

Cloudera Octopai Data Lineage 1.0.0

Installation

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CLOUDERA

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Cloudera Octopai Client - Linux Installation

Learn about installing Cloudera Octopai Client on supported Linux systems.

About this task



Warning:

The following tools from the [supported integrations list](#) are not supported by the Cloudera Octopai Client Linux version:

- Azure Analysis Services
- DB2
- Looker
- Power BI Report Server
- SSISSQLS
- Tabular
- SSAS-TABULAR
- SSIS - ISC
- Tableau PAT
- TABLEU

Before you begin

- You must verify that your environment meets the general system requirements before starting the installation. For instructions, see [General System Requirements for Cloudera Octopai Data Lineage Client](#).
- You must have root or sudo access to the Linux system that must comply with the Cloudera Octopai Client system requirements.

Procedure

1. Install required dependencies.

```
sudo yum update -y
sudo yum install libicu -y
sudo yum install keyutils -y
```

2. Install .NET 8 by running the following script to install .NET 8 in your preferred directory, for example, ~/.dotnet.

```
sudo wget https://dot.net/v1/dotnet-install.sh -O dotnet-install.sh
sudo chmod +x dotnet-install.sh
sudo ./dotnet-install.sh --channel 8.0 --install-dir ~/.dotnet
```

3. Add .NET to the PATH.

```
echo 'export DOTNET_ROOT=$HOME/.dotnet' >> ~/.bashrc
echo 'export PATH=$HOME/.dotnet:$PATH' >> ~/.bashrc
source ~/.bashrc
dotnet --version
```

4. Configure firewall rules.

Use an existing or newly installed firewall and open the required ports.

```
sudo firewall-cmd --zone=public --permanent --add-port=80/tcp
```

```
sudo firewall-cmd --zone=public --permanent --add-port=5656/tcp
```



Note: For external firewalls, ensure that ports 80 and 5656 are open for both inbound and outbound traffic.

5. Set SELinux to disabled or permissive.

```
sudo nano /etc/selinux/config
```

- a) Locate the line that starts with SELINUX= and update it to one of the following values:

```
SELINUX=disabled
```

```
SELINUX=permissive
```

- b) Reboot the machine, then verify the status by using the following command:

```
sestatus
```

The output should look like this:

```
SELinux status: disabled
```

6. Download TAR or zip archive file from File Manager, and extract the Cloudera Octopai Client package at /opt/Octopai-Client.

```
sudo tar xvf Octopai-Client.tar.gz
sudo yum install unzip -y
sudo unzip Octopai-Client.zip -d /opt/
```

Figure 1: License file example

| Name | Size | Last Updated | |
|---|----------|--------------|------------------|
| Automating Octopai extractions using Microsoft Task Scheduler.pdf | 390.8 KB | 10/11/2020 | Download, Delete |
| METADATA EXTRACTIONS GUIDELINES.pdf | 151.2 KB | 30/09/2025 | Download |
| Octopai_CompanyName.lic | 67.9 KB | 30/09/2025 | Download |
| OctopaiClient.msi | 200.8 MB | 21/09/2025 | Download |
| OctopaiClient_Linux.zip | 168.0 MB | 30/09/2025 | Download |

