



Informatica® Metadata Command Center  
November 2025

# Microsoft Power BI Sources

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# Preface

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

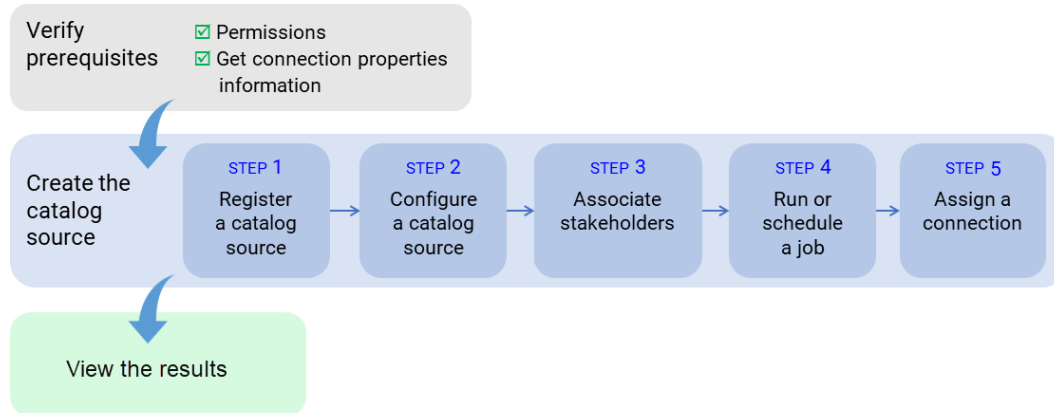
The following table describes the capabilities of the catalog source:

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 Microsoft Power BI:

1. Register a catalog source. Create a catalog source object, select Microsoft Power BI, and then select and test the connection.
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.

Run the catalog source again after you assign connections to referenced source system assets.

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

## About the Microsoft Power BI catalog source

You can use the Microsoft Power BI catalog source to extract metadata from a Microsoft Power BI source system hosted on the cloud.

Microsoft Power BI is a business intelligence tool that connects data and creates reports and dashboards.

## Extracted metadata

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

Metadata Command Center extracts the following metadata from a Microsoft Power BI source system:

- Report

**Note:** You can also extract metadata from reports generated by Power Query custom functions and DAX functions.

- Workspace
- Dashboard
- Datamart
- Data Set (Semantic Model)
- Tile
- Field
- PaginatedReportDataset
- Dataflow
- Dataflow Table
- Dataset Table

**Note:** For catalog sources created prior to the November 2024 release, you must run the catalog sources again. When you run the catalog sources again, Metadata Command Center creates a pre-processing job. The pre-processing job updates the extracted metadata to include dataset tables.

### Data Analysis Expressions (DAX)

You can use Data Analysis Expressions (DAX) to generate reports.

You can use the following DAX functions:

- ADDCOLUMNS
- ALL
- ALLCROSSFILTERED
- ALLEXCEPT
- ALLNOBLANKROW
- ALLSELECTED
- AVERAGE
- AVERAGEX
- CALCULATE
- CALCULATETABLE
- CALENDAR
- CALENDARAUTO
- COMBINEVALUES
- CONCATENATE
- CONCATENATEX
- CONTAINS

- CONTAINSROW
- CONVERT
- COUNT
- COUNTA
- COUNTAX
- COUNTROWS
- COUNTX
- CROSSJOIN
- DATATABLE
- DATE
- DATEADD
- DISTINCT
- EXCEPT
- FILTER
- GENERATESERIES
- GROUPBY
- HASONEFILTER
- HASONEVALUE
- IF
- ISCROSSFILTERED
- ISEMPY
- SFILTERED
- KEEPFILTERS
- MAX
- MAXX
- MEDIAN
- MEDIANX
- MIN
- MINX
- PERCENTILEX\_EXC("PERCENTILEX.EXC")
- PERCENTILEX\_INC("PERCENTILEX.INC")
- PERCENTILE\_EXC("PERCENTILE.EXC")
- PERCENTILE\_INC("PERCENTILE.INC")
- PRODUCT
- PRODUCTX,
- RANKX
- RELATEDTABLE
- REMOVEFILTERS
- ROW



- SELECTCOLUMNS
- STDEVX\_P("STDEVX.P")
- STDEV\_P("STDEV.P")
- SUM
- SUMMARIZE
- SUMMARIZECOLUMNS
- SUMX
- SWITCH
- TABLE\_CONSTRUCTOR
- TABLE\_REFERENCE
- TOPN
- TREATAS
- UNION
- USERRELATIONSHIP
- VALUES
- GENERATE
- GENERATEALL
- NATURALLEFTOUTERJOIN
- NATURALINNERJOIN

## Compatible connectors

Before you configure a Microsoft Power BI catalog source, you must connect to the Microsoft Power BI source system.

