



Informatica® Metadata Command Center
November 2025

IDERA ER/Studio Data Architect Sources

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Table of Contents

- Preface. 4
- Chapter 1: Introduction to IDERA ER/Studio Data Architect catalog sources... 5**
 - Extraction and view process. 6
 - About the IDERA ER/Studio Data Architect catalog source. 6
 - Extracted metadata. 7
- Chapter 2: Before you begin..... 9**
- Chapter 3: Create catalog sources in Metadata Command Center..... 10**
 - Step 1. Register a catalog source. 10
 - Step 2. Configure capabilities. 11
 - Configure metadata extraction. 12
 - Configure lineage discovery. 13
 - Step 3. Associate stakeholders and asset groups. 14
 - Step 4. Run or schedule the job. 15
 - Step 5. Assign reference catalog source connections to endpoint catalog source objects. 17
- Chapter 4: View results in Data Governance and Catalog..... 18**
 - View metadata extraction results. 18
 - View relationships. 20
 - View relationships at catalog source level. 20
 - View relationships at data set level and data element level. 21

Preface

Read *IDERA ER/Studio Data Architect Sources* to learn how to register and configure IDERA ER/Studio Data Architect sources in Metadata Command Center as catalog sources. After you configure a catalog source, you extract metadata and then view the results in Data Governance and Catalog.

CHAPTER 1

Introduction to IDERA ER/Studio Data Architect catalog sources

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

A source system is any system that contains data or metadata. For example, IDERA ER/Studio Data Architect is a source system from which you can extract metadata through an IDERA ER/Studio Data Architect 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 relationships, and creating links between those assets and their business context.

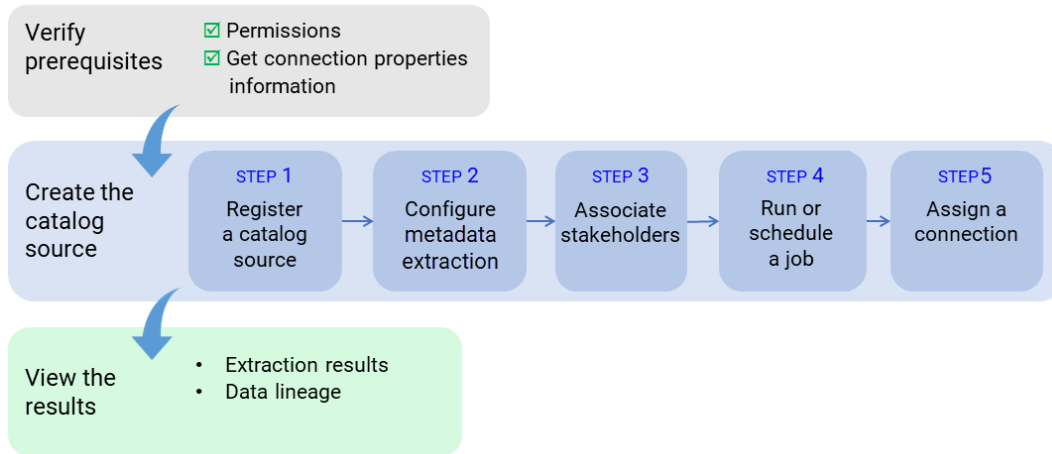
The following table describes the capabilities of the catalog source:

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.

Extraction and view process

To extract metadata from a source system, configure the catalog source and run the catalog source 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 IDERA ER/Studio Data Architect:

1. Register the source system. Register the IDERA ER/Studio Data Architect source system with Metadata Command Center to create the catalog source.
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.

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

About the IDERA ER/Studio Data Architect catalog source

You can use the IDERA ER/Studio Data Architect catalog source to extract metadata from the IDERA ER/Studio Data Architect source system.

IDERA ER/Studio Data Architect is an enterprise tool for data architects to design and document data assets.

Extracted metadata

You can use the IDERA ER/Studio Data Architect catalog source to extract metadata from the IDERA ER/Studio Data Architect source system.

