



Informatica® Metadata Command Center  
November 2025

# Microsoft Purview Sources

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# Preface

Read *Microsoft Purview Sources* to learn how to register and configure Microsoft Purview sources 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 Microsoft Purview 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, Microsoft Purview is a source system from which you can extract metadata through a Microsoft Purview 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.

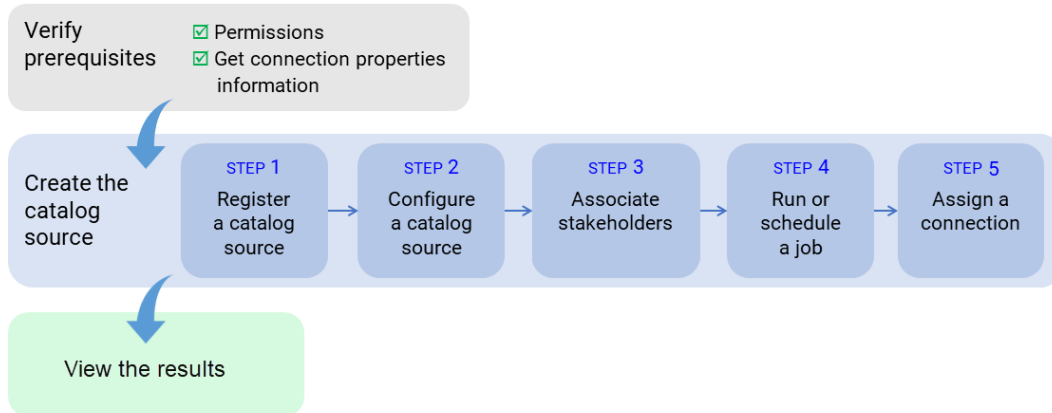
The following table describes the capabilities of the catalog source:

Capability	Description
Serverless Runtime Environment	A serverless runtime environment is an advanced serverless deployment solution that doesn't require downloading, installing, configuring, or maintaining a Secure Agent or Secure Agent group. You can use a serverless runtime environment in the same way that you use a Secure Agent when you configure a catalog source.
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 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 Microsoft Purview:

1. Register a catalog source. Create a catalog source object, select Microsoft Purview, 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 Microsoft Purview catalog source

You can use the Microsoft Purview catalog source to extract metadata from a Microsoft Purview source system.

Microsoft Purview is a centralized data governance solution that helps organizations manage and govern their on-premises, multicloud, and SaaS data.

## Extracted metadata

You can use the Microsoft Purview catalog source to extract metadata from a Microsoft Purview source.

### Data stores

Metadata Command Center extracts metadata from the following data stores in Microsoft Purview:

- Database
  - Apache Cassandra
  - Google BigQuery
  - Hive Metastore
  - IBM Db2 for LUW
  - Microsoft Azure Cosmos DB API for NoSQL
  - Microsoft Azure Database for MySQL
  - Microsoft Azure Database for PostgreSQL
  - Microsoft Azure Dedicated SQL pool (SQL Data Warehouse)
  - Microsoft Azure SQL Database
  - Microsoft Azure SQL Managed Instance
  - Microsoft SQL Server
  - MongoDB
  - MySQL
  - Oracle
  - PostgreSQL
  - SAP HANA
  - Snowflake
  - Teradata
- File system
  - Amazon S3
  - Microsoft Azure Blob Storage
  - Microsoft Azure Data Lake Storage Gen2

### Objects extracted

Metadata Command Center extracts collections from a Microsoft Purview source.

Metadata Command Center extracts the following objects from referenced source systems:

- Database
- Schema
- Table
- View
- Column
- View Column
- Folder
- File
- Field

## 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:

- Assign the required permissions.
- Get Microsoft Purview source information.
- Create endpoint catalog sources for connection assignment.

## Verify permissions and privileges

To extract Microsoft Purview metadata, you need account access and permissions to the Microsoft Purview source system.

