



Informatica® Data Ingestion and Replication  
July 2024

# Asset Management

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Publication Date: 2024-07-12

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# Preface

Use *Asset Management* to learn how to manage Data Ingestion and Replication assets such as projects, folders, and database ingestion and replication and streaming ingestion and replication tasks. Learn how to configure asset permissions, manage asset versions, and tag and migrate assets.

## Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

### Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit <https://docs.informatica.com>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at [infa\\_documentation@informatica.com](mailto:infa_documentation@informatica.com).

### Informatica Intelligent Cloud Services web site

You can access the Informatica Intelligent Cloud Services web site at <http://www.informatica.com/cloud>. This site contains information about Informatica Cloud integration services.

### Informatica Intelligent Cloud Services Communities

Use the Informatica Intelligent Cloud Services Community to discuss and resolve technical issues. You can also find technical tips, documentation updates, and answers to frequently asked questions.

Access the Informatica Intelligent Cloud Services Community at:

<https://network.informatica.com/community/informatica-network/products/cloud-integration>

Developers can learn more and share tips at the Cloud Developer community:

<https://network.informatica.com/community/informatica-network/products/cloud-integration/cloud-developers>

### Informatica Intelligent Cloud Services Marketplace

Visit the Informatica Marketplace to try and buy Data Integration Connectors, templates, and mapplets:

<https://marketplace.informatica.com/>

## Data Integration connector documentation

You can access documentation for Data Integration Connectors at the Documentation Portal. To explore the Documentation Portal, visit <https://docs.informatica.com>.

## Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at [KB\\_Feedback@informatica.com](mailto:KB_Feedback@informatica.com).

## Informatica Intelligent Cloud Services Trust Center

The Informatica Intelligent Cloud Services Trust Center provides information about Informatica security policies and real-time system availability.

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Subscribe to the Informatica Intelligent Cloud Services Trust Center to receive upgrade, maintenance, and incident notifications. The [Informatica Intelligent Cloud Services Status](#) page displays the production status of all the Informatica cloud products. All maintenance updates are posted to this page, and during an outage, it will have the most current information. To ensure you are notified of updates and outages, you can subscribe to receive updates for a single component or all Informatica Intelligent Cloud Services components. Subscribing to all components is the best way to be certain you never miss an update.

To subscribe, on the [Informatica Intelligent Cloud Services Status](#) page, click **SUBSCRIBE TO UPDATES**. You can choose to receive notifications sent as emails, SMS text messages, webhooks, RSS feeds, or any combination of the four.

## Informatica Global Customer Support

You can contact a Global Support Center through the Informatica Network or by telephone.

To find online support resources on the Informatica Network, click **Contact Support** in the Informatica Intelligent Cloud Services Help menu to go to the **Cloud Support** page. The **Cloud Support** page includes system status information and community discussions. Log in to Informatica Network and click **Need Help** to find additional resources and to contact Informatica Global Customer Support through email.

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <https://www.informatica.com/services-and-training/support-services/contact-us.html>.

# CHAPTER 1

## Asset Management

You can manage Data Ingestion and Replication assets such as projects, folders, and ingestion tasks from the **Explore** page.

You can perform the following management tasks depending on your user role and permissions:

- Edit ingestion tasks.
- Copy projects, folders, and ingestion tasks.
- Move folders and ingestion tasks.
- Rename projects, folders, and ingestion tasks.
- Delete projects, folders, and ingestion tasks.
- Apply tags so you can filter assets on the **Explore** page.
- Configure user permissions for projects, folders, or assets.
- Use source control to manage versions of projects, folders, and tasks.
- Migrate assets between organizations.

## Editing ingestion tasks

You can edit an ingestion task from the **Explore** page.

1. In Data Ingestion and Replication, open the **Explore** page.
2. If a list of projects is displayed, select the project or project folder that contains the ingestion task that you want to edit.
3. In the list of tasks, select the row for the ingestion task that you want to edit.
4. In the Actions menu for the selected row, click **Edit**.  
The **Definition** page of the task wizard appears in edit mode.
5. Edit the available fields on the **Definition**, **Source**, **Target**, and **Runtime Options** pages.
6. When you are finished, click **Save**.

# Copying projects, folders, and tasks

You can copy projects, folders, and tasks on the **Explore** page. You might want to copy an object to use as a template, or you might want to create a backup copy.

When you copy a project, the new project contains all of the folders and tasks that were in the original project. Similarly, when you copy a folder, the new folder contains all of the tasks that were in the original folder.

When you copy a task within the folder where the task exists, you have the option to keep both tasks or cancel the operation. When you copy a task into a different folder that contains a task with the same name, you have the option to keep both tasks, overwrite the task in the folder, or cancel the operation. If you choose to keep both tasks, Informatica Intelligent Cloud Services appends the new task name with "Copy x" where x is the sequential copy number.

**Note:** To avoid naming conflicts with duplicate tasks, rename assets with a "Copy x" suffix.

1. On the **Explore** page, navigate to the object that you want to copy.
2. In the list of assets, select one or more rows for the objects that you want to copy. Then perform one of the following actions:
  - If you selected a single asset row, in the Actions menu for the row, click **Copy To**. Alternatively, right-click the row and click **Copy To**.
  - If you selected multiple asset rows, right-click a highlighted row and click **Copy To** to copy all of the assets.
3. Browse to the new location and click **Select**.

# Moving folders and tasks

You can move folders and tasks on the **Explore** page.

1. On the **Explore** page, navigate to the folder or task that you want to move.
2. In the list of assets, select one or more rows for the ingestion tasks or folders that you want to copy. Then perform one of the following actions:
  - If you selected a single row, in the Actions menu for the row, click **Move To**. Alternatively, right-click the row and click **Move To**.
  - If you selected multiple rows, right-click a highlighted row and click **Move To** to copy all of the assets.
3. Browse to the new location and click **Select**.

# Renaming projects and folders

You can rename projects and folders.

You can't use the following characters:

# ? ' | { } " ^ & [ ] / \



Do not use these characters in project, folder, asset, or tag names.

1. On the **Explore** page, navigate to the project or folder that you want to rename.
2. In the row that contains the project or folder, click **Actions** and select **Properties**.
3. Enter the new name and click **Save**.

You cannot use special characters in a name or use the same name as another object that is in the same folder.

## Renaming database ingestion and replication tasks

You can rename database ingestion and replication tasks.

