Setting Up Metadata Manager
Abstract

This article includes Metadata Manager first-time setup information from the PowerCenter and Metadata Manager 8.6.1 and 8.6.0 user documentation. Get information about Metadata Manager source components and prerequisites and get information about creating services, creating users, and creating and loading resources.

Supported Versions

The information in this article supports the following PowerCenter and Metadata Manager versions:

- 8.6.1
- 8.6.0

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Metadata Manager Overview

Informatica Metadata Manager is a web-based metadata management application that you can use to browse and analyze metadata from disparate metadata repositories. Metadata Manager extracts metadata from application, business intelligence, data integration, data modeling, and relational metadata sources. It uses PowerCenter workflows to extract metadata from metadata sources and load it into a centralized metadata warehouse called the Metadata Manager warehouse.
The Metadata Manager Service is an application service that runs the Metadata Manager application in a PowerCenter domain. The Metadata Manager application manages access to metadata in the Metadata Manager repository. The following figure shows the Metadata Manager components managed by the Metadata Manager Service on a node in a PowerCenter domain:

The Metadata Manager Service manages the following components:

- **Metadata Manager application.** The Metadata Manager application is a web-based application. Use Metadata Manager to browse and analyze metadata from disparate source repositories. You can load, browse, and analyze metadata from application, business intelligence, data integration, data modeling, and relational metadata sources. Metadata Manager uses the Metadata Manager Agent to extract metadata from some metadata sources.
- **PowerCenter repository for Metadata Manager.** Contains the PowerCenter objects used by the Integration Service to load metadata into the Metadata Manager warehouse. The PowerCenter objects include sources, targets, sessions, and workflows.
- **Repository Service.** Manages connections to the PowerCenter repository for Metadata Manager.
- **Integration Service.** Runs the workflows in the PowerCenter repository to read from metadata sources and load metadata into the Metadata Manager warehouse.
- **Metadata Manager repository.** Contains the Metadata Manager warehouse and models. The Metadata Manager warehouse is centralized metadata warehouse that stores the metadata from metadata sources. Models define the metadata that Metadata Manager extracts from metadata sources. You can use a Reporting Service to run reports on the Metadata Manager Repository. You can link reference tables to objects in the Metadata Manager warehouse.
- **Metadata sources.** The application, business intelligence, data integration, data modeling, and database management sources that Metadata Manager extracts metadata from.

After you set up Metadata Manager, you can browse, search, analyze, and share metadata in the metadata warehouse.

**Setup Overview**

Before you can extract metadata, you must set up Metadata Manager. This article assumes that you already have a PowerCenter installation.
To set up Metadata Manager, complete the following tasks:

1. **Complete prerequisites.** Verify minimum system requirements, create a repository database and user account, and configure your web browser.

2. **Create a Repository Service and Integration Service.** You can use an existing Repository Service and Integration Service, or you can create them.

3. **Create the Metadata Manager Service.** Use the Administration Console to create the Metadata Manager Service.

4. **Create repository contents.** Use the Administration Console to create the Metadata Manager repository and PowerCenter repository contents.

5. **Enable services.** Enable the Metadata Manager Service and Integration Service.

6. **Create or assign users.** Create users and assign users privileges for the Metadata Manager Service, or assign existing users privileges for the Metadata Manager Service.

7. **Install the Metadata Manager Agent.** Install the Metadata Manager Agent to load resources that require it.

8. **Create and load resources.** Create and load resources to browse and search metadata.

**Note:** If you want to run Metadata Manager on a different machine than the machine on which your current PowerCenter installation runs, you can install PowerCenter on another machine and join the existing domain. Then, you can configure Metadata Manager on the new machine.

### Step 1. Complete Prerequisites

Before you begin, complete the following tasks:

- Verify minimum system requirements.
- Create a repository database and user account.
- Configure your web browser.
- Install Adobe Flash Player on the web browser.

### Verify Minimum System Requirements

The following table describes the minimum system requirements for the Metadata Manager Service:

<table>
<thead>
<tr>
<th>Component</th>
<th>Requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metadata Manager Repository</td>
<td>Database type:</td>
</tr>
<tr>
<td></td>
<td>• IBM DB2 UDB</td>
</tr>
<tr>
<td></td>
<td>• Microsoft SQL Server</td>
</tr>
<tr>
<td></td>
<td>• Oracle</td>
</tr>
<tr>
<td></td>
<td>• Sybase ASE</td>
</tr>
<tr>
<td>Web Browser</td>
<td>Microsoft Internet Explorer, Mozilla Firefox</td>
</tr>
<tr>
<td>Third-party Software</td>
<td>Adobe Flash Player 10 Plug-in</td>
</tr>
</tbody>
</table>

The following table describes the minimum system requirements for the Metadata Manager Agent:

<table>
<thead>
<tr>
<th>Processor</th>
<th>RAM</th>
<th>Disk Space</th>
<th>Operating System</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 CPU</td>
<td>512 MB</td>
<td>220 MB</td>
<td>Windows 2000 / 2003 / Vista</td>
</tr>
</tbody>
</table>

The following table describes the minimum and recommended system requirements for a Metadata Manager instance:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Minimum</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU or core</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>RAM</td>
<td>2 GB</td>
<td>4 GB</td>
</tr>
</tbody>
</table>
### Requirement | Minimum | Recommended
--- | --- | ---
Metadata Manager warehouse tablespace | Up to 5x the size of the metadata in the source system (for PowerCenter) | 
Database temporary tablespace | At least 5 GB. You may need more depending on the number of resources you load into the Metadata Manager warehouse. | At least 10 GB. You may need more depending on the number of resources you load into Metadata Manager warehouse.
Search index file size | Two or three times the size of the metadata in the source system (for PowerCenter) | 
Processor | 32-bit | 64-bit

### Create a Repository Database and User Account
Set up a database and user account for the Metadata Manager repository database. Use the following rules and guidelines when you set up the user account for the Metadata Manager repository:

- The database user account must have permissions to create and drop tables, indexes, and views, and to select, insert, update, and delete data from tables.
- Use 7-bit ASCII to create the password for the account.
- If you use Oracle 10.2 for a repository database, grant Resource permission to the user. Grant Resource permission independent of the Connect privilege in Oracle 10.2.
- If you use Sybase for a Metadata Manager repository, grant the dtm_tm_role to the user. Do not grant the sa_role to the user. If you grant the sa_role to the user, if you grant the sa_role, the Metadata Manager Service reports that the repository has no content.

### Configure Web Browser
To set up the web browser to access Metadata Manager, configure the following options in the web browser:

- **Pop-up blocking utility.** To display the Data Analyzer and Metadata Manager pages, disable any pop-up blocking utility on your browser.
- **Scripting and ActiveX.** Internet Explorer requires the Active scripting, Allow paste operations, Run ActiveX controls and plug-ins, and Script ActiveX controls marked safe for scripting controls enabled. To configure the controls, click Tools > Internet Options > Security > Custom level.
- **TLS 1.0.** If you configure HTTPS for the Administration Console on a domain that runs on 64-bit AIX, Internet Explorer requires TLS 1.0. To enable TLS 1.0, click Tools > Internet Options > Advanced. The TLS 1.0 setting is listed below the Security heading.
- **Browser cache.** Set the browser cache options in Internet Explorer to ensure that Metadata Manager properly caches pages and applies user privileges. Click Tools > Internet Options. Under Browsing history, click Settings. Under Check for newer versions of stored pages, select Every time I visit the webpage.
- **Javascript.** Enable Javascript to use Firefox.
- **Context menus.** Set the context menu options in Firefox to ensure that Metadata Manager properly displays the shortcut menu Click Tools > Options. On the Content tab, click Advanced next to the Enable JavaScript option. In the Advanced JavaScript Settings dialog box, select Disable or replace context menus.

### Install Adobe Flash Player on the Web Browser
Metadata Manager requires the Adobe Flash Player plug-in to properly display data lineage. Get the Flash plug-in from the following web site:

http://www.adobe.com/products/flashplayer/
Step 2. Create Repository Service and Integration Service

You can use an existing Repository Service and Integration Service, or you can create them. If you want to create the application services to use with Metadata Manager, create the services in the following order:

- **Repository Service.** Create a Repository Service, but do not create contents. Start the Repository Service in exclusive mode.
- **Integration Service.** Create the Integration Service. The service will not start because the Repository Service does not have content. You enable the Integration Service after you create and configure the Metadata Manager Service.

Step 3. Create the Metadata Manager Service

To create a Metadata Manager Service, complete the following steps:

1. In the Administration Console, click Create > Metadata Manager Service. The Create New Metadata Manager Service page appears.
2. Enter the following values for the Metadata Manager Service properties:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Name</td>
<td>Name of the Metadata Manager Service. The name is not case sensitive and must be unique within the domain. The name cannot contain spaces, include carriage returns or tabs, exceed 79 characters, or contain the following characters: `/ * ? &lt; &gt;</td>
</tr>
<tr>
<td>Location</td>
<td>Domain and folder where the service is created. Click Select Folder to choose a different folder. You can move the Metadata Manager Service after you create it.</td>
</tr>
<tr>
<td>License</td>
<td>License object that allows use of the service. To apply changes, restart the Metadata Manager Service.</td>
</tr>
<tr>
<td>Node Setup</td>
<td>Node in the PowerCenter domain that the Metadata Manager Service runs on.</td>
</tr>
<tr>
<td>Associated Integration Service</td>
<td>Integration Service used by Metadata Manager to load metadata into the Metadata Manager warehouse</td>
</tr>
<tr>
<td>Repository User Name</td>
<td>User account for the PowerCenter repository. Use the repository user account you configured for the Repository Service.</td>
</tr>
<tr>
<td>Repository Password</td>
<td>Password for the PowerCenter repository user.</td>
</tr>
<tr>
<td>Security Domain</td>
<td>Security domain that contains the user account you configured for the Repository Service.</td>
</tr>
<tr>
<td>Database Type</td>
<td>Type of database for the Metadata Manager repository. To apply changes, restart the Metadata Manager Service.</td>
</tr>
<tr>
<td>CodePage</td>
<td>Metadata Manager repository code page. The Metadata Manager Service and Metadata Manager application use the character set encoded in the repository code page when writing data to the Metadata Manager repository. <strong>Note:</strong> You must use the same code page for the Metadata Manager repository, the Integration Service, and any database management, PowerCenter, and Data Analyzer resources you want to load into the Metadata Manager warehouse.</td>
</tr>
<tr>
<td>ConnectString</td>
<td>Native connect string to the Metadata Manager repository database. The Metadata Manager Service uses the connect string to create a connection object to the Metadata Manager repository in the PowerCenter repository. To apply changes, restart the Metadata Manager Service.</td>
</tr>
<tr>
<td>DBUser</td>
<td>User account for the Metadata Manager repository database. Set up this account using the appropriate database client tools. To apply changes, restart the Metadata Manager Service.</td>
</tr>
<tr>
<td>DBPassword</td>
<td>Password for the Metadata Manager repository database user. Must be in 7-bit ASCII. To apply changes, restart the Metadata Manager Service.</td>
</tr>
</tbody>
</table>
### Property Description

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tablespace Name</td>
<td>Tablespace name for Metadata Manager repositories on IBM DB2. When you specify the tablespace name, the Metadata Manager Service creates all repository tables in the same tablespace. You cannot use spaces in the tablespace name. To improve repository performance on IBM DB2 EEE repositories, specify a tablespace name with one node. To apply changes, restart the Metadata Manager Service.</td>
</tr>
<tr>
<td>Database Hostname</td>
<td>Host name for the Metadata Manager repository database.</td>
</tr>
<tr>
<td>Database Port</td>
<td>Port number for the Metadata Manager repository database.</td>
</tr>
<tr>
<td>SID/Service Name</td>
<td>Indicates whether the Database Name property contains an Oracle full service name or SID.</td>
</tr>
<tr>
<td>Database Name</td>
<td>Full service name or SID for Oracle databases. Service name for IBM DB2 databases. Database name for Microsoft SQL Server or Sybase ASE databases.</td>
</tr>
<tr>
<td>Additional JDBC Parameters</td>
<td>Additional JDBC options. For example, you can use this option to specify the location of a backup server if you are using a database server that is highly available such as Oracle RAC.</td>
</tr>
<tr>
<td>Port Number</td>
<td>Port number the Metadata Manager application runs on. Default is 10250. If you configure HTTPS, make sure that the port number one less than the HTTPS port is also available. For example, if you configure 10255 for the HTTPS port number, you must make sure 10254 is also available. Metadata Manager uses port 10254 for HTTP.</td>
</tr>
<tr>
<td>URLScheme</td>
<td>Indicates the security protocol that you configure for the Metadata Manager application: HTTP or HTTPS.</td>
</tr>
<tr>
<td>Keystore File</td>
<td>Keystore file that contains the keys and certificates required if you use the SSL security protocol with the Metadata Manager application. Appears if you select the HTTPS URL scheme.</td>
</tr>
<tr>
<td>Keystore File Password</td>
<td>Password that you created while creating the keystore file. Appears if you select the HTTPS URL scheme.</td>
</tr>
</tbody>
</table>

3. Click OK.
4. The following message appears:
   
   The Metadata Manager Service was created successfully.
5. Click Close.

### Configure the Metadata Manager Service

Depending on your setup, you may need to configure the following properties after you create the Metadata Manager Service:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Heap Size</td>
<td>Amount of RAM in megabytes allocated to the Java Virtual Machine (JVM) that runs Metadata Manager. Use this property to increase the performance of Metadata Manager. Default is 512. For example, you can use this value to increase the performance of Metadata Manager during indexing.</td>
</tr>
<tr>
<td>Maximum Catalog Child Objects</td>
<td>Number of child objects that appear in the Metadata Manager metadata catalog for any parent object. The child objects can include folders, logical groups, and metadata objects. Use this option to limit the number of child objects that appear in the metadata catalog for any parent object. Default is 100.</td>
</tr>
</tbody>
</table>
| Maximum Concurrent Resource Load | Maximum number of resources that Metadata Manager can load simultaneously. If a resource load fails but can be resumed, Metadata Manager keeps the resource load in the queue until the timeout interval is exceeded. Default is 3. Maximum is 5.  
   
   **Note:** Metadata Manager includes any resumable load in the number of concurrent loads. |
### Property Description

**Timeout Interval**

Amount of time in minutes that Metadata Manager holds a failed resource load in the load queue. If you do not resume a failed load within the timeout period, Metadata Manager removes the resource from the load queue.

Default is 30.

**ODBC Connection Mode**

Connection mode the Integration Service uses to connect to metadata sources and the Metadata Manager repository when loading resources. You can select one of the following options:

- **True.** The Integration Service uses ODBC.
- **False.** The Integration Service uses native connectivity.

You must set this property to True if the Integration Service runs on a UNIX machine and you want to extract metadata from or to load metadata to a Microsoft SQL Server database or if you use a Microsoft SQL Server database for the Metadata Manager repository.

### Note

You can configure these properties and additional properties in the PowerCenter Administration Console. For more information, see the *PowerCenter Administrator Guide*.

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### Step 4. Create Repository Contents

Use the Administration Console to create the Metadata Manager repository and PowerCenter repository contents.

When you create the Metadata Manager repository, you create the Metadata Manager warehouse tables and import models for metadata sources.

When you create the PowerCenter repository contents, the Service Manager restores PowerCenter objects, including sessions and workflows, into a folder called Metadata Load in the PowerCenter repository.

**To create the Metadata Manager repository:**

1. In the Navigator, select the Metadata Manager Service for which the Metadata Manager repository has no content.
2. Click Actions > Create Contents.
   
   The page displays the option to create content.
3. Optionally, choose to restore the PowerCenter repository. You can restore the PowerCenter repository if the PowerCenter Repository Service runs in exclusive mode and does not contain contents.
4. Click OK.
   
   The activity log displays the results of the create contents operation.

### Step 5. Enable Services

Enable the Metadata Manager Service and Integration Service.

**Enable the Metadata Manager Service**

Use the Administration Console to enable the Metadata Manager Service. The Repository Service for Metadata Manager must be enabled and running before you can enable the Metadata Manager Service.

When you enable the Metadata Manager Service, the Service Manager starts the Metadata Manager application on the node where the Metadata Manager Service runs. If the PowerCenter repository does not contain the Metadata Load folder, the Administration Console imports the metadata objects required by Metadata Manager into the PowerCenter repository.

**To enable the Metadata Manager Service:**

1. In the Navigator of the Administration Console, select the Metadata Manager Service.
2. Click Enable.
Enable the Integration Service
Use the Administration Console to enable the Integration Service.

To enable the Integration Service:
1. In the Navigator of the Administration Console, select the Integration Service.
2. Click Enable.
   The Service Manager enables the service.

Step 6. Create or Assign Users
Create and manage Metadata Manager users and groups and configure privileges and roles in the PowerCenter Administration Console.

Create users and assign them privileges for the Metadata Manager Service, or assign existing users privileges for the Metadata Manager Service. A user with an account in the PowerCenter domain can log in to Metadata Manager after you assign privileges.

Complete the following tasks in the Administration Console for users and groups:

- **Create and configure users.** Create and configure Metadata Manager user accounts.
- **Create and configure groups.** Create and configure groups for Metadata Manager.
- **Configure privileges and roles.** Configure the Metadata Manager privileges and roles. The tasks that users and groups can perform in Metadata Manager depend on the privileges and roles you assign to users and groups.

The Service Manager in the PowerCenter domain stores users and groups in the domain configuration database and copies the list of users and groups to the Metadata Manager repository. The Service Manager periodically synchronizes the list of users and groups in the repository with the users and groups in the domain configuration database.

For more information about configuring users, groups, privileges, and roles, see the *PowerCenter Administrator Guide*.

Step 7. Install the Metadata Manager Agent
The Metadata Manager Agent is a lightweight program that Metadata Manager uses to access metadata sources and extract source metadata. The metadata sources include source files or source repositories for business intelligence and data modeling tools.

The Metadata Manager Agent only runs on a Windows machine. By default, the Metadata Manager Agent runs on the nodes where the Metadata Manager Service runs. It uses one port number higher than the Metadata Manager Service. You can configure the port number in the PowerCenter Administration Console. A separate instance of the Metadata Manager Agent runs for each Metadata Manager Service on a node. The agent is located in the following directory:

```
<PowerCenter installation directory>\server\tomcat\mmagentapps\mmagent\n```

Install the Metadata Manager Agent separately for the following resource types:

- **Business intelligence or data modeling sources.** Install the agent on the machine where the client for the business intelligence or data modeling tool is located. The client must be able to connect to the source repository or source file. If the Metadata Manager Service runs on the same machine as the business intelligence or data modeling client, you do not need to install the Metadata Manager Agent.
  
  The Metadata Manager Agent extracts the metadata from the source repository or source file.

- **Resources that use metadata file sources.** Install the agent on a Windows machine if the source files are on a machine other than the one that runs the Metadata Manager Service. For example, you can install the agent on the machine where the source files for data modeling tools are located.
  
  The Metadata Manager Agent extracts metadata from the metadata source file.

**Note:** The Metadata Manager Agent does not run on a UNIX machine. You can download the Metadata Manager Agent to install on a separate machine if you run the Metadata Manager Service on a UNIX machine.
Before You Install

Before you install the Metadata Manager Agent, verify that the user account you use to install the agent is a member of the Windows administrator group on the machine where you install the agent. The user account must have the Log on as a service and Act as operating system permissions.

Install the Metadata Manager Agent

To install the Metadata Manager Agent:

1. Log in to Metadata Manager. On the Load page, click Download Agent Installer.
2. The browser prompts you to download MMAgentInstaller.exe.
3. Save the file to your hard drive.
4. Copy the installer to the machine where you want to install the Metadata Manager Agent.
5. Double-click MMAgentInstaller.exe to begin the installation. The Introduction window appears.
6. Click Next. The Agent Configuration page appears.
7. Configure the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTTP port</td>
<td>Port used by Metadata Manager to communicate with the Metadata Manager Agent. Default is 19983.</td>
</tr>
<tr>
<td>Agent home</td>
<td>Directory where you want to install the Metadata Manager Agent. Default is &lt;current version&gt;.</td>
</tr>
</tbody>
</table>

You can use the default installation directory or click Browse to select a directory.

8. Click Next. The HTTPS Configuration window appears.

**Note:** The mode of the Metadata Manager Agent you install must be the same security mode as the Metadata Manager Service. You must generate the keystore file to use with HTTPS security mode.

9. If you do not want to use HTTPS, skip to step 11.
   -or-
   If you want to use HTTPS, you can use the same keystore file as the Metadata Manager Service, or you can use another keystore file.

10. Enter the following information based on your selection:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTTPS Port Number</td>
<td>Port used by the node to communicate between the Metadata Manager Agent and the Metadata Manager application.</td>
</tr>
<tr>
<td>Keystore Password</td>
<td>A plain-text password for the keystore file. If you use the same keystore file as the Metadata Manager Service, use the same keystore file password. Otherwise, you can use any password.</td>
</tr>
<tr>
<td>Keystore File Location</td>
<td>A file that includes private or public key pairs and associated certificates. You can use a self-signed certificate or a certificate signed by a certificate authority. If you use a different keystore file than the Metadata Manager Service, you must import the Metadata Manager Agent keystore certificate with the Metadata Manager Service keystore file.</td>
