



DATABLAU · DAM

Data quality

Product module user manual

Version 9.1.2

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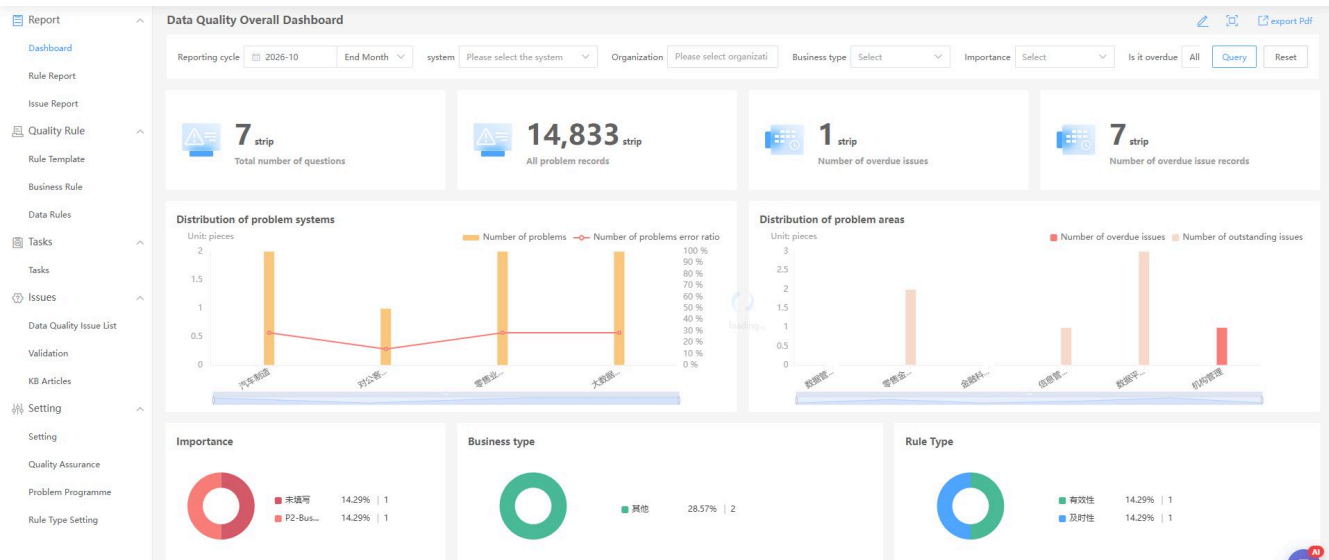
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Data quality

Use Data Quality to define validation rules, run tasks, review reports, and confirm, assign, and resolve issues.

Validation checks actual records against business requirements through technical rules. [Automated standards validation](#) checks column associations and conformity to standards. Issue verification rechecks failures after remediation; successful execution alone does not confirm resolution.

Navigation group	Pages
Quality Reports	Quality Overview, Rule Report, Issue Report
Rule Management	Rule Templates, Business Rules, Technical Rules
Validation Tasks	Validation Tasks
Issue Management	Issues, Issue Verification, Knowledge Base
Rule Parameters	Parameter Settings, Quality Permissions, Issue Assignment Plans, Rule Types



[Open the full image](#). Statistics and filters vary by environment; the screenshot illustrates navigation and layout.

Follow the remediation lifecycle

Business rules define requirements, technical rules implement checks, tasks execute them, issue lists organize remediation, and verification confirms the outcome. Reports summarize results; the knowledge base captures solutions.

Object	Work	Output
Rule template	Capture reusable descriptions and parameters	Reference for business rules
Business rule	Define objects, requirements, responsible organization, and category; publish	Requirement for technical rules
Technical rule	Define the source, executable check, and record identifier	Rule available to tasks
Validation task	Select published rules, scope, interval, and recipients	Results, statistics, and failed records
Issue list	Confirm, assign, and document remediation	Traceable remediation record
Issue verification	Recheck data after closure	Failed, partially passed, or passed result
Knowledge base	Capture causes, solutions, and verification	Reusable guidance

A requirement can need several technical checks. Create executable rules as well as business rules. Business rule details link to technical rules, tasks, and issues.