7. Move the client folder and set permissions by using the following command:

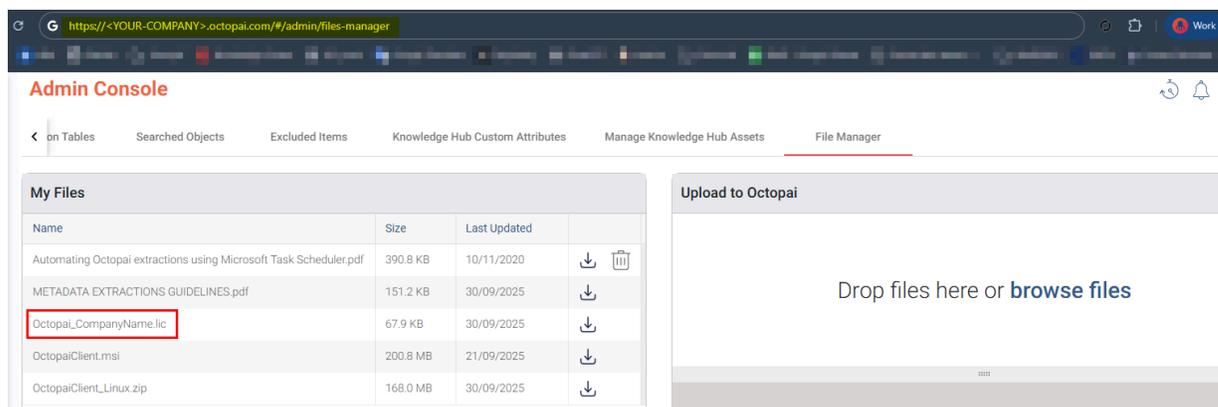
```
sudo mv Octopai-Client /opt/
cd /opt/
sudo chmod -R 777 Octopai-Client
```



Attention:

Apply full control using the `chmod -R 777` command only to the Cloudera Octopai Client folder so that the application can read, write, and execute the files it requires.

8. Copy the license file by downloading the license file from File Manager and placing it in the /opt/Octopai-Client directory on the Linux host.



9. Run the Cloudera Octopai Client by using the following command:

```
cd /opt/Octopai-Client
dotnet OctopaiClient.dll --Urls http://0.0.0.0:5656
```

The following example shows a sample Cloudera Octopai Client output.

Figure 2: Sample Cloudera Octopai Client output

```
Octopai-Client]$ dotnet OctopaiClient.dll --Urls http://0.0.0.0:5656
901484331
info: Microsoft.Hosting.Lifetime[14]
      Now listening on: http://0.0.0.0:5656
info: Microsoft.Hosting.Lifetime[0]
      Application started. Press Ctrl+C to shut down.
info: Microsoft.Hosting.Lifetime[0]
      Hosting environment: Production
info: Microsoft.Hosting.Lifetime[0]
      Content root path: /opt/Octopai-Client
```

10. Open the Cloudera Octopai Client interface.

Go to <http://localhost:5656/index.html> to begin connecting systems for metadata analysis.

What to do next

Create a Linux service

Configure a systemd service so the Cloudera Octopai Client starts automatically after reboots.

1. Create the service definition.

- a. Edit the service file.

```
sudo nano /etc/systemd/system/octopai.service
```

- b. Paste and adjust the following content to match your environment.

```
[Unit]
Description=Octopai Client
[Service]
ExecStart=/usr/bin/dotnet /opt/Octopai-Client/OctopaiClient.dll --Urls http://0.0.0.0:5656
Restart=always
RestartSec=10
KillSignal=SIGINT
SyslogIdentifier=octopai-client
User=octopai
Group=octopai
```

```
WorkingDirectory=/opt/Octopai-Client/  
Environment=USER=octopai  
[Install]  
WantedBy=multi-user.target
```

2. Reload systemd configuration by using the following command:

```
sudo systemctl daemon-reload
```

3. Enable the service by using the following command:

```
sudo systemctl enable octopai.service
```

4. Start or restart the service by using the following command:

```
sudo systemctl restart octopai.service
```

5. Check the service log by using the following command:

```
sudo journalctl -u octopai.service
```

Cloudera Octopai Client - Installation guide

Learn about installing your Cloudera Octopai Client.

Procedure

1. On the server, where the Cloudera Octopai Client is installed or will be installed, go to your platform at [***CUSTOMER NAME***].octopai.com, then go to the File Manager tab on the Admin Console.

- Download the latest version of the OctopaiClient.msi and the license files.

