



Informatica® Data Validation  
August 2023

# Asset Management

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Publication Date: 2023-08-08

# Table of Contents

- Preface ..... 4**
  - Informatica Resources. .... 4
    - Informatica Documentation. .... 4
    - Informatica Intelligent Cloud Services web site. .... 4
    - Informatica Intelligent Cloud Services Communities. .... 4
    - Informatica Intelligent Cloud Services Marketplace. .... 4
  - Data Integration connector documentation. .... 5
  - Informatica Knowledge Base. .... 5
  - Informatica Intelligent Cloud Services Trust Center. .... 5
  - Informatica Global Customer Support. .... 5
- Chapter 1: Project and asset management..... 6**
  - Copying projects, folders, and assets. .... 6
  - Moving folders and assets. .... 7
  - Deleting projects, folders, and assets. .... 7
  - Tags. .... 7
    - Creating tags. .... 8
    - Assigning tags. .... 9
    - Editing and deleting tags. .... 10
  - Asset migration. .... 10
    - Asset export. .... 10
    - Asset import. .... 11
  - Asset dependencies. .... 12
- Index..... 13**

# Preface

Read *Asset Management* to learn how to manage Data Validation projects, folders, and assets. Learn how to export assets, import assets, and view asset dependencies.

## 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.

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

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

## Project and asset management

You can manage projects and assets on the **Explore** page. The **Explore** page is an Informatica Intelligent Cloud Services feature that is available for most services. If you use multiple services, you might see projects, folders, and assets for all of your services 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.
- Migrate assets between organizations.

## 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.

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**.
3. To move multiple assets, select the assets, click **Selected** and select **Move To**, and then browse to the new location and click **Select**.

## 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.
- The asset is a test case used by a test suite.

**Note:** When you delete a test case, Data Validation deletes any jobs or reports associated with the test case.

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**.
3. To delete multiple assets, select the assets, click **Selected** 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:

Explore ▾ | All Tags ▾ > SW Region

SW Region (2) ↕ 🔍

<input type="checkbox"/>	Name	Description	Type	Location	Tags	Updated On
<input type="checkbox"/>	m_RegionTotalNew		Mapping	Accounts\February2018	SW Region	Mar 29, 2018, 6:06 PM
<input type="checkbox"/>	m_TotalMonthly		Mapping	Accounts\February2018	SW Region	Mar 29, 2018, 6:06 PM

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 (3) ↕ 🔍

<input type="checkbox"/>	Name	Asset Count	Description	Updated On
<input type="checkbox"/>	NE Region	1		Mar 29, 2018, 6:44 PM
<input type="checkbox"/>	NW Region	2		Mar 29, 2018, 7:29 PM
<input type="checkbox"/>	SW Region	2		Mar 29, 2018, 6:48 PM

## 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.

**Properties** ✕

Name:

Description:

Tags:



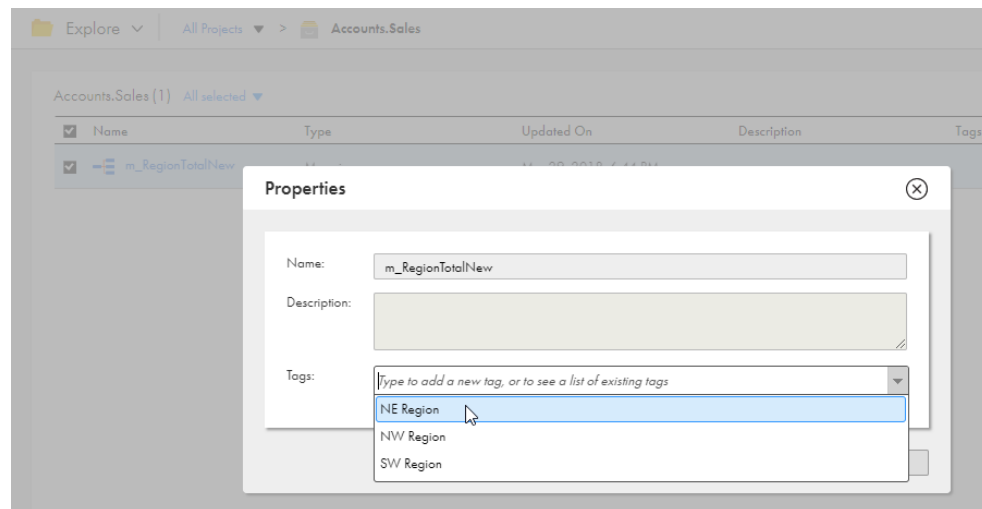
5. After you have entered the tags, delete the tags from the **Tags** field so that the asset does not become associated with the tags. The tags will still appear in the list of available tags.
6. Click **Save**.