You can't use the following characters:

# ? ' | { } " ^ & [ ] / \

Do not use these characters in project, folder, asset, or tag names.

1. On the **Explore** page, select the row for the ingestion task that you want to rename.
2. In the Actions menu for the selected row, click **Edit**.  
The **Definition** page of the task wizard appears in edit mode.
3. In the **Name** field, enter the new name and click **Save**.

If you rename a database ingestion task, the task name and job name will no longer be synchronized. If you want the task name to correspond to the job name, undeploy the job and then deploy the task again. Any log history will be lost.

## Renaming file ingestion tasks

You can rename file ingestion and replication tasks.

You can't use the following characters:

# ? ' | { } " ^ & [ ] / \

Do not use these characters in project, folder, asset, or tag names.

1. On the **Explore** page, navigate to the task that you want to rename.
2. To rename a task, in the row that contains the task, click **Actions** and select **Rename**.
3. Enter the new name and click **Save**.

You cannot use special characters in a name or use the same name of another task that is in the same folder.

# Renaming streaming ingestion and replication tasks

You can rename streaming ingestion and replication tasks.

You can't use the following characters:

# ? ' | { } " ^ & [ ] / \

Do not use these characters in project, folder, asset, or tag names.

1. On the **Explore** page, navigate to the task that you want to rename.
2. To rename a task, in the row that contains the task, click **Actions** and select **Rename**.
3. Enter the new name and click **Save**.

You cannot use special characters in a name or use the same name as another task that is in the same folder.

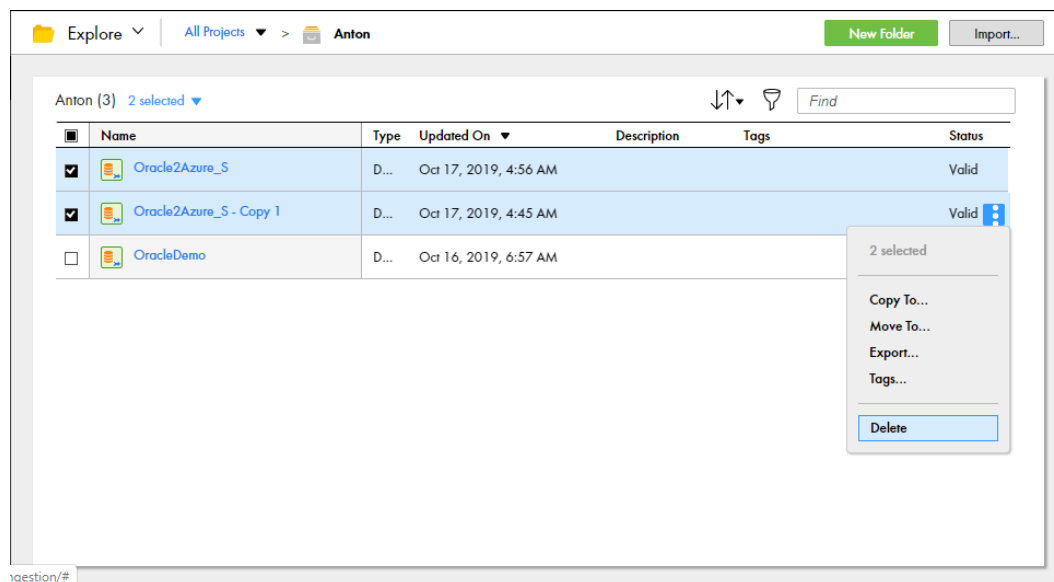
## Deleting projects, folders, and tasks

You can delete a project, folder, or task if you no longer need it. However, before you delete it, verify that no users in the organization plan to use it. You cannot retrieve projects, folders, or tasks after you delete them.

You cannot delete an asset in the following situations:

- The asset is a task that is associated with a deployed job.  
**Note:** In Database Ingestion and Replication, if you undeploy the job, you can then delete the task.
- The asset is a folder that contains tasks.

Delete a project, folder, or task from the **Explore** page, as shown in the following image:



1. To delete a project, folder, or task, on the **Explore** page, navigate to the object that you want to delete.
2. In the list of assets, select one or more rows for the ingestion tasks or folders that you want to delete. Then perform one of the following actions:

- If you selected a single row, in the Actions menu for the row, click **Delete**. Alternatively, right-click the row and click **Delete**.
- If you selected multiple rows, right-click a highlighted row and click **Delete** to delete all of the objects.

A confirmation message appears.

3. Click **Delete** again.

The selected objects are permanently deleted. You cannot use them again.

## Tags

A tag is an asset property that you can use to group assets. Create tags to filter for assets that share a common attribute on the **Explore** page.

For example, each of your organization's assets includes a tag that identifies the regional office that manages the asset. You want to view all of the assets that the Southwest regional office manages. On the **Explore** page, you explore by tag and then click the SWRegion tag.

The following image shows this configuration:

The screenshot shows the 'Explore' page with the 'All Tags' dropdown set to 'SWRegion'. The table displays 10 assets, all of which are tagged with 'SWRegion'. The assets are listed with their names, types, update dates, locations, descriptions, and status.

Name	Type	Updated On	Location	Description	Tags	Status
EC_AcctE	Mapping	Oct 1, 2020, 2...	ECDistr_SC\E...		SWRegion	Valid
It_Reps_e	Linear Taskfl...	Mar 28, 2024,...	Accounts		SWRegion	Valid
MapLkUp:	Mapping	Mar 28, 2024,...	Accounts		SWRegion	Invalid
MapLkUp:	Mapping	Mar 21, 2024,...	Default\Tag		SWRegion	Invalid
MapLkUp:	Mapping	Mar 28, 2024,...	Default		SWRegion	Invalid
MapLkUp:	Mapping	Mar 21, 2024,...	Default		SWRegion	Invalid

You can assign tags to all asset types. An asset can have up to 64 tags.

You can find all of the assets that have a particular tag using one of the following methods:

- Click the name of the tag in the **Tags** column, in any row.
- Explore by tag, and then in the list of tags that shows on the page, click the name of the tag.

The following image shows an **Explore** page that lists all the tags created for the organization:

Explore

All Tags

All Tags (10)







None Selected

↕

🔍

Find

?