</tr>
</tbody>
</table>

11. Click Next. The Pre-Installation Summary window appears.
12. Verify the installation options and click Install.
The installer completes the installation and installs the Metadata Manager Agent as a Windows service named Metadata Manager Agent <version>.

13. Click Done.

The Metadata Manager Agent starts as a service after you install it. You can stop or start the Metadata Manager Agent from the Windows Start menu.

**After You Install**

After you install the Metadata Manager Agent, complete the following tasks:

- Verify connectivity.
- Enable the Metadata Manager Agent to interact with the desktop.
- Optionally, increase the Java Virtual Manager (JVM) memory.

**Verify Metadata Manager Agent Connectivity**

The Metadata Manager Agent uses HTTP to communicate with the Metadata Manager Service when you load a resource. After you install the Metadata Manager Agent, verify that the agent and the Metadata Manager Service can communicate.

To verify that the agent and the Metadata Manager Service can communicate, complete the following steps:

1. Run the following command on the machine where the Metadata Manager Agent runs:
   `telnet <Metadata Manager Service machine name> 80`
2. Run the following command on the machine where the Metadata Manager Service runs:
   `telnet <Metadata Manager Agent machine name> <Metadata Manager Agent port>`

If one of the commands fails, make sure that the Metadata Manager Service and the Metadata Manager Agent service are available. If the machines are separated by a firewall, contact the administrator to make the port numbers available.

**Enable the Metadata Manager Agent to Interact with the Desktop**

For Business Objects, Microstrategy, or ERwin 7.x Data Modeler (Model Manager), you must enable the Metadata Manager Agent to interact with the desktop.

To enable the Metadata Manager Agent to interact with the desktop:

1. From the Start Menu, click Administrative Tools > Services.
2. Double-click Metadata Manager Agent.
   The Metadata Manager Agent <Version> Properties dialog box appears.
3. Click the Log On tab.
4. Under Local System Account, click Allow service to interact with desktop.
5. Click OK.

**Increase Java Virtual Machine Memory**

If you want to load a large amount of metadata for a resource type that uses the Metadata Manager Agent, optionally increase the Java Virtual Machine (JVM) heap size. For example, increase the JVM heap size to 1 GB if you load a large universe from Business Objects and receive the following error:

> Not enough storage is available to process this command.

To increase the JVM heap size:

1. Open MIRSetup.xml from the following location in a text editor:
   `<Metadata Manager Agent installation directory>\conf`
2. Add the following option to the <RunTime> section:
   `<Options>-Xmx1024m</Options>`
3. Save MIRSetup.xml.
4. Restart the Metadata Manager Agent service.
Step 8. Create and Load Resources

Use the Metadata Manager Load page to complete the following tasks:

- **Create resources.** Resources represent metadata sources in Metadata Manager. You create a resource before you can load metadata into the Metadata Manager warehouse.
- **Load resources.** When you load a resource, Metadata Manager uses the connection information for the resource to load metadata, extract profiling information, and index the resource.

**Create Resources**

Use the Resource Wizard on the Load page to configure the following resource properties:

- **Resource name and description.** Name for the resource and an optional description.
- **Direct source connections.** Source repositories from which Metadata Manager extracts metadata for some resource types.
- **Metadata source files.** Metadata files from which Metadata Manager extracts metadata for some resource types.
- **Parameters.** Parameters that control how Metadata Manager extracts metadata from the metadata source.
- **Schedules.** Schedules that control when Metadata Manager loads metadata for a resource.

After you create a resource, configure connection assignments. Connection assignments are connections between two metadata source repositories.

**Load Resources**

Metadata Manager loads metadata, extracts profiling information, and indexes the resource.

**To load a resource:**

1. On the Load page, select the resource you want to load in the Resource List.
2. Click the Load icon.
   -or-
   Right-click and select Load.
   Metadata Manager adds the resource to the load queue and starts the load process. Metadata Manager pauses the load if it finds an unassigned connection to another metadata source.
   You can configure the connection assignments in the Resource Properties section and resume the resource load, or you can resume the resource load without configuring the assignments.
3. To cancel the load, click the Cancel icon.
4. Click the Load Monitor icon to view the load progress.

When the resource load completes, Metadata Manager updates the Last Status Date and Last Status for the resource. You can use the Load Monitor to view more information about the resource load.

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