Before you begin

Review folders, user group access, and rule types in [Quality configuration](#). Verify source read access. Use stable record identifiers for continuous tracking; automatically generated primary keys do not support verification.

A quality lead coordinates validation, business owners confirm definitions, and data maintainers fix source data. These responsibilities are recommendations; actual roles depend on your organization. Verify rule, folder, and issue handling permissions separately.

Choose a report

Report	Information	Next check
Quality Overview	Score, rule counts, remediation monitoring, issues, overdue items	Actual scope in tasks, issues, and records
Rule Report	Rules by type, system, additions, and removals	Requirements have executable rules used in tasks
Issue Report	Issues by type, system, and other dimensions	Ownership, progress, verification

Issue lists and failed records use different units; one list can contain several failed records. Use reports to prioritize and handle remediation through lists and records.

Filter by reporting period, system, organization, business type, importance, and overdue status. Record filters before reading cards and retain them with PDF exports. Clear filters and query again to check the full scope.

Find a task

Goal	Guide
First validation and remediation cycle	Quick start
Publish business requirements	Business rules
Templates and imports	Rule templates
SQL, expressions, functions, comparisons	Technical rules
Run tasks and inspect results	Validation tasks
Read and export statistics	Report operations
Assign, fix, and verify issues	Issue handling
Capture reusable solutions	Knowledge base
Folders, types, variables, assignments	Quality configuration

Align rules with business definitions. See [Data standards](#) for semantics and [Metadata lineage](#) for dependencies.

Data quality quick start

Start with one clear requirement, one technical rule, and a limited task. Prepare a readable source, stable primary key, quality folder, and responsible users.

1. Define the requirement

Follow [Business rules](#) to specify scope, valid conditions, and failures, then publish. A non-null business identifier is only an example; confirm actual columns and scope with the business.

2. Create a technical rule

Choose a method available in [Technical rules](#). The verified creation page supports SQL and data comparison. Use expressions or functions only where available. SQL selects failures; regular expressions describe valid formats. Use a stable key for verification.

Rule Content

* Rule Writing Method

☒ SQL ☐ Compare

* Execute data source

Execute data source

Metadata binding field

Target Data Source

Schema

Belonging Table/view

Field

* SQL Content

Please enter the rule content

Automatically generate content using templates

Automatically create primary key

☐

?

If you enable the automatic creation of primary keys, each time you perform a check task, a new duplicate problem will be generated in the problem list, a key in the problem verification, verification cannot be performed.

* SQL content primary key

Please select SQL primary key

SQL Content Primary Key, **Total Record Count Calculation**, and **Issue Count Calculation** identify records and calculate statistics respectively. They are not interchangeable. Click to open the full image.

3. Create a validation task

Add published rules to a [Validation task](#). Set system, interval, and recipients. Inspect history and failures after the first run to confirm pass/fail logic.

4. Remediate issues

Inspect [Issues](#), assign authorized owners, fix source data, document solutions, and mark fixed and closed through the workflow.

5. Verify resolution

Confirm all records pass verification. Reopen failed or partially passed issues where permitted. Add reusable solutions to the knowledge base.

Completion criteria

Rules, tasks, issues, and verification are mutually traceable. Execution success, issue closure, and successful verification are separate conclusions.

Manage rule templates and business rules

Rule templates provide reusable validation expressions. Business rules describe business requirements; technical rules implement executable checks. Set up quality folders and permissions first.

Create a rule template

1. Go to **Data Quality > Rule Management > Rule Templates** and click **New**.
2. Enter the template name, category, and rule content.
3. Define column, table, view, and code value parameters as needed.
4. Save, use **View** to verify the template, and **Edit** to maintain it.

For bulk entry, download the Excel template from **More > Import**, complete it, and import it. Select the scope before exporting or deleting. Review dependent rules after changing a template.

