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

Overview

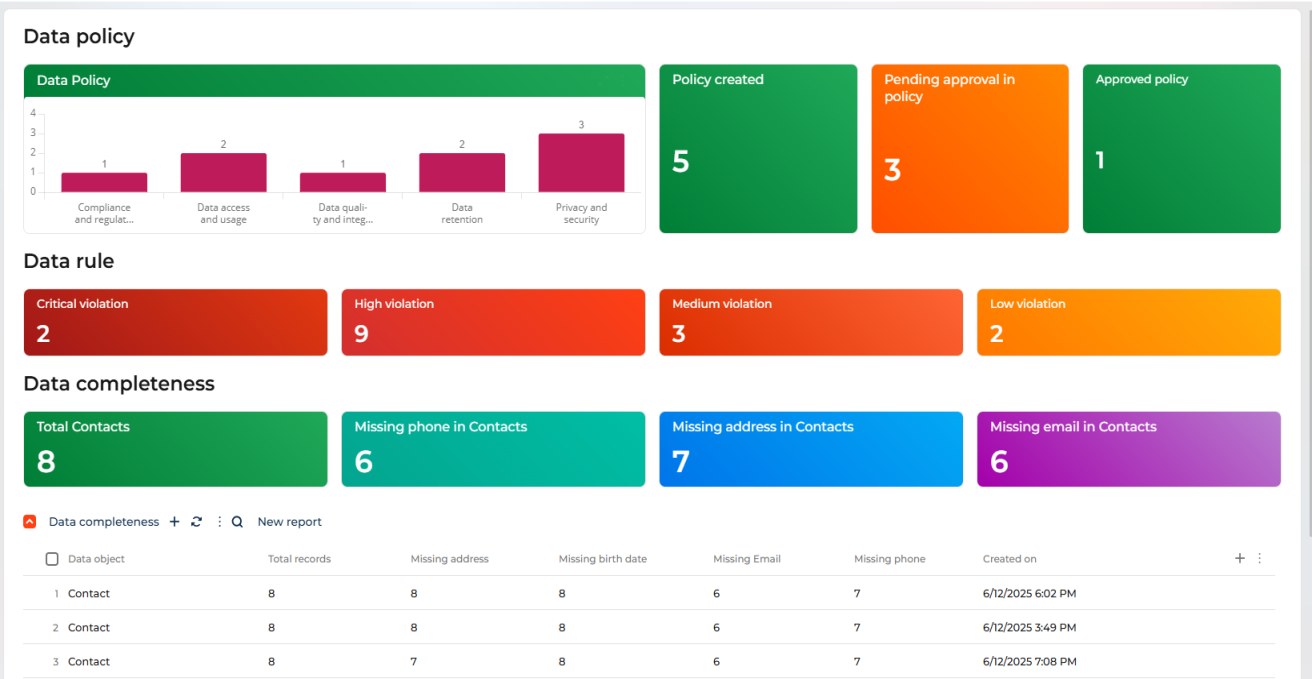
The Data Governance and Data Quality Management app enables users to establish robust data governance practices within Creatio, facilitating metadata cataloging, policy lifecycle management, and data quality monitoring—all through a no-code interface.

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

- Bar chart showing policy count by type as configured by the user, such as Compliance & Regulatory, Data Retention, Privacy, Standard