Metadata Command Center extracts the following metadata from the IDERA ER/Studio Data Architect source system:

- Attachment
- Attachment Type
- Attribute
- Candidate Key
- Column
- Condition
- Default
- Diagram
- Domain
- Entity
- File Directory
- Flat File Model
- Flat File Source
- Folder
- Identifying Relationship
- Identity
- Index
- Index Member
- Logical Data Model
- Logical Model
- Logical Source
- Logical Submodel
- Logical Submodel Diagram
- Main Logical Model
- Main Physical Model
- Named Relationship End
- Non Identifying Relationship
- Non Specific Relationship
- Note
- Other Source
- Parameter
- Physical Data Model
- Physical Model
- Physical Source

- Physical Submodel
- Physical Submodel Diagram
- Primary Key Attribute
- Primary Key Column
- Project
- Reference Value List
- Reference Value Range
- Repository
- Rule
- Schema
- Sequence
- Source Table
- Stored Procedure
- Super Type Relationship
- Synonym
- Table
- Transformation
- Trigger
- Type Value
- Unnamed Relationship End
- User
- User Datatype
- View
- View Column
- View Relationship

Note: If you previously extracted objects with no names, you can resolve the issue after you upgrade to the November 2023 release. To resolve the issue, set the **Metadata Change Option** to Delete and then rerun the catalog source job.

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:

- Install the Secure Agent on a Windows machine.
- Save DM1 files in one of the following ways:
 - On the Microsoft Windows machine where the Secure Agent is installed.
 - On any Microsoft Windows machine, and share the folder over the network through File Explorer.
- Verify permissions to access the IDERA ER/Studio Data Architect source system.

Note: You don't need to create a connection object in Administrator. You provide connection information when you configure the catalog source.

CHAPTER 3

Create catalog sources in Metadata Command Center

Use Metadata Command Center to configure a catalog source for IDERA ER/Studio Data Architect and run the catalog source job.

When you configure a catalog source, you define the source system that you want to extract metadata from.

To provide stakeholders access to technical assets, you can assign access through roles. To view relationships for any system that the source system references, create a catalog source and a connection associated with the referenced source system after you run the job.

Step 1. Register a catalog source

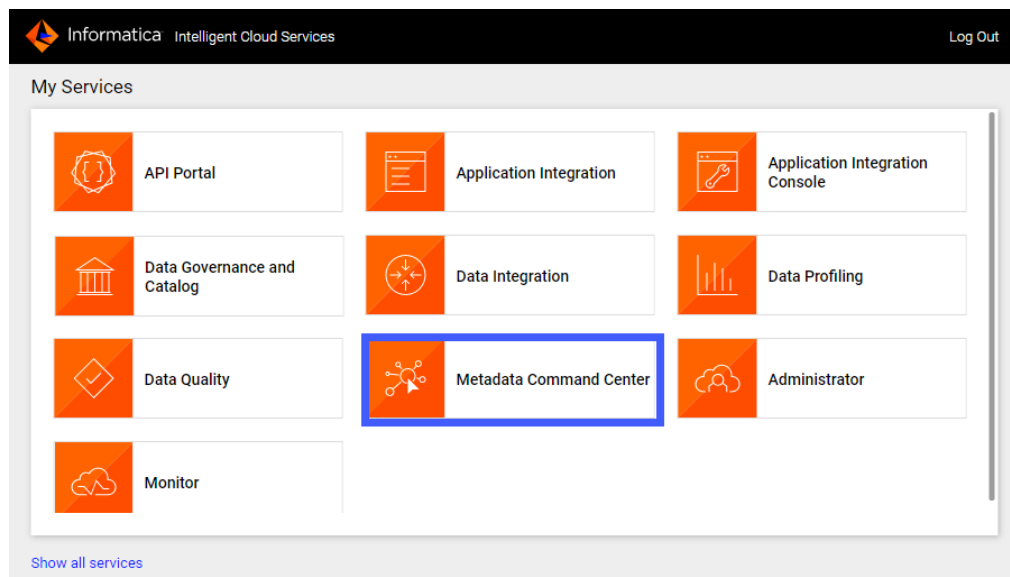
When you register a catalog source, provide both general and connection information.

1. Log in to Informatica Intelligent Cloud Services.

The **My Services** page appears.

2. Click **Metadata Command Center**.

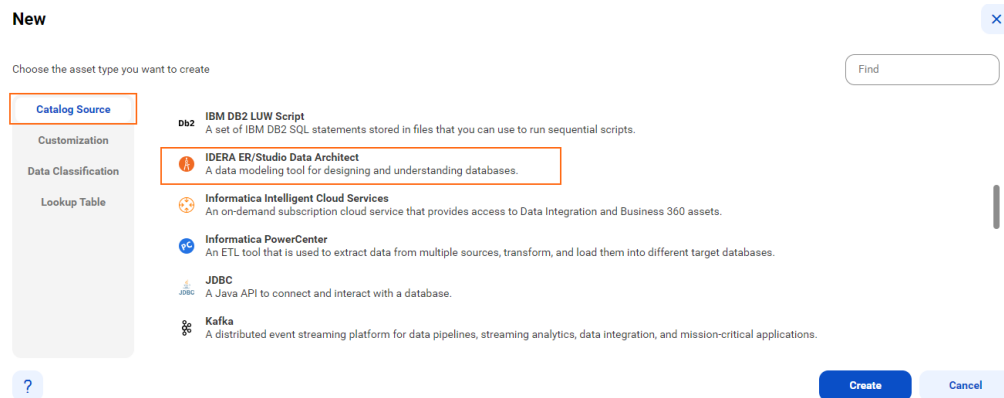
The following image shows the Metadata Command Center box on the **My Services** page:



The Metadata Command Center home page appears.

3. Click **New**.
4. Select **Catalog Source** from the list of asset types.
5. Select **IDERA ER/Studio Data Architect** from the list of catalog source types.
6. Click **Create**.

The following image shows you where to choose the source system:



The **New Catalog Source** page opens.

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 absolute path to the DM1 file that you want to import in one of the following formats:
 - If you saved DM1 files on the Microsoft Windows machine where Secure Agent is running, enter:
`<drive>:\<files directory>\<DM1 file name>`
 - If you saved DM1 files in any Microsoft Windows machine and shared the folder using File Explorer, enter: `\\<machine name>\<shared files directory>\<DM1 file name>`

9. Click **Next**.

The **Configuration** page appears.

Step 2. Configure capabilities

When you configure the IDERA ER/Studio Data Architect catalog source, you define settings for the metadata extraction capability.

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 IDERA ER/Studio Data Architect catalog source, you choose a runtime environment and enter configuration parameters for metadata extraction.

Before you configure metadata extraction, ensure that you saved DM1 files.

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.

Note: Serverless runtime environment options are available if the catalog source works with a serverless runtime environment.

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 **Configuration Parameters** area, enter configuration parameters.

The following table describes the properties that you need to enter:

Property	Description
Model selection	The type of models that you want to import: <ul style="list-style-type: none">- Logical model.- Physical model.- All Models. Imports logical and physical models.
Physical model name	The name of a physical model to import. Required if you want to limit the import to a specific physical model to improve performance.
Import UDPs	The way that you import User Defined Properties (UDPs): <ul style="list-style-type: none">- As metadata. Imports UDPs as additional metadata associated with imported objects.- In description. Merges UDP values into the description fields of imported objects.- Migrate default values. Includes default values of properties that don't have a value specified.
Import owner schemas	Specify if you want to import owner schemas. You can choose to import owner schemas to preserve the original ownership information from the source database in the data analysis.

Property	Description
Remove text formatting	The way that you want to process rich text formatting (RTF). True removes RTF from definitions and notes. Required if you want to simplify the data models. False leaves RTF in definitions and notes.
Miscellaneous Options	Enter additional configuration options to be passed at runtime. Required if you need to troubleshoot the catalog source job.

4. 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:

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.

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

↕

<input type="checkbox"/>	Full Name	Email	User Name ↑	Status
<input type="checkbox"/>	gov owner_09			Active

?

