



DATABLAU · DAM

Data standards and indicators

Product module user manual

Version 9.1.2

Contents

01	Data standards
02	Data standards quick start
03	Metric management overview
04	Create, import, and maintain basic standards
05	Manage reference codes, domain standards, and naming dictionaries
06	Define metric dimensions and values
07	Manage business domain standards and naming dictionaries
08	Manage metric standards and dimension hierarchies
09	Publish, change, and deprecate standards
10	Match, recommend, and validate standards
11	Map, preview, monitor, and query metrics
12	Define atomic, calculated, and qualified metrics
13	Publish, change, and authorize metrics
14	Manage reference codes and value domains
15	Review standards and reference statistics
16	Manage standards folders and publication states

Data standards

Manage basic standards, reference codes, naming dictionaries, business domain standards, reusable domain definitions, dimensions, publication, changes, matching, and validation.

Choose the right object

Need	Object or capability	Relationship
Consistent names and meanings	Basic standards	Definitions and technical requirements mapped to columns
Controlled values and meanings	Reference codes	Referenced by standards and columns, rather than maintained only as free text
Standards by business domain	Business domain standards	Domain-specific maintenance and access; same names do not imply identical definitions
Shared constraints	Domain standards	Reusable definitions for other standards
Consistent naming vocabulary	Naming dictionary	Standardizes terms without replacing approvals
Metric meanings and dimensions	Metric Standards and dimensions	Use Metric Management for data mapping and queries
Apply standards to metadata	Intelligent Matching, Grouped Recommendations, Automated Standards Validation	Review candidates, create mappings, then validate associations

Definition, publication, column mapping, and record compliance are separate activities. Correct definitions still require approval; publication still requires mapping; mappings still require technical and data checks.

Intelligent Matching suggests existing standards for columns. Grouped Recommendations groups unmapped columns for potential shared definitions. Automated Standards Validation checks existing mappings. Recommendations require human review; standards validation is not record-level quality checking. See [Matching and validation](#).

Before you begin

Choose a data item with a clear business owner. Prepare names, definition, technical requirements, value domain, and folder. Administrators configure [Approval workflows](#); harvest [Metadata](#) before mapping.

Recommended responsibilities: business owners confirm meaning, standard stewards draft, reviewers approve, and metadata stewards map. Configure actual roles and permissions for your organization.

Understand metric capabilities

Capability	Module	License
Basic definitions and dimensions	Metric Standards	Provided with data standards, subject to license composition
Atomic, calculated, and qualified metrics; mapping, queries, monitoring, alerts, permissions	Metric Management	Data Metrics

These are distinct entry points. Metric Standards definitions do not automatically create Metric Management mappings or query results.

Find a task

Goal	Guide
First standard and mapping	Quick start
Definitions and bulk import	Basic standards
Folders and statuses	Standards catalog
Publish, change, deprecate	Lifecycle
Controlled values	Reference codes
Domains and naming	Domains and dictionary
Codes and vocabulary	Codes and dictionary
Basic metric definitions	Metric standards
Dimensions and values	Dimensions
Map and validate columns	Matching and validation
Complete metric workflow	Metric management
Atomic, calculated, qualified metrics	Metric definitions
Bulk maintenance and authorization	Metric governance
Map, preview, monitor, query	Metric analysis
Publication and system/column references	Overview and reference statistics

Use overviews for trends; verify conclusions in definitions, references, and validation results.

Approvals

Publication and change approvals support customer-defined workflows. Nodes, roles, and forms depend on environment configuration.

Data standards quick start

Define one business standard and map it to one column. Use an item with an agreed organizational definition rather than an unconfirmed industry template.

1. Prepare the definition

Confirm folder, meaning, technical requirements, owner, and domain. Prepare [Reference codes](#) for controlled values and check reusable [Domain standards](#).

2. Create a standard

Follow [Basic standards](#). Create one manually and verify conventions before bulk import.

Import Business Glossary

The glossaries to be reviewed will be directly updated. The glossaries that have been reviewed and discarded cannot be updated. The published glossaries will enter the change process

Content Review

After import, the data status will be displayed as "pending approval", and the data can be published only after the publishing approval process is completed.

