Informatica® Data Integration - Free & PayGo
April 2023

Asset Management

Informatica Data Integration - Free & PayGo Asset Management
April 2023

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Preface

Use *Asset Management* to learn how to manage Data Integration projects, folders, and assets. Learn how to 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.

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.

Informatica Intelligent Cloud Services Trust Center

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

You can access the trust center at https://www.informatica.com/trust-center.html.

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You can contact a Customer Support Center by telephone or online.

For online support, click **Submit Support Request** in Informatica Intelligent Cloud Services. You can also use Online Support to log a case. Online Support requires a login. You can request a login at https://network.informatica.com/welcome.

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

Project and asset management

You can manage projects and assets on the **Explore** page.

You can manage your Informatica Intelligent Cloud Services projects and assets in the following ways:

- Copy projects, folders, or assets to create new versions of them.
- Move folders or assets to other locations.
- Rename projects, folders, or assets.
- Delete projects, folders, or assets.
- Apply tags so you can filter for related assets on the **Explore** page.

Copying projects, folders, and assets

You can copy projects, folders, and assets 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 objects, Informatica Intelligent Cloud Services retains child elements in the following instances:

- When you copy a project, the new project contains all of the folders and assets that were in the original project. Similarly, when you copy a folder, the new folder contains all of the assets that were in the original folder.
- When you copy assets or a folder containing assets to another location, the assets retain their references to dependent objects.
  For example, a folder in the Customers project contains the m_cust and the mt_ca_cust assets. The mt_ca_cust asset requires the m_cust asset. If you copy the mt_ca_cust asset to a folder in the Customers_ca_upsell project, the mt_ca_cust asset in the Customers_ca_upsell project still references the m_cust asset in the Customers project.

When you copy an asset within a folder, you can keep both assets. When you copy an asset into a different folder that contains an asset with the same name, you can overwrite the asset in the folder or keep both. If you choose to keep both assets, Informatica Intelligent Cloud Services appends the new asset name with "Copy x" where x is the sequential copy number.

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

When you copy an asset with a schedule, the schedule is removed from the copied asset.

Perform the following steps to copy an object:

1. On the **Explore** page, navigate to the object that you want to copy.

2. In the row that contains the object that you want to copy, click **Actions** and select **Copy To**.
3. Browse to the new location and click **Select**.

Moving folders and assets

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

1. On the **Explore** page, navigate to the folder or assets that you want to move.
2. To move a folder or a single asset, in the row that contains the folder or asset, click **Actions** and select **Move To**, and then browse to the new location and click **Select**.

Renaming projects, folders, and assets

You can rename projects, folders, and assets without losing references to objects that they use.

For example, if an asset named mt_ResolveClientList uses an asset named m_RegionToMainList, you can rename the mt_ResolveClientList asset to mt_ClientList and it will still reference the m_RegToMainList asset.

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

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

1. On the **Explore** page, navigate to the object that you want to rename.
2. To rename an asset, in the row that contains the asset, click **Actions** and select **Rename**.
3. To rename a project or folder, in the row that contains the project or folder, click **Actions** and select **Properties**.
4. 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.

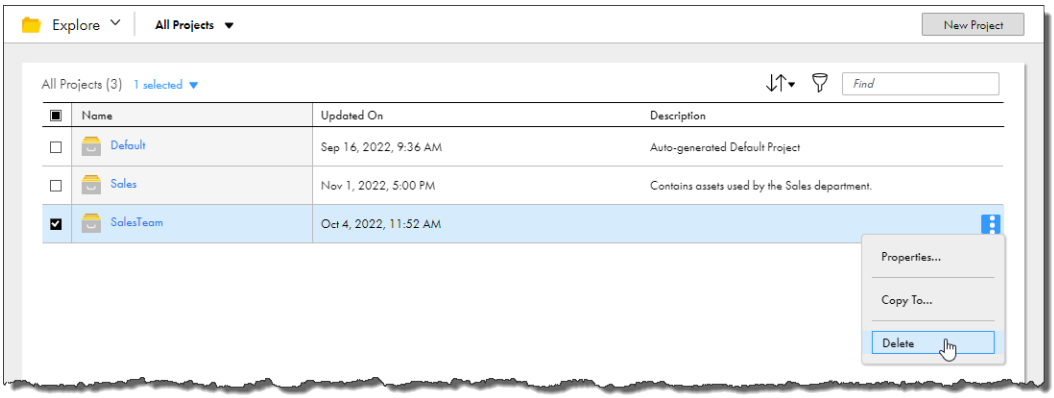
Deleting projects, folders, and assets

You can delete a project, folder, or asset 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 assets after you delete them.

You cannot delete an asset in the following situations:

- The asset is a task that is currently running.
- The asset is a mapping that is currently running.
- The asset is used by another asset. You must first delete the dependencies of the asset before you can delete the asset.
  For information about viewing asset dependencies, see "Asset dependencies" on page 11.
- The asset is a taskflow that was published, previously run from the taskflow designer, or associated with a schedule. You must first unpublish the taskflow, and then delete it.

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



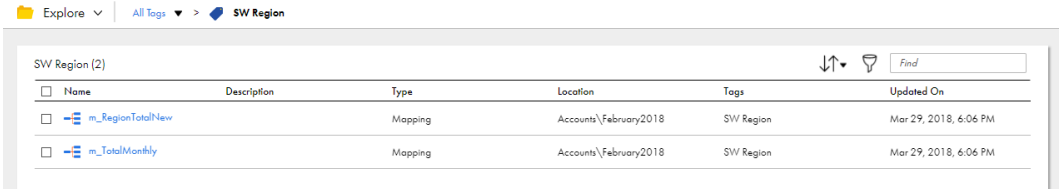
1. On the **Explore** page, navigate to the object that you want to delete.
2. In the row that contains the project, folder, or asset, click **Actions** and select **Delete**.

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 SW Region tag.

The following image shows this configuration:

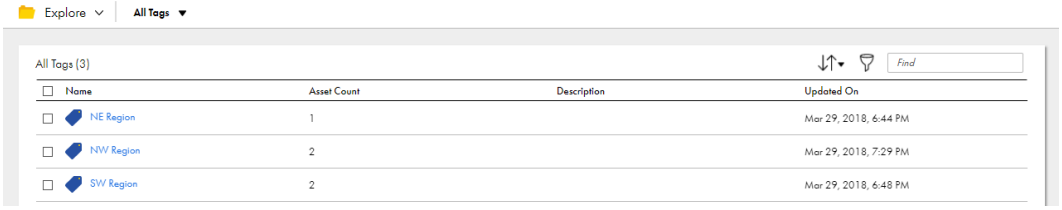


You can assign tags to all asset types. An asset can have up to 64 tags.

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:



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.

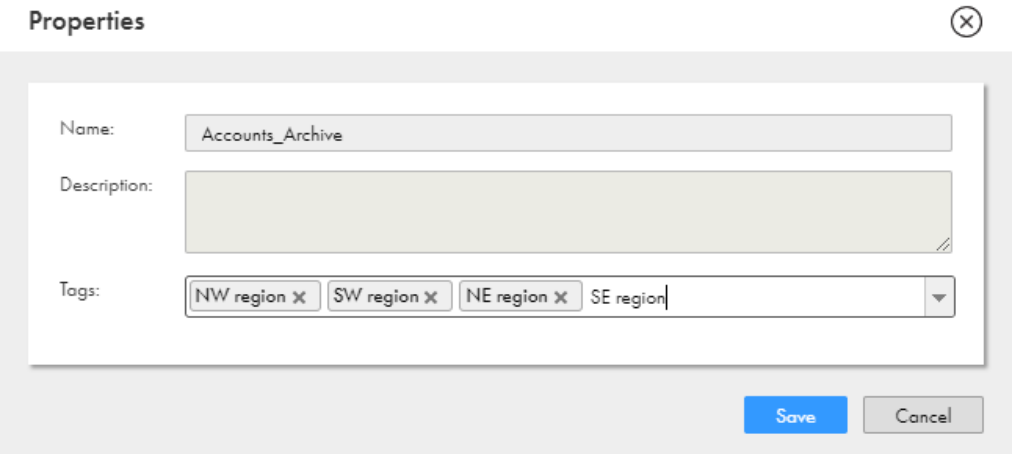
Perform the following steps to create multiple tags without assigning them to an asset:

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 the following characters in project, folder, asset, or tag names:

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

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



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

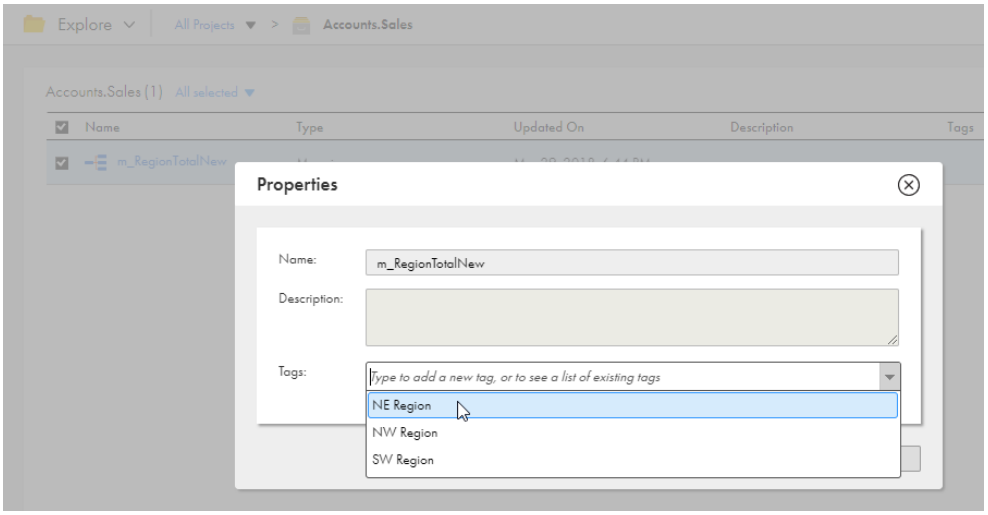
Assigning tags

You can assign a tag to one asset at a time or assign a tag to multiple assets at the same time. You can also assign multiple tags to one asset.

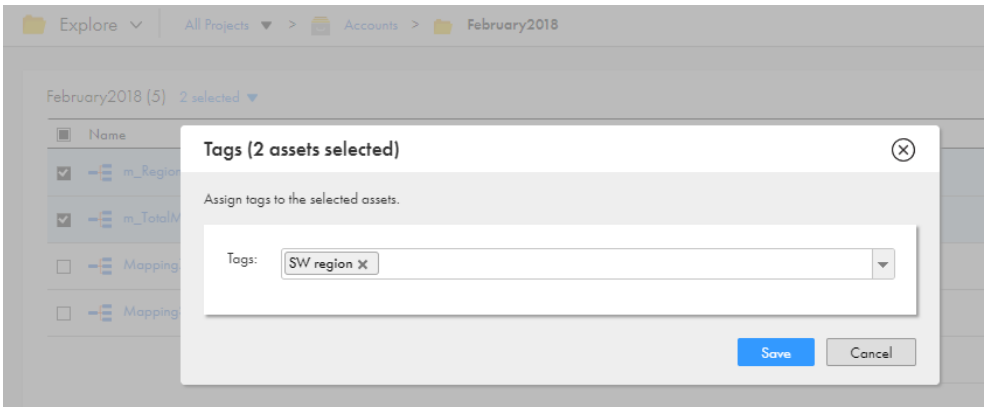
When you assign tags to an asset, you can choose an existing tag or create a new one.

1. On the **Explore** page, navigate to the asset or assets.

2. Perform one of the following tasks depending on whether you want to assign tags to one asset or assign tags to multiple assets at the same time.
   - To assign tags to one asset, in the row that contains the asset, click **Actions** and select **Properties**.



   - To assign tags to multiple assets at the same time, in the row for each asset, select the check box. After you have selected all of the assets, from the Selection menu, select **Tags**.



3. Select an existing tag or enter the name of a new tag.

   Continue adding tags or creating new tags until you have assigned all of the desired tags.
4. Click **Save**.

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.

You can also view object dependencies for a taskflow from the taskflow designer page. Open the taskflow, click **Actions**, and click **Show Dependencies**. The **Dependencies** page opens showing the **Uses** tab by default.

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

For example, a mapping task might use a connection, mapping, and runtime environment.

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

For example, a mapping might be used by one or more mapping tasks.

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:

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