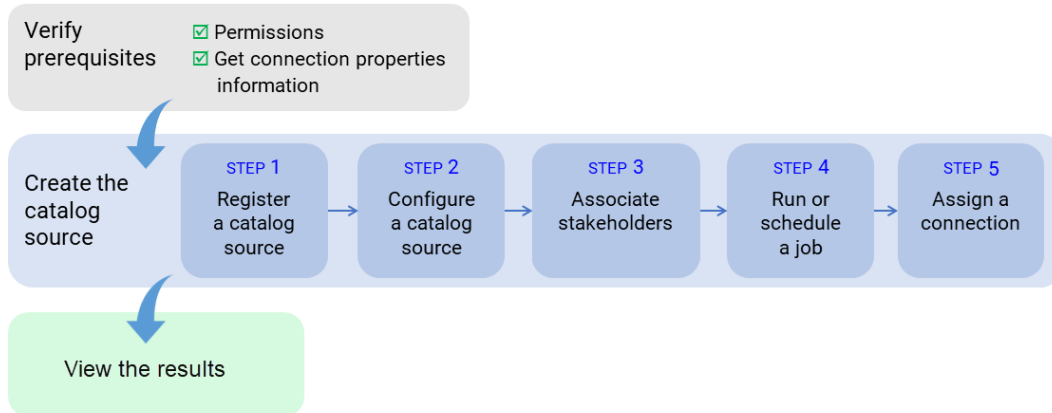
The following table describes the capabilities of the catalog source:

Capability	Description
Lineage Discovery	Builds the complete lineage of a catalog source by recommending endpoint catalog source objects to assign to reference catalog source connections. When you run the catalog source job, Metadata Command Center assigns the reference catalog source connections to CLAIRE recommended endpoint catalog source objects. You can then view the list of CLAIRE recommendations and accept or reject them.
Data Classification	Data classification is the process of identifying and organizing data into relevant categories based on the functional meaning of the data. Classifying data can help your organization manage risks, compliance, and data security.
Glossary Association	You can associate terms that are in the glossary with technical assets to provide user-friendly business names to technical assets. Glossary Association automatically associates glossary terms with technical assets or recommends glossary terms that you can manually associate with technical assets in Data Governance and Catalog.

Extraction and view process

To extract metadata from a source system, configure the catalog source and run the extraction job in Metadata Command Center. Then view the results in Data Governance and Catalog.

The following image shows the process to extract metadata from a source system:



After you verify prerequisites, perform the following tasks to extract metadata from IBM Cognos:

1. Register a catalog source. Create a catalog source object, select the source system, and specify values for connection properties.
2. Configure the catalog source. Specify the runtime environment and configure parameters for metadata extraction. Optionally, add filters to include or exclude source system assets from metadata extraction. You can also configure other capabilities such as data profiling and quality, data classification, or glossary association.
3. Optionally, associate stakeholders. Associate users with technical assets, giving the users permission to perform actions determined by their roles.
4. Run or schedule the catalog source job.
5. Optionally, if the catalog source job generates referenced asset objects, you can assign a connection to referenced source system assets.
You can view the lineage with object references without performing connection assignment. After connection assignment, you can view the objects.

After you run the catalog source job, you view the results in Data Governance and Catalog.

About the IBM Cognos catalog source

You can use the IBM Cognos catalog source to extract metadata from the IBM Cognos source system.

IBM Cognos is a business intelligence tool that helps you connect to data sources and create reports.

Extracted metadata

You can use the IBM Cognos catalog source to extract metadata from the IBM Cognos source system.

Metadata Command Center extracts the following metadata from the IBM Cognos source system:

<ul style="list-style-type: none">- ActiveReport- ActiveReportVariable- Argument- Attribute- BooleanVariable- CalculatedMeasure- CalculatedMember- Calculation- CalculationShortcut- ChartNodeMember- Column- ConditionFilter- Connection- ConnectionPackageDataSource- CrosstabNodeMember- Dashboard- DashboardModel- DataAttribute- DataAttributeMeasure- DataModule- DataModuleModel- DataSet- DataSetModel- DataSource- DatabaseConnection- DatabaseQuery- DatabaseQueryShortcut- DatabaseSchema- DelimitedColumn- DelimitedFile- Dimension- DimensionAttribute- DimensionAttributeCalculation	<ul style="list-style-type: none">- DimensionMap- DimensionShortcut- Directory- DynamicCube- DynamicSource- Field- FieldBody- Filter- FilterShortcut- FixedWidthColumn- FixedWidthFile- Folder- FrameworkManagerModel- Function- Hierarchy- Identifier- KeyLevelAttribute- LanguageVariable- Level- LevelAttribute- Macro- Measure- MeasureDimension- MeasureDimensionShortcut- Member- Model- ModelConnection- ModelQuery- ModelQueryShortcut- Namespace- OlapSchemaNamespace- Package- Parameter	<ul style="list-style-type: none">- ProcedureQuery- Prompt- PromptAnswer- Query- QueryItem- QueryPackage- QueryStudioModel- QuerySubject- Relationship- Report- ReportFieldMeasure- ReportFilter- ReportFilterCondition- Repository- ResultColumn- ResultSet- Schema- ScopeRelationship- StoredProcedure- StringVariable- SummaryStoreConnection- Table- Text- TimeDimension- Transformer- TransformerModel- UserAccount- View- ViewColumn
--	--	--

CHAPTER 2

Before you begin

Before you create a catalog source, ensure that you have the information required to connect to the source system.

Perform the following tasks:

- Verify permissions and privileges.
- Get the database source information to connect to the source system.
- Install the Secure Agent on a Windows machine.

Note: The library files from IBM Cognos SDK are available only for Windows operating systems. You can't use a Secure Agent installed on a Linux machine.

- Copy the JAR files from the `sdk\java\lib` directory of the IBM Cognos SDK installation to a directory on the machine.
- Create endpoint catalog sources for connection assignment.

Verify permissions

To extract metadata and to configure other capabilities that a catalog source might include, you need account access and permissions on the source system. The permissions required might vary depending on the capability.

Permissions for metadata extraction

To extract IBM Cognos metadata, you need account access and permissions to the IBM Cognos source system.

Verify that the administrator performs the following tasks:

- Creates a user account for the Informatica user to access the source system.
- Grants read, execute, and traverse permissions for all objects for which you want to extract metadata.

Permissions to run data classification

You can perform data classification with the permissions required to perform metadata extraction.

Permissions to run glossary association

You can perform glossary association with the permissions required to perform metadata extraction.

Get IBM Cognos source information

Before you configure the catalog source, get the values of the connection properties that you need to configure from the IBM Cognos administrator

Note: You don't need to create a connection object for IBM Cognos. You provide this information when you configure the catalog source.

The following table describes the properties that you need:

Property	Description
Version	The version of the IBM Cognos software that's installed. Note: If you don't know the version, you can select Auto detect when you specify the connection information.
Dispatcher URL	The external dispatcher URI of a dispatcher through which the Framework Manager, Metrics Designer, or SDK clients connect to IBM Cognos. For example: <code>http://<host name>:9300/p2pd/servlet/dispatch</code>
Namespace	The namespace that defines a collection of user accounts from an authentication provider. Leave this parameter blank if authentication isn't configured.
User	The user name of the user to connect to the IBM Cognos repository. Verify that this user has permissions to the objects that you want to extract. Leave this parameter blank if authentication isn't configured.
Password	The password to connect to the IBM Cognos repository. Leave this parameter blank if authentication isn't configured.

Create endpoint catalog sources for connection assignment

An endpoint catalog source represents a source system that the catalog source references. Before you perform connection assignment, create endpoint catalog sources and run the catalog source jobs.

You can then perform connection assignment to reference source systems to view complete lineage with source system objects.

CHAPTER 3

Create catalog sources in Metadata Command Center

Use Metadata Command Center to configure a catalog source for IBM Cognos and extract metadata.

When you configure a catalog source, you define the source system that you want to extract metadata from. Configure filters to include or exclude source system metadata before you run the job. Optionally, configure other capabilities, such as lineage discovery, data profiling and quality, data classification, relationship discovery, and glossary association.

To provide stakeholders access to technical assets, you can assign access through stakeholder roles. You can also associate technical assets extracted from the catalog source to asset groups. If your catalog source references other source systems, you can create a connection assignment to the endpoint catalog source to view complete lineage.

Step 1. Register a catalog source

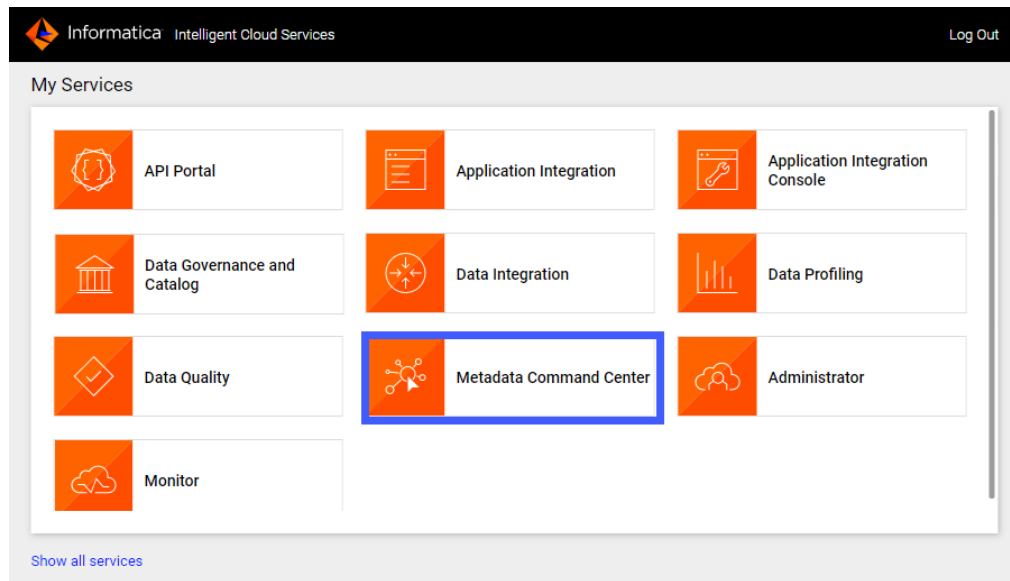
When you register a catalog source, provide general information and connection values.

1. Log in to Informatica Intelligent Cloud Services.

The **My Services** page appears.

2. Click **Metadata Command Center**.

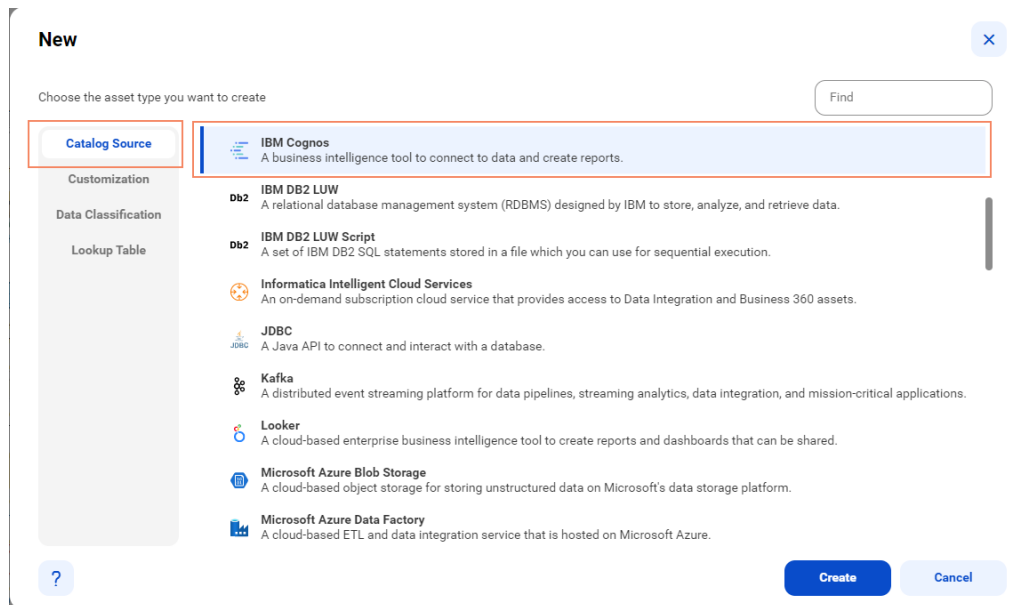
The following image shows the Metadata Command Center box on the **My Services** page:



The Metadata Command Center home page appears.