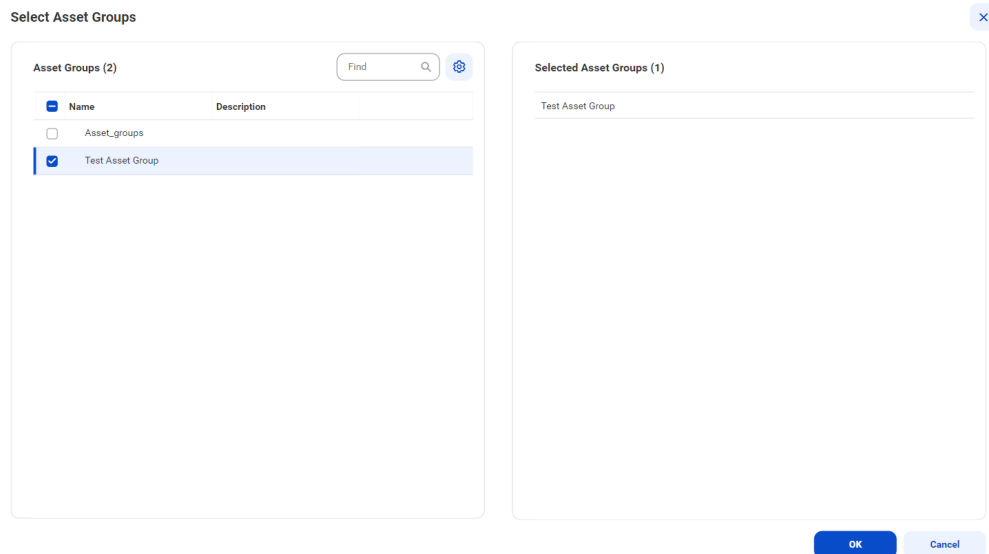
OK

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.

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 filter the list of catalog sources by name, type, or endpoint.

Note: To assign connections to an IDERA ER/Studio Data Architect catalog source, the target catalog source type must be Oracle. The target catalog source must belong to the **Schema** 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 the catalog source and the included technical assets in a hierarchical structure.

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 relationship information of an asset in a catalog source to see individual elements such as data sources, calculations, and filters. When you view the relationship information of an asset, you can see how the assets relate to one another.

View metadata extraction results

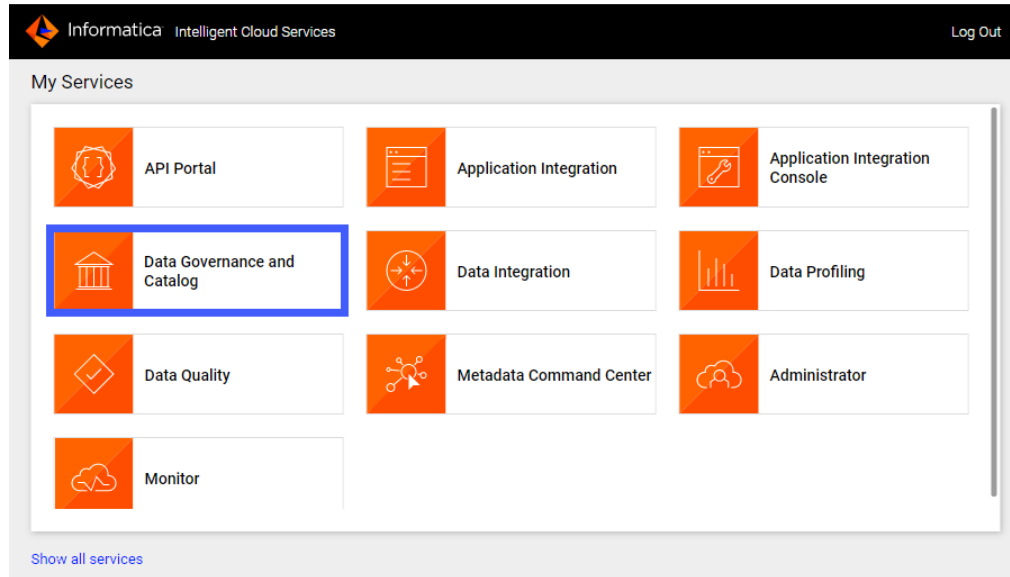
After a job runs in Metadata Command Center, view the results in Data Governance and Catalog. You can view details about source system contents in a hierarchical structure and trace data lineage.

1. Log in to Informatica Intelligent Cloud Services.

The **My Services** page appears.

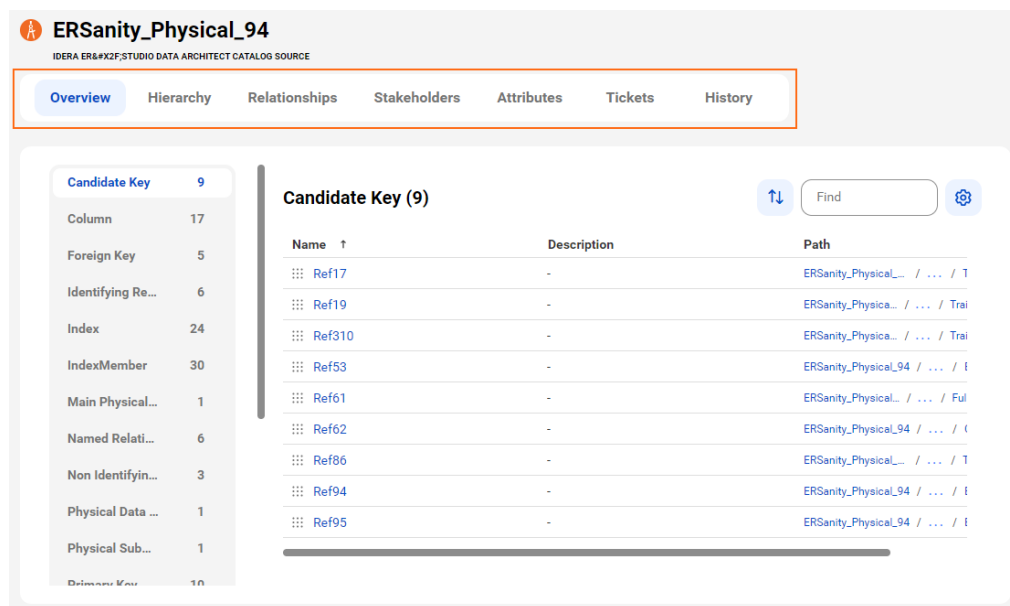
2. Click Data Governance and Catalog.

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 IDERA ER/Studio Data Architect catalog source 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 *Cloud Data Governance and Catalog* help.

View relationships

Relationship views are available for technical assets in the catalog source. You can connect assets to each other using different types of relationships.

A relationship between assets shows how the assets relate to one another. When data from a source system is ingested into the catalog, Data Governance and Catalog can automatically create relationships among the technical assets of that source system.

For more information about viewing relationships, see *Relationships* in the Data Governance and Catalog help.

View relationships at catalog source level

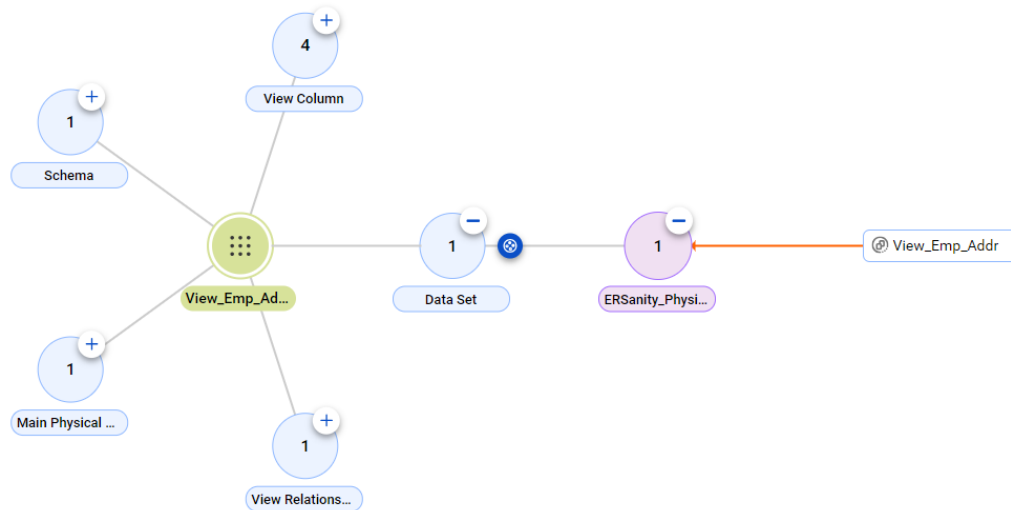
The **Relationships** tab of an asset page displays the relationships between the selected asset and other business and technical assets in Data Governance and Catalog.