Create a business rule

1. Open **Business Rules** and click **New**.
2. Enter the name, folder, rule type, business type, organization, and description.
3. Specify a testable requirement with its objects, scope, and failure conditions.
4. Save and submit for publication approval. If the simplified workflow is available, use **Save and Publish**.
5. Verify **Published** status before creating a technical rule that references it.

Unpublished rules are private and cannot have associated technical rules. Saving does not publish a rule.

Check implementation coverage

In the list, check associated technical rules and tasks. Open details to follow links to technical rules, validation tasks, and issues. Visibility depends on menu and business folder permissions.

Change and deprecate rules

The first save when editing a published rule creates a change draft. Further edits affect the draft. Approval replaces the published content with the draft.

The simplified workflow supports **Save and Publish** directly. When a technical rule references a business rule, its folder and rule type cannot be changed. Resolve dependencies before deprecating. Unpublished rules, deprecated rules, and change drafts can be deleted where permitted.

Maintain rules in bulk

Download the business rule template from **More > Import**. Complete the name, folder, rule type, business type, status, description, and organization. Import one .xlsx file at a time. Select content and error handling before uploading.

Import Rules

Importing business rules will update the status of existing business rules. Rules to be reviewed will be updated directly, while rules that are under review or have been abandoned cannot be updated. Published business rules will enter the change process

Content review

1.If the business rule already exists:

A.To be reviewed, update the content to be reviewed.

B.If it is already published, make a copy of the change.

C.If it is obsolete, make a republished copy.

3.If there is a copy under review, an error message will appear.

4.If the business rule does not exist, it will be imported directly as pending approval.

Directly publish

1.Make all business rules published (including obsolete), and all copies of business rules with existing copies will be deleted. If a copy is in the process of approval, an error message will be displayed.

2.If the business rules do not exist, they will be imported directly as published.

Continue importing when encountering errors:

True

False

Select Yes to import all the content with no problem data and return the specified number of incorrect data
Choose otherwise to roll back imported data and return the specified number of erroneous data when encountering problem data

Only supports uploading a single file, supports uploading file format: xlsx

Download template

ConfirmCancel

Choose how to handle content

Existing status	Result with Content Review
Does not exist	Import as unpublished
Unpublished	Update unpublished content
Published	Create or update a change draft
Deprecated	Update and change to Unpublished
Rule or draft under review	Reject the update

Publish Directly publishes imported rules, including deprecated rules. Confirm scope and authorization. The documented behavior also removes existing change drafts; drafts under approval cause an error. This option cannot bypass unfinished approval. Inspect official rules and drafts after import, not only the number added.

Choose how to handle errors

- Set **Continue importing on error** to **Yes** to import valid rows and return invalid rows. Results can be partially successful.
- Select **No** to roll back imported data on error and return invalid rows.

Check required fields, folders, types, statuses, and organizations in error records. After partial success, verify successful rows and statuses before reimporting the whole file.

Verify import and export results

1. Check successful and failed rows in the results.
2. Find representative rules and verify their folder, organization, description, and status.
3. For published rules, determine whether official content changed or only a draft was created.
4. Export for offline review if needed, matching the export and change scopes.

Next: [Create technical rules](#).

Run validation tasks and review quality reports

Screenshot note: Captured from the English interface. Some controls are still untranslated in this release; demo data names retain their original language.

A validation task runs published technical rules once or on a schedule. Successful execution means the run completed. Review rule results and failed records to determine data quality.

Create a validation task

Verify published rules, configured business systems, and working execution connections. Start with an approved scope before scheduling all rules.

1. Go to **Data Quality > Validation Tasks > Validation Tasks**. Under **New**, select **New Quality Validation Task**.
2. In **Basic Information**, enter the name, run time, and time filter.
3. In **Issue Management**, select the business system. Configure email notifications and verify recipients as needed.
4. Click **Add Technical Rules** and select published rules for that system. Some interfaces call this **Add Quality Rules**.
5. Review rules, parameters, and data scope, then click **OK** at the bottom.
6. After execution, check the last scheduling result and open details for run history.