Use the Microsoft Power BI connector to connect to the Microsoft Power BI source system.

For information about configuring a connection, see *Connections* in the Administrator service.

## 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.
- Configure a connection to the Microsoft Power BI source system in Administrator.
- Enable port 443 and configure your firewall to allow traffic to pass over port 443. The Secure Agent uses port 443 to connect to the internet.
- If you use service principal authentication to authenticate your organization to the Microsoft Power BI service, enable read-only access to the Power BI admin API. For information about configuring service principal for read-only admin APIs, see [HOW TO: Configure Service Principal for Microsoft Power BI](#).
- In the **Admin API settings** section of the Power BI admin portal, enable the option **Enhance admin APIs responses with DAX and mashup expressions**.
- Whether you authenticate using the administrator privileges or a service principal, enable Preview features for your organization to extract metadata from a Microsoft Power BI source system. Additionally, enable the enhanced metadata scanning feature to extract lineage from refreshed and republished datasets in your Microsoft Power BI environment.  
For information about enabling Preview in Microsoft Power BI, see [HOW TO: Enable Preview in Microsoft Power BI](#).
- If you plan to connect Microsoft Power BI to Microsoft Azure through a REST API with the administrator user role, perform the following tasks:
  1. Assign one of the following Power BI administrator privileges to the administrator user role:
    - Microsoft 365 Global Administrator
    - Power BI Service Administrator
  2. Obtain administrator access at the workspace level.
- 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 metadata, you need account access and permissions to the Microsoft Power BI source system.

Verify that the administrator performs the following tasks:

- Grants read permission to the user account to access the source system for Administrator user authentication.
- Enables read-only access to the registered application for service principal authentication.

## 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.

# Create a connection

Create a Microsoft Power BI connection object in Administrator with the connection details of the Microsoft Power BI source system.

1. In Administrator, select **Connections**.
2. Click **Add Connection** and select Microsoft Power BI.
3. Enter the connection properties.

The following table describes the connection properties:

Property	Description
Use Secret Vault	<p>Stores sensitive credentials for this connection in the secrets manager that is configured for your organization.</p> <p>This property appears only if secrets manager is set up for your organization.</p> <p>When you enable the secret vault in the connection, you can select which credentials that the Secure Agent retrieves from the secrets manager. If you don't enable this option, the credentials are stored in the repository or on a local Secure Agent, depending on how your organization is configured.</p> <p><b>Note:</b> If you're using this connection to apply data access policies through pushdown or proxy services, you cannot use the Secret Vault configuration option.</p> <p>For information about how to configure and use a secrets manager, see "Secrets manager configuration" in the Administrator help.</p>
Connection Name	<p>Name of the connection.</p> <p>Each connection name must be unique within the organization. Connection names can contain alphanumeric characters, spaces, and the following special characters: _ . + -, Maximum length is 255 characters.</p>
Description	<p>Description of the connection. Maximum length is 4000 characters.</p>

Property	Description
Runtime Environment	The name of the runtime environment where you want to run tasks. Select a Secure Agent or serverless runtime environment.
Authentication Type	The authentication type to use for the connection. Choose to connect using the Admin User option or the Service Principal option.
Power BI service URL	The URL to access Microsoft Power BI and connect to the REST API. For example, <a href="https://api.powerbi.com/">https://api.powerbi.com/</a>

4. Based on the authentication type you selected, enter the following connection properties:

#### Admin User option

Specify the following properties:

Property	Description
Client ID	The ID to connect to the Microsoft Power BI cloud host. Enter the application ID or client ID for your Power BI app registered in Microsoft Azure Portal.
User Name	User name of the administrator to connect to the Microsoft Power BI cloud host.
Password	The password of the administrator account to connect to the Microsoft Power BI cloud host.