Admin Console

Transition Tables Searched Objects Excluded Items Knowledge Hub Custom Attributes Manage Knowledge Hub Assets

My Files

| Name | Size | Last Updated | |
|--|----------|--------------|------|
| Automating Octopai extractions usin... | 390.8 KB | 10/11/2020 | ↓ 🗑️ |
| METADATA EXTRACTIONS GUIDELI... | 137.5 KB | 04/12/2024 | ↓ |
| Octopai_...lic | 63.5 KB | 04/12/2024 | ↓ |
| OctopaiClient.msi | 195.4 MB | 23/12/2024 | ↓ |

Upload to Octopai

Drop files here or **browse**



Note: Cloudera Octopai recommends creating a backup of the Data folder by navigating to C:\Program Files (x86)\Octopai\Service\Data and copying the folder to your desktop.

- Run the MSI installation file and wait for it to finish.
- If you aim to run the Cloudera Octopai Client with a dedicated user or service account, perform the following steps:
 - Go to Services.
 - Right-click Octopai Agent and select the Properties option.
 - Go to the Log On tab and set the user.
- Grant Full Control permission to the Cloudera Octopai folder for your dedicated user or group.
 - Right-click the folder and select the Properties option.
 - Go to the Security tab, and click Edit.
 - Choose the user or group and check Full Control.
- Open the Cloudera Octopai Client.

Choose the license by clicking on the green key or pop-up message.
- Rerun the necessary or desired connections.
 - Click the metadata source connection on the left-hand bar.
 - Select Test & Save, click OK, and then click Run.



Note:

If the connections are not visible or some are missing from the Cloudera Octopai Client after the upgrade, restore the Data folder from your backup. Alternatively, navigate to the C:\ProgramData\Octopai-Backup folder, where Cloudera Octopai automatically creates a backup during upgrades, and copy its contents to the C:\Program Files (x86)\Octopai\Service\Data folder.

Configuring Proxy settings

Learn about configuring Proxy settings for the Cloudera Octopai Client if your server's network is routed through a proxy tunnel.

Before you begin

You must upgrade your Cloudera Octopai Client to the latest version before configuring the Proxy settings.

Procedure

1. Go to C:\Program Files (x86)\Octopai\Service\Data.
2. Open the **PS** file using your preferred text editor.

3. Update the following parameters for proxy configuration:

- ProxyEnabled – Set to true to enable or to false to disable the proxy option.
- ProxyAddress – Specify the address in the "http://YOUR_PROXY_NAME:PORT" format.
- ProxyUsername – Provide the Username.
- ProxyPassword – Provide the Password.



Note: You must wrap the above parameters in quotation marks.

Figure 3: Example

```
{
  "skipsoggar": false,
  "LastConnectionId": 229,
  "AutoUpload": false,
  "Portalupload": true,
  "PortalUrl": "https://portal.octopai.com",
  "FTPUUpload": false,
  "FTPUser": "",
  "FTPPass": "",
  "AllowAuto": true,
  "skipsyn": false,
  "AllowBatFiles": true,
  "CustomVT": false,
  "customvtrpath": "",
  "FTPUrl": "",
  "FTPPort": false,
  "vaultupload": false,
  "VaultType": "Box",
  "VaultUser": "",
  "vaultPass": "",
  "VaultFolderID": "0",
  "CESEnabled": false,
  "CESPort": 0,
  "CESRootFolder": null,
  "ProxyEnabled": false,
  "ProxyAddress": null,
  "ProxyUsername": null,
  "ProxyPassword": null
}
```

If you are upgrading your Cloudera Octopai Client, these values will be added automatically to the PS file.



Note: The proxy option is disabled by default.

How to Install Curl

Learn about properly installing and configuring Curl for use with the Cloudera Octopai Client, enabling seamless extraction of metadata.

Option 1: Install Curl with a package manager

1. For Chocolatey, run the `choco install curl` command.
2. For MSYS2, run the `pacman -S curl` command.
3. For Scoop, run the `scoop install curl` command.

Option 2: Install Curl manually

1. Download curl from <https://curl.se/windows/> and choose the Windows 64-bit version.

Packages

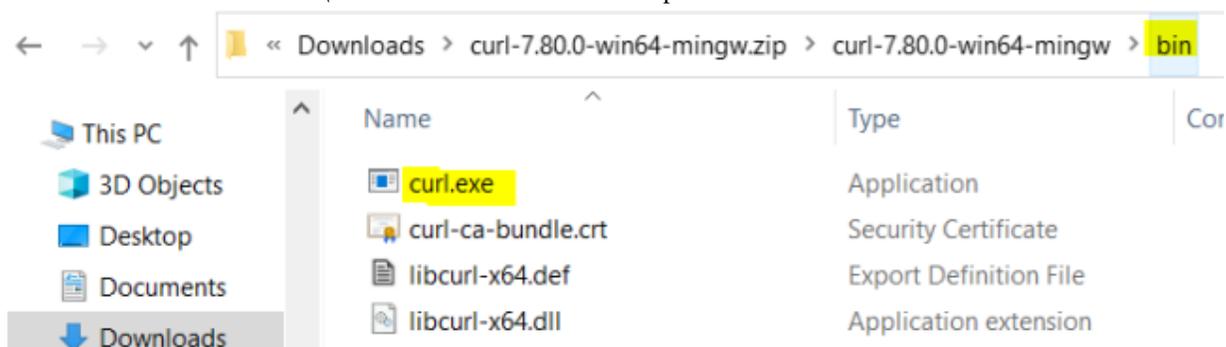


curl for 64 bit

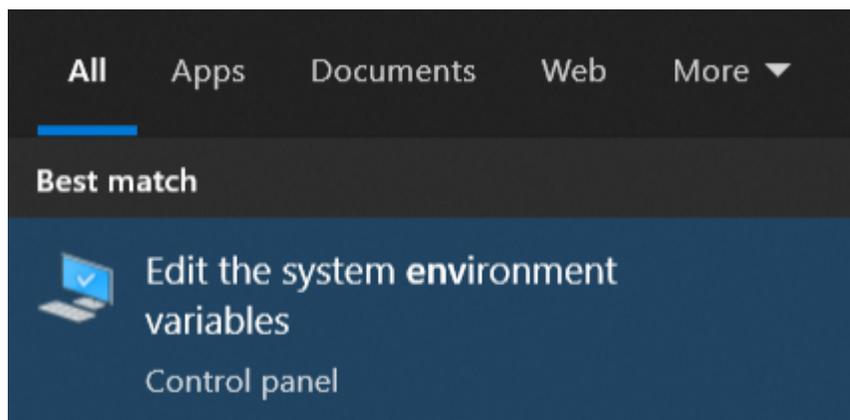
Size: 5.6 MB

sha256: 75b2f64ae1dc6d2cc47bc59a33eb0f863f29f3b4423a9ad174905103818edb6f

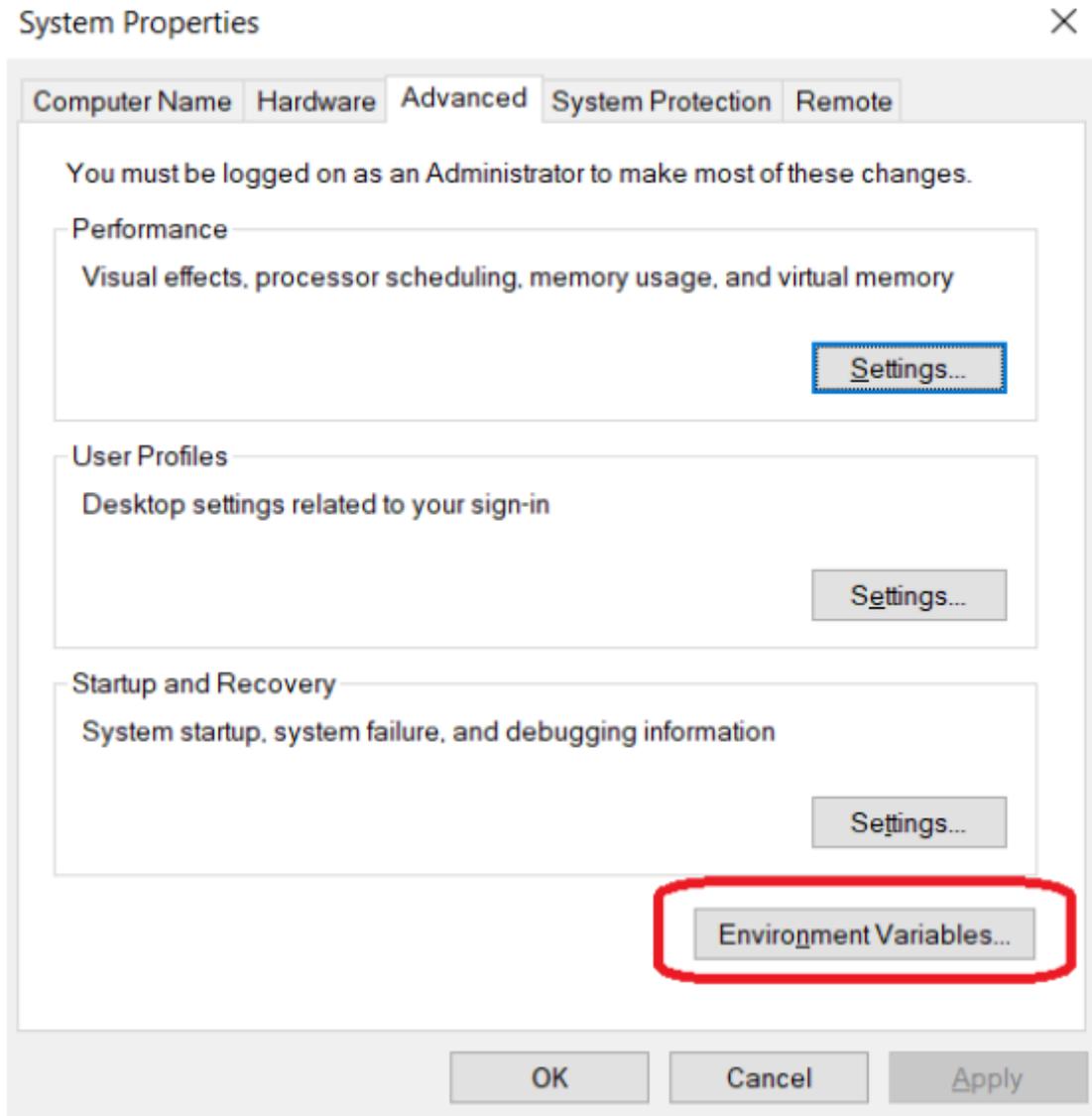
2. Locate the `curl.exe` file in the `\bin` folder of the downloaded zip file.