<input type="checkbox"/>	Name	Asset Count	Updated On
<input type="checkbox"/>	 east	10	2021-04-02T17:50:49Z
<input type="checkbox"/>	 local	13	2020-10-02T18:27:08Z
<input type="checkbox"/>	 map	3	2019-09-16T18:49:54Z
<input type="checkbox"/>	 map, east, local	2	2021-05-27T21:14:12Z
<input type="checkbox"/>	 north	1	2024-03-28T19:20:00Z
<input type="checkbox"/>	 northeast	1	2024-03-28T19:20:54Z

## Creating tags

Use an asset's **Properties** dialog box to create and assign tags for that asset or to create tags to be available for future use.

Perform the following steps to create multiple tags without assigning them to an asset:

1. On the **Explore** page, browse by asset type.
2. In a row that contains an asset, click **Actions** and select **Properties**.
3. In the **Tags** field, enter the name of a tag that you want to create, and then press Enter.

A tag can have a maximum of 255 characters.

You can't use control characters or the following special characters in project, folder, asset, or tag names:

# ? ' | { } " ^ & [ ] / \

- Continue to enter the desired tags. Press Enter after each tag name to add it to the tag list.

**Properties: m\_TrimEmployeeNames\_Parameterized-Advanced**



**Name:** m\_TrimEmployeeNames\_Parameterized-  
Advanced

**Description:**

**Tags:**

**Save**

**Cancel**

- After you have entered the tags, delete the tags from the **Tags** field so that the asset does not become associated with the tags. The tags will still appear in the list of available tags.
- Click **Save**.

## Assigning tags to an ingestion task

After you define an ingestion task, you can assign tags to the task. You can then filter the tasks on the **Explore** page based on one or more tag names.

- In Data Ingestion and Replication, open the **Explore** page.
- If a list of projects is displayed, select the project or project folder that contains the ingestion task to which you want to assign one or more tags.
- In the **All Assets** or **All Assets > ingestion task type** view, select the row for the ingestion task.
- In the Actions menu for the selected row, click **Properties**. Alternatively, right-click the row and select **Properties**.

The **Properties** dialog box for the task appears.

- In the **Tags** list, select one or more existing tags or enter a new tag name.
- Click **Save**.

After you assign tags to ingestion tasks, you can find all ingestion tasks that have a particular tag name from the **Explore** page. Click **Explore > Tags**. Then in the list of tags, click a tag name to see a list of the tasks with that tag. You can drill down on a task name to see the task details.

Alternatively, in a list of task assets, click a tag name in the **Tags** column.

## Editing and deleting tags

You can edit or delete a tag on the **Explore** page.

Edit a tag name or description in the tag properties. When you edit a tag, the properties for associated assets update as well. For example, if your m\_sales asset has the NorthWest tag and you change the name of the tag to NW, the name of the tag changes to NW in the m\_sales asset properties.

If you delete a tag, the tag no longer appears in the asset properties.

1. On the **Explore** page, browse by tags.
2. In the row that contains the tag, perform one of the following tasks:
  - To edit a tag, click **Actions** and select **Edit**. After you make your changes, click **Save**.
  - To delete a tag, click **Actions** and select **Delete**.

## Asset dependencies

You can view object dependencies for an asset. You might want to view object dependencies before performing certain operations on an asset.

For example, you can't delete an asset if another object depends on the asset. You must first delete the dependent objects and then delete the asset. You can find the dependent objects by viewing the asset dependencies.

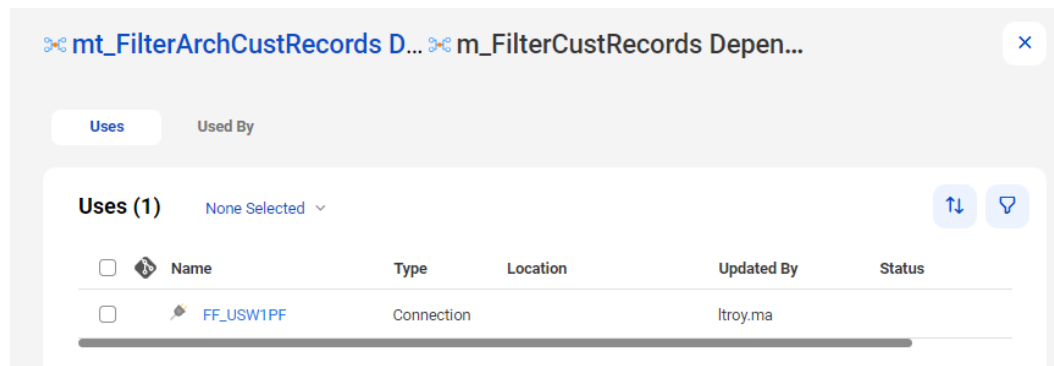
You can view object dependencies for an asset on the **Explore** page. To view object dependencies for an asset, in the row that contains the asset, click **Actions** and select **Show Dependencies**. The **Dependencies** page opens showing the **Uses** tab by default.

The **Uses** tab lists the objects that the selected asset uses.

The **Used By** tab lists the objects that use the selected asset.

To drill down to the lowest level dependency, you can continue to show dependencies for each asset that appears on the **Dependencies** page. At the top of the **Dependencies** page, a breadcrumb shows the chain of dependencies.

The following image shows that the asset mt\_FilterArchCustRecords is dependent on m\_FilterCustRecords, which is dependent on FF\_USW1PF:



If you have the appropriate permissions, you can perform actions on the **Dependencies** page such as viewing or deleting assets. To view or delete an asset, in the row that contains the asset, click **Actions** and select the action.

If you work with source controlled assets, you can view source control information such as the last pull time and the last check-in. To view source control information, you can add the following source control columns to the table:

- Last Pull Time
- Checked Out By
- Last Check in
- Git Hash

## Configuring user permissions on an ingestion task

You can configure permissions for an ingestion task if you are assigned a user role that has the **Set Permission** privilege for the asset type of Streaming Ingestion and Replication Task.

Typically, the organization administrator assigns user roles to specific users of the Data Ingestion and Replication service.

1. In Data Ingestion and Replication, open the **Explore** page and navigate to the row for the ingestion task for which you want to set permissions.
2. In the Actions menu for the row, select **Permissions**.

The **Permissions** dialog box lists the users and user groups that have permissions set on the task. Other users cannot access the task.

If the **Permissions** dialog box lists no users or user groups, no permissions are configured for the task. In this case, any user can access the task without permission restrictions.