#### Service Principal option

Use the service principal authentication method for national clouds in the United States. If you use other national clouds, see

[Tutorial: Embed Power BI content into your application for national clouds.](#)

Specify the following properties:

Property	Description
Authentication URL	URL for user authentication.
Scope	Parameter that the endpoint uses to authenticate the user.
Client ID	The ID to connect to the Microsoft Power BI cloud host. Enter the application ID or client ID for your Power BI app registered in Microsoft Azure Portal.
Tenant ID	Name of the Azure Active Directory tenant.
Client Secret	The client secret key to complete OAuth Authentication in the Azure Active Directory.

#### Proxy properties

If your organization uses an outgoing proxy server to connect to the Internet, the Secure Agent connects to Informatica Intelligent Cloud Services through the proxy server.

Specify the following properties:

Property	Description
Proxy Host	The host name or IP address of the outgoing proxy server.
Proxy Port	The port number of the outgoing proxy server.
Proxy User Name	Name of the authenticated user of the proxy server. Required if the proxy server requires authentication.
Proxy Password	Password for the authenticated user. Required if the proxy server requires authentication.

5. Click **Test**.
6. Click **Save**.

## 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 and run connection-aware scans 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 Power BI 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

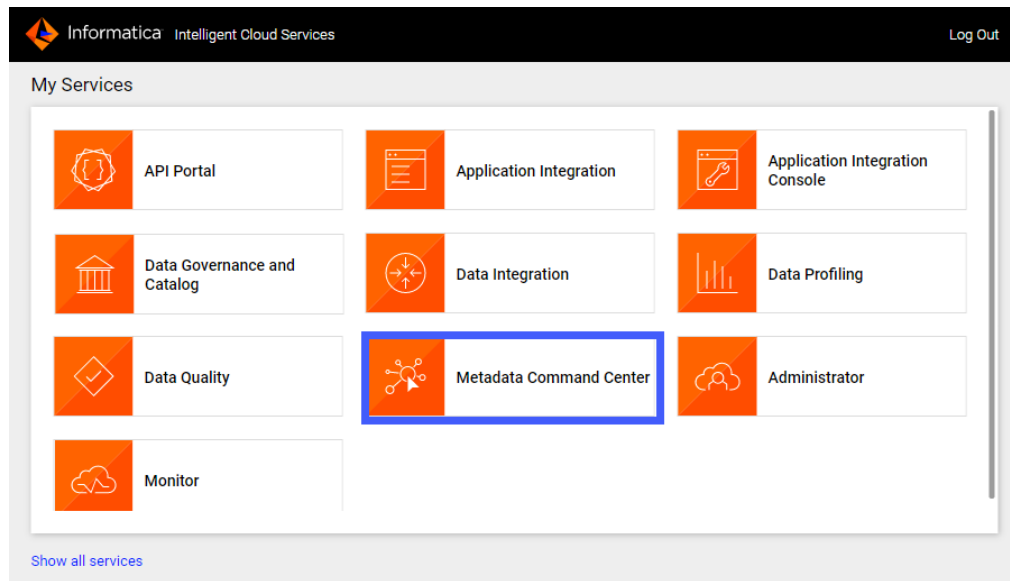
When you register a catalog source, provide general information and connection values.

1. Log in to Informatica Intelligent Cloud Services.

The **My Services** page appears.

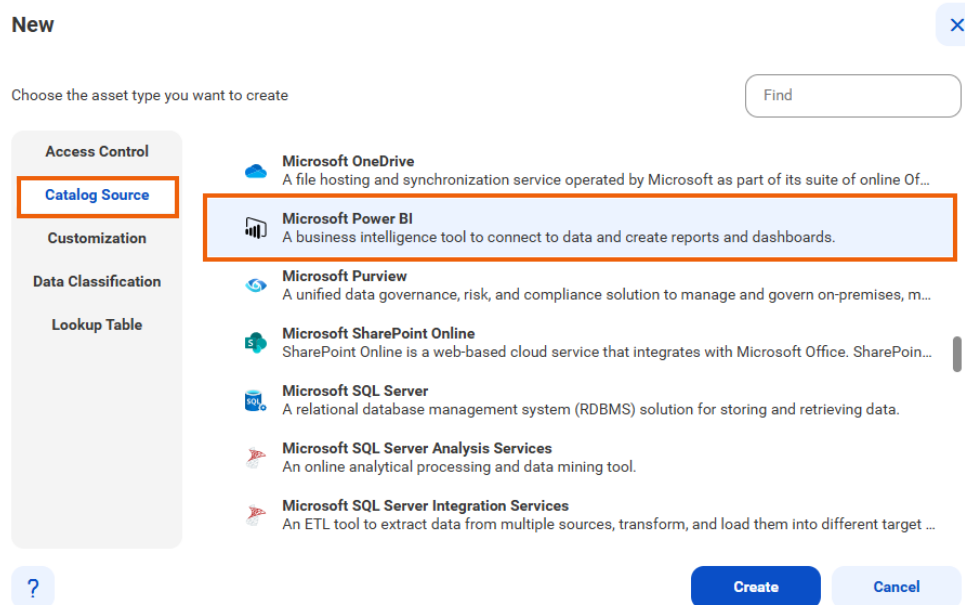
2. Click **Metadata Command Center**.

