



DATABLAU · DAM

Data asset catalog

Product module user manual

Version 9.1.2

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Data catalog

The Data Catalog, part of Data Assets (DDC), organizes assets, records ownership, supports inventory, and manages registration, publication, changes, and retirement. [Data Marketplace](#) supports business discovery and access requests.

Turn resources into discoverable assets

Metadata describes existing tables, columns, and reports. Catalogs organize them by business meaning, add descriptions and accountability, and control publication. Registration normally associates existing objects rather than copying database records.

Object/action	Purpose	Initial sequence
Folder type	Properties, supported assets, completeness	Define each level
Catalog space	Hierarchy, administrators, approvals	Create and enable
Catalog folder	Business nodes, descriptions, ownership, access	Create nodes
Registration	Associate supported objects	Verify source and register
Publication	Separate folder and asset states	Check each approval and visibility
Intelligent Inventory	Recommend folders and tags	Review, accept, then publish

Intelligent Inventory applies configured recognition rules to harvested objects. It does not confirm ownership or publish assets. See [Inventory](#).

Start by responsibility

- Space administrators: [Space design](#).
- Catalog stewards: [Quick start](#), then ownership, descriptions, and permissions.
- Reviewers: business classification, completeness, scope, and separate folder/asset approvals.
- Consumers: [Marketplace](#) for discovery and requests.

These responsibilities can be combined in configured roles. Verify space administration, node access, and space-wide import/export permissions separately.

Find a task

Goal	Guide
First published catalog	Quick start
Types and hierarchy	Space design
Completeness and custom properties	Folder types
Folders, access, imports, history	Folders and permissions
Register, publish, change, retire	Registration and publication
Business browsing and access requests	Asset portal
Bulk recommendations	Inventory
BI integration	BI tasks
Rates, popularity, security, quality	Overview statistics

Read the overview

Review counts, publication, use, and distributions by folder. Completeness measures properties, publication reflects lifecycle, and requests record usage authorization. None replaces the other.

Data catalog quick start

Design, catalog, authorize, publish, and verify one business folder and a few harvested tables.

Before you begin

Requirement	Check
Clear business scope	Inclusions, exclusions, maintainer
Harvested tables	Searchable with verified source/meaning
Stewards/reviewers	Permissions and separate approval responsibilities
Ordinary business user	Consumer visibility testing

Reuse a suitable space. Create one only if its structure is insufficient.

1. Design types and a space

Follow [Space design](#) for levels, assets, properties, completeness, and separate approvals; create and enable the space.

* Type Name

Enter directory type, 20 lengths

* Support Data Asset Types

Please select a data asset type

Extended Attribute

Extended attributes are only effective for the current directory type

Support attribute name

Please select a pr

☐ required

Completion Settings

Default Completion Calculation Formula:

Data Ow... 25%

+

Asset List 20%

+

data ste... 20%

+

keywords 10%

+

Descript... 15%

+

English ... 10%

=

100%

completion baseline

default 60

When the completion reaches a certain base, the directory can submit the approval process for publication

Calculation Properties

Select

Proportion of Weight

Please enter

%

Catalog Code Settings

Auto-generate

Off

Go to "Directory Details" to configure

Fixed Prefix

Number of Digits in Numeric

8

Start Value

0

Increment

1

Part

Use actual organizational thresholds/rules. Verify enabled state, table support, properties, and approvals. Enablement does not create folders or assets.

2. Create folders and node permissions

1. Follow [Folder maintenance](#) to create a node.
2. Complete name, scope, description, ownership, and required properties.
3. Grant user/group/organization management, edit, and access rights.
4. Verify child inheritance does not broaden scope unexpectedly.

Test steward editing and consumer access. Locked public display is not an access grant.

3. Register tables

Use [Register Table](#), verify system/source and business ownership, then inspect assets/numbers. For missing tables, check type support, metadata, and module rights. Avoid same-name objects in other environments.

4. Publish folders and assets separately

Use **More Actions > Publish Asset Folder**, reason, and inclusion options. For individual assets, select and **Publish**. Verify all folder/child/asset states and each approval or direct-publication result.

5. Verify as a business user

1. Open [Marketplace](#) with expected ordinary-user rights.
2. Find the asset by keyword or folder.
3. Verify path, description, source, and request action.
4. If hidden, check enablement, parent/asset publication, then access.