Verify that the administrator performs the following tasks:

- Creates a Service Principal to access the Microsoft Purview source system.
- Assigns the Data readers role to the Service Principal.

## Get Microsoft Purview source information

Get the values of the connection properties that you need to configure from the Microsoft Purview administrator

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

The following table describes the properties that you need:

Property	Description
Client ID	The client ID of the registered application to complete the service principal authentication.
Tenant ID	The tenant ID of the registered application to complete the service principal authentication.



Property	Description
Client Secret	The client secret key to complete the service principal authentication.
Account Name	Name of the Microsoft Purview account.

## 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 Microsoft Purview and run the catalog source job.

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

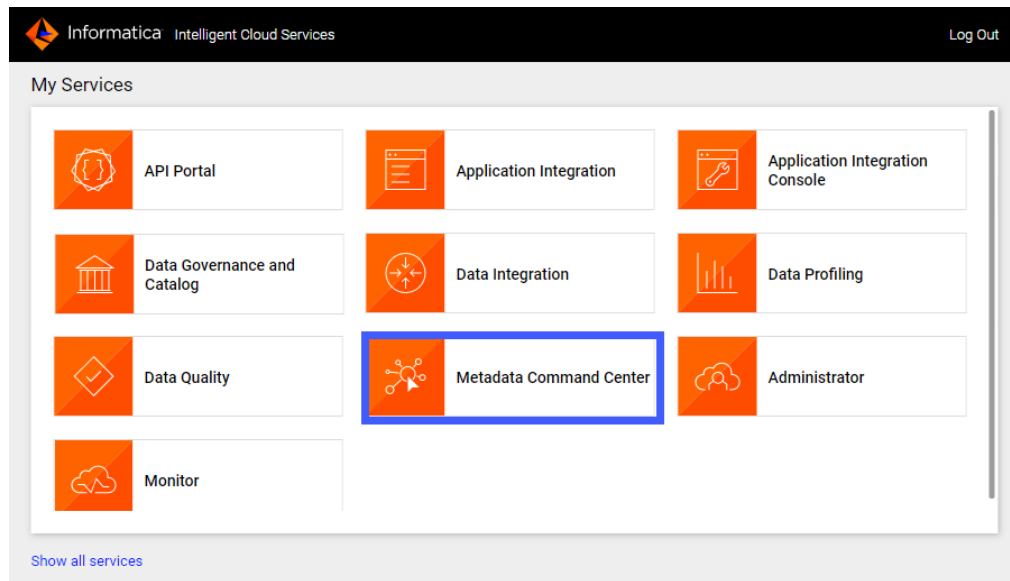
When you register a catalog source, provide general information and connection values.

1. Log in to Informatica Intelligent Cloud Services.

The **My Services** page appears.

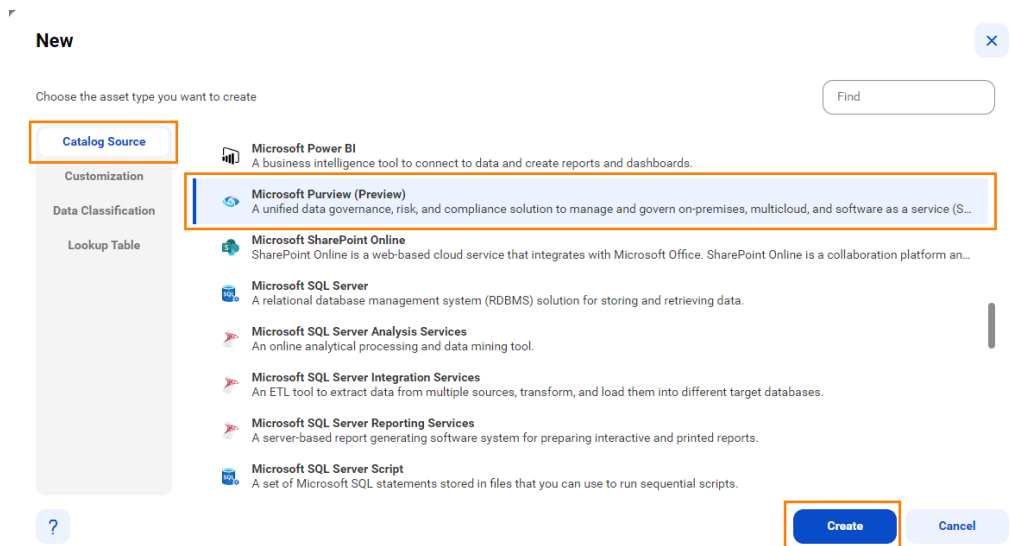
2. Click **Metadata Command Center**.