## Assigning tags

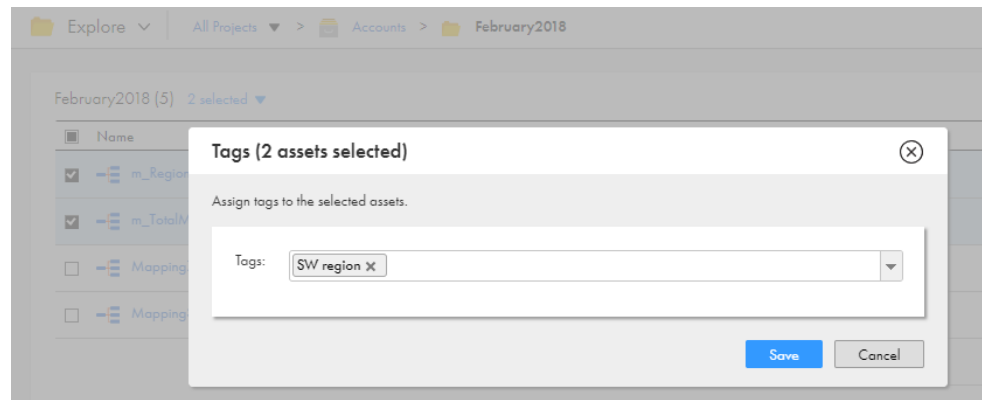
You can assign a tag to one asset at a time or assign a tag to multiple assets at the same time. You can also assign multiple tags to one asset.

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 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 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.

**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**.

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.

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.

### 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.

## 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.

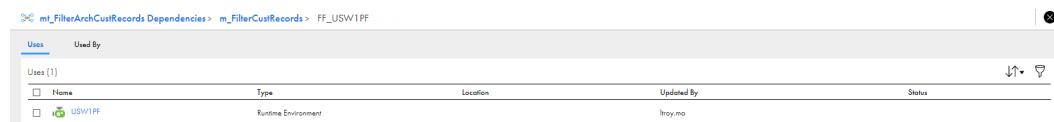
For example, a test suite uses test cases. A test case uses connections and an runtime environment.

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

For example, a test case might be used by a test suite.

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`:



mt_FilterArchCustRecords Dependencies > m_FilterCustRecords > FF_USW1PF				
Uses		Used By		
Uses (1)				
<input type="checkbox"/>	Name	Type	Location	Updated By
<input type="checkbox"/>	FF_USW1PF	Runtime Environment		lray.ma

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

# INDEX

## A

### assets

- assigning tags [9](#)
- copying [6](#)
- creating tags [8](#)
- deleting [7](#)
- exporting [10](#)
- importing [11](#)
- migrating between organizations [10](#)
- moving [7](#)
- tags [7](#)

## C

Cloud Application Integration community  
URL [4](#)

Cloud Developer community  
URL [4](#)

connections  
importing [11](#)

copying  
assets [6](#)  
folders [6](#)  
projects [6](#)

creating  
tags [8](#)

## D

Data Integration community  
URL [4](#)

deleting  
assets [7](#)  
folders [7](#)  
projects [7](#)  
tags [10](#)

dependencies  
viewing dependencies [12](#)

## E

editing  
tags [10](#)

Explore page  
tags [7](#)

exporting  
assets [10](#)  
projects [10](#)

exporting assets  
overview [10](#)

## F

### folders

- copying [6](#)
- deleting [7](#)
- importing [11](#)
- moving [7](#)

## I

importing  
assets [11](#)  
connections [11](#)  
name conflicts [11](#)  
projects [11](#)

importing assets  
overview [10](#)

Informatica Global Customer Support  
contact information [5](#)

Informatica Intelligent Cloud Services  
web site [4](#)

## M

maintenance outages [5](#)

migrating  
assets [10](#)

migration  
assets [11](#)  
of assets between organizations [10](#)

moving  
assets and folders [7](#)

## O

object migration [10](#)

## P

projects  
copying [6](#)  
deleting [7](#)  
exporting [10](#)  
importing [11](#)

## S

scheduling  
copying tasks and taskflows [6](#)

status  
Informatica Intelligent Cloud Services [5](#)

system status [5](#)

## T

tags

assigning [9](#)

creating [8](#)

deleting [10](#)

editing [10](#)

properties [10](#)

tasks

deleting [7](#)

trust site

description [5](#)

## U

upgrade notifications [5](#)

## W

web site [4](#)