The IDERA ER/Studio Data Architect catalog source reads metadata from the input data model and creates reference assets in the model. You can view the relationship with reference objects without performing connection assignment. After connection assignment, you can view the relationship between the actual objects extracted by the IDERA ER/Studio Data Architect catalog source and database assets that already exist in the catalog.

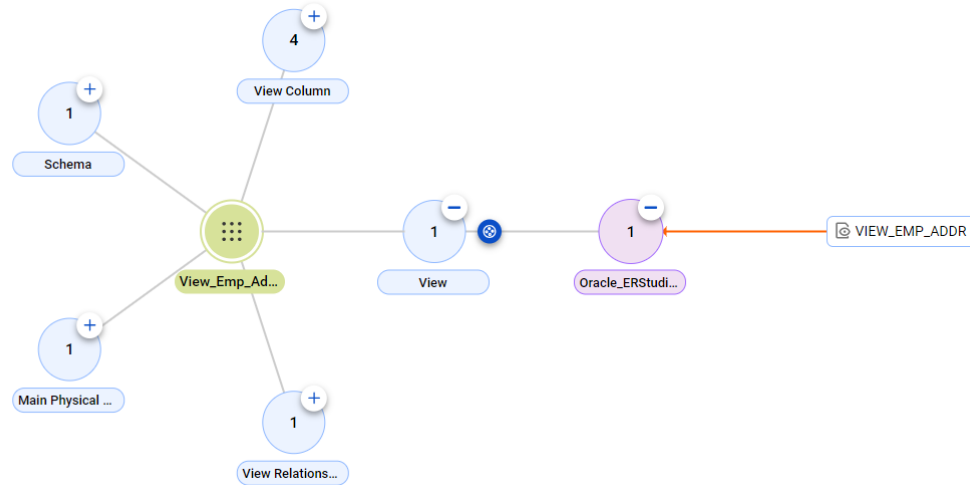
To view relationships at the catalog source level, search for and open a IDERA ER/Studio Data Architect catalog source, click the **Relationships** tab and expand the catalog source.

Note: Only the physical model allows you to view data sets, data elements, and reference resources.

The following image shows the view to view relationship between the IDERA ER/Studio Data Architect asset and the referenced data set before connection assignment:



The following image shows the view to view relationship between the IDERA ER/Studio Data Architect View_Emp_Address asset and the Oracle view after connection assignment:



View relationships at data set level and data element level

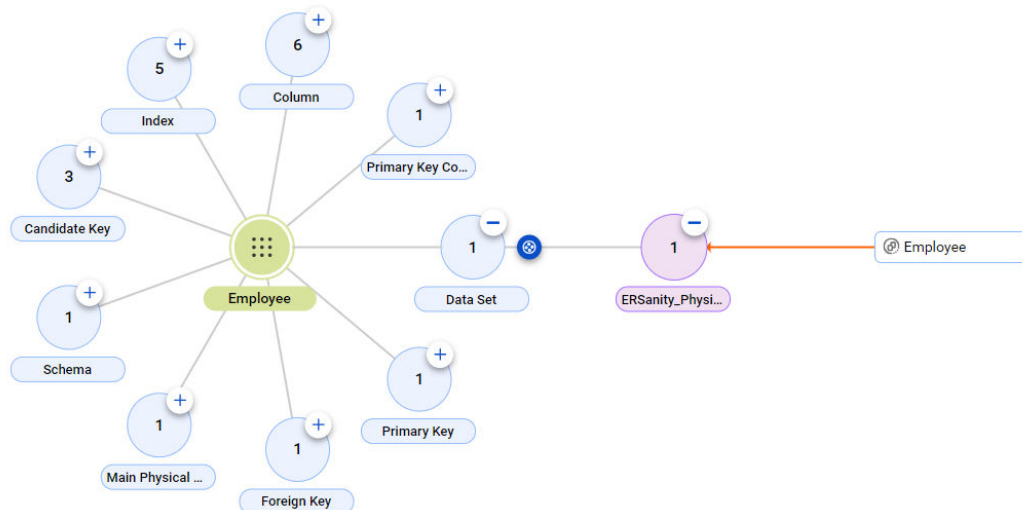
The relationships at the data set level and the data element level show how the technical assets such as tables and columns are related to the selected asset.