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 Microsoft Purview from the list of source systems.



6. Click **Create**.
- The **New Catalog Source** page appears.
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 Microsoft Purview connection information based on the connection values that you got from the administrator.

The following table describes the properties to configure:

Property	Description
Client ID	The client ID of the registered application to complete the service principal authentication.
Tenant ID	The tenant ID of the registered application to complete the service principal authentication.
Client Secret	The client secret key to complete the service principal authentication.
Account Name	Name of the Microsoft Purview account.

9. Click **Next**.

The **Configuration** page appears.

## Step 2. Configure capabilities

When you configure the Microsoft Purview 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 Microsoft Purview 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.

**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 **Filters** area, define one or more filter conditions to apply for metadata extraction:
  - a. Select **Yes** to view filter options.
  - b. From the **Include/Exclude** list, choose to include or exclude metadata based on the filter parameters.
  - c. From the **Object type** list, select **Data asset**.
  - d. From the **Filter criteria** list, choose from the following options:
    - Collection path pattern. Choose to enter the path to the object as the filter value. The path can contain the following wildcards:
      - Question mark. Represents a single character.
      - Asterisk. Represents multiple characters or empty text.
    - Qualified name starts with. Choose to enter the qualified name of the data asset that you want to extract metadata from as the filter value. A data asset can be a database, schema, folder, or file.
 

**Note:** You can't use wildcards.
    - Qualified name contains. Choose to enter a segment from the qualified name of the data asset that you want to extract metadata from as the filter value. A data asset can be a database, schema, folder, or file.
 

**Note:** You can't use wildcards.

The following image shows the filter condition options:

- e. Click **Select**.
- f. Enter the filter value and click **OK**.
- g. Optionally, to define an additional filter with an OR condition, click the **Add** icon.

The following image shows the filter conditions for a Microsoft Purview catalog source that includes metadata from objects with names that start with Accounts in any sub collection of the root collection named EMPDATA and excludes metadata from objects whose qualified name contains the segment SCAN:

- Optionally, in the **Configuration Parameters** area, enter properties to override default context values and job parameters.

The following table describes the property that you enter for Catalog Source Configuration Options:

Property	Description
Extract Lineage	Extract lineage information from assets at the data set and data element levels.

The following table describes the property that you can enter for additional settings:

**Note:** The **Additional Settings** section appears when you click **Show Advanced**.

Property	Description
Expert Parameters	Enter additional configuration options to be passed at runtime. Required if you need to troubleshoot the catalog source job. <b>Caution:</b> Use expert parameters when it is recommended by Informatica Global Customer Support.

- 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.

- Click the **Lineage Discovery** tab.
- Select **Enable Lineage Discovery**.
- 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.

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

## 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

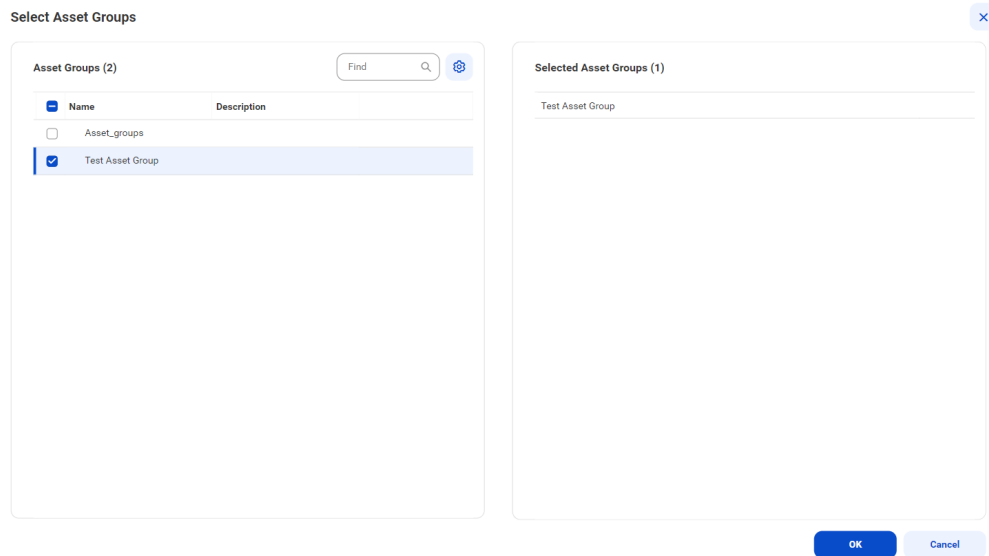
?

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 reference 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:

- IBM DB2
- Google BigQuery
- Apache Hive Metastore
- MongoDB
- MySQL
- Oracle
- PostgreSQL
- SAP HANA Database
- Snowflake
- Microsoft SQL Server
- Apache Cassandra
- Teradata Database
- Microsoft Azure SQL Server
- Microsoft Azure Cosmos DB
- Microsoft Azure Database for MySQL
- Microsoft Azure Database for PostgreSQL
- Microsoft Azure SQL Managed Instance

- Microsoft Azure dedicated SQL pool

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 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

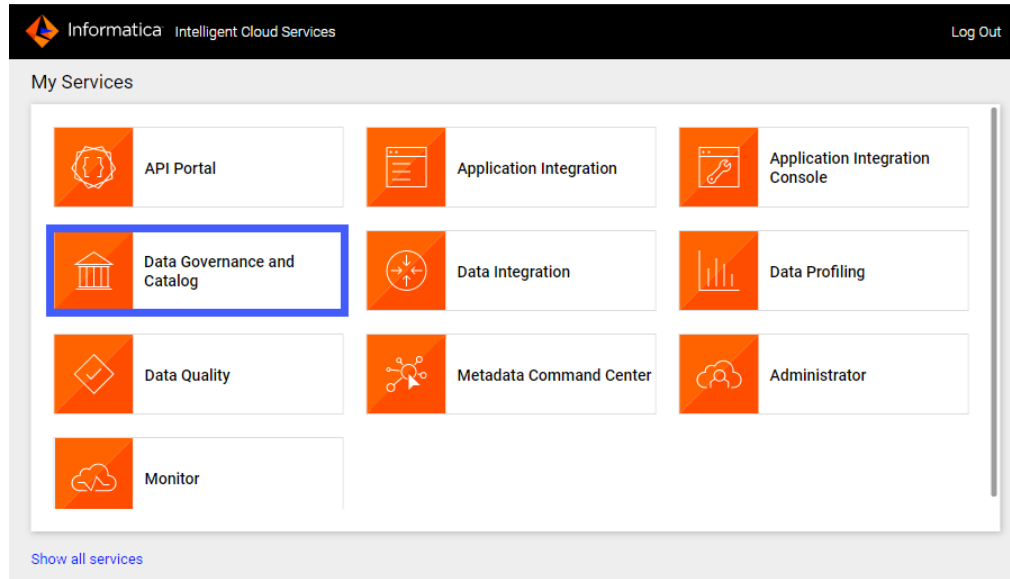
After a job runs in Metadata Command Center, view the results in Data Governance and Catalog. You can view details about source system contents as hierarchical displays and trace data lineage.