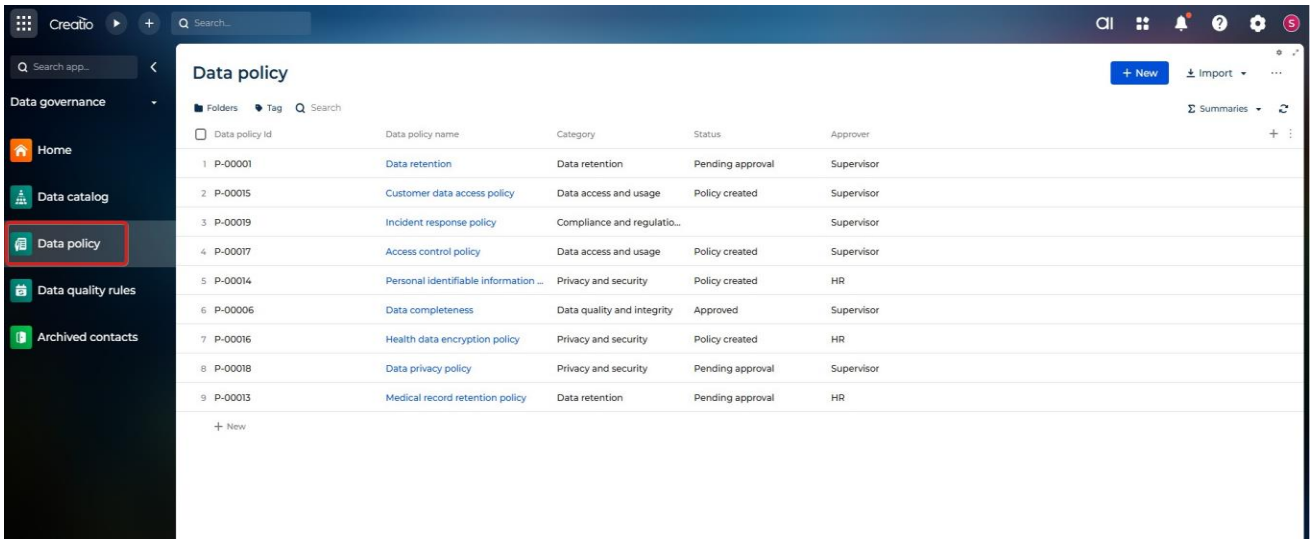
- Status Overview: Created, Pending Approval, Approved

Data rule

- Violations categorized by severity: Critical, High, Medium, Low

List of Data Policies

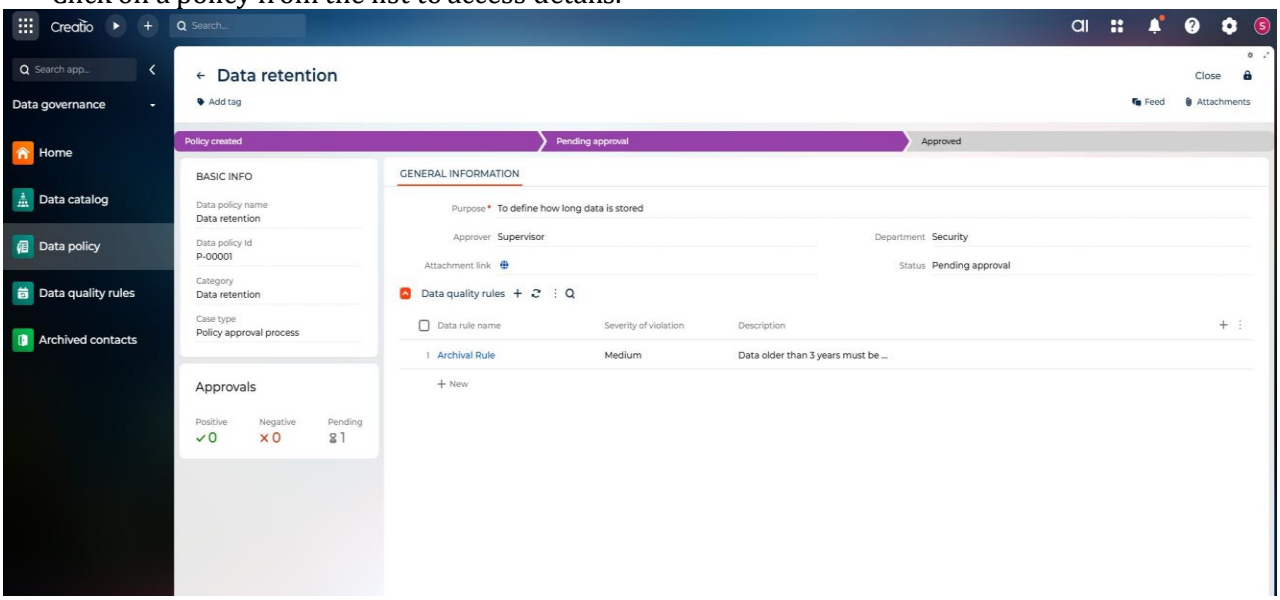
Navigate to Data Policies > List View to see:



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

Data Policy Detail View

Click on a policy from the list to access details.