3. To add a user to the users list and grant permissions on the task to that user, perform the following steps:
  - a. On the **Users** tab, click **Add**.
  - b. In the **Add User** dialog box, select a user and click **Add**.
  - c. In the **Permissions** dialog box, select the permissions on the task that you want to grant to the user.
  - d. Click **Save**
4. To add a user group to the groups list and grant permissions on the task to that user group, perform the following steps:
  - a. On the **Groups** tab, click **Add**.
  - b. In the **Add Group** dialog box, select a group and click **Add**.

If no groups are listed, no user groups are defined.
  - c. In the **Permissions** dialog box, select the permissions on the task that you want to grant to the group.
  - d. Click **Save**.
5. To edit the permissions that are set for a listed user or user group, on the **Users** or **Groups** tab in the **Permissions** dialog box, select or clear the permission check boxes for the user or group. Then click **Save**.
6. To remove all of the permissions that you set for one or more users or user groups, on the **Users** or **Groups** tab in the **Permissions** dialog box, select the users or groups from which you want to remove all permissions. Then click **Remove** and click **Save**.

# Asset migration

You can migrate Informatica Intelligent Cloud Services assets from one organization to another organization. To migrate assets, you export the assets from the source organization and then import the assets into the target organization.

You can export single assets, groups of assets, or export all of the assets in a project. If you export a project or folder, the file structure remains intact so that when you perform the import in the target organization, you can duplicate the original structure.

To export or import assets in a sub-organization, log in to the sub-organization. If you have administrator privileges in the parent organization, you can also switch to the sub-organization and export or import assets.

## Asset migration requirements

To migrate assets from one organization to another, the organizations and your user accounts in the organizations must meet certain requirements.

Ensure that you meet the following requirements:

- You have a user account in the source and target organizations with a role that has import and export privileges, such as the Admin or Designer role.
- The source and target organizations have the required license to import and export assets.
- The target organization has the required licenses for the assets that you want to import.
- The target organization uses the same version or a newer version of Informatica Intelligent Cloud Services. The versions might differ temporarily if the organizations aren't on the same POD (Point of Delivery) during an Informatica Intelligent Cloud Services upgrade.

## Dependent objects

Dependent objects are assets that are required by other assets.

When you set up an export, you have the option to include or exclude dependent objects in the export file. The dependent objects must exist either in the export file or in the target organization, else the import fails.

You might want to include dependent objects if they do not exist in the target organization. Or, you might want to include dependent objects if you want to replace the dependent objects in the target organization with updated versions from the source organization. If you choose to include dependent objects, the export file includes dependent objects for all of the assets that you include in the export. When you configure the import, you can choose which dependent assets to import.

You might want to exclude an asset's dependent objects if the objects exist in the target organization and you do not want to replace them.

**Note:** Schedules are not dependent objects and are not included when you export assets that use them.

## Schedules

You can migrate schedules from one organization to another organization. You might want to migrate a schedule if you migrate an asset that uses it.

When you export an asset that uses a saved schedule, the schedule is not included in the export file.

To migrate a schedule, you export the schedule from the source organization using Administrator and import the schedule into the target organization using the service that will use the schedule. For example, to migrate



a schedule that's used for Data Integration mapping tasks, you export the schedule from the source organization using Administrator and import the schedule into the target organization using Data Integration.

For information about exporting schedules, see the Administrator help. For information about importing schedules, see ["Importing assets" on page 19](#).

## Asset export

When you export assets, Informatica Intelligent Cloud Services creates an export ZIP file that contains the assets that you selected for export.

You can select individual assets to export, or you can select an entire project or folder. When you export a project or folder, the export file includes all of the assets in the project or folder.

To export an asset, you need the following privileges and permissions:

- Your user role must have privileges to export assets.
- You must have read permission on the asset.

**Note:** Informatica recommends that you include no more than 1000 objects in an export file.

### Exporting assets

You can select a single asset, multiple assets, or a project to export.

To include multiple assets, you can either select each asset within a folder or select a project or folder to export all of its assets. If you export a project, during import you can import the entire project or import only the assets that you select.

1. Log in to the source organization.
2. On the **Explore** page, navigate to the assets that you want to export.
3. Select the assets that you want to export.

To export a single asset or project, select the asset or project, and then click **Actions** and select **Export**.

To export multiple assets, select the check box to the left of each asset to export. Or, select the check box for each project or folder that contains the assets to export. From the Actions menu, select **Export**.

The following image shows the selection menu with multiple assets selected:

4. On the **Export Assets** page, change the job name or leave the default.
5. Select whether to include dependent objects for the assets.
6. Click **Export**.
7. To see the progress of the job, select **My Import/Export Logs** from the navigation bar and then select **Export** from the menu at the top of the page. Click the name of the log to open the log details page.

## Asset import

You can import all of the assets in an export file or select the assets that you want to import.

When you import assets, you specify the following information:

- The assets in the export file that you want to import and the projects in which to import them.
- Whether to overwrite assets in the target project with assets in the export file when there is a name conflict.

- Whether to merge tags when you overwrite assets in the target project.

To import an asset, you need the following privileges and permissions:

- Your user role must have privileges to import assets.
- If you import an asset into the target project as a new asset, you must have create, update, and read permissions on the asset.
- If you overwrite an asset in the target project, you must have update and read permissions on the asset.

**Note:** To overwrite a source-controlled asset in the target project, the asset must be checked out.

The **Import Assets** page lists the assets that are in the export file. You can select which assets you want to import, and then specify which project to import the assets to. You can accept the default project, which is the same project name as the source project, or you can select a different project. If the project does not exist in the target organization, Informatica Intelligent Cloud Services creates it.

## Asset name conflicts

You can specify how Informatica Intelligent Cloud Services handles asset name conflicts when the export file contains assets with the same name as assets in the target project. You can choose whether to overwrite the assets in the target project or use the existing assets in the target project.

To see how the import handles any asset name conflicts before you start the import job, you can test the import on the **Import Assets** page before you import the assets. The import action displays in the **Status** column for each asset. You can filter the list of assets by asset name, asset type, or status.

The following image shows a list of assets and the import action to be performed when overwriting existing assets is enabled:

## Importing asset tags

Asset tags are included in the export file and imported with the asset to the target project. When you overwrite existing assets, you can choose to merge tags in the target project with tags in the export file or keep only the tags in the export file.

When you import a new asset, its tags are also imported to the target project. When you overwrite existing assets in the target project, you can choose to merge tags. When you merge tags, after import, both export and target project tags are assigned to the asset.

You can choose to merge tags for all assets or for some assets in the export file. You can only merge tags when you overwrite existing assets in the target project.

If you choose to merge tags and the asset in the export file does not have tags but the asset in the target project does, after import, the asset will retain tags from the target project. To remove the target project tags, navigate to the asset on the **Explore** page and remove the tags.

The following table shows how Informatica Intelligent Cloud Services merges tags when you overwrite existing assets on import:

Asset name	Export file tags	Target project tags	Merge tags	Tags after import
Asset_1	Tag_1, Tag_2	Tag_3	Yes	Tag_1, Tag_2, Tag_3
Asset_2	Tag_1, Tag_2	Tag_4, Tag_5	No	Tag_1, Tag_2

Asset name	Export file tags	Target project tags	Merge tags	Tags after import
Asset_3	Tag_1, Tag_2	-	Yes	Tag_1, Tag_2
Asset_4	-	Tag_5, Tag_6	Yes	Tag_5, Tag_6
Asset_5	-	Tag_5, Tag_6	No	Tag_5, Tag_6

## Importing assets with persisted values

When you import a shared sequence or a mapping task that contains in-out parameters or sequences, you can choose to retain, reset, or overwrite persisted values.

The actions you can take for persisted values depends on whether or not the asset exists in the target project and if you choose to overwrite existing assets.

The following table describes the actions you can take when you import new assets or choose not to overwrite existing assets:

Setting	Description
Reset to default values	Default. Informatica Intelligent Cloud Services creates a new asset in the target location with default in-out parameter values and initial sequence values.
Retain persisted values	Informatica Intelligent Cloud Services creates a new asset with the persisted in-out parameter and sequence values .

The following table describes the actions you can take when you overwrite existing assets:

Setting	Description
Retain persisted values in the target	Default. Informatica Intelligent Cloud Services ignores values coming from the export file and retains the values persisted in the target project.
Reset persisted values to default values	Informatica Intelligent Cloud Services resets persisted values to the default in-out parameter value and initial sequence value.
Overwrite persisted values in the target with source values	Informatica Intelligent Cloud Services overwrites values in the target with persisted values in the export file.

## Importing assets

Import assets from an Informatica Intelligent Cloud Services export file.

1. Log in to the target organization.
2. On the **Explore** page, navigate to **All Projects** and click **Import**.
3. On the **Import Assets** page, navigate to the export file and click **Open**, or drag the zip file from the Downloads folder in Windows.

The **Import Assets** page lists the assets in the file.

4. Optionally, change the import job name.
5. Choose whether to overwrite existing assets with the assets in the import.

- If you choose to overwrite existing assets, when an asset has the same name as an asset in the target project, the asset replaces the existing asset in the target project.
  - If you do not choose this option, if an asset with the same name exists in the target project, the asset is not imported.
6. Select the assets to import.

If the export file contains a project and you want to import the entire project, select all of the assets. Informatica Intelligent Cloud Services creates the project in the target organization.
  7. Select the target project or accept the default.
  8. Click **Test** to see the potential results of the import.

In the Select Assets area, the status for each asset shows the action that the service performs when you import the files.
  9. If necessary, revise your selections to resolve any issues in the test results.
  10. Click **Import**.

You can see the progress of the import on the **Import** tab of the **My Import/Export Logs** page. When the import process is complete, a message appears in **Notifications**. Click the link in the message to open the log details page and see the results of the import.

## Post-import tasks

To complete the migration process you need to perform certain tasks based on the types of assets that you imported.

Perform the following tasks after you import assets:

- Configure connection passwords and security tokens. Informatica Intelligent Cloud Services does not include connection passwords and security tokens in imports for security reasons.

## Source control

You can use a GitHub, Azure DevOps, or Bitbucket Git source control repository with Informatica Intelligent Cloud Services to manage and track changes made to Informatica Intelligent Cloud Services objects such as projects, folders, and assets.

You can use source control to enable version management for the Informatica Intelligent Cloud Services objects that appear on the **Explore** page, except for Data Integration bundles. You cannot apply source control to objects that don't appear on the **Explore** page such as runtime environments or connections. The source control repository structure mirrors the structure in the organization, with **Explore** as the top level directory.

Each time a user performs an action on an object that is source controlled, Informatica Intelligent Cloud Services logs the action. You can view source control logs in the Monitor service. For more information, see *Monitoring source control logs* in the Monitor help.

To use source control, the following prerequisites must be met:

- The organization has the appropriate Informatica Intelligent Cloud Services licenses to use source control.

- The organization administrator has configured a connection between the source control repository and the Informatica Intelligent Cloud Services organization.
- Your user role has privileges to use the Informatica Intelligent Cloud Services source control feature.
- You've entered your source control repository user credentials in Informatica Intelligent Cloud Services.

For information about configuring a connection between a Git source control repository and Informatica Intelligent Cloud Services, see the Administrator help.

**Note:** Informatica recommends that you include no more than 1000 objects in a container such as a project or folder when you use a source control repository with Informatica Intelligent Cloud Services.

## Source control actions

You can perform the following actions on source-controlled objects such as projects, folders, and assets:

### **Pull an object.**

Pull an object to add it to the organization or update a project with the version in the source control repository.

### **Check out an object.**

Check out an object that you want to work on. When you check out an object, the object locks so that other users cannot make changes to it.

### **Check in an object.**

Check in an object to add it to the source control repository or update the source control repository with the latest version of the object. When you check in an object, the lock releases.

### **Delete an object.**

Delete an object from the organization and the source control repository. Before you can delete an object, you must check it out.

### **Restore an object version.**

Restore an object to a previous version.

### **Undo a checkout.**

Undo a checkout if you don't want to save the changes you made to the object. When you undo a checkout, the object reverts to the last source control version.

### **Unlink an object.**

Unlink an object if you no longer want the object in the organization to stay in sync with the object in the source control repository.

**Note:** Some organizations do not have permission to update the source control repository. If your organization cannot update the repository, you can perform a pull action to get a specified version of the Informatica Intelligent Cloud Services objects. However, you cannot perform other source control actions such as checking out and checking in objects.

To check out, pull, unlink, or undo a checkout for an object, you must have update permissions on the object.

## Source control and the Git repository

If you usually work directly in a Git source control repository, you might notice a few differences between using source control in Informatica Intelligent Cloud Services and working directly in the repository.

Note the following differences:

- A pull action in Informatica Intelligent Cloud Services is the same as a Git pull command. However, a pull in Informatica Intelligent Cloud Services cannot merge changes.
- A checkout action in Informatica Intelligent Cloud Services locks an object so that no one else can check it out or change it.
- A check-in action in Informatica Intelligent Cloud Services is the same as a Git commit command and push command combined. Use a check-in to add Informatica Intelligent Cloud Services objects to the source control repository and to commit changes to the repository.

## Configuring repository access

To work with source controlled objects, specify your repository credentials in Informatica Intelligent Cloud Services.

Your credentials can include a personal access token or app password, depending on the repository service that you use.

If your administrator has configured the organization's repository for OAuth access, you can enable OAuth access instead of providing a personal access token or app password.

Personal access tokens and app passwords must be configured to enable full control of private repositories. For information about generating personal access tokens, see the GitHub or Azure DevOps Git help. For information about generating app passwords, see the Bitbucket help.

In Informatica Intelligent Cloud Services, perform the following steps to configure access to the repository:

1. Click the **User** icon in the top right corner of the Informatica Intelligent Cloud Services window and then select **Settings**.
2. Perform one of the following tasks:
  - Enter your repository credentials.
  - Enable OAuth access to the repository. For GitHub and Azure DevOps Git repositories, if you have not already authorized access, a Git access app appears. Select to authorize access for Informatica Intelligent Cloud Services.
3. Click **Save**.

## Project-level repositories

If you're assigned a role with the Configure Custom Repository Source Control privilege, you can specify a source control repository to use at the project level, instead of using the global source control repository that's set up for your organization.

By default, when you perform a source control action on a project or folder, the action uses the global source control repository that's set up by the organization administrator. If the organization administrator enables project-level repositories, you can link a project to a repository other than the global repository.

If you use project-level repositories, be sure to add the Repository URL and Repository Branch columns to the Explore page.

**Note:** Before you link a project to a custom repository, make sure that other users who need access to the project have access to the repository.

## Linking a project to a source control repository

You can link a project to a source control repository other than the global repository.

1. On the **Explore** page, in the row that contains the project, click **Actions** and select **Source Control Properties**.
2. Enter the Git repository URL and branch name that you want to use, and then click **Save**.
3. Click **Save** again to confirm that you want to use a repository other than the global repository.

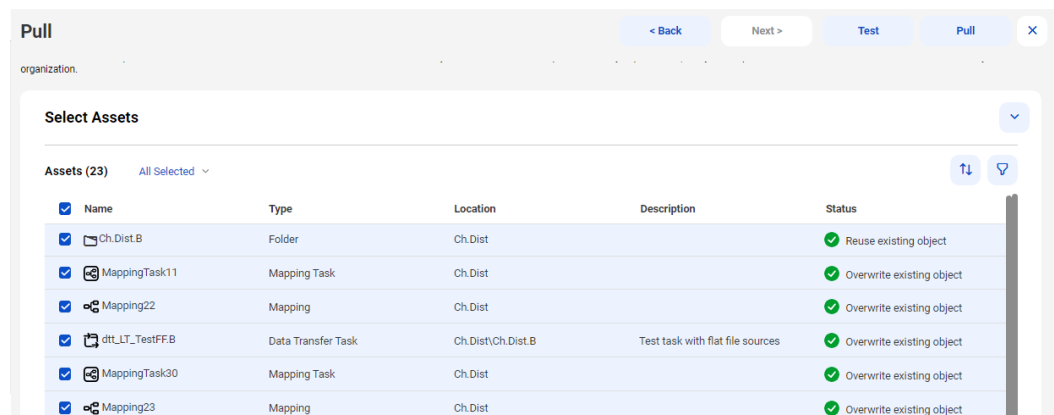
After you click **Save**, only users who have access to the repository can check out and commit the project.

## Source control pulls

Pull an object to add it to the organization or replace the version of the object in the organization with the version in the source control repository. You can pull a project, folder, or an individual object that isn't checked out by another user.

Before a pull takes place, you can review the potential results of the pull. You can cancel the action or select objects to exclude from the pull.

The following image shows a preview page with potential results in the **Status** column:



You can also test the pull to see if any errors might occur. If any errors appear, you can exclude the objects from the pull or close the page to cancel the pull.

A pull doesn't include dependent objects. For example, in Data Integration, if you pull a mapping that uses a saved query, the pull doesn't include the saved query.

A pull doesn't change the state of pulled objects in the organization. For example, if an object was checked out before the pull, it remains checked out after the pull.

Consider the following rules and guidelines:

- If you want to pull an object that uses a connection or runtime environment, be sure that the organization includes a connection and runtime environment before you perform the pull. When you select an object that uses a connection or runtime environment, you can select a runtime environment and connection to use on the test page.
- Informatica Intelligent Cloud Services doesn't consider capitalization in object names. As a result, you can't pull a project that contains multiple assets that have the same name with different capitalization. For example, if you try to pull a project that contains an asset named "sales" and an asset named "SALES", you receive an error because a project or folder can't contain multiple assets with the same name.

- You can pull objects regardless of whether your organization can or cannot update the source control repository.

## Project and folder pulls

You can pull all of the objects in a project or folder, or pull only the objects that changed in a particular commit hash.

You specify the version of the objects that you want to pull. The versions of an object that you can select are based on the object's current location in Informatica Intelligent Cloud Services. For example, you check out version 5 of the `m_customers` object and move it to a project called `NewCustomers`. When you pull the object, the available versions do not include the versions of the object from the previous location.

If you pull a project or folder, the pull doesn't affect any objects in the project or folder that aren't source-controlled.

A pull updates the project or folder in the organization to be identical to the selected version of the project or folder in the repository. For example, if you pull an older version of a project and the project in the organization contains objects that were added in later versions, the pull deletes the objects.

## Pulling an object

Use the pull action to update the organization with objects in the source control repository. You can pull a single asset, a project, or a folder. When you pull a project or folder, you can exclude any assets in the project or folder that you don't want to include in the pull.

1. To pull a project from the global repository, click **Pull from Global Git**. Select the project that contains the objects you want to pull and click **Next**.
2. To pull a project from a repository or branch that's configured at the project level, on the **Explore** page, select the asset or folder. Click **Actions** and select **Pull**.  
**Note:** You can't pull more than one project at a time.
3. To pull a single asset or folder, on the **Explore** page, select the asset or folder. Click **Actions** and select **Pull**.
4. For a project or folder, select the pull method that you want to use, and then click **Next**. You can use one of the following methods:
  - Pull all assets in a commit hash.
  - Only pull modified assets in a commit hash.
5. Select the Git hash that you want to pull and click **Next**.
6. Review the list of assets. You can clear the check box for any of the assets that you don't want to include in the pull. By default, all of the assets are selected.
7. Review the actions in the **Status** column for each asset. These actions will occur when the pull action is performed.
8. Select one of the following options for Sequence Generator transformations and in-out-parameters in existing assets:
  - Retain persisted values in the target.
  - Reset persisted values to default values.
  - Overwrite persisted values with source values.
9. Select one of the following options for Sequence Generator transformations and in-out-parameters in new assets:



- Reset to default values.
  - Retain persisted values.
10. Optionally, click **Test** to see if errors might occur as a result of the pull action.
  11. Click **Pull**.

The pull action generates a log showing details of this action. You can view the log on the **Source Control Logs** page in Monitor.

## Commit tags

When you check in assets to your source control repository, you can include a commit tag. The tag appears as an annotated tag in your Git repository.

You might want to include a commit tag to mark assets within a check-in that are ready for deployment. When you add a commit tag, the tag is applied to each asset in the commit. You can add one tag for each commit, and the tag must be unique.

When you pull assets, Informatica Intelligent Cloud Services displays commit tags in the **Tag** column on the **Pull** page.

**Note:** The pull operation can take longer based on the number of commit tags you have in your repository.

## Checking out and checking in objects

Check out an object so you can make changes to it. Check in the object when you want to update the source control repository with your changes. You can also check in objects to add them to the source control repository.

When you check out an object, the object locks so that other users can't make changes to it. When you check in an object, a new version of the object is created in the source control repository.

If you check in an object that's in a folder or project that isn't source controlled, the folder or project becomes source controlled. An asset can't reside in a source control repository unless it's in a container such as a project or folder.

If you import assets into an organization that uses source control, the assets must be checked out so that they can be overwritten.

**Note:** The size of a check-in cannot exceed 50 MB.

### Checking out an object

When you check out an object, the object is locked so that other users can't update it while you are making your changes.

You can check out individual objects, multiple objects, or a project or folder to check out all of the objects within the project or folder.

Before you check out an object, you might want to perform a pull to be sure you update the latest version of the object. For more information about the pull action, see ["Source control pulls" on page 23](#)

1. On the **Explore** page, navigate to the object you want to check out.
2. In the row that contains the object, click **Actions** and select **Check Out**.
3. If the checkout includes multiple objects, on the preview page, review the results in the **Status** column. If you want to exclude an object, clear the check box next to the object name.
4. Click **Check Out**.

## Checking in an object

Check in an object to add the object to the source control repository or to update the source control repository with the latest version of the object in the organization.

If no changes were made to the object, the check-in isn't reflected in the source control history and a new version of the object isn't created in the source control repository.

**Note:** The size of a check-in cannot exceed 50 MB.

1. On the **Explore** page, navigate to the object you want to check in.
2. In the row that contains the object, click **Actions** and select **Check In**.
3. If the check-in includes multiple objects, on the preview page, review the results in the **Status** column. If you want to exclude an object, clear the check box next to the object name. If you want to cancel the action, close the page.
4. Add a summary and optionally, a description and commit tag.  
A summary is required and has a max length of 255 characters.
5. Click **OK**.

## Deleting an object

To delete a source controlled object, you delete it from the organization and from the source control repository.

You must check out an object before you can delete it.

You can't delete an object that's checked out by another user or delete a project or folder recursively.

1. On the **Explore** page, navigate to the object that you want to delete.
2. On the row that contains the object, click **Actions** and then click **Delete**.
3. To confirm that you want to delete the asset from the organization, click **Delete**.
4. Add a summary that describes the reason for the delete action and optionally, a description.  
A summary is required and has a max length of 255 characters.
5. To delete the object from the repository and complete the delete action, click **OK**.

## Reverting to an older version

You might want to revert to a previous version of an object if you want to discard changes that were made to the object.

To revert to a previous version, perform a pull action and select the version that you want to restore in the organization.

If you revert the version of a project or folder and the project or folder in Informatica Intelligent Cloud Services contains objects that are not in the repository's project or folder, the pull action deletes the additional objects if they are source controlled. If the objects are not source controlled, the action doesn't delete the additional objects.

For more information about the pull action, see [“Source control pulls” on page 23](#).

## Undoing a checkout

When you undo a checkout, the object reverts to the last version that was pulled. The object's version history will not include a record of the checkout and undo checkout actions. The undo checkout releases the lock so that the object is available for checkout.

You can undo the checkout of individual objects, multiple objects, or a project or folder in a single checkout action.

You can undo the checkout of any object that you have checked out. You cannot undo the checkout of an object that has been checked out by another user unless you have the Admin role or your user role has the Force Undo Checkout feature privilege for the Administrator service.

If you undo the checkout of a project or folder, you can select which objects within the project or folder to include or exclude. By default, all of the objects are included.

**Note:** If an object was moved or renamed after it was checked out, undoing the checkout restores the object's name and location to its name and location before it was checked out.

1. On the **Explore** page, navigate to the object.
2. In the row that contains the object, click **Actions** and select **Undo Check Out**.
3. If the undo checkout includes a project or folder, on the preview page, select the objects within the project or folder to exclude from the undo checkout action.

## Unlinking an object

You can unlink an object so that it's no longer source controlled.

Unlinking an object doesn't delete the object from the source control repository or the organization, but you can no longer update the repository for any changes you make to the object in the organization. If you decide to link the object in the future, you can check in the object to reestablish the link. If the name of the object or the path to the object has not changed, the checked in object becomes a new version of the object in the source control repository.

The object must be checked in before you can unlink it. You can unlink an object that's checked out by another user if you have the Admin role or your user role has the Force Undo Checkout feature privilege for the Administrator service.

You can't unlink a project or folder that contains source controlled objects. To unlink a project or folder, unlink each object within the project or folder first.

1. On the **Explore** page, navigate to the object that you want to unlink.
2. On the row that contains the object, click **Actions** and select **Unlink**.

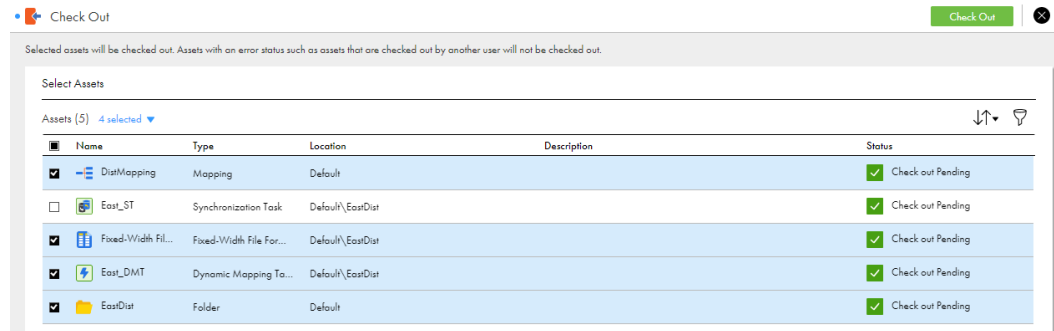
## Working with multiple objects

You can select multiple objects to check in, check out, undo checkout, pull, or unlink.

The total size of the selected objects cannot exceed 50 MB.

You can select a project or folder or select multiple objects within a project or folder. When you include a project or folder or multiple objects in a source control action, a preview page appears that shows you the expected results of the action if you proceed. If an object listed on the preview page is not source controlled, it will be ignored. If an object is checked out by another user or you do not have permission to update the object, the status on the preview page shows that the action will fail. You can opt to remove any of the objects before you continue.

For example, in the Default project, you select the EastDist folder and the DistMapping asset to check out. The preview page includes the DistMapping asset, the EastDist folder, and all of the objects in the EastDist folder. You don't want to check out the East\_ST asset so you clear its check box before you proceed with the checkout action. The following image shows the preview page:



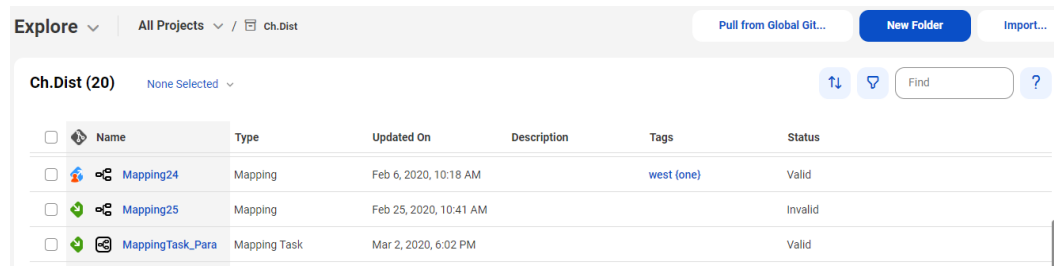
If you select multiple objects for a pull, the preview page lists all of the versions in the repository.

**Note:** You can't delete multiple objects in one transaction.

## Viewing source control columns on the Explore page

If your organization has any objects that are source controlled, the **Explore** page displays an additional column that indicates whether an object is checked in, checked out, or is not source controlled.

In the following image, the blue and red icon indicates that the Mapping24 object is checked out:

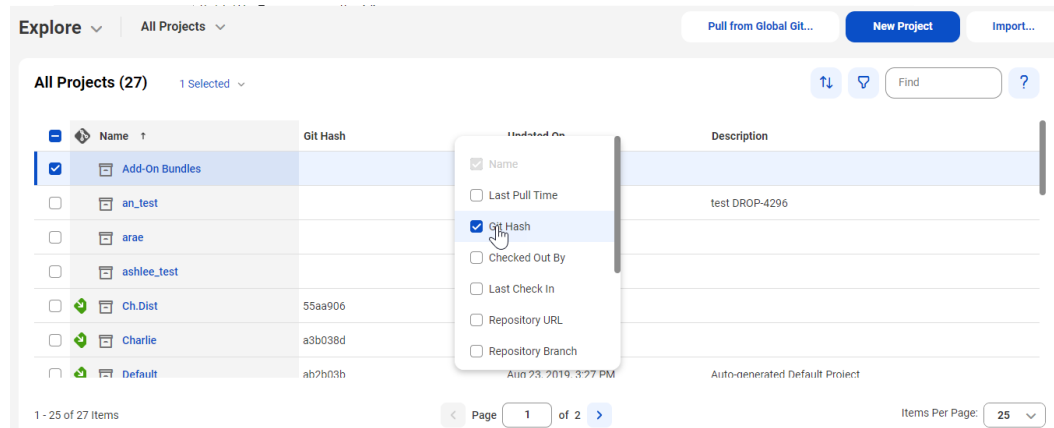


Additional source control columns are available but are not displayed by default. You might want to customize the **Explore** page to show all of the source control-related columns. This way you can easily identify source controlled objects, and you can use the columns to filter and sort source controlled objects on the page.

You can add the following source control-related columns to the **Explore** page:

- Last Pull Time
- Checked Out By
- Last Check In
- Git Hash
- Repository URL
- Repository Branch

To display these columns, right-click a column heading and select the columns that you want to add, as shown in the following image:



## Source control best practices

To use source control effectively, use the following guidelines as best practices.

Adhere to the following guidelines as you develop and work with assets:

### Guidelines for managing dependencies

Use the following guidelines to manage assets with dependencies:

- Create connections and runtime environments before you pull assets from the repository.  
When required connections and runtime environments exist in the target organization, you can run tasks immediately after you pull them from the repository.
- Ensure that reusable assets such as mappings and components are present in the repository before you use them.  
Informatica Intelligent Cloud Services does not allow you to save an asset such as a mapping task when the dependent mapping does not exist in the organization.

### Guidelines for checking in and checking out assets

Use the following guidelines when you check in and check out assets:

- When you rename or move an asset, check out the asset's first-level dependent assets and include them in the same check-in.  
For example, if you want to rename a mapping that a mapping task uses, and the mapping task is used in a taskflow, check out the mapping and the mapping task. You don't need to check out the taskflow. After you rename the mapping, check in the mapping and the mapping task in one check-in action.
- Enter comments when you check in assets.  
When you check in assets, you might enter a release tag name in the **Summary** field and enter more descriptive comments in the **Description** field. When you do this, the **Git Summary** field in Informatica Intelligent Cloud Services shows the release tag that is associated with the asset.
- When you check in multiple assets at one time, limit the number of assets to 1000 or fewer.  
Checking in more than 1000 assets at one time can degrade performance between Informatica Intelligent Cloud Services and the Git repository service.

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