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 Microsoft Power BI from the list of catalog source types.



6. Click **Create**.

The **New Catalog Source** page opens.

The following image shows the Microsoft Power BI catalog source:

The screenshot shows the 'New Catalog Source' interface. At the top, there are four tabs: '1 Registration' (selected), '2 Configuration', '3 Associations', and '4 Schedule'. Below the tabs, the 'Registration' section is divided into two parts. The 'General Information' part has a 'Name' field (marked with a red asterisk) and a 'Description' field. The 'Connection Information' part has a 'Catalog Source Type' dropdown menu (currently showing 'Microsoft Power BI') and a 'Connection' field (marked with a red asterisk and a dropdown arrow). At the top right of the form, there are buttons for '< Back', 'Next >', 'Save', 'Run', and a close button 'X'.

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, select the connection that you created in Administrator.

**Note:** To create or edit a catalog source, you need permissions on the connection to the source system. Select a connection that you have access to, or ask the administrator to grant the necessary permissions to the connection that you want to use.

9. Click **Connection Properties** to expand and view the connection properties for the selected connection.
10. Click **Test Connection** to test your connection to the source system.
11. Click **Next**.

The **Configuration** page appears.

## Step 2. Configure capabilities

When you configure the Microsoft Power BI catalog source, you define the 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 Microsoft Power BI 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**.
  - b. From the Include or Exclude metadata list, choose to include or exclude metadata based on the filter parameters.
  - c. From the Object type list, select **Path**.
  - d. From the Filter criteria list, select **Pattern**.
  - e. Click **Select**.
  - f. Enter the object location as the filter value.

Filters can contain the following wildcards:

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

The following image shows the filter condition options:

**Filters**

Specify metadata filters: ☐ No ☒ Yes

> Show supported wildcards and examples

Include/Exclude <input type="button" value="v"/>	Object type <input type="button" value="v"/>	Filter criteria <input type="button" value="v"/>	<input type="text"/>	<input type="button" value="Select"/>	<input type="button" value="+"/>	<input type="button" value="🗑"/>
	Path					

- g. To define an additional filter with an OR condition, click the **Add** icon.

The following image shows a filter that includes objects from all workspaces with names that start with Workspace1 and Workspace2 and excludes objects from all workspaces with names that start with Workspace1 followed by one additional character.

**Filters**

Specify metadata filters: ☐ No ☒ Yes

[Show supported wildcards and examples](#)

Include Metadata	Path	Pattern	Workspace1* x	Workspace2* x	Select	+	
Exclude Metadata	Path	Pattern	Workspace1? x		Select	+	

4. Optional. In the **Configuration Parameters** area, enter additional settings.

The following table describes the property that you 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.

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.

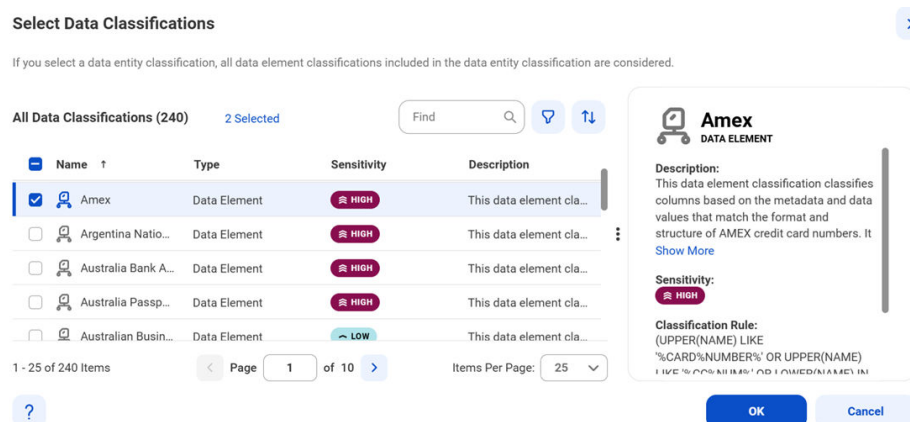
## Configure data classification

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 associations

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.