3. Click **New**.
4. Select **Catalog Source** from the list of asset types.
5. Select IBM Cognos from the list of source systems.

The following image shows the page where you select the IBM Cognos source system:



6. Click **Create**.

The **New Catalog Source** page appears.

The following image shows the IBM Cognos registration information:

7. In the **General Information** section, enter a name and an optional description for the catalog source.

Note: You can rename a catalog source after you create it, but to apply the change to all associated objects you must rerun the metadata extraction job.

After you save the catalog source, you can update the description in Metadata Command Center and Data Governance and Catalog. The update appears only in the service in which you update it.

8. In the **Connection Information** area, enter the IBM Cognos connection information based on the connection values that you got from the administrator.

The following table describes the properties to configure:

Property	Description
Version	The version of the IBM Cognos software that's installed. Note: If you don't know the version, you can select Auto detect when you specify the connection information.
Dispatcher URL	The external dispatcher URI of a dispatcher through which the Framework Manager, Metrics Designer, or SDK clients connect to IBM Cognos. For example: http://<host name>:9300/p2pd/servlet/dispatch

Property	Description
Namespace	The namespace that defines a collection of user accounts from an authentication provider. Leave this parameter blank if authentication isn't configured.
User	The user name of the user to connect to the IBM Cognos repository. Verify that this user has permissions to the objects that you want to extract. Leave this parameter blank if authentication isn't configured.
Password	The password to connect to the IBM Cognos repository. Leave this parameter blank if authentication isn't configured.

9. Click **Next**.

The **Configuration** page appears.

Step 2. Configure capabilities

When you configure the IBM Cognos catalog source, you define the settings for the metadata extraction capability and other optional capabilities.

The metadata extraction capability extracts source metadata from external source systems. You can also configure other capabilities that the catalog source includes.

You can save the catalog source configuration at any point after you enter the connection information. After you save the catalog source, you can choose to run the catalog source job. To run the job once, click **Run**. To run metadata extraction and other capabilities on a recurring schedule, configure schedules on the **Schedule** tab.

Configure metadata extraction

When you configure the IBM Cognos catalog source, you choose a runtime environment, define filters, and enter configuration parameters for metadata extraction.

1. In the **Connection and Runtime** area, choose a serverless runtime environment or the Secure Agent group where you want to run catalog source jobs.
2. Choose to retain, delete, or deprecate objects that are deleted from the source system in the catalog with the **Metadata Change Option**.
 - **Retain**. Retains objects that are deleted from the source system in the catalog. If you update or add a filter, the catalog retains objects extracted from the previous job and extracts additional objects that match the current filter. Objects deleted from the source system are not deleted from the catalog. Enrichments added on deleted objects and relationships are retained.
 - **Delete**. Deletes metadata from the catalog based on objects deleted from the source system and changes you make to the filter. Enrichments added on deleted objects and relationships are also permanently lost. Objects renamed in the source system are removed and recreated in the catalog.

- **Deprecate.** The lifecycle of objects imported into the catalog moves to Obsolete based on objects deleted from the source system and changes you make to the filter. This does not impact enrichments added on deprecated objects and relationships. Objects renamed in the source system are removed and recreated in the catalog. When you run the catalog source job again for other capabilities such as data classification, relationship discovery, or glossary association, the job doesn't consider obsolete objects. Obsolete objects remain in the catalog until they are purged when you run a **Purge Obsolete Objects** job on the **Explore** page.

Note: You can also change the configured metadata change option when you run a catalog source.

3. In the **Filters** area, define one or more filter conditions to apply for metadata extraction:
 - a. Select **Yes** to view filter options.
 - b. From the **Include Metadata** list, choose to include metadata based on the filter parameters.
 - c. From the **Object type** list, select **Objects**.
 - d. From the **Filter criteria** list, select **Named**.
 - e. Click **Select**.
 - f. In the **Select values** dialog box, enter the objects and click **OK**.

Filters can contain the following wildcards:

- Question mark. Represents a single character.
- Asterisk. Represents multiple characters or empty text.

Use '?' in place of '/' in report or folder names.

Use My Folders instead of My content. For example, if the user name is CognosAdmin and the source system path is **My content > Reports > Surety_Reports**, then use the filter value as /CognosAdmin/My Folders/Reports/Surety_Reports. Use Public Folders instead of Team content. For example, if the source system path is **Team content > Reports > Surety_Reports**, then use the filter value as /Public Folders/Reports/Surety_Reports.

The following image shows the filter condition options:

Filters

Specify metadata filters: ☐ No ☒ Yes

> Show supported wildcard characters and examples

Include Metadata	Objects	Named		Select	+	✕
------------------	---------	-------	--	--------	---	---

- g. Optionally, to define an additional filter with an OR condition, click the Add icon.

The following image shows the filter conditions for a IBM Cognos catalog source that includes metadata from all folders within the folder 'Public Folders/Cognos - GW':

Filters

Specify metadata filters: ☐ No ☒ Yes

> Show supported wildcard characters and examples

Include Metadata	Objects	Named	/Public Folders/Cognos - GW/Blank ✕ /Public Folders/Cognos - GW/Chart ✕ /Public Folders/Cognos - GW/User ✕	Select	+	✕
Include Metadata	Objects	Named	/Public Folders/Cognos - GW/Mode ✕	Select	+	✕
Include Metadata	Objects	Named	/Public Folders/Cognos - GW/Query ✕	Select	+	✕

4. In the **Configuration Parameters** area, enter the configuration parameters.

The following table describes the properties that you can enter:

Property	Description
Content browsing mode	<p>The content to retrieve when you search the IBM Cognos repository.</p> <p>Choose from the following options:</p> <ul style="list-style-type: none"> - Packages Only. Retrieves the packages and folders and does not retrieve the reports. - Connections Only. Retrieves the list of connections. - All. Retrieves the packages, folders, queries, and reports. - Content. Allows you to reduce the scope of import to a smaller set of objects than the whole set of objects on the server. <p>Note: If you selected the option Connections Only, do not specify <code>/Public Folders</code> as the filter.</p>
Personal folders	Indicate if you want to import the models and reports located in the personal folders.
Add dependent objects	<p>Imports dependent objects to the selection. Selecting this option requires a complete scan of report dependencies on the IBM Cognos server.</p> <p>Choose from the following options:</p> <ul style="list-style-type: none"> - None. Only imports the selected IBM Cognos objects. - Packages referenced by selected reports. Imports the reports and associated source packages. - All. Imports the source packages when a report is selected and imports the dependent reports when a source package is selected.
Incremental import	<p>Enables incremental import to only extract the metadata that's changed since the last catalog source job.</p> <p>Choose from the following options:</p> <p>True. Import only the changes to the extracted metadata since the last scan.</p> <p>False. Import all metadata.</p>
Folder representation	<p>Indicates how the folders from the IBM Cognos framework manager must be represented.</p> <p>Choose from the following options:</p> <ul style="list-style-type: none"> - Ignore. Ignores the folders. - Flat. Represents the folders as diagrams, but does not retain the hierarchy. - Hierarchical. Represents folders as diagrams and retains the hierarchy.
Transformer import configuration	The XML file that describes mappings between the IBM Cognos Content Manager data sources and PowerPlay Transformer models.