1. Log in to Informatica Intelligent Cloud Services.

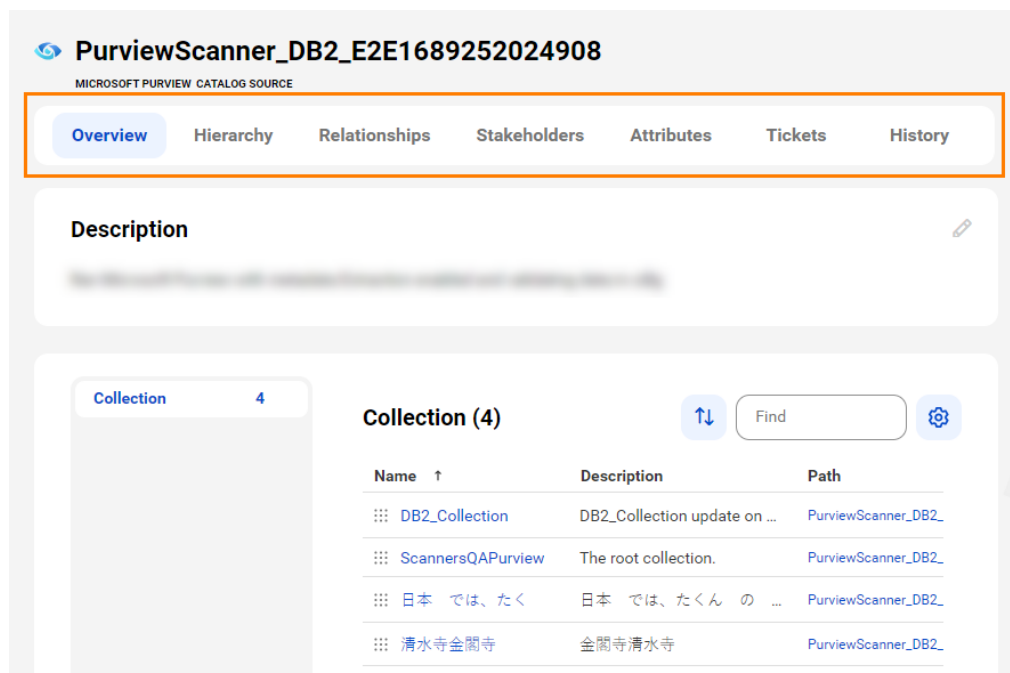
The **My Services** page appears.

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.

Ensure that you choose to view source lineage in the **Extract Lineage** parameter in the Configuration Parameters area of the **Configuration** tab.

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**.

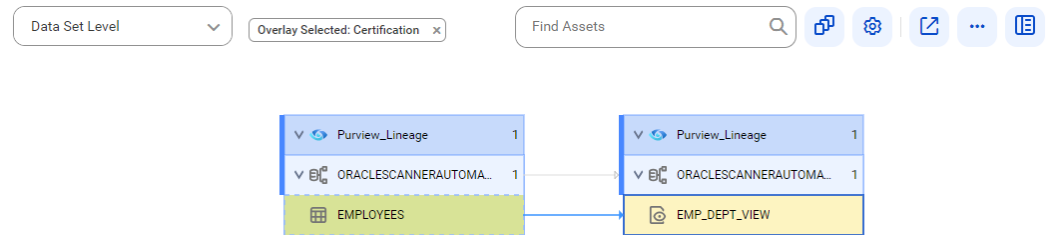
**Note:** You can't view the lineage after connection assignment. After connection assignment, the assets are resolved and do not appear in the reference catalog source.

### View lineage at the data set level

The data set level displays 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 EMPLOYEES reference table gets data from the EMP\_DEPT\_VIEW reference view of the Purview\_Lineage catalog source before 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 how the DEPARTMENT\_NAME reference view column gets data from the DEPARTMENT\_NAME reference column of the Purview\_Lineage catalog source before connection assignment.