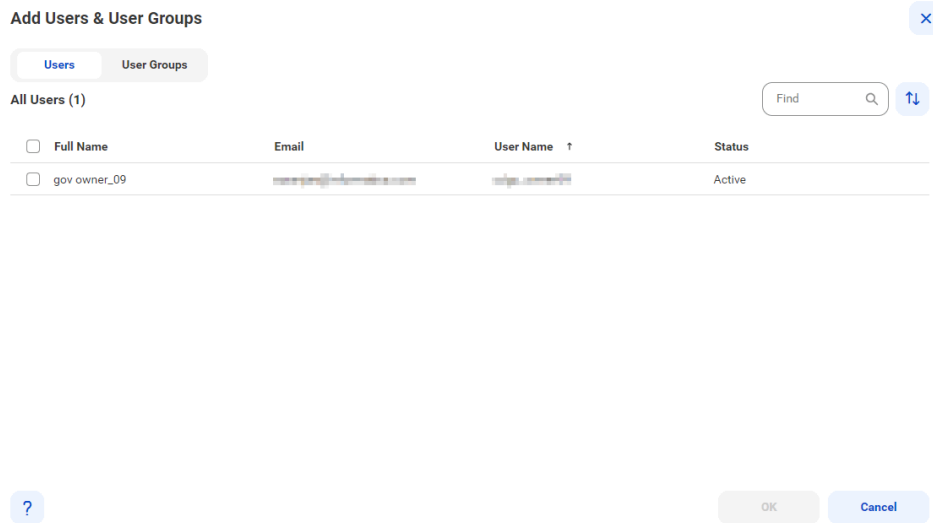
## Step 3. Associate stakeholders and asset groups

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.

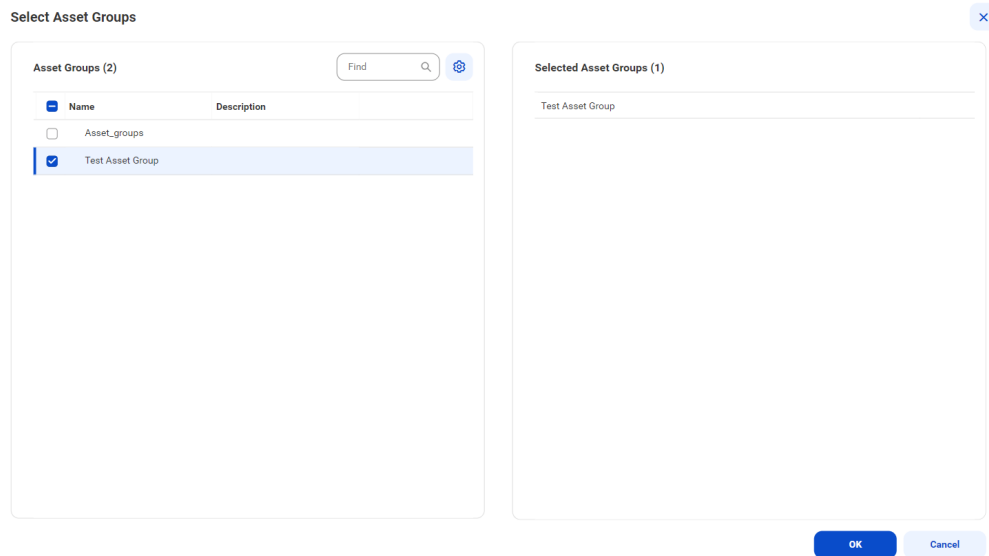
Verify that the administrator assigned users and user groups to the stakeholder role that you want to associate with technical assets.

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.



- 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.

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 objects from the endpoint catalog sources and click **Assign**.

You can filter the list in the **Assign Connection** dialog box by name, type, or endpoint.