Main Fields

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

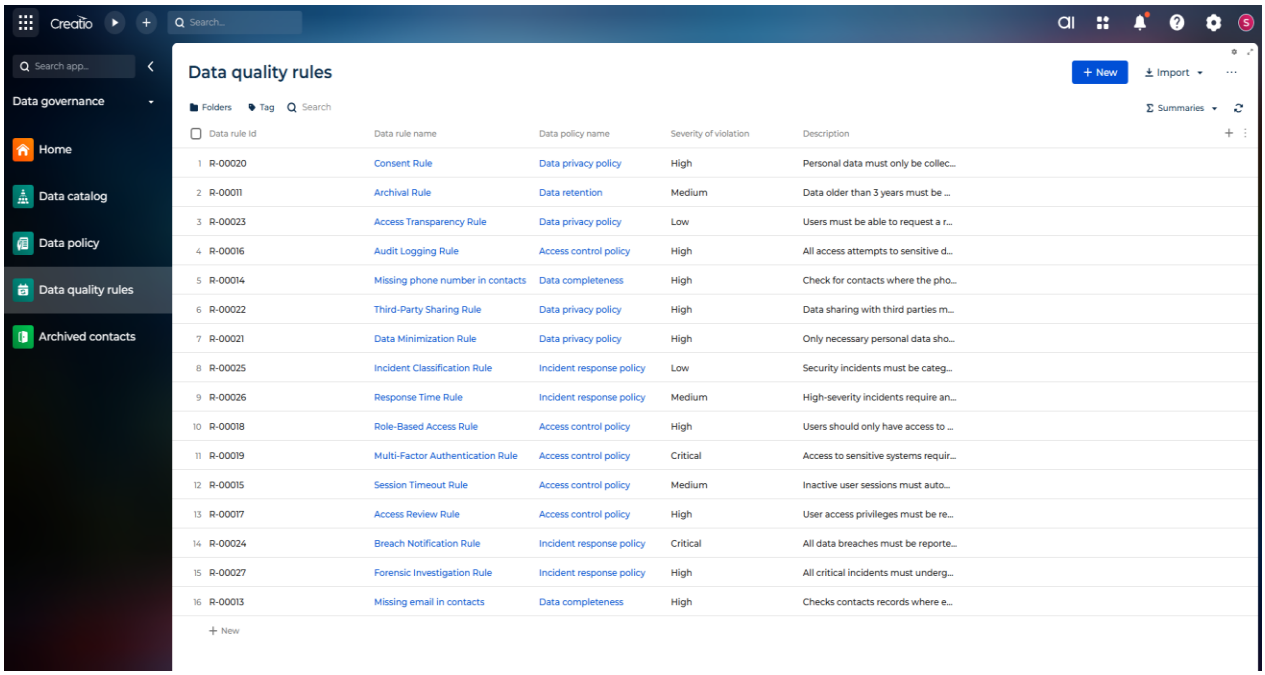
Linked Data Rules

- 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)