Completion means authorized consumers can find and understand assets. Actual data use still requires [Requests](#) and offline delivery.

Expand coverage

After the pilot, use [Inventory](#) or templates. Acceptance/import does not replace publication or consumer testing.

Browse the asset portal and request access

The business-facing portal presents catalog trees, details, and search results. It differs from catalog administration.

Browse folders

1. Open **Data Assets > Asset Portal**, also called Asset Browsing in some deployments.
2. Select an enabled space and expand domains, business objects, or logical entities.
3. Inspect folder descriptions, ownership, keywords, completeness, and published assets.
4. Open asset details and verify source, description, owner, tags, classification, and status.

A lock indicates missing management/view access. Public Display shows restricted nodes with locks and permits access requests; disabling it normally hides them. Locked ancestors can preserve the path to an accessible child.

Search globally or by tag

Search business names, abbreviations, keywords, or asset codes, then filter by space, type, and publication. Tag searches span spaces but still respect rights and states. Verify publication, ownership, classification, and use restrictions before considering data usable.

Request folder access

Select **Request Access** and provide reason, scope, duration, and contact. Confirm the request targets a folder rather than a data asset.

1. Check the request number and state in My Requests/history.
2. The configured space workflow routes approval.
3. Verify visibility after approval, or review rejection reasons and resubmit with corrections.

Understand page responsibilities

Page	Users	Actions
Asset Portal	Consumers	Search, view, request access
Catalog Management	Administrators/editors	Create, register, maintain, publish
Space Design	Space administrators	Levels, properties, administrators, approvals
Marketplace	Consumers	Discover products, cart, request use

Portal requests record platform authorization. For actual files, accounts, or APIs, follow [Marketplace requests](#) and coordinate offline delivery with IT or the responsible team.

Configure catalog integration tasks for BI

Tasks integrate catalogs with supported BI services. This is separate from marketplace offline delivery. Space/catalog administrators need BI-provided authentication, service URL, and API rights.

Prepare integration

For FineReport/FineBI applications using direct AK/SK authentication, verify:

Purpose	API path	Access
List folders	v3/bi/conf/groups	Read target folders
Add folder	v3/bi/conf/pack	Create required folders
List connections	v3/connection	Required connections
Add database dataset	v3/bi/spider/table/db	Create datasets

These are preparation checks, not manual calls required in DAM. Verify actual BI compatibility.

Setting	Provider	Check
Service URL	BI administrator	Application API, not login page; documented entry /webroot/decision/sp/client/api
Client ID	BI administrator	Authorized application, not user login
Secret	BI administrator	Matches ID; never include in documents/screenshots
Properties/scope	Catalog administrator	Intended folders and first-run scope

Create and run

1. Open **Data Assets > Task Management > New**.
2. Enter properties, URL, Client ID, and Secret.
3. Test connection successfully before saving.
4. Confirm the task exists; saving only stores configuration.
5. Enable/disable as needed after checking target/scope.
6. **Run Now**. If outside the system time template, review permitted windows and BI operations before continuing.

7. Queued means another task is running; track it instead of submitting duplicates.
8. Verify target BI results after completion.

Retest edited connections. Check recurring dependencies before deletion. Keep credentials only in secure product configuration.

Verify integration

1. Record completed run, time, and result.
2. Verify BI names, hierarchy, connections, and datasets.
3. Test as an authorized ordinary BI user.
4. Record differences and inspect API rights and connection settings.

Task success does not approve marketplace requests or complete offline delivery.

Troubleshoot

Symptom	Checks
Connection failure	URL/network, matching credentials, authentication/API grants
Cannot save	Successful test, form validation
Persistent queue	Current running tasks; avoid duplicate synchronization
Time restriction	Time template and window
Success with wrong BI results	Scope, target instance, rights, actual objects

Related: [Folders](#), [Publication](#), [Scheduling](#).

Configure folder types, completeness, and custom properties

Folder types define information at each level. Completeness determines publication readiness. Custom properties capture organizational fields. Design these before creating spaces.

Define a folder type

Open **Data Assets > Folder Type Settings**.

Setting	Purpose	Guidance
Name	Tree and form label	Clear singular business noun
Supported asset types	Registrable objects	Only relevant types
Completeness formula	Property completeness	Agree required fields before weights
Custom properties	Organizational information	Type, requirement, validation
Numbering rule	Folder code generation	Stable conventions

Built-in levels commonly include subject domain group, domain, business object, logical entity, and attribute. They can be adapted, but referenced types cannot simply be deleted.

Create or edit a type

1. Select **New** or **Edit**.
2. Enter the name and supported asset types.
3. Configure completeness properties and weights totaling no more than 100%.
4. Add custom property names, types, required flags, and descriptions.
5. Configure automatic numbering if needed, save, and test one folder form.

Verify availability in space design. If missing, check saving and space configuration rights.

Design completeness calculations

Completeness measures filled properties, not business quality or publication status. Valid values contribute configured weights; excluded properties do not.

1. List prerequisites such as ownership, steward, keywords, and description.
2. Include them in the formula and check total weights.
3. Test fully completed, required-only, and missing-critical-property examples.
4. Fill missing information instead of manually changing scores.

Folder and asset approvals remain separate from completeness.

Maintain custom properties and numbering

Custom fields extend abbreviation, ownership, approver, keywords, and description. Check existing folders/reports before deletion or renaming; migrate or retire used properties to preserve history.

With automatic numbering disabled, enter codes manually using organizational uniqueness rules, including imports. With it enabled, test prefixes, levels, and sequences before bulk import.

Handle changes

Symptom	Action
Cannot delete	Check space/node references
Existing folders affected by hierarchy changes	Disable relevant space and assess existing nodes first
Completeness unchanged	Check formula inclusion, null values, types
Duplicate imported codes	Check numbering and template codes before overwriting

Next: [Space design](#).

Maintain catalog folders and permissions

Spaces provide structure; folders record ownership, approvers, and descriptions. Obtain management/edit rights first.

Create and edit folders

1. Select an accessible space in Catalog Management.
2. Use **New Asset Folder** from the space actions or properties.
3. Complete level, name, ownership, description, and other properties; save.
4. Select the folder and **Edit Asset Folder** as needed.
5. Follow [Change workflows](#) for published content.

Check assets and children before deletion. Deletion is not retirement.

Configure node access

1. Open **Permission Settings** in details.
2. Select users, groups, or organizations.
3. Grant management, editing, or access.
4. Decide whether to apply to children and verify scope.
5. Test actual visibility as the target user.

Public Access can be off, include children, or exclude children. It grants access; the space's Public Display controls whether restricted folders appear.

Import and export

Space actions import/export folder structures for the whole space. Node **More Actions** handles that node's assets; space-wide asset import/export covers the entire space. Download templates, verify scope, and choose review or authorized direct publication.

Space-wide asset import/export is an independent permission and can cover the entire space. Node permissions do not automatically restrict it. Check whether operations include otherwise inaccessible nodes.

Review history

Filter operation records by description, user, action, and time. Historical Versions records published/changed folder content, not software versions.

Related: [Spaces](#), [Marketplace requests](#).

Recommend asset folders with Intelligent Inventory

Recognition rules suggest folders and tags for harvested objects. Inventory here means candidate classification and review, not counting database records. Acceptance creates associations; publication remains separate.

If the entry is unavailable, check features/permissions or [Register manually](#). Manual registration does not generate recommendations.

Before you begin

Harvest metadata and prepare [Folders](#) supporting the object types. Obtain space/node access and existing lineage for cascading rules. Test a small set with known positive and negative classifications; this is guidance, not a capacity limit.

Rule and task folders organize configuration. Asset folders are the business destinations.

Maintain rule folders and algorithms

In **Intelligent Inventory > Recognition Rules**, create folders with name/description. View/edit existing folders; nonempty folders cannot be deleted. Use **Manage Algorithm Library** in general rules for reusable algorithms and folders.

Choose a rule

Type	Configuration
General	One object type per rule; AND/OR subconditions; condition testing
Lineage cascade	Upstream or downstream recommendations using existing relationships
Machine learning	Object, folder, description, priority, threshold, result count; data items optionally depend on tables

Test small samples. Destinations require space/node rights and supported types. Referenced rules cannot be deleted.

Create and test a general rule

1. Select **New > General Rule**.
2. Choose one of table, view, data item, report, or file; separate rules by type.
3. Define properties and AND/OR conditions.
4. Maintain reusable algorithms if needed.
5. **Test Conditions** against expected matches and nonmatches.
6. Correct false results, save, and add to a task.

Retest new sources or substantially different naming patterns; sample success does not prove universal accuracy.

Use lineage cascade and machine learning

Cascade rules use known classifications as clues for related objects, not proof of identical business ownership. Inventory supports upstream and downstream; do not copy security recognition's downstream-only restrictions.

For machine learning, verify parent-table ownership before enabling table-dependent data item recognition.

Parameter	Check
Object	Correct metadata type
Folder/description	Applicable systems and business basis
Priority	Existing rules; do not assume merge behavior
Score threshold	Recognition score, not asset quality/publication
Result count	Number of classifications suggested, not sampled rows

Review folder and tag suggestions separately. Resolve task references before deleting rules.

Create recognition tasks

1. Prepare a task folder.
2. Create a task, enter information, and add rules.
3. Save, verify scope, and enable as needed.
4. **Run** and track completion.
5. To reuse, **Copy**, rename, and recheck scope/rules.

Fuzzy-search tasks by name. Copies default to a copy suffix. Edit changes configuration; enabling changes state; running starts execution. Nonempty task folders cannot be deleted. Preserve required configuration and evidence rather than repeatedly recreating failed tasks.

Review recommendations

1. Filter results by asset, system, source, harvesting name, or table.
2. Verify or **Change Asset Folder**.
3. Verify or **Change Tags**.
4. Confirm correct results individually/in bulk or reject incorrect ones.
5. Verify catalog associations and [Publish](#).

Tags take effect immediately. Recommendation withdrawal cannot restore changed folders/tags. Rerunning after algorithm or lineage classification changes may create new recommendations; check duplicates.

Check before bulk confirmation

Check	Method
Identity	System, source, harvesting name, table, asset
Registration eligibility	Space/node rights and supported type, including cross-space destinations
Classification	Business owner confirms; score alone is insufficient
Tags	Review independently of folder correctness
Duplicates	Multiple recommendations may refer to one asset
Publication	Verify status and approval after registration

Troubleshoot

Symptom	Checks
Cannot select destination	Space rights, node rights, supported type
No results	Actual execution, scope, conditions/threshold, lineage/parent table
Many irrelevant results	Negative samples, AND/OR, object type, business basis
Accepted but hidden in market	Asset/folder/parent publication, consumer access
Cannot delete rule	Task references
Need to reverse folder/tag changes	Authorized maintenance on actual relationships; no recommendation undo

Register, publish, change, and retire assets

Registration associates objects with folders. Publication makes reviewed folders/assets available to consumers. Publishing a folder does not automatically publish all assets.

Register assets

1. Select a folder supporting the target type.
2. Select **Register Table**, **Register Data Item**, or the corresponding action.
3. Choose accessible objects and verify source and business classification.
4. Check the resulting asset list.

Available types depend on folder design; object selection also requires module rights. Edit asset numbers for unpublished assets through the numbering column.

Publish folders

1. Select **More Actions > Publish Asset Folder** in details.
2. Choose whether to include assets and child folders and enter a reason.
3. Submit and track approval, or verify direct publication if approvals are disabled.
4. Check parent/child/asset states and consumer visibility separately.

Combined folder/asset publication initiates separate approvals.

Confirm publication scope

Include assets	Include children	Scope
Yes	Yes	Current folder, children, and their assets
Yes	No	Current folder and its assets
No	Yes	Current folder and children, without assets
No	No	Current folder only

Scope is not a promise of immediate success. Check completeness, approvals, and access. To expose structure while assets await review, exclude assets; include reviewed assets only under the organization's publication policy.

Publish assets separately

Select assets, **Publish**, enter a reason, and wait for required approval. A published asset may remain hidden if its parent is unpublished.

Change and retire

Use **More Actions > Change** for folder properties. Use **Retire Asset Folder**, reviewing included assets/children and entering a reason. Space configuration determines approval.

Select assets and **Retire** for individual retirement. Track approvals and browsing visibility. Record existing states and inspect all affected object types afterward; do not infer retirement behavior from publication options. Retirement does not delete source metadata or recall previously delivered data.

Verify and troubleshoot

Symptom	Check
Missing object during registration	Supported type, module rights, source existence
Published but hidden	Parent publication, space enablement, access
Partial batch publication	Separate folder, asset, and child approvals
Excessive retirement scope	Include-assets and include-children options

Publication does not deliver data. See [Marketplace](#).

Read asset overview statistics

Check whether measures cover all platform assets, registered assets, or published assets before comparing ratios.

View and verify

1. Open Asset Overview.
2. Select available type, folder, and department filters.
3. Confirm definitions below before reading trends.
4. Sample [Folder and asset details](#).
5. Follow [Quality tasks/reports](#) for actual issues.

Size and conversion

Measure	Definition
Total assets	Deduplicated published assets in spaces
Published type distribution	Published type count / all published; follow chart treatment of tables/views
Registration rate	Registered / corresponding DAM objects
Publication rate	Published / registered
Retirement rate	Retired / registered; not source deletion
Access rate	Assets with above-average visits / published assets

Popular assets have above-average visits. Data item visits inherit table visits; they are not independent column query counts. Weekly conversion compares the previous week with two weeks earlier. Registration/publication growth uses the earlier period as denominator; inspect absolute numbers too.

Distribution, security, and quality

Chart	Scope
Security levels	Published assets; unassigned grouped as No Security Level
Folder distribution	Published types/counts by top-level folder
Department distribution	Business/technical views with object-specific properties
Catalog overview	Top-level visits and counts; area/color highlight hotspots
Top 10 folders	Published-folder visits
Folder states	Unpublished, published, under review, retired / all folders
Asset quality issues	Weekly published tables/views and their issues
Folder quality issues	Published-folder tables/views and issues

Tables/views may have ownership and technical departments; columns primarily use technical department; report business departments derive from ownership. Check properties/scope for blanks or count differences.

Avoid common misreadings

- Low publication versus registration: inspect unpublished, pending, and retired objects.
- Missing new assets: verify publication and filters in details.
- Popularity: browsing is not database query auditing.
- Unclassified statistics despite assignments: verify the same published scope and levels.

Related: [Publication](#), [Security classification](#).

Design folder types and catalog spaces

Types define properties and supported assets. Spaces assemble levels into business views. Design types, create spaces, then maintain folders.

Configure types

1. Open **Folder Type Settings > New**.
2. Enter name and supported asset types.
3. Configure custom properties, completeness, and numbering.
4. Verify the definition before using it in a space.

Built-in domain groups, domains, business objects, logical entities, and attributes are editable. Referenced types cannot be deleted. Completeness weights must not exceed 100%; the result is property completeness, not correctness or record quality. Check references/values before changing custom properties.

Changing a completeness formula/baseline recalculates displays. Raising the baseline does not automatically withdraw published folders; new and changed folders use the new baseline.

Respect referenced-type restrictions

State	Allowed change	Restriction/impact
Unreferenced	Type, properties, completeness	Check future spaces
Referenced	Rename, add supported types	Cannot remove supported types
Referencing folders retired	Property changes where permitted	Type changes clear values; deletion removes properties
Referencing folders published	No property add/edit/delete	Assess through change workflow
Referencing folders under review	No property edit/delete	Preserve submitted structure
Property used in completeness	Cannot delete	Resolve formula references first

Changing optional to required blocks republication until values exist. Renaming differs from changing data types. Folder numbering and asset numbering are separate settings.

Create a space

1. Open **Catalog Space Design > New**.
2. Enter name, description, levels, and allowed types per level.
3. Set approvers, administrators, and public display.
4. Configure folder approval and asset approval separately.
5. Enable, save, and verify hierarchy and access.

Understand public display

Enabled public display shows restricted folders with locks for access requests. Disabled display normally hides them. Locked parents may still show the path to permitted children. Visibility, detail access, and data use are separate rights.

Change and delete spaces

- Disabled empty spaces allow structural changes.
- Disabled nonempty spaces allow supported name/administrator/approver changes. Existing level types are restricted; levels can increase, not decrease.
- New administrators do not automatically change existing node grants.
- Deleting a nonempty disabled space removes its catalog tree; review the impact.
- Drag ordering in the Enabled tab affects management and browsing order.

Next: [Folders and permissions](#).