You can connect to the following referenced source systems:

Source system	Object class type
Microsoft SQL Server	Database
Microsoft Azure Synapse Data Warehouse	Database
Databricks	Database
Teradata Database	Database
Snowflake	Database
Oracle	Database
Amazon Redshift	Database
SAP Business Warehouse (SAP BW) <b>Note:</b> Set Case-Sensitive to False to perform connection assignment to an SAP Business Warehouse (SAP BW) source system. This ensures that the SAP Business Warehouse (SAP BW) objects appear as shown in Power Query.	Application
SAP BW4/HANA	Application

Source system	Object class type
SAP HANA Database	Database
Microsoft Fabric Data Warehouse	Database
Microsoft Fabric Data Lakehouse	Database
Microsoft Azure Data Lake Storage Gen2	Container
Amazon S3	Bucket

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.

4. Run the catalog source job again. If you configured the catalog source job to run on a regular schedule, the next scheduled run picks up the updated details. If you didn't configure a schedule, run the catalog source job again to view complete lineage.

## 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

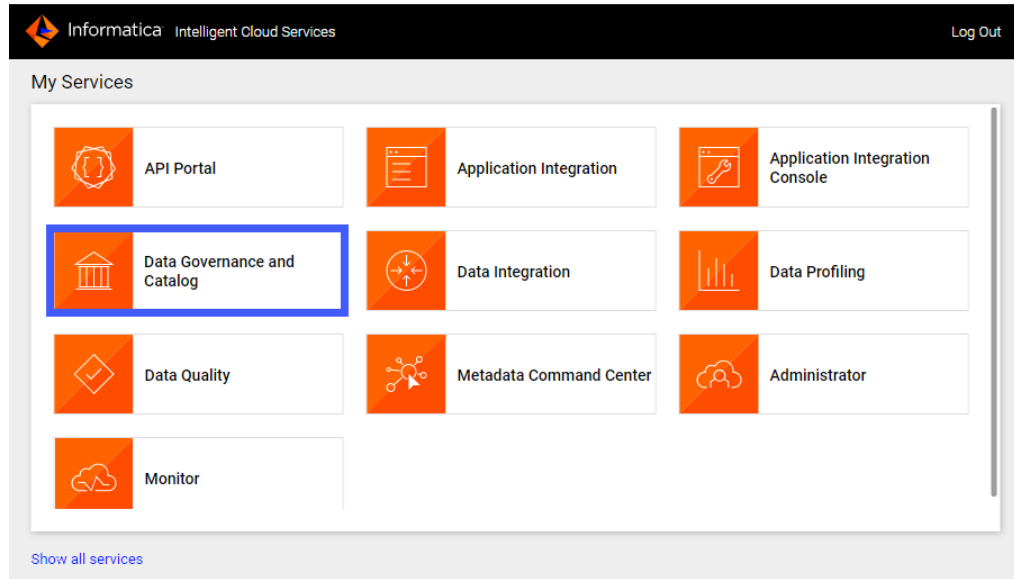
After a job runs in Metadata Command Center, view the results in Data Governance and Catalog. You can view details about source system contents in a hierarchical structure and trace data lineage.

1. Log in to Informatica Intelligent Cloud Services.

The **My Services** page appears.

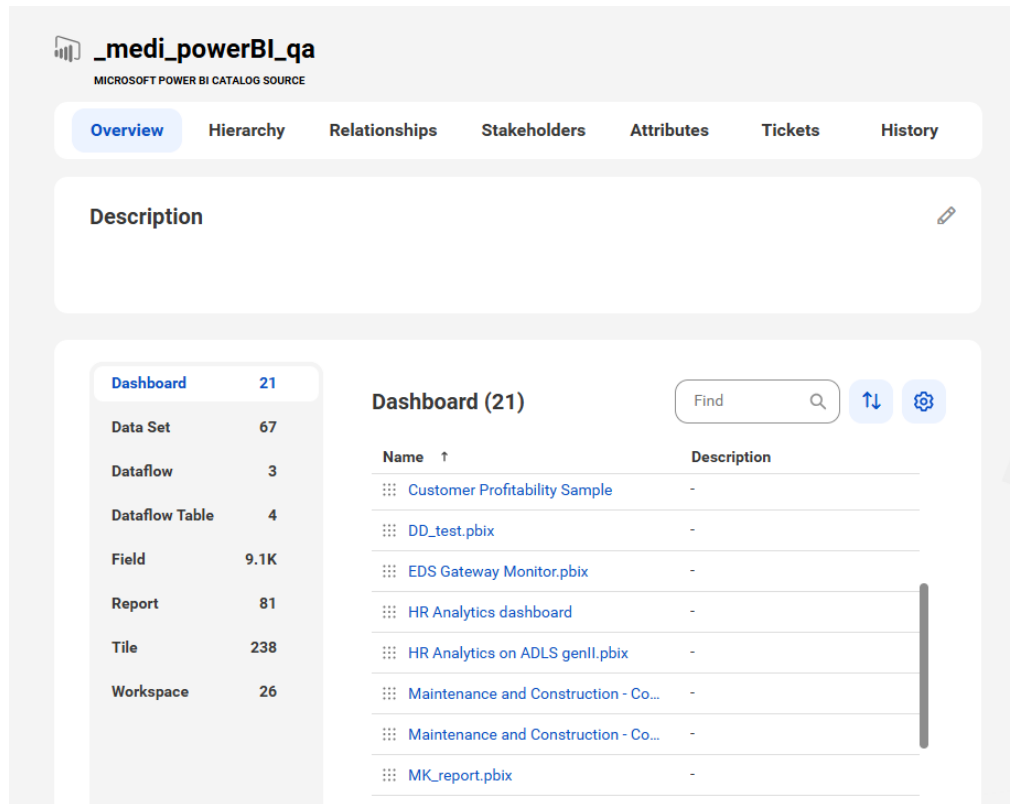
2. Click Data Governance and Catalog.

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 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 *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.

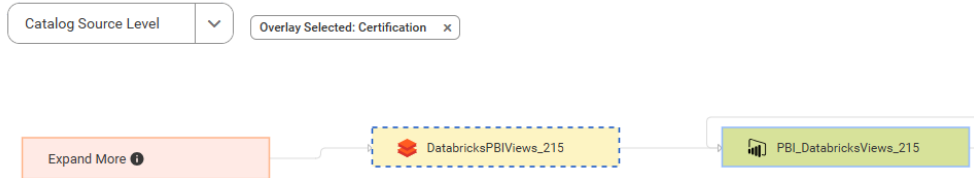
For information about linking catalog sources, see *Link catalog sources* in the Administration help.

## 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**.

The following image shows how the PBI\_DatabricksViews\_215 catalog source gets data from the DatabricksPBIViews\_215 catalog source after connection assignment:



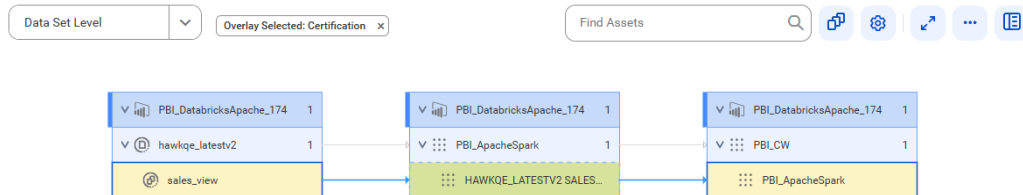
After connection assignment, the referenced object icons change to specific object icons.

## View lineage at the data set level

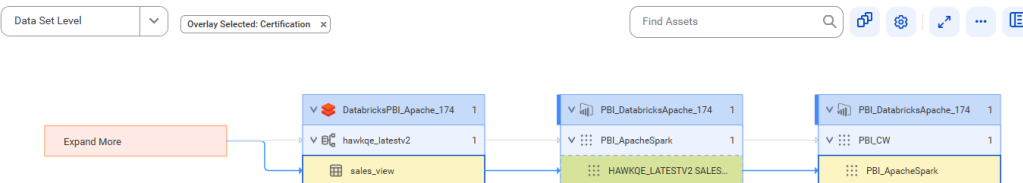
The data set level displays individual sets of data in the data flow.

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 data set level lineage where the PBI\_ApacheSpark report gets data from the sales\_view reference data set using the HAWKQE\_LATESTV2 SALES\_VIEW dataset table before connection assignment:



The following image shows data set level lineage where the PBI\_ApacheSpark report gets data from the sales\_view table using the HAWKQE\_LATESTV2 SALES\_VIEW dataset table after connection assignment:



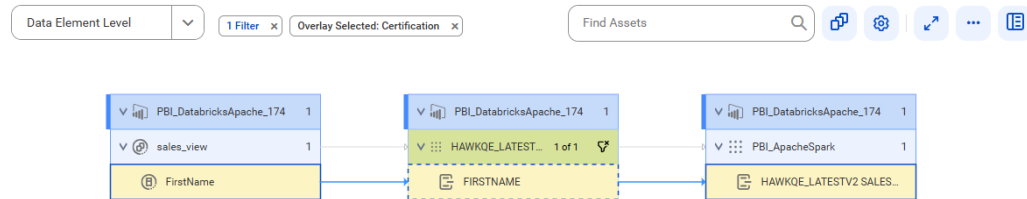
After connection assignment, the referenced object icons change to specific object icons.

## View lineage at the data element level

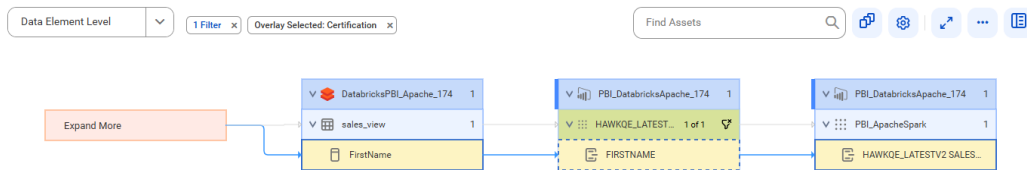
The data element level displays details of the data set level. At the data element level, you can see the input sources for expressions or commands and calculations or transformations on the data.

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 data element level lineage where the HAWKQE\_LATESTV2 SALES\_VIEW[FIRSTNAME] field of the PBI\_ApacheSpark report gets data from the FirstName reference data element of the sales\_view reference data set using the FIRSTNAME field before connection assignment:



The following image shows data element level lineage where the HAWKQE\_LATESTV2 SALES\_VIEW[FIRSTNAME] field of the PBI\_ApacheSpark report gets data from the FirstName column of the sales\_view table using the FIRSTNAME field after connection assignment:

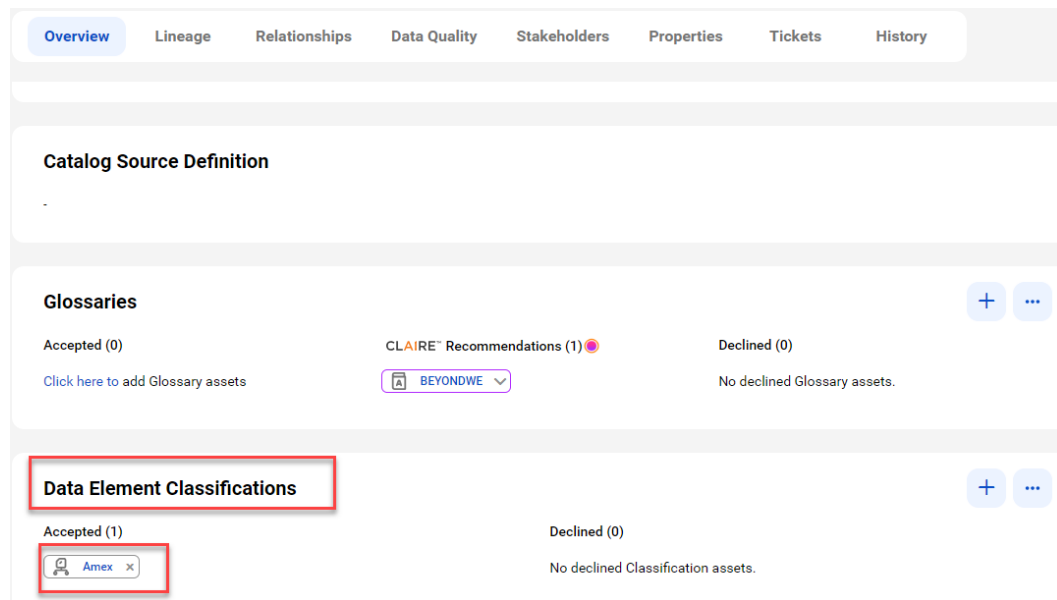


After connection assignment, the referenced object icons change to specific object icons.

## 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:



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:

OverviewLineageRelationshipsData QualityStakeholdersPropertiesTicketsHistory

Catalog Source Definition

Glossaries

Accepted (0)  
[Click here to add Glossary assets](#)

CLAIRE™ Recommendations (1)  

BEYONDWE

Declined (0)  
No declined Glossary assets.

+...