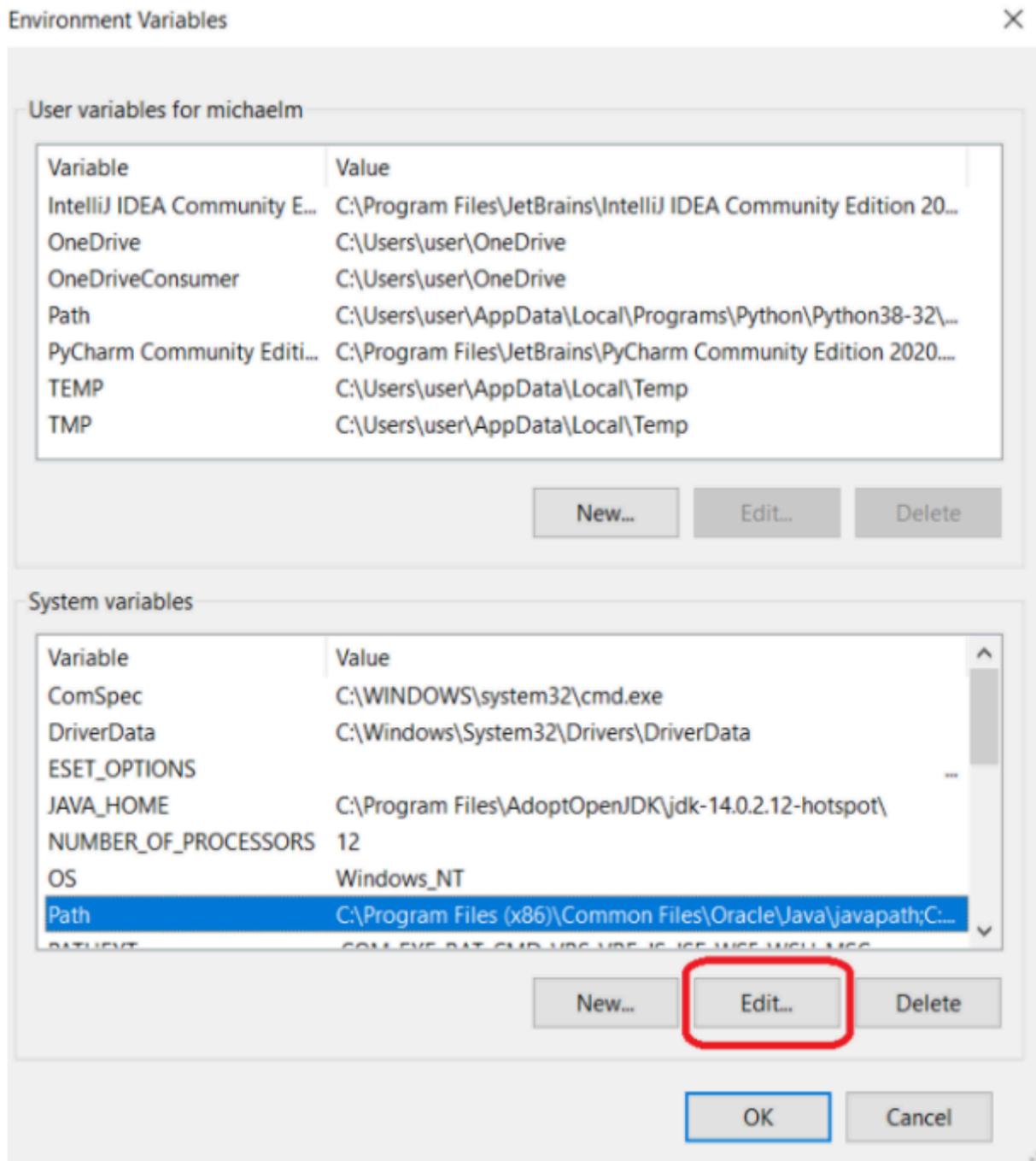
3. Place the `curl.exe` file in a permanent folder, for example to the Cloudera Octopai Client installation folder, such as `C:\Program Files (x86)\Octopai\Service\Data`.
4. Make curl accessible from anywhere on the command line by adding the folder `PATH` as a new system environment variable.
 - a. Open the Start Search, type `env`, and choose the Edit the system environment variables action.



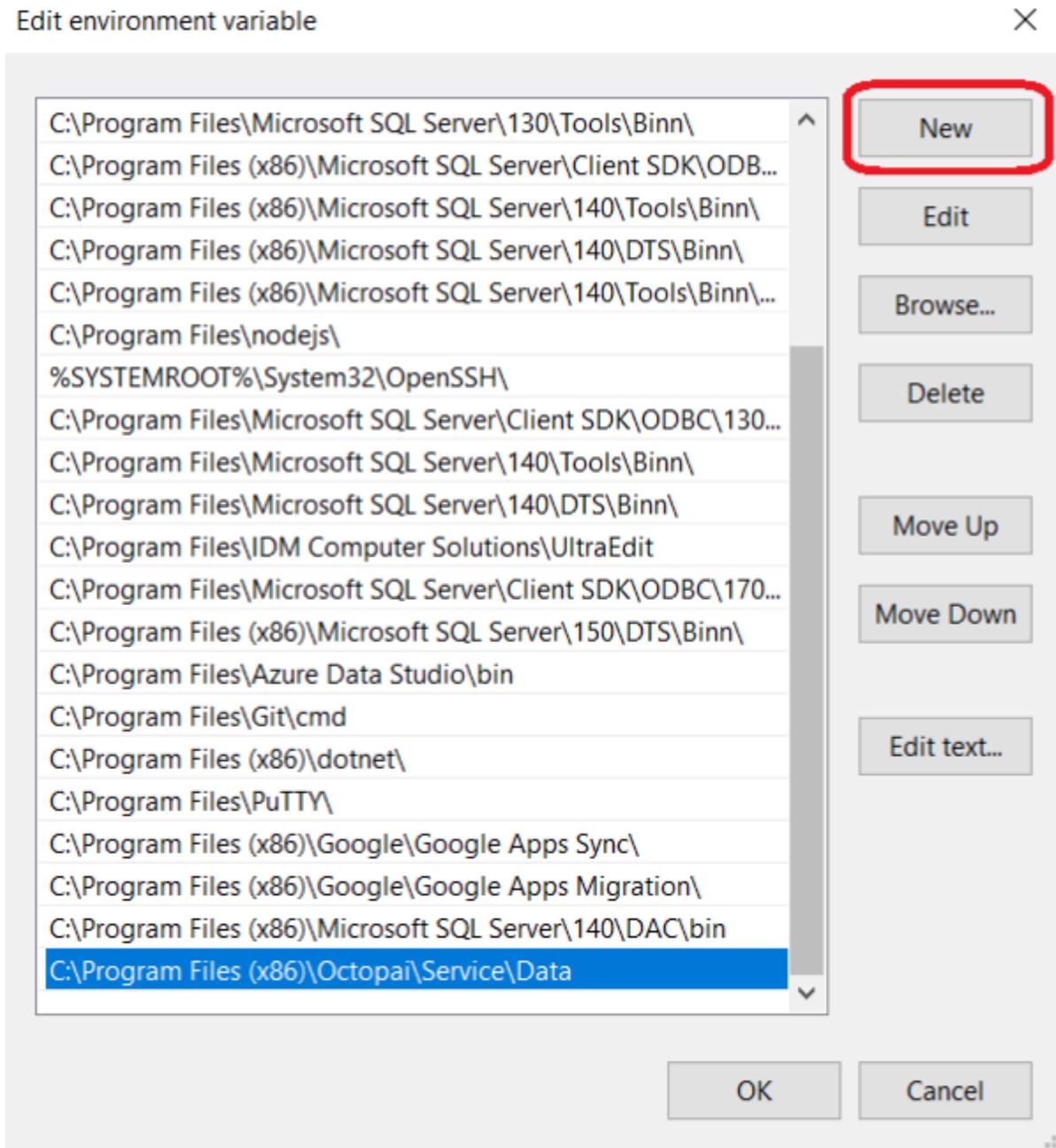
- 5. Click Environment Variables.



6. In the **System Variables** section, select the Path variable and click Edit.



7. Click New and add the location of the folder that contains the curl.exe file.



8. Click Ok.
9. If applicable, reopen any relevant applications to register the changes.