Property	Description
Macro values file	<p>Select a CSV or TXT macro values file that includes the parameterized connections. Required if you want to use parameterized connections.</p> <p>A macro value file includes values of the macro in the following format:</p> <pre>macro1=value1 macro2=value2 ... macroN=valueN</pre> <p>For example, a macro value file can include the following values:</p> <pre>\$machine=localhost \$Language_lookup{\$runLocale}=EN prompt('CountryName')=France sq(\$runLocale)='en' dq('Column ' + \$runLocale)="Column en" \${IC Schema Name Per Environment}\${[Cognos Environment]}{\$machine}}=DBO</pre>
Cognos SDK directory	<p>The path to the IBM Cognos SDK directory that contains the Java libraries.</p> <p>Enter the location of the directory on the Secure Agent machine where you copied the JAR files from the IBM Cognos SDK installation.</p>
Multiple threads	<p>The maximum number of threads that Metadata Command Center uses to extract metadata asynchronously. Leave blank or enter a positive integer value.</p> <p>If left blank, the Secure Agent calculates the number of worker thread by using the JVM architecture and number of available CPU cores on the Secure Agent machine. The computed value can range between 1 and 6.</p> <p>Reduce the number of threads if the Secure Agent generates out-of-memory errors during metadata extraction. Increase the number of worker threads if the Secure Agent machine has a large amount of available memory, for example, 10 GB or more.</p> <p>Note: For optimal performance, do not specify too many threads.</p>
Miscellaneous Options	<p>-m <JVM memory size>. Specify the maximum JVM memory size to use for metadata extraction. The default size is 1G. For example, you can enter the values -m 8G or -m 8000M.</p> <p>-cache clear. Clears the JVM cache before the import. If you clear the cache, you need to import all metadata. Run the catalog source job without incremental metadata extraction.</p>

5. Configure additional capabilities for the catalog source by clicking on the tabs.

Configure lineage discovery

Enable the lineage discovery capability and use CLAIRE to build complete lineage by recommending endpoint catalog source objects to assign to reference catalog source connections.

1. Click the **Lineage Discovery** tab.
2. Select **Enable Lineage Discovery**.
3. In the **Filters** area, define one or more filter conditions to apply for lineage discovery.

To define filters, you can choose to select catalog source types, asset groups, or enter a catalog source name or search from a list of catalog sources.

- a. Select **Yes** to view filter options.
- b. From the Include/Exclude list, choose to include or exclude catalog sources for lineage discovery based on the filter parameters.
- c. From the filter type list, select catalog source type, catalog source name, or asset group.

- d. In the filter value field, select the required catalog source types, or click the Search button and select catalog sources or asset groups.

Filters can contain the asterisk wildcard to represent multiple characters or empty text.

The following image shows the filter condition options:

Enable Lineage Discovery: ☒

Filters

Specify lineage discovery filters: ☐ No ☒ Yes

[Show supported wildcards and examples](#)

Include	Catalog Source Type	Select Catalog Source Types	+	🗑️
Exclude	Catalog Source Name	Select Catalog Sources	+	🗑️
Exclude	Asset Group	Select Asset Groups	+	🗑️

Examples:

- To include or exclude all Oracle catalog sources, select **Catalog Source Type** as the filter type and select `Oracle` in the filter value field.
- To include or exclude the 'Oracle_Retail' catalog source, select **Catalog Source Name** as the filter type and search for the catalog source or enter `Oracle_Retail` in the filter value field.
- To include or exclude all catalog sources with names that start with 'Oracle', select **Catalog Source Name** as the filter type and search for the catalog source or enter `Oracle*` in the filter value field.
- To include or exclude all catalog sources with names that end with 'Retail', select **Catalog Source Name** as the filter type and search for the catalog source or enter `*Retail` in the filter value field.
- To include or exclude all catalog sources with names that contain 'Ret', select **Catalog Source Name** as the filter type and search for the catalog source or enter `*Ret*` in the filter value field.
- To include or exclude all catalog sources that are part of the 'Financial Group' asset group, select **Asset Group** as the filter type and search `Financial Group` in the filter value field.

Note: You can't add more than one include or exclude filter for the same filter type.

- e. Optionally, to define an additional filter with an AND condition, click the **Add** icon.

For more information about lineage discovery, see *Lineage discovery* in the *Administration* help.

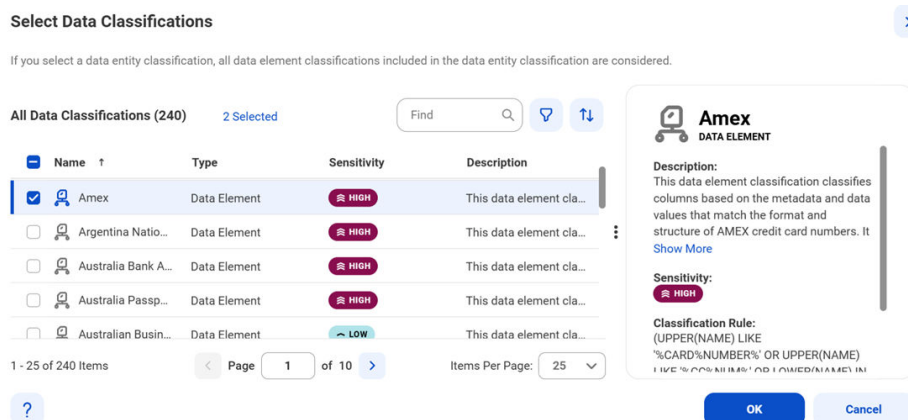
Configure data classification

Enable the data classification capability to identify and organize data into relevant categories based on the functional meaning of the data.

1. Click the **Data Classification** tab.
2. Select **Enable Data Classification**.
3. Choose one or both of the following options:
 - **Generated Data Classifications.** CLAIRE automatically generates data classifications for the data elements.

- **Data Classification Rules.** Choose from predefined or custom data classifications.

1. Click **Add Data Classification**. The following image shows the **Select Data Classifications** dialog box:



2. Select the data classifications that you want to use.
3. Click **OK**.

Configure glossary association

Enable the glossary association capability to associate glossary terms with technical assets, or to get recommendations for glossary terms that you can manually associate with technical assets in Data Governance and Catalog.

Metadata Command Center considers all published business terms in the glossary while making recommendations to associate your technical assets.

1. Click the **Glossary Association** tab.
2. Select **Enable Glossary Association**.
3. Select **Enable auto-acceptance** to automatically accept glossary association recommendations.
4. Specify the **Confidence Score Threshold for Auto-Acceptance** to set a threshold limit based on which the glossary association capability automatically accepts the recommended glossary terms.

Note: Specify a percentage from 80 to 100. If the score is higher than the specified limit, the glossary association capability automatically assigns a matching glossary term to the data element.

5. Select **Enable Below-threshold Recommendations** to receive glossary association recommendations below the auto-acceptance threshold. If you enable auto-acceptance, you can enable below-threshold recommendations to receive glossary recommendations below the auto-acceptance threshold.
6. Specify the **Confidence Score Threshold for Recommendations** to set a threshold based on which the glossary association capability makes recommendations

If you enable auto-acceptance, specify a percentage from 80 to the selected auto-acceptance threshold. You can accept or reject the recommended glossary terms that fall within this range in Data Governance and Catalog.

If you disable auto-acceptance, specify a percentage from 80 to 100 inclusive.

7. Choose to automatically assign business names and descriptions to technical assets. You can then choose to retain existing assignments and only assign business names and descriptions to assets that don't have assignments, or allow overwrite of existing assignments.

By default, existing assignments are retained.

8. Optional. Choose to ignore specific parts of data elements when making recommendations. Select **Yes** and enter prefix and suffix keyword values as needed.

Click **Select** to enter a keyword. You can enter multiple unique prefix and suffix keywords. Keyword values are case insensitive.

9. Optional. Choose specific top-level business glossary assets to associate with technical assets. Selecting a top-level asset selects its child assets as well. Select **Top-level Glossary Assets** and specify the assets on the **Select Assets** page.
10. Optional. Choose to use abbreviations and synonym definitions from lookup tables for accurate glossary association. Select **Yes** to enable, and then click **Select** to upload a lookup table.
11. Click **Next**.

The **Associations** page appears.

Step 3. Associate stakeholders and asset groups

Associate users or user groups within a stakeholder role as stakeholders for technical assets in Data Governance and Catalog. Also, you can choose to assign technical assets extracted from the catalog source to asset groups. You can then use access policies to control permissions on assets that are assigned to asset groups.

Verify that the administrator assigned users and user groups to the stakeholder role that you want to associate with technical assets.

1. To associate users or user groups as stakeholders with technical assets extracted from the catalog source, perform the following steps:
 - a. On the **Associations** page, click **Stakeholders**.
 - b. Select **Assign Stakeholders**.
 - c. Select a stakeholder role.
 - d. Click **Select** to add users and user groups from the stakeholder role as stakeholders for the technical assets.

The **Add Users & User Groups** dialog box displays a list of users and user groups assigned to the selected stakeholder role.

Add Users & User Groups

Users

User Groups

All Users (1)

Find

Full Name

Email

User Name ↑

Status

gov owner_09

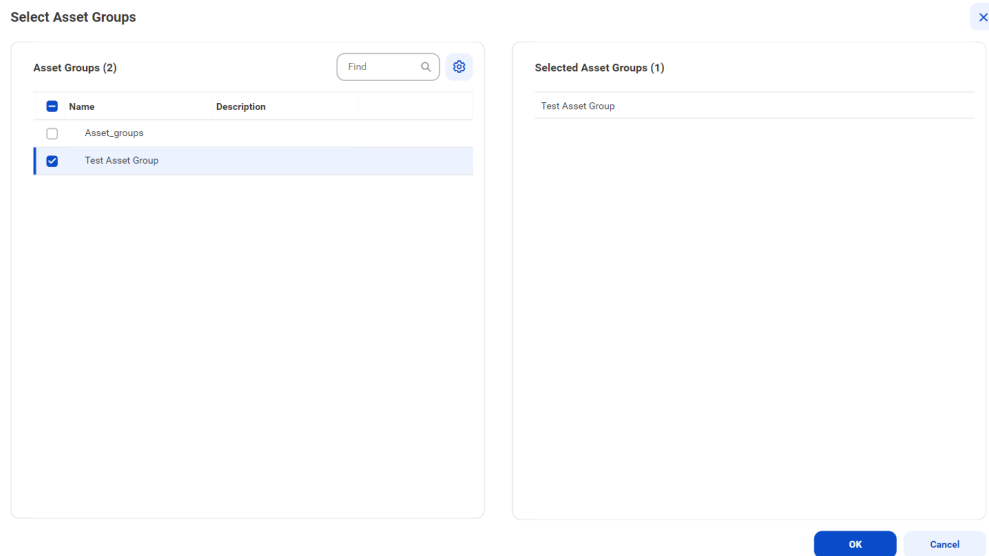
Active

?

OK

Cancel

- e. Select one or more users or user groups to assign as stakeholders for the technical assets, and click **OK**.
Only the selected users and user groups belonging to the specified stakeholder role are granted the permissions to technical assets.
- f. To assign users or user groups from another stakeholder role, click **Add** and then repeat the steps.
2. To assign asset groups to technical assets extracted from the catalog source, perform the following steps:
 - a. On the **Associations** page, click **Asset Groups**.
 - b. Select **Assign Asset Groups**.
 - c. Click **Select**.
The **Select Asset Groups** dialog box displays the list of asset groups.
If you enabled an access policy that includes an asset group, you can only view assets that belong to that asset group.
3. Select the asset groups to which you want to assign technical assets extracted from the catalog source, and click **OK**.



4. Choose to save and run the job or to schedule a recurring job.
 - To save and run the job, click **Save** and then **Run**.
 - To schedule a recurring job, click **Next** to open the **Schedule** page.

Step 4. Run or schedule the job

Choose to run a catalog source job manually, or configure it to run on schedule.

Note: You can't run multiple jobs simultaneously.

You can choose to perform a full or an incremental metadata extraction. A full metadata extraction extracts all objects from the source to the catalog. An incremental metadata extraction extracts only the changed and new objects since the last successful catalog source job run. Incremental metadata extraction doesn't remove deleted objects from the catalog and doesn't extract metadata of code-based objects if applicable.

When you run an incremental metadata extraction job with a filter to include metadata from objects, the job extracts only the objects that have the latest timestamp since the last successful job.

Note: The incremental extraction option appears if it is available for the catalog source.

Run the job manually

Click **Save** to save the catalog source and click **Run**. On the **Run Catalog Source Job** window, click **Run** to run the job.

You can override the capabilities that you selected while configuring your catalog source on the **Configuration** page. The first time you run the catalog source job, the metadata extraction capability is mandatory. From the second run onwards, you can choose to override the configured metadata change option. You can retain, delete, or deprecate objects that are deleted from the source in the catalog. For subsequent runs of the catalog source job, the metadata extraction capability is optional.

Note: You can choose incremental metadata extraction for subsequent runs only after one full metadata extraction job completes successfully. Incremental metadata extraction jobs run with the **Retain** metadata change option even if you set the option to **Delete** or **Deprecate** in the catalog source.

Note: To run a catalog source job, you need permissions on the connection to the source system. To run a catalog source job for catalog sources that reference other source systems, you need permissions on the connections for all the reference source systems.

Run the job on a schedule

You can choose to run metadata extraction and other capabilities on a recurring schedule. You can't choose incremental metadata extraction and full metadata extraction in the same schedule. To create a schedule for incremental metadata extraction, you must have completed at least one full metadata extraction job successfully. If not, first create a schedule for a full metadata extraction.

If an incremental metadata extraction is scheduled to run when the last run details aren't available, the job first performs a full metadata extraction, followed by incremental metadata extraction on subsequent runs.

For example, this can happen in the following scenarios:

- You create schedules for both incremental metadata extraction and full metadata extraction, but schedule the incremental extraction to run before the first full metadata extraction job.
- You create schedules for both incremental metadata extraction and full metadata extraction, but delete the full metadata extraction schedule before its first run.

1. On the **Schedule** tab, select **Run on Schedule**.
The **Schedule** configuration page opens.
2. Click the checkbox corresponding to each capability that you want to include in the schedule.
3. Enter the start date, time zone, and the interval at which you want to run the job.
4. You can manage additional schedules using the following options:
 - To create a new schedule, click the **Add** button.
 - To delete a schedule, click the **Delete** button.
 - To enable or disable a schedule, click the **Enable Schedule** toggle button.

Note: You can create a maximum of one schedule per capability that you enable. If you purged a catalog source or did not run the metadata extraction job, the catalog source job runs metadata extraction before running other scheduled capabilities.

Note: To create a schedule, you need permissions on the connection to the source system. If you lose permissions on the connection after you create a schedule, the scheduled jobs continue to run.

5. Click **Save** to save the schedule.

Monitor job status

After the job runs, you can monitor the status of the job on the **Overview** page of the job.

For more information about job monitoring, see *Administration*.

Step 5. Assign reference catalog source connections to endpoint catalog source objects

When you run the catalog source job, if the catalog source references another source system, a reference catalog source and connection get created that point to the reference source system. To view the complete lineage for your catalog source, you can perform connection assignment from the reference catalog source connection to the objects in the reference source system. A referenced source system might be a database,

such as Oracle. You must first create and run an endpoint catalog source that connects to the reference source system.

Before you assign a connection, ensure that you have created and run an endpoint catalog source for each reference source system.

Note: If the source schema contains case-sensitive tables or if the reference objects contain multiple objects with the same name in different cases, perform case-sensitive connection assignment to get correct lineage.

If you enabled the lineage discovery capability for your catalog source, you can either curate the CLAIRE recommended endpoint objects on the **Related Catalog Sources** tab or assign connections manually.

For more information about related catalog sources and lineage discovery, see *Lineage discovery* in the *Administration* help.

You can only perform connection assignment at the database level for referenced source systems.

1. On the **Configure** page, select the **Lineage** tab, and then select the **Lineage Discovery** tab. On the **Catalog Sources** panel, select the required catalog source and click the **Assign Connections** tab.

The **Assign Connections** tab displays a list of assigned and unassigned connections along with details for each connection. Use filters to view the connections based on the connection names. Click the **Add Filter** menu to add filters.

2. Select the connection to the reference source system and click **Assign**.

The connection name appears prefixed to the reference catalog source name on the **Hierarchy** tab of your catalog source in Data Governance and Catalog.

The **Assign Connection** dialog box appears with a list of recommended objects from the endpoint catalog sources. Click **All** to view all endpoint catalog source objects.

3. In the **Assign Connection** dialog box, select one or more catalog sources to assign to the selected connection and click **Assign**.

You can connect to the following referenced source systems:

- Oracle
- Microsoft SQL Server
- IBM DB2
- IBM Netezza
- Snowflake

The referenced catalog source must belong to the Database class type.

When you click **Assign**, Metadata Command Center creates links between matching objects in the connected catalog sources, and it calculates the percentage of matched and unmatched objects. The higher the percentage of matched objects, the more accurate the lineage that you view in Data Governance and Catalog.

CHAPTER 4

View results in Data Governance and Catalog

After Metadata Command Center runs a job, you can view the results in Data Governance and Catalog where the catalog source and its elements are called technical assets. You can view a catalog source as a hierarchy. Expand each technical asset to see its components.

When referenced source systems are connected to a catalog source, you can expand the hierarchy to see details about the technical asset's component elements.

You can view the data lineage of an asset contained within a catalog source to see individual elements such as data sources, calculations, and filters. When you view data lineage, you can see the individual upstream elements that contribute data or expressions to each component of a data flow or catalog source.

View metadata extraction results

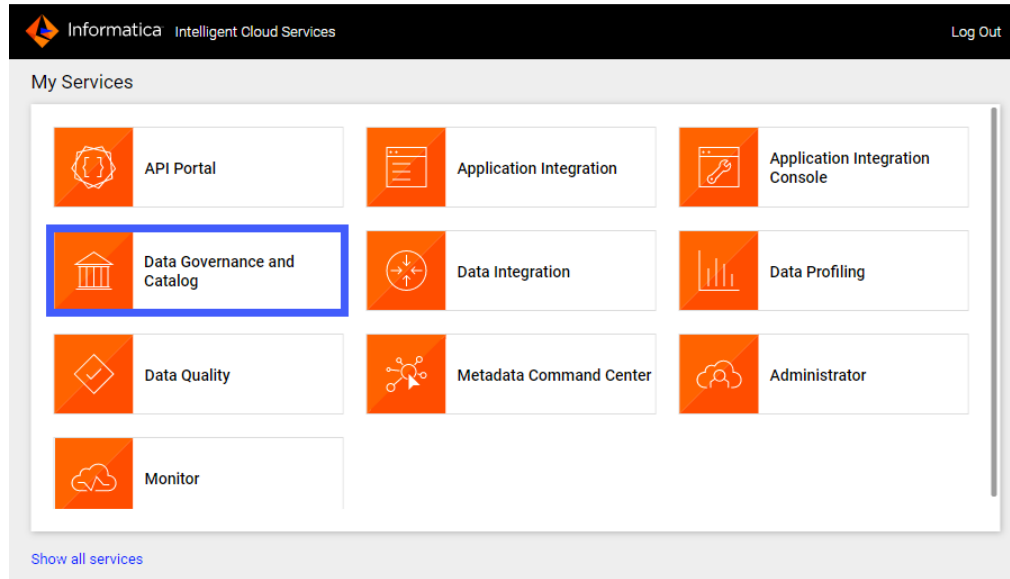
After a job runs in Metadata Command Center, view the results in Data Governance and Catalog. You can view details about source system contents as hierarchical displays and trace data lineage.

1. Log in to Informatica Intelligent Cloud Services.

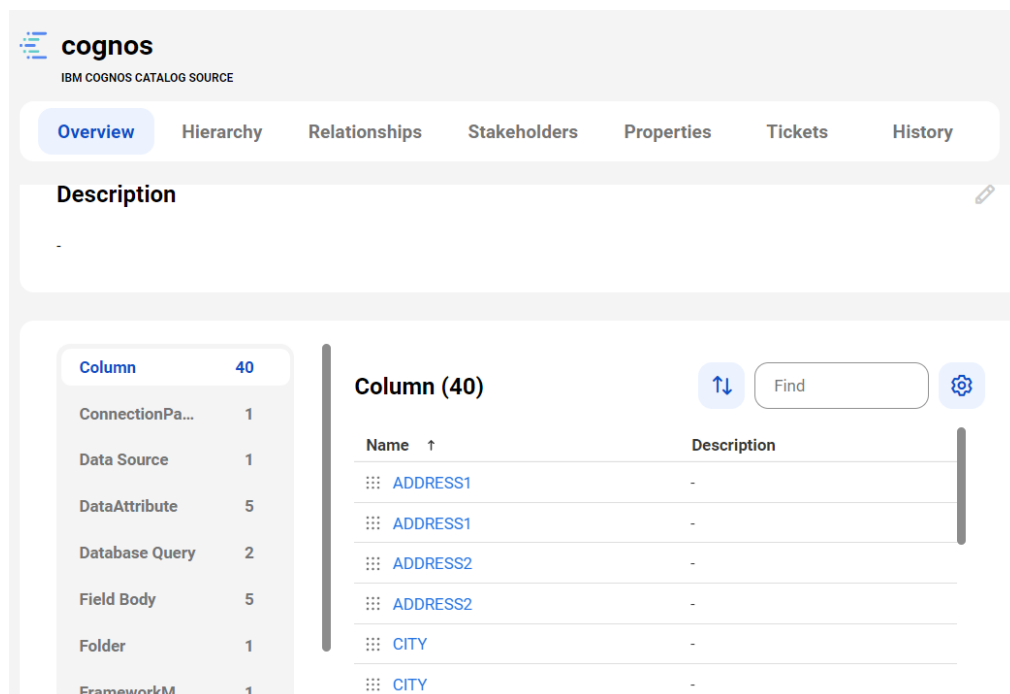
The **My Services** page appears.

2. Click Data Governance and Catalog.

The following image shows the Data Governance and Catalog box on the **My Services** page:



3. On the Data Governance and Catalog home page, click the number in the **Technical Assets** panel. The **Technical Assets** page opens.
4. Select **Catalog Source** in the **Filter** list. The list of catalog sources opens.
5. Search for the catalog source from which you extracted metadata, and click the name. The **Overview** tab of the asset opens. The following image shows a sample asset page:



6. View the asset from different perspectives by clicking on the tabs.

For more information about working with assets, see *Working with Assets* in the Data Governance and Catalog help.

View data lineage

Data lineage is a visual representation of the flow of data across the systems in your organization. Lineage depicts how the data flows from the system of its origin to the system of its destination.

Data lineage views are available for technical assets in the catalog source. You can view lineage at the catalog source, data set, or data element level.

The lineage at the catalog source level shows how data flows from one catalog source to another. The lineage at the data set and the data element levels show how other technical assets such as files or tables contribute to the selected asset.

If linking catalog sources is available for your catalog source, you can use Metadata Command Center to generate data lineage based on rules or by generating automated lineage with CLAIRE. You can choose source and target catalog sources and objects to link and generate lineage.

To determine whether linking catalog sources is available for your catalog source, navigate to the **Configuration** tab of the **Link Catalog Sources** page. The catalog source must appear in the list of source and target catalog sources.

For information about linking catalog sources, see *Link catalog sources* in the Administration help.

View lineage at the catalog source level

The catalog source level shows how data flows from one catalog source to another with the lineage aggregating data from the data set and data element levels.

To view data lineage at the catalog source level, open a technical asset, click the **Lineage** tab, and then verify that the level is set to **Catalog Source Level**.

View lineage at data set level and data element level

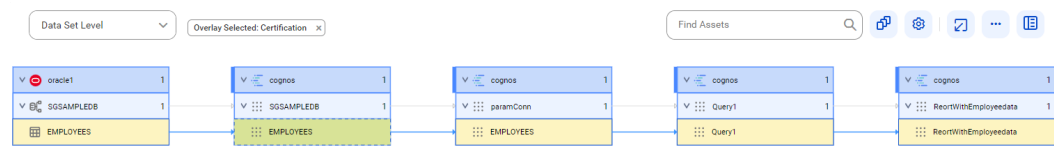
The lineage at the data set level and the data element level shows how technical assets such as files and commands contribute to the selected asset.

Data sets are technical assets that contain sets of data. Examples include files, databases, or temp files that hold the results of calculations. Data elements are objects upstream or downstream of a data set, and are accessible when you expand a data set to the data element level. For example, a table is a data set, and a column in a source object is a data element.

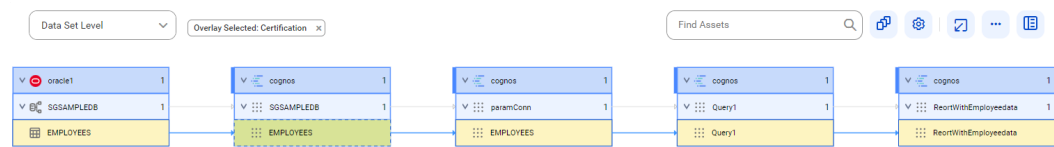
View lineage at the data set level

The data set level is a view that shows individual sets of data in the data flow. To view lineage at the data set level, open a technical asset, click the **Lineage** tab, and then verify that the level is set to **Data Set Level**.

The following image shows how the target ReortWithEmployeeData report gets data from Oracle and IBM Cognos referenced source systems before connection assignment:



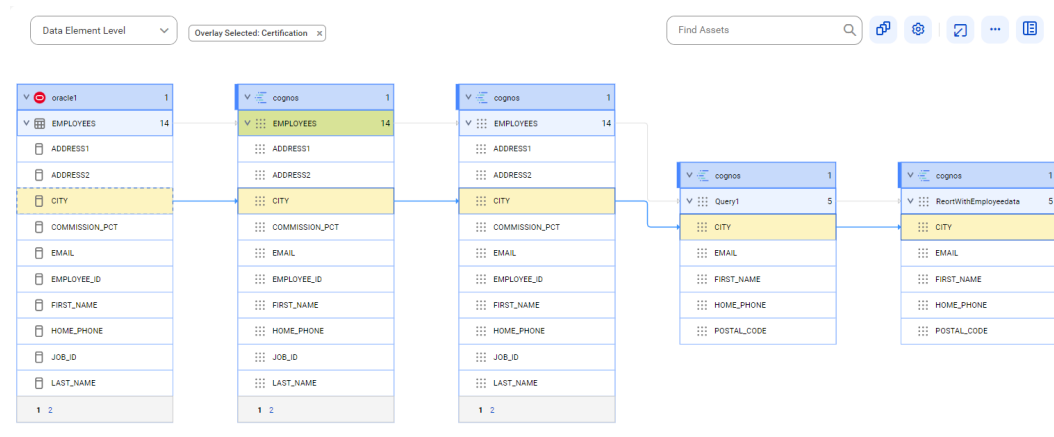
The following image shows how the target ReortWithEmployeeData report gets data from Oracle and IBM Cognos actual source systems after connection assignment:



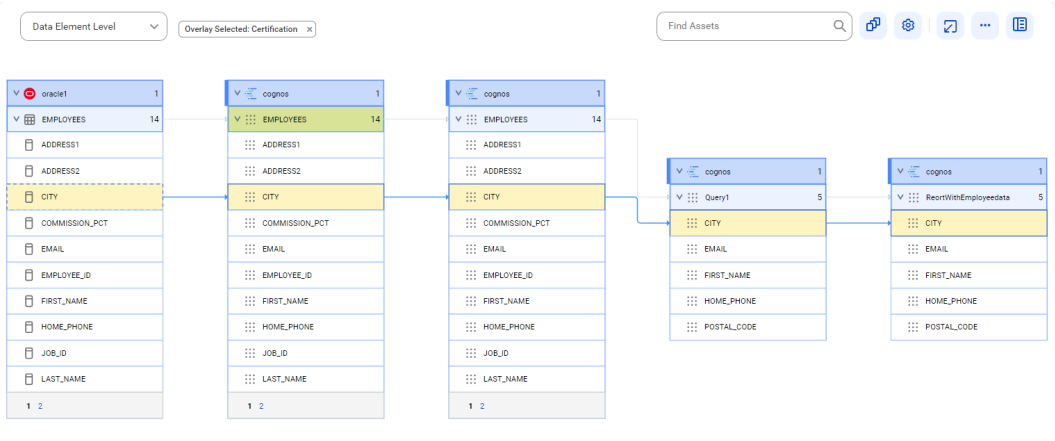
View lineage at the data element level

The data element level displays details of the data set level. At the data element level, you can see the input sources for expressions or commands and calculations or transformations on the data. To view data lineage at the data element level, open a technical asset, click the **Lineage** tab, and then verify that the level is set to **Data Element Level**.

The following image shows the lineage where the target field CITY of the ReortWithEmployeeData report gets data from the CITY referenced column of the Oracle and IBM Cognos source systems before connection assignment:



The following image shows the lineage where the target field CITY of the ReortWithEmployeeedata report gets data from the CITY column of the Oracle and IBM Cognos source systems after connection assignment:



View classified data

When you add data classification rules to a catalog source in Metadata Command Center, the system identifies the columns and tables that match the rules and displays one or more matched data classifications on the column or table asset pages in Data Governance and Catalog.

The following image shows a column asset page with the inferred data element classifications that match the column data and metadata:

Overview

Lineage

Relationships

Data Quality

Stakeholders

Properties

Tickets

History

Catalog Source Definition

Glossaries

Accepted (0)

Click here to add Glossary assets

CLAIRE Recommendations (1)

BEYONDWE

Declined (0)

No declined Glossary assets.

Data Element Classifications

Accepted (1)

Amex

Declined (0)

No declined Classification assets.

For more information about data classification assets, see *Asset Details* in the Data Governance and Catalog help.

View glossary associations

When you enable the glossary association capability for a catalog source in Metadata Command Center, you can view the accepted glossary assets in Data Governance and Catalog.

The **Overview** tab for a technical asset in the catalog source displays glossary assets in the Accepted and CLAIRE Recommendations sections.

The **Glossaries** panel shows the automatically accepted and CLAIRE® recommended terms.

The following image shows a sample asset page:

