

Title: How to Use the Data Governance and Data Quality App

Overview

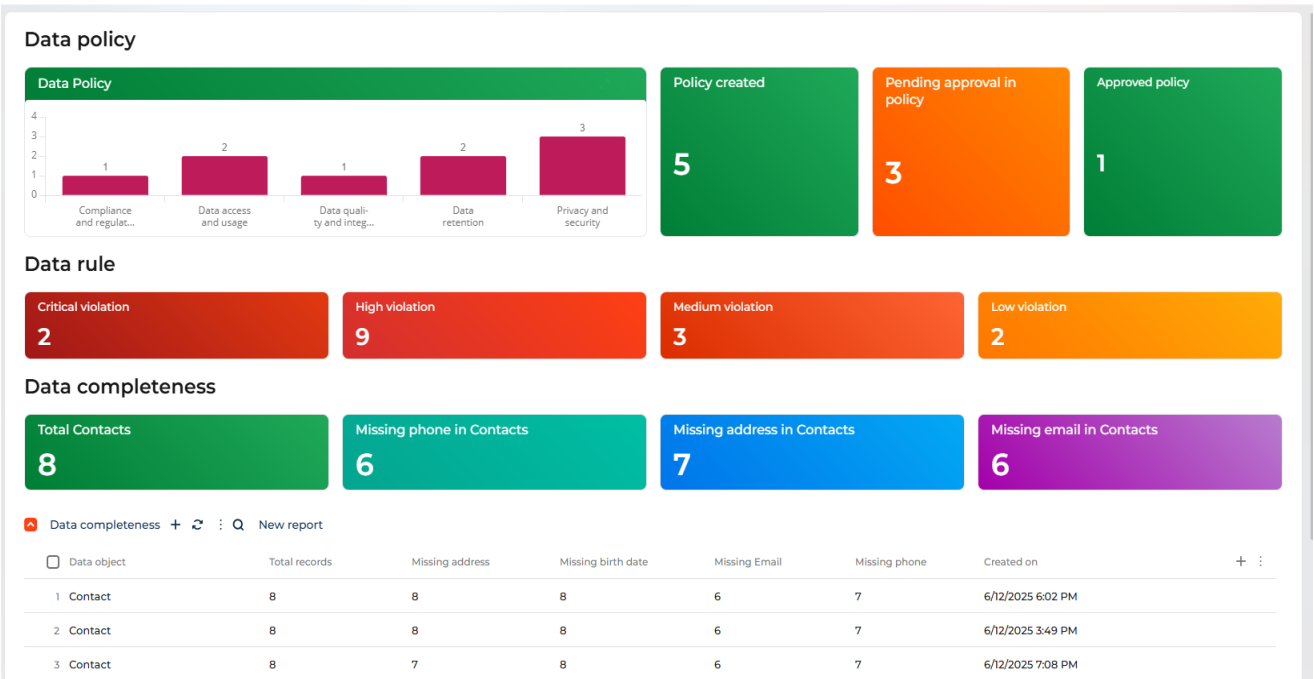
The Data Governance and Data Quality Management app enables users to establish robust data governance practices within Creatio, facilitating metadata cataloging, policy lifecycle management, and data quality monitoring—all through a no-code interface.

Key Terms

Term	Definition	Relationship in the Tool
Data Policy	A formal guideline that governs how data is managed, used, protected, and retained across the organization. Categories may include compliance, privacy, and other relevant areas.	Multiple Data Quality Rules can be linked to a Data Policy to ensure its enforcement.
Data Quality Rule	A rule used to assess or enforce the quality of data, such as checks for completeness, accuracy, formatting, and duplication.	Can be mapped to one or more Data Policies. Violations are categorized as Critical, High, Medium, or Low.
Data Completeness	A measure of whether all required data fields are filled in as expected.	Monitored and scored on the Dashboard. Rules can be defined to enforce completeness.
Data Accuracy	A measure of whether data is correct, valid, and consistent with authoritative sources.	Scored and reported in real time. Accuracy-focused rules can validate data against Authoritative Sources.
Data Catalog	A centralized inventory of data domains (e.g., customer, product, transaction) including ownership, metadata, and sensitivity classification.	Allows configuration of data owners, sensitivity levels, and access permissions.
Data Terms	Business glossary entries defining critical data concepts used across the organization.	Associated with data domains in the catalog; includes stewards, sensitivity, and lineage.
Authoritative Data Source	The officially recognized system or source of truth for a specific type of data, such as a CRM for customer records.	Defined in the Data Catalog and used for validating data accuracy.

Dashboard Overview

Data governance homepage



Data policy id	Data policy name	Category	Status	Approver
1 P-00001	Data retention	Data retention	Pending approval	Supervisor
2 P-00015	Customer data access policy	Data access and usage	Policy created	Supervisor
3 P-00019	Incident response policy	Compliance and regulatio...		Supervisor
4 P-00017	Access control policy	Data access and usage	Policy created	Supervisor
5 P-00014	Personal identifiable information ...	Privacy and security	Policy created	HR
6 P-00006	Data completeness	Data quality and integrity	Approved	Supervisor
7 P-00016	Health data encryption policy	Privacy and security	Policy created	HR
8 P-00018	Data privacy policy	Privacy and security	Pending approval	Supervisor
9 P-00013	Medical record retention policy	Data retention	Pending approval	HR

- Data Policy Number
- Data Policy Name
- Category
- Status
- Approver

Data Policy Detail View

Click on a policy from the list to access details.

The screenshot shows the 'Data retention' policy detail view. The left sidebar contains navigation links: Home, Data catalog, Data policy, Data quality rules, and Archived contacts. The main content area has a top bar with 'Data retention' and a search bar. Below this is a progress bar showing 'Policy created', 'Pending approval', and 'Approved'. The 'BASIC INFO' section lists: Data policy name (Data retention), Data policy id (P-00001), Category (Data retention), and Case type (Policy approval process). The 'GENERAL INFORMATION' section includes: Purpose (To define how long data is stored), Approver (Supervisor), Department (Security), Attachment link, and Status (Pending approval). The 'Data quality rules' section shows a table with one rule: 'Archival Rule' with a 'Medium' severity and description 'Data older than 3 years must be ...'. The 'Approvals' section shows counts: Positive (0), Negative (0), and Pending (1).

Main Fields

- Name, Number, Category
- General Info: Purpose, Approver, Department, References, Status

Linked Data Rules

- Shows all mapped rules with:
 - Data Rule ID (linked to details)
 - Rule Name & Description

Attachments & Feed

- Upload policy documents
- Provide external document link
- Use @mentions in feed for collaboration
- Status Workflow:
 - Created → Pending Approval → Approved(Approved policies are frozen and only editable by Policy Owner)

Data rule id	Data rule name	Data policy name	Severity of violation	Description
1 R-00020	Consent Rule	Data privacy policy	High	Personal data must only be collec...
2 R-00011	Archival Rule	Data retention	Medium	Data older than 3 years must be ...
3 R-00023	Access Transparency Rule	Data privacy policy	Low	Users must be able to request a r...
4 R-00016	Audit Logging Rule	Access control policy	High	All access attempts to sensitive d...
5 R-00014	Missing phone number in contacts	Data completeness	High	Check for contacts where the pho...
6 R-00022	Third-Party Sharing Rule	Data privacy policy	High	Data sharing with third parties m...
7 R-00021	Data Minimization Rule	Data privacy policy	High	Only necessary personal data sho...
8 R-00025	Incident Classification Rule	Incident response policy	Low	Security incidents must be categ...
9 R-00026	Response Time Rule	Incident response policy	Medium	High-severity incidents require an...
10 R-00018	Role-Based Access Rule	Access control policy	High	Users should only have access to ...
11 R-00019	Multi-Factor Authentication Rule	Access control policy	Critical	Access to sensitive systems requir...
12 R-00015	Session Timeout Rule	Access control policy	Medium	Inactive user sessions must auto...
13 R-00017	Access Review Rule	Access control policy	High	User access privileges must be re...
14 R-00024	Breach Notification Rule	Incident response policy	Critical	All data breaches must be reporte...
15 R-00027	Forensic Investigation Rule	Incident response policy	High	All critical incidents must underg...
16 R-00013	Missing email in contacts	Data completeness	High	Checks contacts records where e...

Data

Quality Rules

List View

- Data Rule ID
- Rule Name
- Associated Policy
- Severity Level

Data Quality Rules Detail View

Missing phone number in contacts

BASIC INFO

Data rule name*
Missing phone number in contacts

Data rule ID*
R-00014

Data policy name*
Data completeness

Severity of violation
High

GENERAL INFORMATION

Description* Check for contacts where the phone number is missing

Business process library + 🔍 New business process

Data quality rule name	Business Process
1. Missing phone number in contacts	Check contacts where phone number is missing
2. Missing phone number in contacts	Test
3. Missing phone number in contacts	Test New Rule

+ New

- Rule Info: Name, ID, Associated Policy
- Violation Severity: Low / Medium / High / Critical
- Object Scope:
 - Object Lookup
 - Data Source
 - BPM Process (Select or custom)
- Output Records: View rule violations generated post-execution

Data Catalog

List View

- Data Domain ID & Name
- Description
- Data Owner
- Modified Date

The screenshot shows the Credio Data Catalog interface. On the left is a dark sidebar with navigation links: Home, Data catalog (selected), Data policy, Data quality rules, and Archived contacts. The main area is titled 'Data catalog' and contains a table with the following columns: Domain id, Domain name, Data sensitivity, Data owner name, and Modified on. The table lists seven data domains, each with a unique ID, a description, a sensitivity level, an owner, and a modification timestamp.

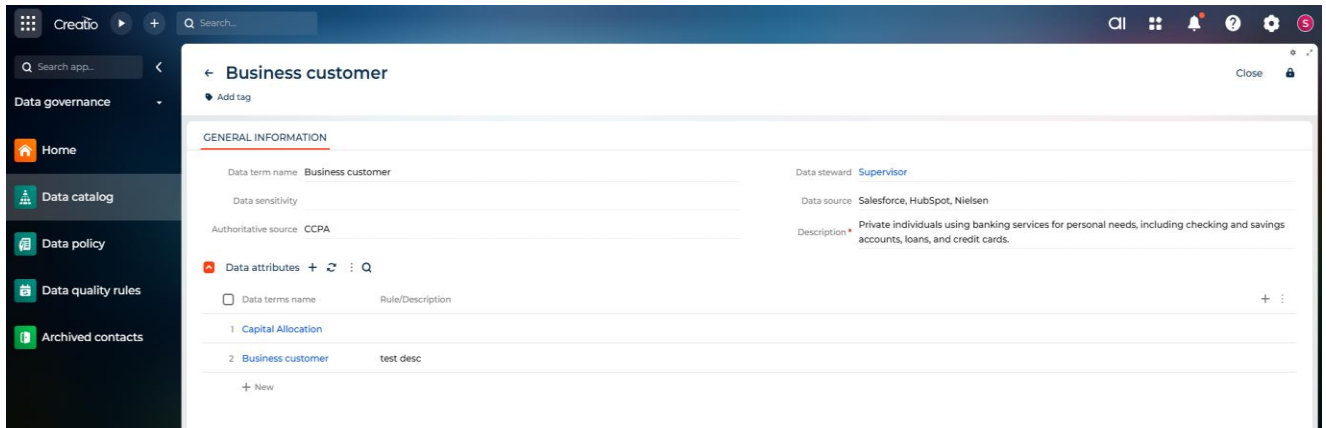
Domain id	Domain name	Data sensitivity	Data owner name	Modified on
1 GL-00016	Investor Relations	Low	Supervisor	6/13/2025 8:04 PM
2 GL-00009	Marketing, Sales & Customer Eng...	Medium	Supervisor	6/13/2025 5:28 PM
3 GL-00001	Customer	Low	Supervisor	6/26/2025 1:11 AM
4 GL-00012	Legal & Contracts		Supervisor	6/13/2025 7:57 PM
5 GL-00013	Transactions & Payments Data	High	Supervisor	6/26/2025 1:11 AM
6 GL-00015	Financial & Treasury Data	High	Supervisor	6/13/2025 8:01 PM
7 GL-00010	Orders	Low	Supervisor	6/13/2025 7:54 PM

Detail View

- Contact Info for Owner
- General Info:
 - Description
 - Data Sensitivity (Low / Medium / High)
 - Access Permissions (Confidential, External, Internal, Public, Read-only, Restricted)

The screenshot shows the 'Customer' detail view in the Credio Data Catalog. The left sidebar is the same as in the list view. The main area is divided into two panels. The left panel, titled 'BASIC INFO', shows the domain name 'Customer', domain ID 'GL-00001', data owner name 'Supervisor', and modification date '6/26/2025 1:11 AM'. The right panel, titled 'GENERAL INFORMATION', shows the description 'Contains customers details such as name, email, and location', data sensitivity 'Low', and access permission 'Internal'. Below this, there is a section for 'Data terms' with a table listing terms and their descriptions.

Data term name	Description	Data steward
1 Business customer	Private individuals using banking servi...	Supervisor



Data Terms List & Detail

- Term Name & Description
- Detail Includes:
 - Steward Info
 - Sensitivity
 - Authoritative Source
 - Linked Data Sources (used for lineage)

Important Notes

- Approved policies are locked from edits (except by owners).
- Data rules support many-to-many relationships with policies.
- BPM-driven data rule outputs are updated dynamically.
- Rule scope must be applied to valid object types/sources.