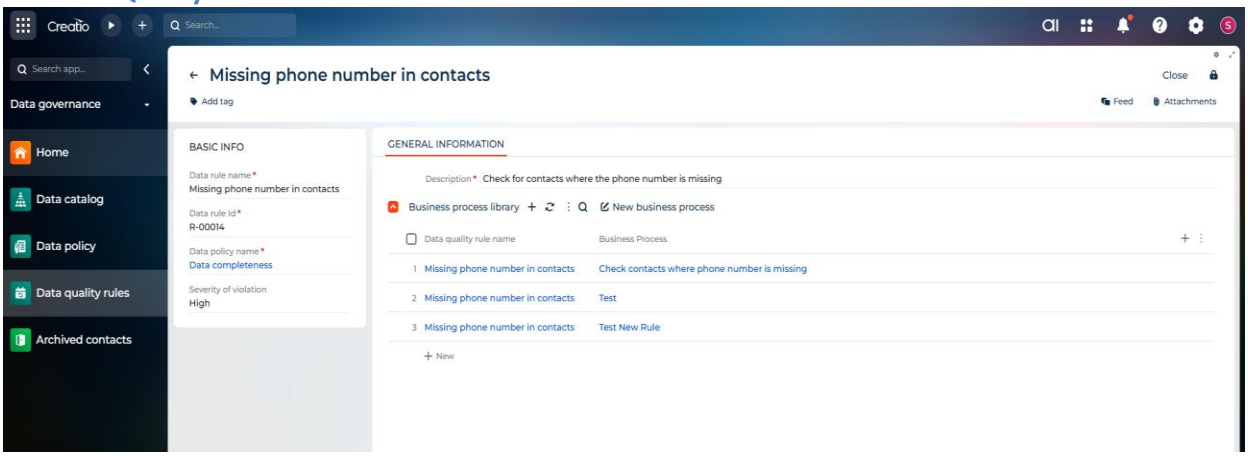


Data Quality Rules

List View

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

Data Quality Rules Detail View



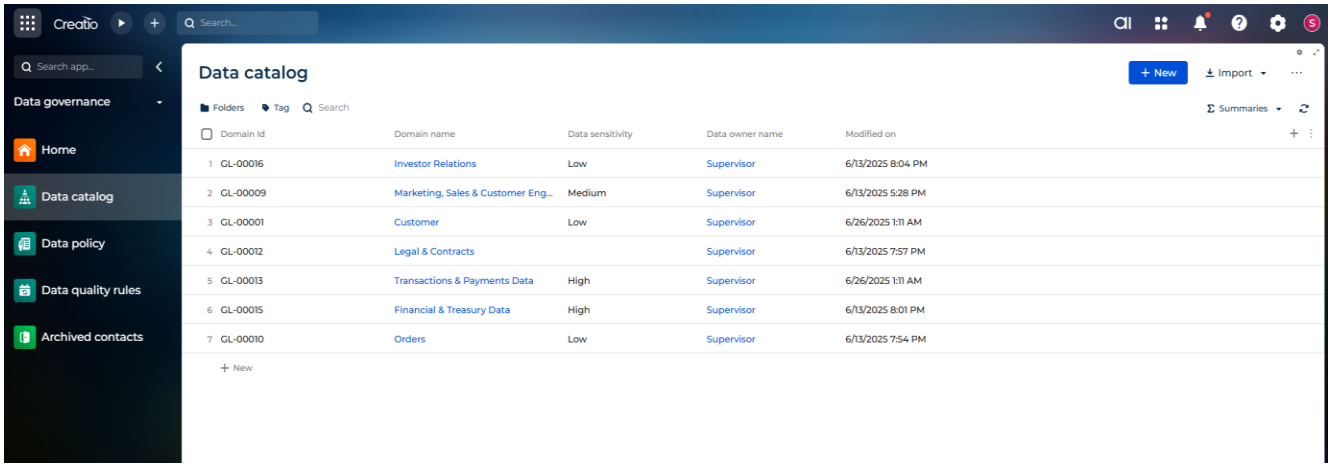
- Rule Info: Name, ID, Associated Policy
- Violation Severity: Low / Medium / High / Critical
- Object Scope:
  - Object Lookup
  - Data Source
  - BPM Process (Select or custom)

- Output Records: View rule violations generated post-execution

Data Catalog

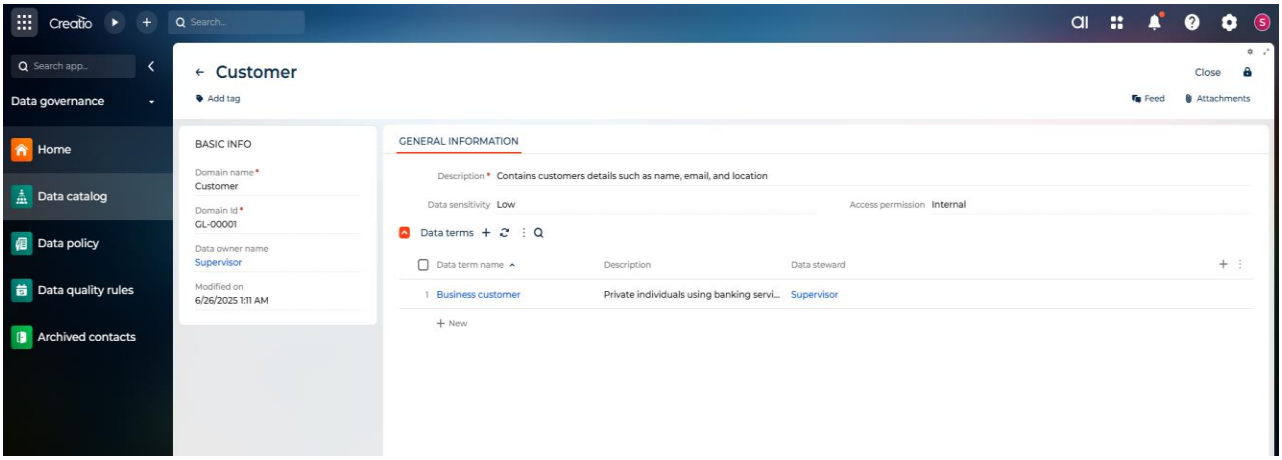
List View

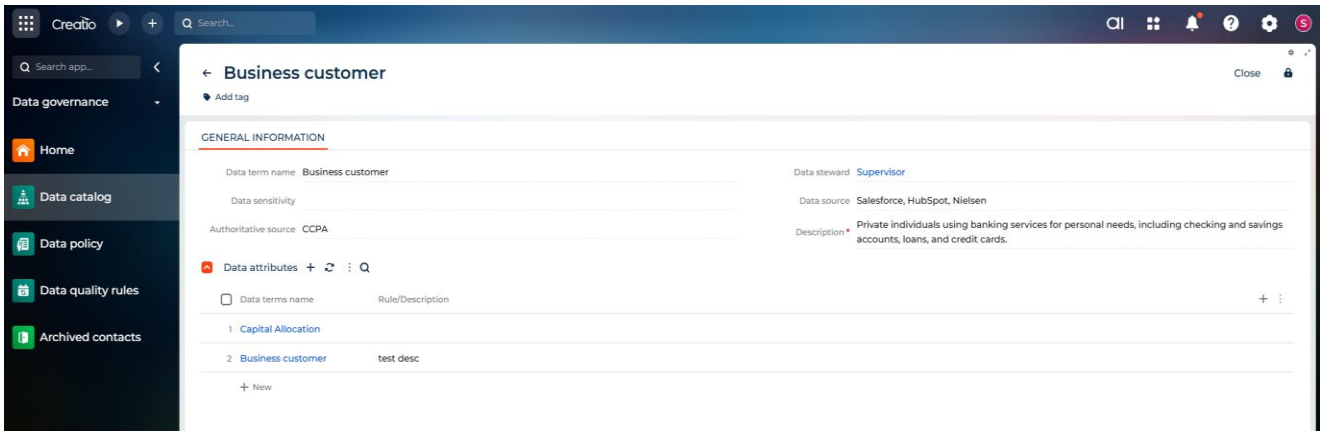
- Data Domain ID & Name
- Description
- Data Owner
- Modified Date



Detail View

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





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.