Direct Release

After import, the data status is displayed as "published", and no approval is required.

Only a single file can be uploaded. The supported file format is xlsx

Template

Upload file

Automatic generation of standard codes

Continue importing when encountering errors:

True

False

Ok

Cancel

The dialog provides template download and status choices. Confirm organizational authorization before direct publication.

3. Request publication

Follow [Lifecycle](#). Reviewers inspect definitions in Personal Workspace; verify Published status afterward.

4. Map a column

Choose a semantically matching harvested column and use [Metadata mappings](#). Verify column details and standard references.

5. Validate implementation

Limit scope and run [Automated Standards Validation](#). Record issues and handling notes. Use [Quality rules](#) for actual value compliance.

Completion criteria

Correct status, business-confirmed definitions, traceable mappings, and recorded issue handling. Expand through matching and grouped recommendations after the first complete cycle.

Metric management overview

Metric Management is a complete capability under Data Standards for atomic, calculated, and qualified metrics, dimensions, lifecycle, mappings, preview, authorization, monitoring, and queries. Its license is Data Metrics. [Metric Standards](#) is a separate entry point.

Usable metrics require definitions, component preparation, approval, mapping, result verification, and authorization.

Choose a task

Stage	Task	Guide
Dimensions	Folders, hierarchy, mappings, values	Dimensions
Definitions	Atomic/calculated metrics, qualifiers, time periods, qualified metrics	Definitions
Governance	Import/export, publication, change, deprecation, review, authorization	Governance
Data access	Sources, tables, metric/dimension columns, preview	Mapping and preview
Ongoing use	Alerts, monitoring, subject folders, self-service queries	Monitoring

Understand the main objects

Object	Purpose	Prerequisite
Dimension Definitions	Analytical perspectives, levels, values	Defined folder and meaning
Atomic/Calculated Metrics	Basic measures and calculations	Definition, unit, owner
Qualified Metrics	Existing metrics plus periods/qualifiers	Consistent components
Qualifier Management	Scope, state, or type constraints	Distinct, unambiguous names
Time Period Management	Statistical range/grain	Alignment with extraction logic
Subject Folders	Group sources and metrics	Verified mappings
Metric Applications	Self-service queries by subject	Query permissions and mappings

Atomic metrics are indivisible business measures. Calculated metrics apply formulas/business rules to atomic metrics. Qualified metrics add time periods or qualifiers to existing measures. These relationships define meaning; queries still require mappings.

Follow the complete workflow

1. Define business question, owner, object, calculation, unit, and refresh frequency.
2. Prepare dimensions and hierarchy and identify required physical mappings.
3. Create atomic/calculated metrics, then qualified variants if needed.
4. Approve publication and verify editing, viewing, and querying scopes.
5. Map metrics/dimensions to sources, tables, and columns; verify known samples.
6. Configure alerts, monitoring, subjects, and queries; inspect execution history.

Publication does not enable queries by itself; saved mappings do not prove correct definitions; saved alerts do not establish execution.

Understand the Metric Standards boundary

Metric Standards provides basic definitions and dimensions. Metric Management adds composition, data access, monitoring, and permissions. Parameters may control visibility/editability. Published metrics and dimensions can synchronize to Metric Standards. Avoid conflicting definitions across the two entry points.

Create, import, and maintain basic standards

Basic standards combine business definitions, technical requirements, and management information for metadata columns. Agree on definitions before publication, mapping, and validation.

Maintain classification folders

In **Data Standards > Basic Standards**, open the folder ... menu:

- **View** shows name, order, and description.
- **Add** creates a child folder with name, description, and order.
- **Edit** changes these properties; order affects sorting.
- **Delete** requires no standards or child folders.

Create a standard

1. Select a folder and click **New**.
2. Complete standard, business, technical, and management information.
3. Align code, definition, type, length, and value domain. See [Domain standards](#) for reusable definitions.
4. Click **OK** to save or **Cancel** to discard.
5. Verify status and follow the [Publication workflow](#).

Complete the form

Define meaning before technical constraints. Asterisks indicate required fields; the current form determines validation.

Group	Fields	Guidance
Standard	Subject classification	Use the correct folder rather than retaining all definitions in a default
Standard	Code	Unique identifier also used to match imports; do not reuse another standard's code
Standard	Chinese/English names, abbreviation	Consistent full names and abbreviations; a short name is not a definition
Business	Definition	Meaning, scope, and boundaries beyond the name
Business	Referenced codes	Existing code values with verified meanings
Business	Business rules	Value, calculation, or use constraints; this text does not create technical quality rules
Business	Source, synonyms	Definition authority and searchable aliases
Business	Related standards, authoritative system	Verified associations and source of authority
Business	Documents	Supporting documents specific to the definition
Management	Business definition department, technical department	Separate semantic and technical responsibilities
Technical	Use domain type	Reuse Domain constraints where appropriate
Technical	Information type, data type, length, precision, format, non-null	Derive from requirements rather than copying an arbitrary source column

The verified form requires classification, code, Chinese name, English name, abbreviation, definition, business definition department, and data type. Automatic code generation depends on configuration. If unavailable, follow organizational coding rules.

For example, define customer statuses and their meaning, associate code values, then check type, length, and nullability. This is an authoring example, not a preinstalled standard.

Find standards

Combine name, code, status, definition department, and publication date, then **Search**. Use **Reset** to clear filters and **More Filters** for custom properties and tags. Names support discovery; codes identify objects. Recheck filters and selections before export, publication, or changes.

Import in bulk

1. Download the template from **More > Import** and read its Instructions sheet.
2. Complete codes, subjects, and other fields without changing structure.
3. Check duplicate codes. Matching codes identify existing standards: identical content is skipped; differences are processed as updates.
4. Select the resulting status and file. Status affects review; imports do not replace required approval.
5. Review progress and failures and correct rejected rows.
6. Verify added, updated, and skipped objects, especially existing codes.

Test a few records to verify update behavior before bulk processing.

Export and delete

Use **More > Export**, or select rows and **Export Selected**. Deprecation retains the object with a changed status. Deletion removes it irreversibly. Only standards Awaiting Review can be deleted.

View references and subscriptions

Use **Referenced Codes** for values and **Reference Information** for columns and documents, including unbinding where needed. **Knowledge Graph** shows tags, columns, systems, and other associations.

Subscribe to published standards from the list or details, then view **Personal Workspace > My Subscriptions**. Subscribing does not change publication status.

Troubleshoot

Issue	Action
Cannot delete folder	Check standards and children
Import updates instead of adds	Check matching codes
Import fails	Correct reported template errors without changing columns
Cannot delete standard	Check status; use change/deprecation for published objects
Standard exists but no mapping	Map columns or review intelligent matching candidates

Manage reference codes, domain standards, and naming dictionaries

Reference codes maintain stable codes and value domains. Domain standards constrain standards for a domain. Naming dictionaries standardize Chinese/English names and abbreviations. Standards, metrics, and column mappings can reference them.

Reference codes

1. Go to **Data Standards > Reference Codes** and select a folder.
2. Create a code set with name, code, description, owner, and scope.
3. Maintain values, display names, order, and active status.
4. Save and publish through the workflow before referencing it in standards or metrics.

Keep codes unique and stable. Review references and downstream rules before deleting or changing values.

Domain standards and naming dictionaries

Domain administrators maintain domain standard groups and grant viewing, editing, and publication rights, then add basic standards. Maintain Chinese terms, English terms, abbreviations, prohibited terms, and examples in the naming dictionary.

Check references

Inspect referencing standards, metrics, and columns. If inactive values remain in rules, create replacements and migrate references rather than clearing old values.

Define metric dimensions and values

Dimensions describe analytical perspectives such as organization, region, product, or time. Metric Standards' Dimension Hierarchy and Metric Management's Dimension Definitions are separate entry points.

Maintain dimensions in Metric Standards

1. Go to **Metric Standards > Dimension Hierarchy** and select a folder.
2. Add dimension information and save.
3. Select the dimension and **Add Value**.
4. Verify names, hierarchy, and values against definitions.

Review affected metrics before edits or deletion. Available actions depend on permissions and validation.

Define dimensions in Metric Management

1. Prepare folders in **Metric Management > Dimension Definitions**.
2. Create a dimension and complete the form.
3. Configure hierarchy and mapping if needed, such as province, city, and district.
4. Browse it, maintain values, and verify hierarchy.

Dimension values do not directly drive preview queries. Configure physical field associations in [Metric mappings](#).

Import dimensions from reference codes

Use **Import from Reference Codes** in Dimension Hierarchy. Verify matching meaning first, then sample counts, codes, and descriptions. Have business owners resolve inconsistencies.

Validate metric use

Inspect referencing definitions and mappings. For preview, check source dimension columns and query rights. Distinguish missing dimension values, mappings, source records, and permissions when results are empty.

Next: [Metric definitions](#) and [Metric mapping](#).

Manage business domain standards and naming dictionaries

Business domain standards independently organize standards and codes. Domain standards provide reusable, refinable definitions. Naming dictionaries standardize word roots and abbreviations.

Create a business domain group

1. Open **Business Domain Data Standards** and click **New**.
2. Enter the required group name and optional description.
3. Open the group's Data Standards or Reference Codes.
4. Maintain them as described in [Basic standards](#) and [Reference codes](#).
5. Submit publication, change, or deprecation requests as appropriate.

Group content is independent of external basic standards and codes. Domain standards can associate standards in their domain. Matching names do not identify the same object.

Search groups by name/description; inside a group filter by name, code, status, definition department, and custom properties. Edit group information as needed. Nonempty groups cannot be deleted.

Grant domain permissions

Select **Permissions > New Permission**, choose type, user, and rights, then save. Edit or disable existing grants and search by user or department. Test with the target user, checking both role and domain permissions.

Use domain standards

Define shared requirements under **Domain Standards**. Browse by folder or inheritance, and derive more specific definitions. Basic standards can reference these definitions. **Referenced technical information becomes read-only**, so verify constraints before selection.

Create a naming dictionary

1. Open **Naming Dictionary > New**.

2. Enter Chinese name, English name, abbreviation, and category. Chinese name and abbreviation are required.
3. Check duplicate or ambiguous roots.
4. For bulk entry, download the template and import it after completion.
5. Export for review; check selected scope before deleting.

Have business and technical teams agree on vocabulary. Consistent translations do not prove identical business definitions.

Manage metric standards and dimension hierarchies

Metric Standards records basic, algorithm, and management properties and dimensions. For atomic, calculated, and qualified metrics, mappings, queries, monitoring, alerts, and permissions, use [Metric Management](#). Check entry points and rights separately.

Create or import metric standards

1. Select a folder and **New**.
2. Complete metric information, business definition, algorithm, and ownership.
3. Click **OK** and verify saved content and status.
4. For bulk entry, download the template under **More > Import** and follow its instructions.
5. Select whether review is required and import the file.

Distinguish all query results from **Export Selected**. Only Awaiting Review objects can be deleted directly.

Publish and derive

Request publication for Awaiting Review objects; request changes or deprecation for published ones. Reviewers use Personal Workspace; verify final status using [Lifecycle](#).

Click **Derive** above details, complete the form, and confirm. The new metric shows its atomic source. Review its definition and approval status.

Maintain dimensions and values

1. In Dimension Hierarchy, use the modifier dimension ... menu to add a dimension.
2. Enter information and save.
3. Select it and **Add Value**.
4. Verify meanings and remove obsolete values through available actions.

Use **Import from Reference Codes** below the folder tree to convert existing codes. Review results to avoid confusing technical codes with business dimensions.

Verify completion

Confirm clear definitions, algorithms, consistent values, and correct derivation. Definitions do not execute data queries. Mapping and preview require licensed [Metric Management](#).

Publish, change, and deprecate standards

Basic standards, reference codes, domain standards, and metric standards have corresponding approval scenarios. Nodes and reviewers are organization-configured.

Request publication

1. Filter the appropriate list by **Awaiting Review**.
2. Select business-reviewed objects and **Request Publication**.
3. Verify scope and submit.
4. Reviewers inspect and approve/reject through Personal Workspace.
5. Check **My Requests**, then verify the object list status.

Approval sets Published; rejection retains Awaiting Review. Correct rejected content and resubmit. Submission is not publication.

Request a change

Select a published standard and **Request Change**. Review column references, codes, and dependencies and explain definition impacts. After approval, verify content/status and rerun standards validation on affected metadata.

Request deprecation

Select a published standard and **Request Deprecation**. Approval sets Deprecated; rejection retains Published. History remains. Define replacement and migration ownership where applicable; deprecation does not automatically replace mappings.

Check both workflow and object

Location	Check
My Requests	Objects, progress, decision
Approval tasks	Content, participants, comments
Standard list/details	Status, business/technical content
Reference Information	Affected columns
Automated Standards Validation	Post-change conformance

For missing tasks, check participants, rights, and deployment. If status remains unchanged, inspect whether approval is still pending. See [Approval workflow management](#).

Match, recommend, and validate standards

Recommendations, associations, and validation produce different outcomes.

Term	Meaning	Follow-up
Standards mapping	Associate a column with an applicable standard	Verify meaning, technical properties, and relationship
Intelligent Matching	Suggest existing basic standards using column properties	Accept or reject candidates; recommendations alone are not mappings
Grouped Recommendations	Group unmapped columns by Chinese name	Confirm equivalent meanings, create standards, verify bindings
Automated Standards Validation	Check existing mappings within a task scope	Inspect issues, correct definitions/mappings, rerun; does not validate actual record values

Matching names or high scores do not establish equivalent meaning.

Use Intelligent Matching

Intelligence here means property-based candidate generation and ranking, not automatic business approval.

1. Go to **Standards Implementation > Intelligent Matching > Data Scope**.
2. Select sources and reference properties such as Chinese name, English name, and description.
3. Wait for the background scan.
4. Compare candidate meanings, types, lengths, and domains.
5. **Accept** correct candidates to create mappings or **Reject** incorrect ones.
6. Verify selections before bulk acceptance/rejection.

Rejected pairs appear in **Re-recommendation** management and can be restored. Verify accepted mappings from columns and standard references.

Use Grouped Recommendations

This groups unmapped columns by Chinese name to identify potential shared definitions, whereas matching finds existing standards.

1. Open **Standards Implementation > Grouped Recommendations**.
2. Check the grouping task's interval/configuration, run it, and inspect groups.

- 3. **View** a group and verify source systems and equivalent meanings.
- 4. Select only semantically equivalent columns and **Create Standard**.
- 5. Verify the new standard and bindings.

Same-name columns may differ. Deleting recommendations does not delete database columns.

Run Automated Standards Validation

Automatic refers to configured scope and scheduling, not automatic repair or record-level quality validation.

- 1. Open **Standards Implementation > Automated Standards Validation**.
- 2. Configure scope and interval or execute immediately.
- 3. Inspect global and system-level statistics.
- 4. Review per-standard conformance, issue descriptions, and handling notes.
- 5. Correct mappings/definitions, rerun, and export Excel results if needed.

Activation ☒

Run

viewTaskProgress

Repetition Period

Not Sched

Time Filtering

Select

CreateTime	StartTime	EndTime	Status	Job Result	Operate
2026-07-09 14:51:38	2026-07-09 14:51:38	2026-07-09 14:51:39	FINISHED		Log
2026-05-29 14:41:01	2026-05-29 14:41:01	2026-05-29 14:41:01	FINISHED		Log

Review execution history as well as configuration. Use [Data quality](#) for actual records.

Parameters and troubleshooting

System Settings > Parameters controls code generation for standards, codes, domains, and metrics. Automatic generation disables manual code entry; verify the rule first.

For stale recommendations, check scope, reference properties, and jobs. For inaccurate matches, improve descriptions and review definitions. For missing accepted mappings, verify source and column identities.

Map, preview, monitor, and query metrics

Screenshot note: Screenshots are illustrative. Controls or labels may remain untranslated in the demo release, and pages without a faithful English capture retain the source illustration. Control names and layouts can vary by release.

Map metrics and dimensions to physical tables after definition. Prepare accessible sources, tables, and query permissions.

Configure metric mappings

- 1. Open a metric from Atomic/Calculated or Qualified Metrics.
- 2. Select one or more related dimensions under **Metric Mapping**.
- 3. Select the source and metric table through its system.
- 4. In **Relationship Mapping**, inspect Property Information and Type. Map the metric row and each dimension row to the appropriate column.
- 5. Check every mapped column and add notes. Verify affected properties before unbinding or remapping a row.
- 6. Reopen mappings and verify dimensions, source, table, and physical columns.

相关维度

地区:城市 ×

分支机构:大区 ×

客户类型:类型 ×

设置

数据源

DW-DM / DM / DM_CUST_PROFILE

设置

关系映射

属性信息	属性类型	映射字段	备注	操作
排名体系	指标	YEAR_SALARY		解绑
地区:城市	维度	ADDR_LINE		解绑
分支机构:大区	维度	PARTY_NAME		解绑
客户类型:类型	维度	请选择		解绑

The screenshot illustrates controls and includes incomplete rows. Complete and verify every actual mapping.

Area	Check
Related dimensions	Select required perspectives after agreeing on grain
Source	Correct physical table and environment
Property/type	Distinguish metric and dimension rows; include the metric itself
Mapped column	Meaning, type, unit, grain
Notes	Explain mappings, especially differing business/physical names
Unbind	Removes the row association; recheck previews afterward

Preview and verify data

Metric Preview generates SQL from mappings and queries immediately. Compare known samples and dimensions. For empty results, check mappings, rights, and source records rather than editing dimension descriptions.

1. Choose approved samples with known expected values and dimensions.
2. Verify metric/dimension correspondence in preview.
3. Compare units, time scope, and grain; returned values alone do not prove correctness.
4. Correct mappings and verify source logic. Qualified names do not automatically add periods or qualifiers to extraction.
5. Retain conclusions before enabling other users and verify each user's preview rights.

Set up alerts and monitoring

Configure thresholds and recipients in **Alert Settings**. Analysis/monitoring queries use alert schedules; task scheduling scans and executes them.

标题

预警等级

警告

预警公式

与

指标值

等于

🗑️ +

指标值

等于

🗑️ +

通知方式

☒ 通知 ☐ 邮件

通知内容

通知对象

设置

取消

保存

1. Enter an identifiable alert title.
2. Choose priority according to organizational policy.
3. Set comparisons and thresholds in Alert Formula. For multiple conditions, verify their combination.
The screenshot uses AND, requiring all conditions.
4. Choose Notification or Email. Check [Email configuration](#).
5. Enter content and set recipients.
6. Save, review, and verify results/notifications after scheduling, or cancel to discard.

Title is required in the screenshot. Other validation and available levels/operators follow the current form. Scheduling scans alert settings daily; inspect execution history for effective timing. Saving is not immediate querying or triggering. Check threshold units, execution, and notification setup; distinguish business anomalies from technical failures.

Organize subjects and self-service queries

1. Build source-centered metric collections in Subject Folders.
2. Select a subject in **Metric Applications > Self-service Query**.
3. Query available metrics/dimensions and verify sources and definitions.
4. If unavailable, inspect included metrics, mappings, and authorization.

Related: [Overview](#), [Definitions](#), [Governance](#), [Scheduling](#), [Email](#).

Define atomic, calculated, and qualified metrics

Define what is measured, how it is calculated, and who owns it before mapping data. Composition determines type, not the metric name alone.

Choose a metric type

Type	Definition	Example	Preparation
Atomic	Indivisible measure of an event/fact	Order amount/count	Object, unit, definition, owner
Calculated	Formula/business rule over atomic metrics	Average order amount, conversion rate	Inputs, formula, aggregation grain, exceptions
Qualified	Atomic/calculated metric with period/qualifiers	Monthly completed order amount	Base metric, period, qualifiers, meaning

Periods and qualifiers identify meaning; they do not automatically add SQL filters. Verify extraction logic in mappings and source data.

Create atomic or calculated metrics

1. Open **Metric Management > Atomic/Calculated Metrics > New**.
2. Choose type and folder.
3. Enter code, names/abbreviation, and business definition that distinguish object and measure.
4. Set unit, technical properties, and ownership. For calculations, define inputs, formula, aggregation, and boundary conditions.
5. Verify basic, business, technical, and management details after saving.
6. Test a few definitions and approvals before bulk import.

Definitions should specify object, scope, calculation, time basis, unit, refresh frequency, and owner. Names such as total or completion rate are insufficient.

Prepare qualifiers and periods

Qualifiers constrain scope, type, state, or properties, such as completed or online channel. Periods describe day/week/month/year ranges or grain.

1. Create reusable qualifiers without near-duplicate meanings.

2. Maintain approved periods, distinguishing calendar months from rolling 30 days.
3. Review references before changes.
4. Reread composed names and definitions for ambiguity.

Create qualified metrics

1. Open **Metric Management > Qualified Metrics**, select a folder, and create.
2. Select a published or usable atomic/calculated metric.
3. Choose period and qualifiers; complete definition and ownership.
4. Verify grain and semantic consistency.
5. Save, inspect details, and follow [Governance](#).
6. Configure actual extraction using [Mapping and preview](#).

Verify definitions

- Types match calculations and component references are traceable.
- Codes, names, meanings, units, periods, and ownership are complete and consistent.
- Periods/qualifiers are not mistaken for automatic query conditions.
- Required [Dimensions](#) exist.
- Do not claim query/monitoring readiness before mapping and validation.

Publish, change, and authorize metrics

After definition, manage bulk maintenance, approvals, states, details, and access. Publication confirms the definition is usable; authorization controls maintenance and queries. Neither replaces mapping or result validation.

Import and export in bulk

1. Open **More Actions** in Atomic/Calculated or Qualified Metrics.
2. Download the current template and read Instructions rather than reusing an older version.
3. Keep folders, codes, types, and references valid; test a few rows and inspect failures/statuses.
4. Confirm export scope: query results or selected objects. Record filters.
5. Sample definitions, compositions, owners, and statuses. Import success is not publication.

Publish, change, and deprecate

Action	When	Verify
Request Publication	Reviewed new definition ready for use	Approval and final status
Request Change	Published definition, components, or owner changes	New definition, impact, history
Request Deprecation	Retire while preserving evidence	Deprecated state and downstream handling
Delete	State/rights allow and retention unnecessary	Object and reference scope

1. Verify type/status and select the request.
2. Explain reason, changes, and impacts on mappings, subjects, alerts, and users.
3. Reviewers open Personal Workspace through the user menu.
4. Verify final list status; correct rejections and resubmit.
5. Revalidate mappings, previews, monitoring, and queries after changes.

Use deprecation when definitions, history, and reference evidence must remain.

Review metric details

Tab	Check
Basic/business/technical/management	Folder, code, names, type, meaning, unit, constraints, owner
Mapping	Correct source, table, metric and dimension columns
Preview	Known samples, units, time, grain
Lineage/graph analysis	Dependencies and direction
Analysis/monitoring and alerts	Conditions, thresholds, schedule, methods, recipients
Authorization	Maintenance, querying, viewing, alert settings
History	Definition, state, approval, revisions

Visible details do not imply query permission or business validation.

Apply least privilege

- Definition maintenance: create, edit, request changes.
- Metric access: view definitions and management information.
- Data query/preview: access real data through mappings, potentially sensitive.
- Alert settings: change thresholds, schedules, and recipients.

Do not grant query access by default to definition-only users. Test menus, metrics, and data scope as the target user.

Review change impacts

Check qualified metrics, subjects, self-service queries, alerts, report references, and users after definition/component/mapping changes. Retain before/after definitions, approvals, samples, and notification scope for traceability.

Manage reference codes and value domains

Centrally maintain reusable codes and meanings for standards and metadata instead of inconsistent per-column value lists.

Create a code set

1. Open **Data Standards > Reference Codes > New**.
2. Complete code information and values; verify their meanings.
3. Click **OK**.
4. Review details, references, history, and custom properties as needed.
5. Request publication through [Lifecycle](#).

Import and export

Download from **More > Import > Download Template**, read Instructions, and import. Verify counts/values, distinguishing stored codes from display names. **More > Export** exports query results, or all without filters. Select rows to restrict scope.

Publish, change, and deprecate

Awaiting Review codes can request publication; published codes can request changes or deprecation. Personal Workspace handles approvals. Approved deprecation sets Deprecated; rejection retains Published. Only Awaiting Review codes can be deleted directly.

Review referencing standards/columns before changing values or meaning. Dictionary maintenance does not change stored database values.

Reuse references and dimensions

Associate codes through a standard's Referenced Codes. Column mappings can include the standard's codes or maintain a separate code association.

Use **Import from Reference Codes** to create [Dimensions](#). Verify dimensions/values; do not assume ongoing bidirectional synchronization.

Review standards and reference statistics

Use the overview for publication/use trends and query statistics for system references. Published and mapped are separate outcomes.

View the overview

Open **Data Standards > Standards Overview** for basic standards, codes, metrics, dictionaries, and domains. Select systems under Business System Standard References, then use query statistics for details.

Chart/measure	Meaning and use
Published/under-review standards	Basic standard states, not mapped column counts
Published/under-review codes	Code states, separate from basic standards
Published/under-review metrics	Metric Standard states, not data mappings
Dictionary/domain totals	Inventory completeness against folders
Total columns	All columns in the current system; verify harvesting scope
Referencing columns	Columns with standard associations
Conformance rate	Fully conforming mapped columns divided by referencing columns, not all columns
Top 20 influential standards	Frequently referenced; prioritize change impact review
References by subject	Compare references, publication, and conformance with aligned scopes
Top 20 metadata references	Subjects, systems, standards, reference counts
Top 10 publishing departments	Volume does not measure definition quality or use
Last-year trend	Monthly publications interpreted with policy/release activity

Unmapped columns need mappings; mapped but nonconforming columns need property/relationship review. See [Mapping](#) and [Validation](#).

Find systems referencing a standard

1. Open **Data Standards > Standards Statistics > Query Statistics**.
2. Select **Standard Reference Details**.
3. Filter by subject, system, name, or code.

4. Search and inspect subject, system, standard name/code, and count.
5. **View** a row for system, table/view, and column details; filter the detail list by system if needed.
6. Reset for new criteria or refresh current results.

Use codes for precise identification. Clear system filters to assess cross-system impacts. Verify scope before export. Reference statistics are not metadata backups.

Read department and subject statistics

1. Select **Department and Subject References**.
2. Choose department/system and search.
3. Inspect department, subject, system, and referenced information items row by row.
4. Reset criteria or refresh results as needed.

Export All is not limited to the current page. Confirm scope and distinguish system department, definition department, and column owner.

Troubleshoot

Symptom	Checks
Published with zero references	Column mappings, statistic filters
Missing standard	Name/code, subject/system, reset
Many references, low conformance	Types, lengths, precision, constraints, validation results
Overview/list counts differ	Align state, system, subject, time, deduplication

Related: [Create standards](#), [Lifecycle](#), [Matching and validation](#).

Manage standards folders and publication states

Folders organize standards. Basic standards define column names, meanings, types, lengths, and values; reference codes and dictionaries provide reusable value/naming constraints.

Design folders

In **Data Standards > Standards Folder Management**, organize by domain, subject, or department. Folder rights govern viewing, maintenance, and publication requests, not object-level data access.

Enter name, code, owner, description, and order. Keep referenced codes stable. Check standards, mappings, and approvals before deleting.

Create a basic standard

1. Select a folder and **New Standard**.
2. Enter names, definition, type, length/precision, rules, owner, and scope.
3. Associate codes, dictionary terms, or standards as needed.
4. Save a draft and preview required fields and examples.
5. Submit approval, then map columns after publication.

For imports, use the current template with unique codes, valid folders/types. Inspect draft/published states and failed rows after import.

Publish, change, and deprecate

Check definitions, owners, codes, and mapping scope. Record reasons, affected columns, and approvals for changes. Review metadata, rules, and catalog references before deprecation.

Next: [Lifecycle](#) and [Column mappings](#).