Data sets are technical assets that contain sets of data. For example, a table in a source object. Data elements are objects upstream or downstream of a data set. For example, a column in a source object.

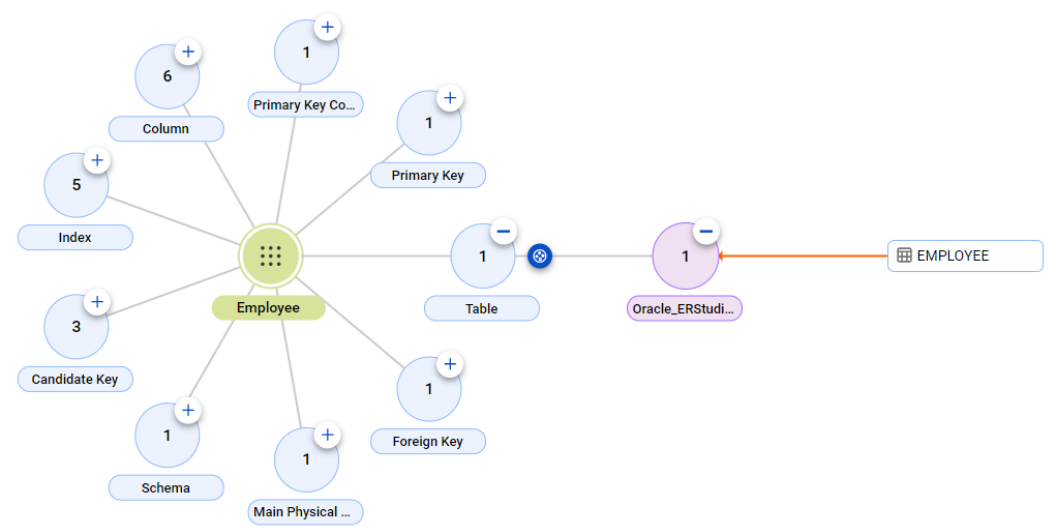
View relationships at the data set level

The relationships at the data set level show how the technical assets such as tables are related to the selected asset. To view relationships at the data set level, open a technical asset such as a table, click the **Relationships** tab, and then expand the data set.

The following image shows the table-to-table relationship between the IDERA ER/Studio Data Architect Employee asset and the referenced data set before connection assignment:



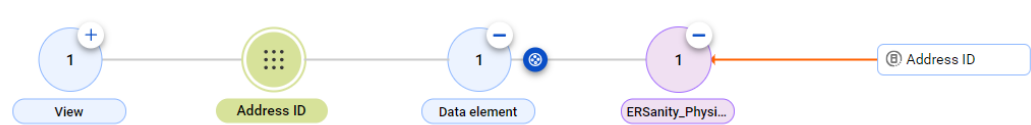
The following image shows the table-to-table relationship between the IDERA ER/Studio Data Architect Employee asset and the Oracle table after connection assignment:



View relationships at the data element level

The data element level displays details of the data set level. The relationships at the data element level show how the technical assets such as columns are related to the selected asset. To view relationships at the data element level, open a technical asset, click the **Relationships** tab, and then expand the data element.

The following image shows the view column to view column relationship between the IDERA ER/Studio Data Architect Address ID asset and the reference data element before connection assignment:



The following image shows the view column-to-view column relationship between the IDERA ER/Studio Data Architect Address ID asset and the Oracle view column after connection assignment:



The following image shows the table column-to-table column relationship between the IDERA ER/Studio Data Architect Address ID asset and the reference data element before connection assignment:



The following image shows the table column-to-table column relationship between the IDERA ER/Studio Data Architect Address ID asset and the reference data element after connection assignment:

