



Informatica® Metadata Command Center  
November 2025

# Oracle Business Intelligence Sources

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# Preface

Read *Oracle Business Intelligence Sources* to learn how to register and configure Oracle Business Intelligence 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 Oracle Business Intelligence 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, Oracle Business Intelligence Enterprise Edition Presentation Server is a source system from which you can extract metadata through an Oracle Business Intelligence 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.

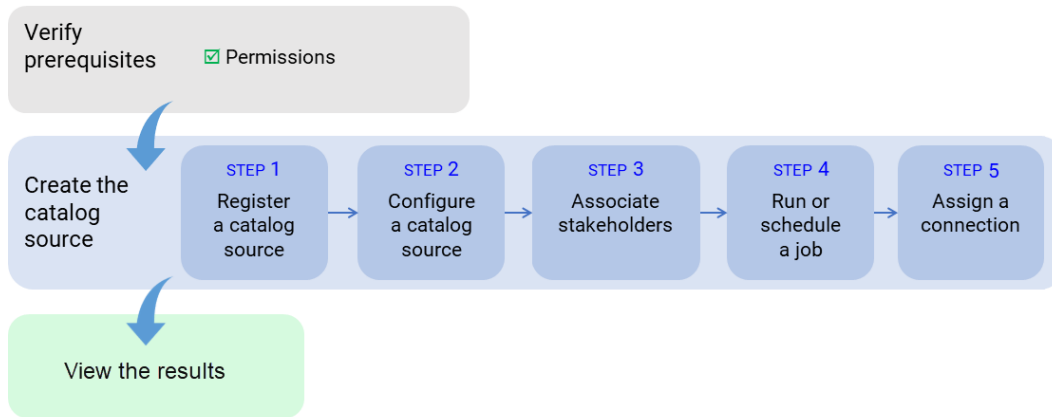
When Metadata Command Center extracts metadata, Data Governance and Catalog displays the extracted metadata and its attributes as technical assets. You can then perform tasks such as analyzing the assets, viewing lineage, and creating links between those assets and their business context.

You can only extract metadata using this catalog source.

# 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 an Oracle Business Intelligence source system:



After you verify prerequisites, perform the following tasks to extract metadata from Oracle Business Intelligence:

1. Register a catalog source. Create a catalog source object, select Oracle Business Intelligence, and specify values for connection properties.
2. Configure the catalog source. Specify the runtime environment, configure the metadata extraction capability, and add filters for metadata extraction.
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 Oracle Business Intelligence catalog source

You can use the Oracle Business Intelligence catalog source to extract metadata from the Oracle Business Intelligence Enterprise Edition Presentation Server.

Oracle Business Intelligence is a business intelligence tool to gather, store, and visualize enterprise data. You can create and configure an Oracle Business Intelligence catalog source to extract metadata from the Oracle

Business Intelligence Enterprise Edition Presentation Server. Metadata Command Center extracts report objects that include presentations, business, and physical models.

## Extracted metadata

You can use the Oracle Business Intelligence catalog source to extract metadata from the Oracle Business Intelligence Enterprise Edition Presentation Server.

Metadata Command Center extracts the following metadata from an Oracle Business Intelligence source system:

- Alias
- Alias Column
- Alias Key Column
- Alias Table
- Answers Report
- Business Model
- Business Model and Mapping
- Catalog
- Column
- Condition
- Criteria
- Criteria Column
- Criteria Hierarchical Column
- Dashboard
- Dashboard Page
- Dashboard Prompt
- Database
- Data Set
- Data Source
- Derived Logical Column
- Derived Presentation Column
- Element
- External Schema
- Folder
- Group
- Hierarchy
- Key
- KPI
- Link
- List of Values
- Logical Column
- Logical Dimension

- Logical Fact Table
- Logical Key Column
- Logical Level
- Logical Table
- Measure
- Parameter
- Parameter Answer
- Parameter Value
- Physical Column
- Physical Key Column
- Physical Table
- Presentation Column
- Presentation Fact Table
- Presentation Hierarchy
- Presentation Level
- Presentation Table
- Presentation Variable
- Prompt
- Prompt Answer
- Publisher Data Model
- Publisher Report
- Report
- Report Field
- Repository
- Repository Variable
- Session Initialization Block
- Session Variable
- Static Variable
- Subject Area
- Value
- Variable



## CHAPTER 2

# Before you begin

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

Perform the following tasks:

- Verify permissions needed.
- Download the Oracle Business Intelligence RPD repository file.
- Convert the Oracle Business Intelligence RPD repository file to an XML or UDML file.
- Install the Informatica Secure Agent on a Windows or Linux machine.
- Import SSL certificate to the JRE folder of the Informatica Secure Agent.
- Copy the following files to a directory on the Informatica Secure Agent machine:
  - Oracle Business Intelligence RPD variable values file that contains a list of RPD variable values in the key=value format.
  - Converted XML or UDML metadata files.
  - Data sources XML file that defines the Oracle Business Intelligence Publisher data source connections.
- 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 Oracle Business Intelligence metadata, you need account access and read permissions to the Oracle Business Intelligence Enterprise Edition Presentation Server.

# Get Oracle Business Intelligence source information

Get the values of the connection properties that you need to configure from the Oracle Business Intelligence Enterprise Edition Presentation Server administrator.

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

The following table describes the properties that you need:

Property	Description
Version	Select the version of the Oracle Business Intelligence Enterprise Edition Presentation Server from where you want to import metadata. Select one of the following options to specify the version: <ul style="list-style-type: none"><li>- Auto Detect. Select this option to let Metadata Command Center detect the version of Oracle Business Intelligence.</li><li>- OBIEE 10.x. Select this option if you use the Oracle Business Intelligence 10.x version.</li><li>- OBIEE 11.x. Select this option if you use the Oracle Business Intelligence 11.x or 12.x versions.</li></ul>
Server URL	The URL to connect to the Oracle Business Intelligence Enterprise Edition Presentation Server. Format is: <code>http://&lt;host name&gt;:&lt;port number&gt;/analytics/saw.dll</code> If you use SSL, ensure that Metadata Command Center trusts the server certificate of the Oracle Business Intelligence Presentation Server. <b>Note:</b> If single sign-on is enabled for the user, replace analytics with analytics-ws in the server URL. Format is: <code>http://&lt;host name&gt;:&lt;port number&gt;/analytics-ws/saw.dll</code>
Login User	The user name to access the Oracle Business Intelligence Enterprise Edition Presentation Server. Ensure that the user name you use has the necessary permissions to import metadata.
Login Password	The password associated with the user name.
Metadata File	The absolute path to the XML or UDML metadata file located on the Secure Agent machine. <b>Note:</b> <ul style="list-style-type: none"><li>- For Oracle Business Intelligence version 10.x, you must convert the RPD file to a Universal Database Markup Language (UDML) file.</li><li>- For Oracle Business Intelligence versions 11.x and 12.x, you must convert the RPD file to XML format. Metadata Command Center doesn't support the UDML file format for Oracle Business Intelligence 11.x and 12.x versions.</li></ul> For information on how to convert RPD files to XML and UDML files, see <a href="#">"Convert the Oracle Business Intelligence RPD repository file to an XML or UDML file" on page 11</a> .

## Download the Oracle Business Intelligence RPD repository file

The Oracle Business Intelligence Administration tool natively stores metadata in an RPD repository file. To convert the RPD file to an XML or Universal Database Markup Language (UDML) file, you need to download the RPD file.

1. Start a command prompt in the console of the machine where Oracle Business Intelligence Presentation Server is installed.

2. Navigate to the `bitools\bin` folder of your WebLogic server domain.  
For example, you can run the following command for Windows operating systems:  

```
cd Oracle_Home\user_projects\domains\bi\bitools\bin
```
3. Run the **downloadrpd** download repository command.  
To run the **downloadrpd** command, you need the data model launder script. Use `datamodel.cmd` for Windows and `datamodel.sh` for Linux operating systems.  
  
For example, you can run the following command to download the live RPD repository for Windows operating systems:  

```
datamodel.cmd downloadrpd -O repository.rpd -SI ssi -U weblogic -P weblogicpsw
```

  
You are prompted to choose a password for the local RPD file.  
  
For more information, see [Oracle documentation on Download Repository Command](#).

## Convert the Oracle Business Intelligence RPD repository file to an XML or UDML file

After you download the RPD repository file, you can convert the file to XML or UDML format. The steps to convert the RPD file to an XML or UDML file differ based on the Oracle Business Intelligence version.

### Oracle Business Intelligence version 12.2.1.4

Run the **biserverxmlgen** command to generate the XML file.

Use `biserverxmlgen.cmd` for Windows and `biserverxmlgen.sh` for Linux operating systems.

For example, you can run the following command to generate the XML file for Windows operating systems:

```
biserverxmlgen.cmd -R repository.rpd -P Admin123 -O repository.xml -N -Q -8
```

**Note:** Metadata Command Center doesn't support the UDML file format for Oracle Business Intelligence version 12.x.

For more information, see the corresponding Oracle documentation.

### Oracle Business Intelligence version 11.x

1. Run the initialization script to configure a command prompt or shell window that is initialized to your Oracle instance.

For recent 11.x versions, it is `bi-init.cmd` for Windows and `bi-init.sh` for UNIX operating systems.

For example, you can run the following initialization script for Windows operating systems:

```
ORACLE_INSTANCE\bifoundation\OracleBIApplication\coreapplication\setup\bi-init
```

For older 11.x versions, it is `nqinit.bat` for Windows and `nqinit.sh` for UNIX operating systems.

For example, you can run the following initialization script for UNIX operating systems:

```
/u01/wls/oracle/j2ee/bi/bifoundation/server/bin/nqinit.sh
```

You might have to configure the following environment variables for UNIX operating systems:

- export ORACLE\_HOME=/u01/wls/oracle/j2eeexport
- export DOMAIN\_HOME=/u01/wls/oracle/j2ee/user\_projects/domains/mod

2. Run the **biserverxmlgen** command to generate the XML file.  
Use `biserverxmlgen.cmd` for Windows and `biserverxmlgen.sh` for Linux operating systems.

For example, you can run the following command to generate the XML file for Windows operating systems:

```
biserverxmlgen -R paint.rpd -P Admin123 -O paint.xml -N -Q -8
```

**Note:** Metadata Command Center doesn't support the UDML file format for Oracle Business Intelligence version 11.x.

For more information, see the corresponding Oracle documentation.

### Oracle Business Intelligence version 10.x

Run the **nQUDMLGen** command in the `$OracleBIHome$\server\bin` directory to convert the RPD file to a UDML file.

For example, you can run the following command to generate the UDML file for Windows operating systems:

```
QUDMLGen.exe -U Administrator -P Administrator -R paint.rpd -O paint.udml -N -Q -8s
```

For more information, see the corresponding Oracle documentation.

## Import the SSL certificate to the Informatica Secure Agent machine

If SSL is enabled on the Oracle Business Intelligence source system, import the SSL certificate to the JRE folder of the Informatica Secure Agent installation directory.

Complete the following steps to import the SSL certificate:

1. Download the SSL certificate from the Oracle Business Intelligence installation.
2. Copy the SSL certificate file to any location on the Informatica Secure Agent machine.
3. Identify the Java version for the Secure Agent.  
You can identify the Java version from the following files:
  - `<Informatica Secure Agent installation directory>\apps\agentcore\agentcore.log`  
Search for "AgentCore JRE version".
  - On Windows operating systems, open the `lcm-env.bat` file from one of the following locations:
    - `<Informatica Secure Agent installation directory>\apps\agentcore\<latest version>\lcm`
    - `<Informatica Secure Agent installation directory>\apps\DIS\<latest version>\lcm`
  - On Linux operating systems, open the `lcm-env.sh` file from one of the following locations:
    - `<Informatica Secure Agent installation directory>/apps/agentcore/<latest version>/lcm`
    - `<Informatica Secure Agent installation directory>/apps/DIS/<latest version>/lcm`
4. Open a command prompt from the following directory:  
`<Informatica Secure Agent installation directory>\apps\jdk\<latest version>\jre\bin`
5. Run the following command to import the SSL certificate:

```
keytool -import -alias <alias name> -keystore <path to cacert file> -file <absolute path to SSL certificate>
```

**Note:** The Java certificate file is named cacerts and is located in the following Java directory: \jre\lib\security\cacerts

For example, you can run the following command on Windows operating systems:

```
keytool -import -alias aliasname -keystore "C:\data\devprod\jdk\jre\lib\security\cacerts" -file "C:\data\devprod\filename.crt"
```

6. Restart the Secure Agent.

## Create endpoint catalog sources for connection assignment

You can perform connection assignment to reference source systems to view source system objects. Before you perform connection assignment, create catalog sources for each reference source system that you want to connect to.

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

## CHAPTER 3

# Create catalog sources in Metadata Command Center

Use Metadata Command Center to configure a catalog source for Oracle Business Intelligence and extract metadata.

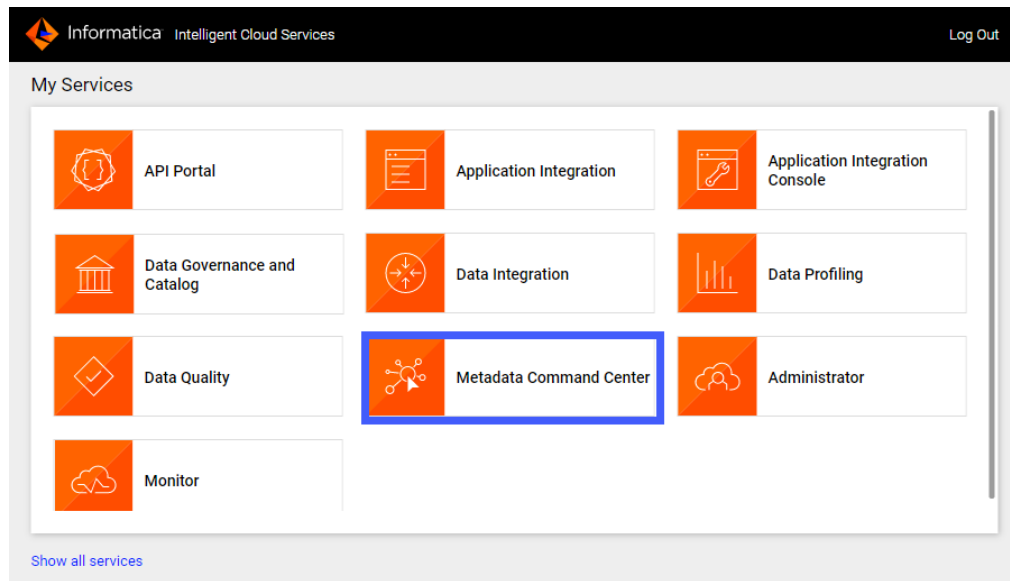
When you configure a catalog source, you define the source system where you want to extract metadata from. Configure filters to include source system metadata before you run the job. To provide stakeholders access to technical assets, you can assign access through stakeholder roles. You can also associate 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**.

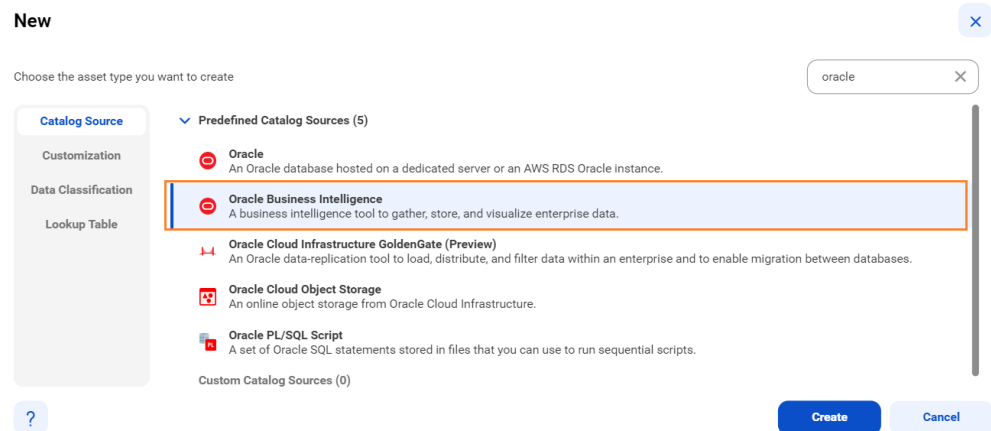
The following image shows the Metadata Command Center box on the **My Services** page:



The Metadata Command Center home page appears.

3. Click **New**.
4. Select **Catalog Source** from the list of asset types.
5. Select Oracle Business Intelligence from the list of catalog source types.

The following image shows the Oracle Business Intelligence catalog source:



6. Click **Create**.

The **New Catalog Source** page opens.

The following image shows the **New Catalog Source** page:

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 Oracle Business Intelligence connection information.

The following table describes the properties to configure:

Property	Description
Version	<p>Select the version of the Oracle Business Intelligence Enterprise Edition Presentation Server from where you want to import metadata.</p> <p>Select one of the following options to specify the version:</p> <ul style="list-style-type: none"> <li>- Auto Detect. Select this option to let Metadata Command Center detect the version of Oracle Business Intelligence.</li> <li>- OBIEE 10.x. Select this option if you use the Oracle Business Intelligence 10.x version.</li> <li>- OBIEE 11.x. Select this option if you use the Oracle Business Intelligence 11.x or 12.x versions.</li> </ul>
Server URL	<p>The URL to connect to the Oracle Business Intelligence Enterprise Edition Presentation Server. Format is: <code>http://&lt;host name&gt;:&lt;port number&gt;/analytics/saw.dll</code></p> <p>If you use SSL, ensure that Metadata Command Center trusts the server certificate of the Oracle Business Intelligence Presentation Server.</p> <p><b>Note:</b> If single sign-on is enabled for the user, replace analytics with analytics-ws in the server URL. Format is: <code>http://&lt;host name&gt;:&lt;port number&gt;/analytics-ws/saw.dll</code></p>
Login User	<p>The user name to access the Oracle Business Intelligence Enterprise Edition Presentation Server. Ensure that the user name you use has the necessary permissions to import metadata.</p>



Property	Description
Login Password	The password associated with the user name.
Metadata File	<p>The absolute path to the XML or UDML metadata file located on the Secure Agent machine.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>- For Oracle Business Intelligence version 10.x, you must convert the RPD file to a Universal Database Markup Language (UDML) file.</li> <li>- For Oracle Business Intelligence versions 11.x and 12.x, you must convert the RPD file to XML format. Metadata Command Center doesn't support the UDML file format for Oracle Business Intelligence 11.x and 12.x versions.</li> </ul> <p>For information on how to convert RPD files to XML and UDML files, see <a href="#">"Convert the Oracle Business Intelligence RPD repository file to an XML or UDML file" on page 11</a>.</p>

9. Click **Next**.

The **Configuration** page appears.

## Step 2. Configure capabilities

When you configure the Oracle Business Intelligence catalog source, you define the settings for the metadata extraction capability.

The metadata extraction capability extracts source metadata from external source systems.

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 Oracle Business Intelligence catalog source, you choose a runtime environment 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 Metadata list, select **Include Metadata** to include metadata based on the filter parameters.
  - c. From the object type list, select **Objects**.
  - d. Enter the filter values.

Filters can contain the following wildcards:

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

For path hierarchies, use the '/' separator. Filters are case-sensitive. To extract metadata from My Folders, the path in the filter value must start with: /User Folders/My Folders/

The following image shows the filter condition options:

Filters

Specify metadata filters: ☐ No ☒ Yes

[Show supported wildcards and examples](#)

Include Metadata  Select the object type  Enter a value to specify the object location  +

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

The following image shows that the filter includes metadata from all objects named CustomerReport located across folders in the specified Oracle Business Intelligence repository:

Filters

Specify metadata filters: ☐ No ☒ Yes

[Show supported wildcards and examples](#)

Include Metadata  Objects  /Shared Folders/\*CustomerReport  +

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

The following table describes the properties that you can enter:

Property	Description
Variable Values File	The absolute path to the Oracle Business Intelligence Repository RPD variable values file located on the Secure Agent machine. The file contains a list of RPD variable values in the following format: key=value
Data Sources File	The absolute path to the data sources XML file located on the Secure Agent machine. The file defines the Oracle Business Intelligence Publisher data source connections.

Property	Description
Optimize for Large Models	<p>Choose whether you want to optimize metadata import for large files.</p> <p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>- True. Optimizes the import of metadata for large Oracle Business Intelligence repository models.</li> <li>- False. Imports metadata of the entire repository model. This might result in a high consumption of memory.</li> </ul> <p>If you select True, Metadata Command Center doesn't import metadata for the following assets:</p> <ul style="list-style-type: none"> <li>- Foreign keys</li> <li>- Joins</li> <li>- Relationships</li> <li>- Logical foreign keys</li> </ul> <p>In addition, Metadata Command Center doesn't store expression tree objects with lineage links.</p>
Incremental Import	<p>To configure how you want to extract metadata, select one of the following options:</p> <ul style="list-style-type: none"> <li>- True. Extracts only the metadata that changed since the last metadata extraction job.</li> <li>- False. Extracts the complete metadata.</li> </ul>
Worker Threads	<p>The number of worker threads to process metadata asynchronously. You can leave the value empty or enter a positive integer. If you don't enter a value, Metadata Command Center computes and assigns a value between 1 and 6 based on the JVM architecture and the number of available CPU cores on the Secure Agent machine.</p> <p>Default values are between 1 and 6. If you enter an invalid value, Metadata Command Center shows a warning and uses the value 1. If your machine has more memory, you can specify a higher value to process more metadata asynchronously.</p> <p><b>Note:</b> Specifying a higher value might impact performance of the system.</p>
Miscellaneous Options	<p>Enter values for additional extraction runtime options in the following format:</p> <p>-key &lt;value&gt;</p> <p>Start each value with a hyphen followed by parameters. Separate multiple values with a space.</p>

5. 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.

- To associate users or user groups as stakeholders with technical assets extracted from the catalog source, perform the following steps:
  - On the **Associations** page, click **Stakeholders**.

- b. Select **Assign Stakeholders**.
- c. Select a stakeholder role.
- d. Click **Select** to add users and user groups from the stakeholder role as stakeholders for the technical assets.

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

**Add Users & User Groups**

Users User Groups

All Users (1)

Find 🔍 ↕

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

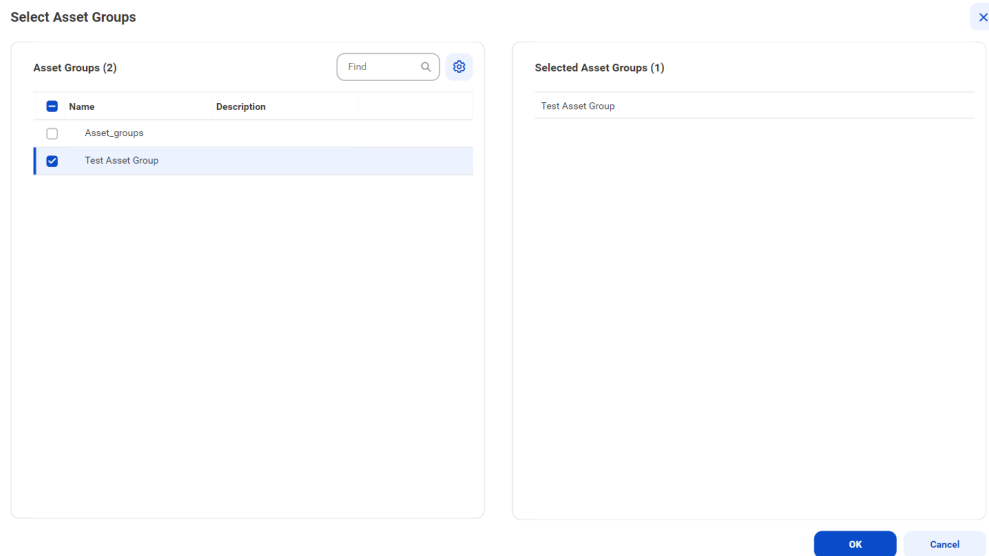
? OK Cancel

- e. Select one or more users or user groups to assign as stakeholders for the technical assets, and click **OK**.
  - 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 endpoint objects to assign to the selected connection and click **Assign**.  
You can filter the list in the **Assign Connection** dialog box by name, type, or endpoint.  
You can assign Oracle relational databases as reference source systems. To create a connection assignment, the endpoint object can belong to the Schema or Database class type.

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

## CHAPTER 4

# View results in Data Governance and Catalog

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

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

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

## View metadata extraction results

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

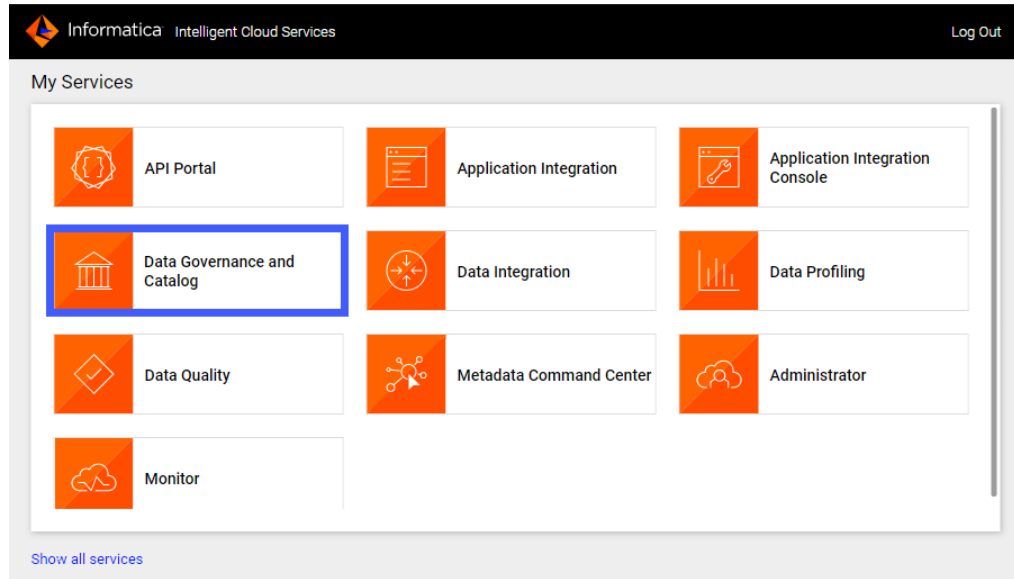
1. Log in to Informatica Intelligent Cloud Services.

The **My Services** page appears.

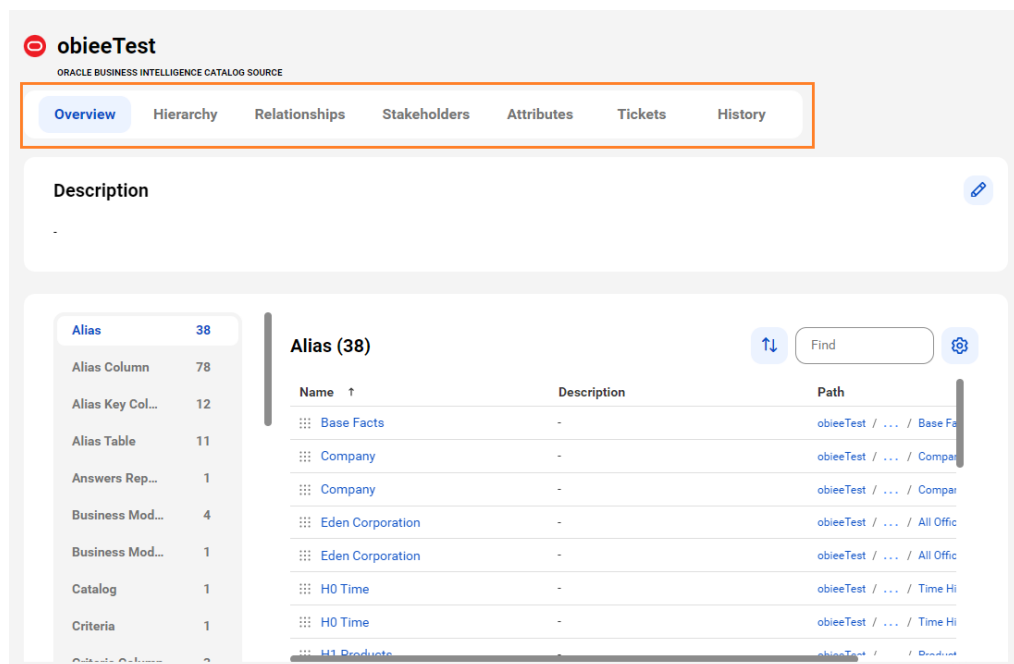
2. Click Data Governance and Catalog.

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.

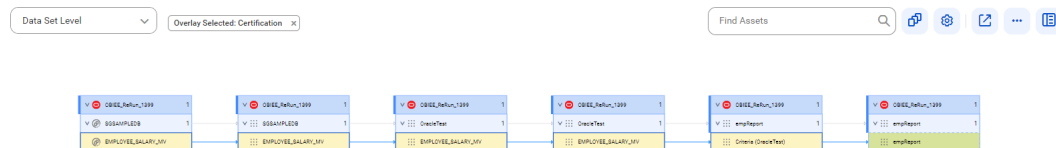
To view data lineage at the catalog source level, open a technical asset, click the **Lineage** tab, and then verify that the level is set to **Catalog Source Level**.

View lineage at the data set level

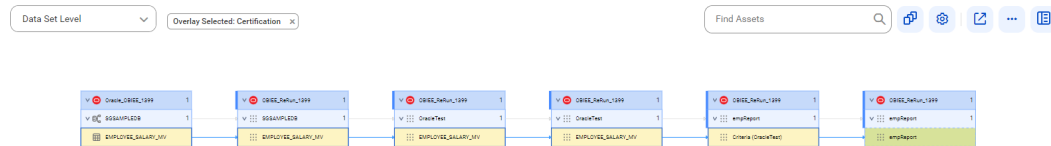
The data set level displays individual sets of data in the data flow.

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 empReport report of an Oracle Business Intelligence source system gets data from the EMPLOYEE\_SALARY\_MV reference table of a reference source system before connection assignment:



The following image shows data set level lineage where the empReport report of an Oracle Business Intelligence source system gets data from the EMPLOYEE\_SALARY\_MV table of an Oracle source system after connection assignment to the Oracle source system:

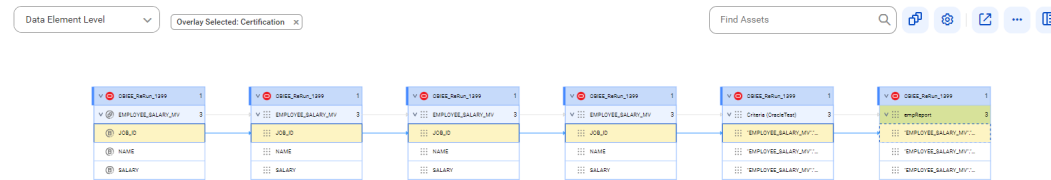


## View lineage at the data element level

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 "EMPLOYEE\_SALARY\_MV"."JOB\_ID" report field of the empReport report of an Oracle Business Intelligence source system gets data from the JOB\_ID reference column of the EMPLOYEE\_SALARY\_MV reference table before connection assignment:



The following image shows data element level lineage where the "EMPLOYEE\_SALARY\_MV"."JOB\_ID" report field of the empReport report of an Oracle Business Intelligence source system gets data from the JOB\_ID column of the EMPLOYEE\_SALARY\_MV table of an Oracle source system after connection assignment to the Oracle source system:

