

Metadata Management Tutorial

BI Tool Integration
Using Meta Integration® Metadata
Management (MIMM)

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1 Introduction

Meta Integration® Metadata Management (MIMM) provides two primary user interfaces for access, analysis, management and administration. The Metadata Manager UI provides a more technical interface for those who are managers of the metadata or administrators of the repository. While it is a very important UI and provides functions that are not available otherwise, it is actually the least used of the two.

Instead, the vast majority of users will generally only see the Metadata Explorer UI. This UI is designed for optimized search, analysis and reporting, as well as more control over the context (configuration version) presented to given users. In particular, users who are assigned to the Metadata Explorer UI are also assigned a single configuration version as context for search and analysis.

In addition to being the most heavily used UI, the Metadata Explorer UI is also quite customizable. XML files on the application server machine may be edited to control the browse and search categories, action icons available in lists and single element pages. These UI setups then may be associated with specific configurations, allow one to control the user experience and complete Metadata Explorer UI presentation depending upon the role of the user using the product.

In addition, both UI's allow for customization of their respective home pages and of the general UI properties.

Disclaimer

Some of the features detailed in this document may not apply and/or be available for the particular Meta Integration® Metadata Management (MIMM) edition you may have.

1.1 Metadata Explorer UI customization

Located in the the `conf\template\resources` folder within the installation on the application server machine, the `MetadataExplorer.xml` file contains complete XML providing definition of the behavior of the Metadata Explorer UI. This is where we will include the new Environment for calls via URL.

To activate it (so that the UI is controlled by your settings) you must copy the file from `conf\template\resources\` to `conf\resources\`.

1.1.1 Metadata Explorer UI URL Customization

URLs in the Metadata Explorer UI are completely reusable. You may bookmark a page using the browser and it will be a live and valid link as long as that objects exists in that configuration.

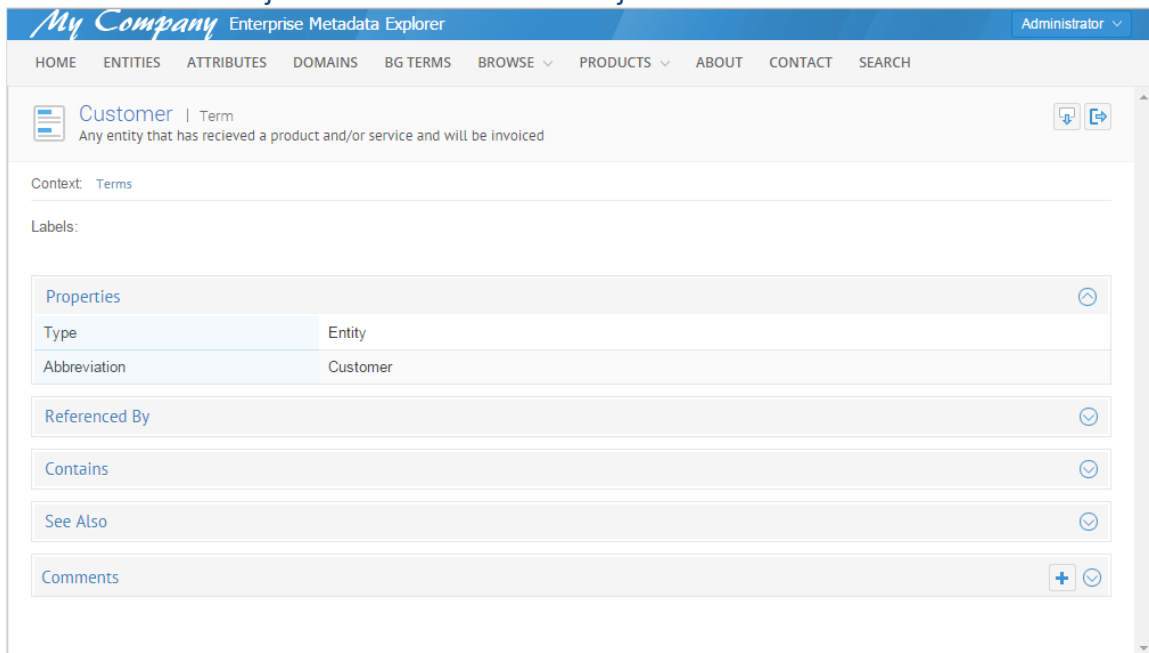
One common way to customize other environments, such as a report portal, is to use these URLs as a way to access Meta Integration® Metadata Management (MIMM). In many cases, one would want to customize the presentation, and several options may be applied to any Metadata Explorer UI URL to customize the presentation when called this way.

