Configuring a Microstrategy Resource in Metadata Manager 9.5.0
Abstract

This article shows how to create and configure a Microstrategy resource in Metadata Manager to extract metadata from Microstrategy.

Supported Versions

- Metadata Manager 9.5.0

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Overview

Microstrategy is a business intelligence tool that includes performance management, dashboards, analysis, and reporting capabilities.

You can create and configure a Microstrategy resource to extract metadata from Microstrategy. Metadata Manager extracts schema and reporting metadata from Microstrategy.

Configuring Microstrategy

Before you create a Microstrategy resource, you must configure the metadata source. If you do not correctly configure the metadata source, the metadata load can fail or the metadata can be incorrectly loaded in the Metadata Manager warehouse.

To configure Microstrategy, complete the following tasks:

- Install the Metadata Manager Agent.
- Enable the Metadata Manager Agent to interact with the desktop.
- Configure privileges.
- Configure multiple projects (optional).
Install the Metadata Manager Agent

The Metadata Manager Agent is a program that Metadata Manager uses to access metadata sources and extract source metadata. By default, the Metadata Manager Agent runs on the nodes where the Metadata Manager Service runs.

The Metadata Manager Agent and the Microstrategy client must be on the same machine. The client must be able to connect to the source repository. If the Microstrategy client is not on the same machine as the Metadata Manager Service, install the Metadata Manager Agent on the same machine as the client.

Enable the Metadata Manager Agent to Interact with the Desktop

If you run the Metadata Manager Agent as a service, you must enable the Metadata Manager Agent to interact with the desktop for the following metadata sources:

- Business Objects
- Microstrategy
- ERwin 7.x and ERwin 8.x

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

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

Configure Privileges

The Microstrategy project user account for which you provide the user name and password must have the Bypass All Object Security Access Checks administration privilege. Set this privilege in the Microstrategy Desktop client tool.

**Note:** Although Microstrategy allows you to connect to a project source using database or network authentication, Metadata Manager uses project source authentication.

Configure Multiple Projects in the Same Metadata File

Microstrategy projects can be from different project sources. You can load multiple Microstrategy projects under the same Microstrategy resource. You must provide the user name and password for each project source. Project names must be unique.

When you configure the Microstrategy resource, you specify the project source, project, user name, and password for each project.

Creating a Microstrategy Resource

Before you create a Microstrategy resource, configure the Microstrategy source.

To create a Microstrategy resource:

1. On the **Load** tab, click **Actions > New Resource**.
   
   The **Resource Selection** window appears.
2. Click **Business Intelligence > Microstrategy**.
3. Click **Next**.
   
   The **Properties** page appears.
4. Enter the following information:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name for the resource. The resource appears in the Resources panel with this name. The name must be unique and have from 1 through 256 characters. It cannot include the following characters: `\ / : * ? &quot; &lt; &gt;</td>
</tr>
<tr>
<td>Description</td>
<td>Description for the resource. Description cannot exceed 4,000 characters.</td>
</tr>
</tbody>
</table>

5. Click **Next**.
   The **Configuration** page appears.

6. Configure the following resource properties:

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent URL</td>
<td>Host name and port number of the Metadata Manager Agent. You can use the Metadata Manager Agent installed on any machine.</td>
</tr>
<tr>
<td>Source System Version</td>
<td>Version of the data source that you want to connect to. Some Microstrategy source versions are deprecated and will become obsolete. Use the supported versions to load metadata from Microstrategy. You can still create, edit, and load resources from the deprecated versions. However, Informatica cannot help you resolve an issue encountered on a deprecated version.</td>
</tr>
<tr>
<td>Version</td>
<td>Version of Microstrategy. Select one of the following values:</td>
</tr>
<tr>
<td></td>
<td>- Auto detect</td>
</tr>
<tr>
<td></td>
<td>- 9.0.0 to 9.2.1</td>
</tr>
<tr>
<td></td>
<td>- 8.0.0 to 8.1.2</td>
</tr>
<tr>
<td></td>
<td>- 7.5.2</td>
</tr>
<tr>
<td></td>
<td>- 7.5.0</td>
</tr>
<tr>
<td></td>
<td>- 7.0</td>
</tr>
<tr>
<td></td>
<td>Default is Auto detect.</td>
</tr>
<tr>
<td>Project Source</td>
<td>Name of the project source you want to connect to. A project source is a connection to a repository that is located on a local or remote Intelligence Server. The Intelligence Server connects to a data warehouse and contains a number of metadata projects that operate on the data warehouse.</td>
</tr>
<tr>
<td>Login User</td>
<td>The user name to connect to the project source.</td>
</tr>
<tr>
<td>Login Password</td>
<td>The password used to connect to the project source.</td>
</tr>
<tr>
<td>Default Language</td>
<td>The language you want to use. Microstrategy 9.x supports multiple languages. Select one of the following values:</td>
</tr>
<tr>
<td></td>
<td>- Chinese (Simplified)</td>
</tr>
<tr>
<td></td>
<td>- Chinese (Traditional)</td>
</tr>
<tr>
<td></td>
<td>- English (United States)</td>
</tr>
<tr>
<td></td>
<td>- French (France)</td>
</tr>
<tr>
<td></td>
<td>- German (Germany)</td>
</tr>
<tr>
<td></td>
<td>- Italian (Italy)</td>
</tr>
<tr>
<td></td>
<td>- Japanese</td>
</tr>
<tr>
<td></td>
<td>- Korean</td>
</tr>
<tr>
<td></td>
<td>- Portuguese (Brazil)</td>
</tr>
<tr>
<td></td>
<td>- Spanish (Spain)</td>
</tr>
<tr>
<td></td>
<td>- Swedish (Sweden)</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Data model Tables design level</td>
<td>The design level of the imported tables. Specify one of the following values: - Physical. A table appears in the physical view of the model. - Logical and Physical. A table appears in the logical view and in the physical view of the model.</td>
</tr>
<tr>
<td>Data model reverse engineer Joins</td>
<td>Transforms SQL joins of a model into foreign key relationships. Specify one of the following values: - True. Transform SQL joins into foreign key relationships. - False. Do not transform SQL joins into foreign key relationships. Default is False.</td>
</tr>
<tr>
<td>Dimensional model reverse engineering</td>
<td>Reverse engineer dimensional objects into relational objects. You can reverse engineer the following properties: - The dimension name, description, and role (fact or dimension) to the underlying table. - The attribute or measure name, description, and datatype to the underlying column. Note: These properties are transferred if there is a direct match between the dimensional object and the relational object. Specify one of the following options: - Disabled. Do not reverse engineering dimensional objects into relational objects. - Enabled (business names). Reverse engineer and migrate the dimension business names to the relational names. - Enabled (physical names). Reverse engineer and migrate the dimension physical names to the relational names. - Enabled (preserve names). Reverse engineer the dimensional objects, but retain the relational names.</td>
</tr>
<tr>
<td>Incremental Import</td>
<td>Choose to incrementally load recent changes to the metadata or load complete metadata. You can specify one of the following values: - True. Do an incremental load changes to the metadata. - False. Do a complete load of the metadata.</td>
</tr>
<tr>
<td>Auto Assign Connections</td>
<td>Metadata Manager configures connection assignments to relational database resource types during the resource load. If you disable this option, you must configure connection assignments in the resource properties after you create the resource.</td>
</tr>
<tr>
<td>Projects</td>
<td>The name of the project that you want to connect to in the selected project source. Separate multiple project names with a semi colon.</td>
</tr>
</tbody>
</table>

7. Click **Test Connection** to test the connection to the source system and validate the Metadata Manager Agent URL.

   If Metadata Manager cannot connect to the source system or validate the agent URL, an error message appears. Correct any error and test the connection again.

8. Click **Next**.

   The **Schedules** window appears.

9. To add a schedule, select **Attach a Schedule** and select a schedule in the Schedule list.

   If you have not created a schedule, you can assign a schedule to a resource after you create the resource.

10. Click **Finish**.

    The resource appears in the Resources panel on the Load tab.
Reference

After you create and load a Microstrategy resource, you can view and run data lineage on the metadata objects that Metadata Manager extracted.

Objects Extracted

Metadata Manager extracts schema and reporting metadata. In Microstrategy Desktop, you can hide objects, such as folders, attributes, facts, and logical tables. By default, Metadata Manager extracts hidden objects stored in Microstrategy.

Metadata Manager extracts the following reporting metadata object types:

- Column
- Consolidation
- Consolidation Element
- Custom Group
- DesignPackage Folder
- Dimension Attribute
- Dimension Fact
- Dimension Metric
- Dimension Sub Total
- Dimension Attribute Attribute Form
- Filter
- Folder Folder
- Folder Project
- Hidden DesignPackage Folder
- Hidden Folder
- Hierarchy
- Logical Table
- Lookup
- Measure Fact
- Measure Metric
- Project Metric
- Project Metrics
- Prompt
- Prompt Answer
- Report Document
- Report Field2
- Report Graph
- Report HTML Document
- Report Page
- Report Page Body
- Report Page Footer
- Report Page Header
Creation and Modification Date of Classes

Metadata Manager displays the source creation date and the source modified date for most Microstrategy classes. Metadata Manager does not display these dates for the following classes:

- MicrostrategyDataType
- MicrostrategyReportField
- MicrostrategyGraph
- MicrostrategySchemaJoin
- MicrostrategyGrid
- MicrostrategyReportObjectDetail
- MicrostrategyReportObject

Lineage Between Logical Tables

Metadata Manager does not display data lineage between logical tables defined in Microstrategy and the underlying database tables. Metadata Manager cannot parse the SQL query used to define the logical tables in Microstrategy. As a result, Metadata Manager cannot determine lineage between the logical table and the database table.

Metadata Catalog

The metadata catalog does not display attributes and facts the same way Microstrategy does. Microstrategy contains a classifier object for attributes, but not for facts. Metadata Manager displays a classifier for Microstrategy facts to remain consistent with the display of attributes.
The following figure shows how Microstrategy and Metadata Manager display attributes and facts:

**Expressions**

If you define multiple expressions for the same metric or attribute, Metadata Manager may not display the metric or attribute expression in the metadata catalog.

The following example shows a metric with multiple expressions, where col1 can be found in table T1 and T2:

\[ m = \text{col1} \]

**Report Hierarchies**

If you include a hierarchy object in a Microstrategy report, Metadata Manager does not load the hierarchy object.

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