You may append any of the following to any Metadata Explorer UI URL:

URL Option text	Result
<code>&noHeader</code>	Removes the explorer header and menu bar
<code>&noTitle</code>	Remove the title for the glossary report

E.g., given the URL to the customer:

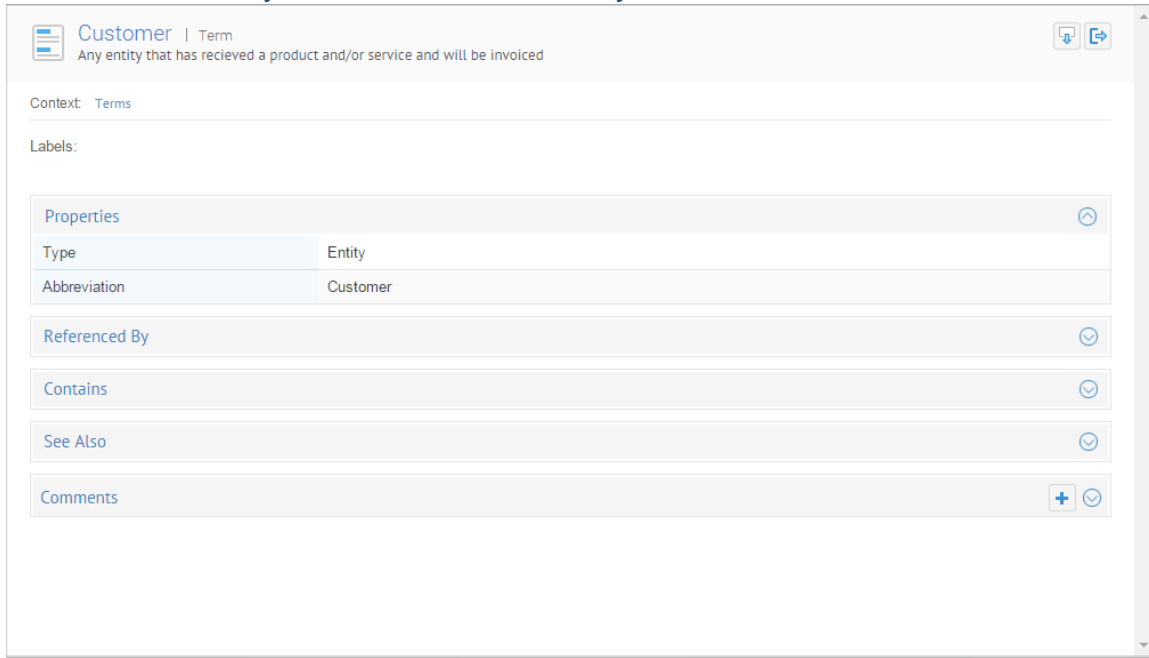
`http://localhost/MM/Explorer#w=report&zo=-1%232545%230&objectId=441%2329%230&objectName=Customer`



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If we append the `&noheader` option above we have the following:

<http://localhost/MM/Explorer#w=report&zo=-1%232545%230&objectId=441%2329%230&objectName=Customer&noheader>



The screenshot shows a web interface for the 'Customer' entity. At the top, there is a header with the entity name 'Customer' and a description: 'Any entity that has recieved a product and/or service and will be invoiced'. Below the header, there is a 'Context: Terms' section and a 'Labels:' section. The main content area is divided into several sections: 'Properties', 'Referenced By', 'Contains', 'See Also', and 'Comments'. The 'Properties' section is expanded to show a table with the following data:

Type	Entity
Abbreviation	Customer

The 'Comments' section has a '+' icon and a refresh icon. The interface is clean and modern, with a light gray background and blue accents.

2 Generic Business Glossary Report

One URL based result is the generic business glossary report. Business intelligence sources which are imported in Meta Integration® Metadata Management (MIMM) include the metadata about reports presented by the BI system. The reports then may have a hierarchical organization of “sub” reports and individual data elements.

The business glossary report is a simple report of all elements and sub reports contained in a report and then all terms linked to those elements and sub reports and any terms linked to the report as a whole. It is designed to be invoked from a URL which can be called from within the BI solution itself, thus allowing one to customize the reports themselves to provide the terms and definitions associated with the report.

The URL signature is as follows:

<http://localhost/MM/BusinessGlossaryReport>

You may append any of the following to any Metadata Explorer UI URL:

URL Option text	Value
&env	Environment as defined in MIRMetadataExplorer.xml
&report	A unique report id or name

In our above example with Tableau, one can obtain the `&report` option value by clicking on the report and opening the Parameters panel and then looking at the Nativeid parameter for the workbook in Tableau.

Thus, the URL would be:

<http://localhost/MM/BusinessGlossaryReport?env=Env1&report=CustomerInvoices>

Note, if you embed this link in Tableau, you should use the following URL which takes advantage of the workbook name substitution parameter:

<http://localhost/MM/BusinessGlossaryReport?env=Env1&report=<Workbook Name>>

Where this has been added to MIRMetadataExplorer.xml:

```
<Environment name="Env1" user="Guest"
configPath="/Demo/Metadata Management/Demo of Metadata Management"
contentPath="/Demo/Metadata Management/3 - Business
Reporting/Tableau/Tableau">
  <URLParameter>noHeader=true</URLParameter>
  <URLParameter>noTitle=true</URLParameter>
  <URLParameter>noHyperlink=true</URLParameter>
  <URLParameter>noContext=true</URLParameter>
  <URLParameter>noIcon=true</URLParameter>
  <URLParameter>noGrouping=true</URLParameter>
</Environment>
```

Here are all the possible options

URL Option text	Value
noHeader=(true false)	Hides the header of the report
noTitle=(true false)	Hides the title of the report

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noHyperlink =(true false)	Makes hyperlinks non clickable
noContext =(true false)	Hides the context information
noIcon =(true false)	Hides all icons
showDefinitionsOnly =(true false)	Only show the list of distinct terms documenting the report
modelDefinitionsOnly =(true false)	- Only show the definitions of the model itself (not the report item ones)

2.1.1 BI tool specific calls

2.1.1.1 IBM Cognos

The URL signature is as follows:

<http://localhost/MM/IBMCognosGetObjectInfo>

You may append any of the following to any Metadata Explorer UI URL:

URL Option text	Value
&info	<ul style="list-style-type: none">• lineage• glossary
&configuration	configuration name
&direction	“Both”

2.1.1.2 SAP BusinessObjects

The URL signature is as follows:

<http://localhost/MM/SAPBusinessObjectsGetReportInfo>

You may append any of the following to any Metadata Explorer UI URL:

URL Option text	Value
&configuration	configuration name
&keyword	
&model	modelID
&report	reportID
&fieldName	fieldID
&elements	reportitemIDs

2.1.1.3 Oracle Business Intelligence Enterprise Edition (OBIEE)

The URL signature is as follows:

<http://localhost/MM/OracleOBIEEGetReportInfo>

You may append any of the following to any Metadata Explorer UI URL:

URL Option text	Value
&configuration	configuration name
&model	modelID
&fieldName	fieldID

2.1.1.4 Tableau

The URL signature is as follows:

<http://localhost/MM/TableauGetReportInfo>

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You may append any of the following to any Metadata Explorer UI URL:

URL Option text	Value
&configuration	configuration name
&model	modelID
&sheet	sheetID