For missing rules, check publication status, system, and permissions. Do not create duplicates to bypass the problem.

Configure basic information and scheduling

Setting	Purpose and checks
Task name	Required. Include scope and purpose for easier searching.
Run time	Required. Use selection mode or a custom schedule.
Repeat interval	Select once, daily, weekly, monthly, quarterly, yearly, or not scheduled, and complete the time settings.
Time filter	Restricts eligible dates using a time template; does not filter business dates in SQL.
Business system	Required for issue ownership and rule scope.
Email notifications	Verify recipients and the email service. Enabling the switch does not confirm delivery.
Parameter list	Review names, current values, data types, and expressions against the intended scope.

Daily scheduling does not execute immediately on save. Check the next run time. **Not Scheduled** does not establish automated checks. See [Task scheduling](#) for time template intersections and enablement.

Configure email notifications

Problem Management

* Application

邮件通知 ☒

recipients [+ 新增](#) 共0名

The screenshot identifies system, notification, and recipient settings. Match recipients to validation and remediation responsibilities. If a completed task sends no email, check enablement, recipient users and addresses, then [Email configuration](#). Missing email does not mean the task did not run.

Verify selected technical rules

Add Technical Rule

Type

Select

Sub Type

Select

Business Type

Select

Keyword

Query

Reset

Rule Name	Application	Type	Sub Type	Business Type	Creator	Create Time
交易类型编码有效性校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:34:21
关键审计字段非空校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:34:03
创建与更新时间逻辑校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:33:59
统计机构编码有效性校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:33:55
签约账户数非负校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:33:51
网银收入非负校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:33:47
交易金额非负校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:33:43
交易笔数非负校验	对公客户信...			其他	AI代理(ai_agent)	2026-05-08 18:33:40

☐ Only display rules that have not been referenced by the task.

Total 13

10/page

<

1

/ 2 Page

>

New

Close

The screenshot shows filtering and adding rules. For an empty list, check the prerequisites above. After adding, verify names, systems, categories, business types, and statuses. Search selected rules by name, category, subcategory, and business type. **Remove All** clears selected rules; it does not reset search filters.

Check run results

1. Find the task by name, system, and interval. Review time filters.
2. Check **Last Scheduling Result**, **Last Start Time**, **Last End Time**, and **Next Run Time**.
3. Select the intended run in details and verify its time, status, and rules.
4. On failure, inspect logs, connections, SQL, parameters, and permissions before retrying.
5. After success, inspect [Issues](#) and failed records. If expected issues are missing, check rule inclusion, filter scope, and actual data checked.

Use **Edit** to change a task and name search to find it. Review schedules and dependencies before deletion. See [Task scheduling](#) for nodes and time restrictions.

Read the three report types

Page	Focus	Question
Quality Overview	Issues, failed records, overdue items, and distributions; cards depend on dashboard settings	What is the governance status?
Rule Report	Rule types, systems, additions, and removals	Where is validation coverage?
Issue Report	Issue types, systems, and related statistics	Where are failures concentrated?

Use reports to identify priorities, then inspect rules, runs, and issue details. An aggregate score does not prove a table meets all requirements.

Filter Quality Overview by period, system, organization, business type, importance, and overdue status. **Issue Count** counts issue lists; **Issue Record Count** counts individual failed records. Align filters before drilling into overdue or organizational distributions. Use **Export PDF** and retain the query scope with the file.

Troubleshoot common issues

Symptom	Checks
No selectable rules	System, publication status, visibility permissions
Unexpected next run	Interval and time, time template, scheduling status
Success but issues remain	Same run, failed records, remediation and verification
Old results after editing	Whether a run started after the change
More records than issues	Whether one issue list contains multiple failures

Configure quality folders, parameters, and assignment plans

Quality management controls visibility through folders as well as module permissions. Define folders and responsible groups before entering rules.

Configure folders and permissions

Under **Rule Parameters > Quality Permissions**, add, rename, or delete folders. Grant user groups viewing or maintenance permissions. Rule actions also require quality module permissions.

Create business rules in the appropriate folder and organize technical rules accordingly. Verify the target user's access to rules, issues, and actions rather than relying on role names.

Define rule parameters

Maintain variables in **Parameter Settings**. Reference them as `[[parameterName]]` using the exact name. Before changing a parameter, inspect dependent rules, tasks, and execution results to avoid unintended scope changes.

Define issue assignment plans

1. Define a name, distribution values, and responsible users in **Issue Assignment Plans**.
2. Select custom distribution when distributing failed records.
3. Select the distribution field and predefined criteria.
4. Specify an **Unmatched Records** recipient if needed.
5. Verify destinations for matched and unmatched records.

Without a fallback recipient, explicitly inspect unmatched records.

Configure rule types

Default types include accuracy, completeness, uniqueness, consistency, validity, and timeliness, with subtypes. Defaults cannot be edited or deleted.

For custom types, enter the name, code, order, and description. Select a parent for subtypes; two levels are supported. Custom types can be edited, but the relationship code cannot change. Referenced types cannot be deleted.

Related: [Organizations and roles](#), [Business rules](#), [Issue remediation](#).

Assign, remediate, and verify quality issues

Issue lists record validation failures or manually registered issues. Issue data contains individual failed records. Review list handling and record handling separately.

Find and register issues

Filter **Issues** by status, name, system, and technical rule. **Issue Details** shows causes and history; **Issue Data** shows failures. For manual issues, enter a name, owner, description, and attachments, including impact and reproduction details. Export checked records or all query results.

Handle and assign issues

1. Verify the rule, run, and failed data scope.
2. Select an available action at the bottom of details based on status and responsibility.
3. Reassign to a user with the required folder permissions.
4. Distribute records to users or organizations, or use an [Assignment plan](#).
5. Fix source data, record the outcome, and update status.

The standard workflow includes Unprocessed, Received, Confirmed, Fixed, and Closed. The simplified workflow includes Unprocessed, Fixed, and Closed. Actions depend on owner and status. Reassignment and distribution can send notifications, subject to email configuration. Closing a list does not modify source data.

Verify remediation

1. After closure, open **Issue Verification**; initial status is Not Verified.
2. Quality tasks update issues to Verification Not Required, Failed, Partially Passed, or Passed.
3. Query by name, organization, system, verification status, and technical rule.
4. Inspect remaining failures in details.
5. Where permitted, **Reopen** moves Closed issues back to Confirmed for further handling.

Unverified and fully passed issues cannot be reopened. Automatically generated primary keys prevent verification; review [Technical rules](#).

Capture solutions

Add a solution from issue details, or use **Knowledge Base > New**, enter a document name and description, associate quality rules, and upload supporting material. Entries support viewing, editing, querying, and deletion. Capture reusable causes, handling steps, and verification.

Change column settings carefully

Authorized users can adjust column visibility, width, and order in Issues, Issue Verification, and Issue Data. Settings synchronize globally and affect other users.

Troubleshoot common issues

Symptom	Action
Missing assignee	Check folder permissions
Closed but unverified	Check verification task execution and results
New issue each run	Check automatic primary keys
Partially passed	Inspect failed records and remediation scope
Missing action buttons	Check ownership, status, and workflow

Manage the quality issue knowledge base

Capture confirmed causes, fixes, and verification steps for reuse. Entries are not rules and do not modify source data.

Create an entry

1. Go to **Data Quality > Issue Management > Knowledge Base > New**.
2. Enter a title, description, cause, solution, verification method, and applicable systems.
3. Associate rules or issue types and upload necessary masked examples.
4. Save and have the quality lead review content and scope.

Mask table names, accounts, phone numbers, and business data. Explain how to confirm remediation; rerunning a task alone is insufficient.

Capture knowledge from issue details

Record the outcome, add it to the knowledge base, and complete applicable rules, responsible roles, and verification. Check for temporary workarounds before presenting an incident-specific fix as general guidance.

Find and maintain entries

Search by keyword, rule type, system, and status. Update applicability when systems or rules change. Deprecate obsolete entries and retain the reason rather than deleting audit evidence.

Read quality reports and export statistics

Reports identify priorities but do not independently prove data quality. Quality Overview, Rule Report, and Issue Report use different measures. Read them with execution and issue details.

Quality Overview

Filter by reporting period, system, organization, business type, importance, and overdue status. Record filters before comparing scores, rule counts, issues, and overdue counts. Clear filters and query again for full results.

Rule Report and Issue Report

Rule Report shows types, systems, and rule additions or removals. Issue Report shows types, systems, and handling distributions. Keep time and system filters consistent when drilling down to avoid mixing runs.

Export and retain reports

Use **Export PDF**. Record filters, export time, run, and reviewer in the filename and retention record. On failure, check download permissions and service logs; screenshots do not replace the complete file.

With backend class-loading or service errors, blank cards do not mean no data exists. Record the error and involve operations.

Reuse rule templates and import business rules

Templates capture reusable descriptions and parameters. Business rules apply them to requirements; technical rules implement checks. Templates do not directly generate failed records.

Create a rule template

1. Go to **Data Quality > Rule Management > Rule Templates**.
2. Enter name, type, purpose, objects, failure definition, and parameters.
3. Describe input columns, expected results, owner, and verification.
4. Save and create a test rule for one scenario to verify parameter substitution.

Configure customer table names, accounts, and temporary SQL in project rules rather than reusable templates.

Import and export

Use the page's template download and import actions. Check folders, types, codes, and owners first, then inspect failed rows, duplicate codes, and unrecognized parameters. Exported files support migration and review, not proof of publication.

Maintain templates

Check whether generated business rules need corresponding updates before editing. Avoid silently changing running tasks. Check references before deleting; if blocked, retain and mark inactive or deprecated.

Next: [Business rules](#) and [Technical rules](#).

Create and publish technical rules

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.

Technical rules implement published business rules against data sources. Prepare source connections, tables and columns, failure criteria, and stable keys.

Create a rule

1. Go to **Rule Management > Technical Rules > New**.
2. Enter a name and select a published business rule and type.
3. Select the authoring method; configure source, system, model, table, column, and database type as applicable.
4. Set content, maximum errors, and execution parameters against requirements.
5. Save and request publication. Only published rules can join tasks.

Verify required **Issue Business System**, **Business Rule**, **Owner**, **Rule Type**, and **Business Type** fields. Issue ownership may differ from the source's system. Use **Test** before saving.

Understand the four rule methods

Some deployments offer only SQL and comparison. Use regular expressions or functions only at their own available entry points.

Method	Configuration	Failures
SQL	Source, SQL, result key, total count, issue count	Returned records
Regular expression	Source, column, key, expression, row limit	Nonmatching records
Function	Built-in template, parameters, system, standards or columns	Function-detected failures
Data comparison	A/B sources and SQL, relationship, total count	Records violating the relationship

SQL selects failures; regular expressions describe valid values. Do not reverse these conventions.

Configure SQL rules

Return only failures and choose a returned column as **SQL Content Primary Key**. Total Record Count Calculation returns all records in scope; Issue Count Calculation returns failures using the same scope.

Configure **Pre-execution SQL**, **Post-execution SQL**, and parameters only as needed. These statements execute; have a source specialist review them.

Automatic primary key generation is available without an existing key, but **each run creates a new issue list and verification is unavailable**. Agree on a stable identifier for continuous tracking.

Configure regular expression and function rules

Set the row limit and primary key for expression rules. Generated keys have the same verification restriction.

规则内容

* 规则编写方式 ☐ SQL ☒ 正则表达式 ☐ 函数规则 ☐ 数据对比

* 执行数据源

* 元数据绑定字段

自动创建主键 ☐ ⓘ 若开启自动创建主键，每次执行一次检核任务，都将在问题清单中产生一个新的重复问题，且在问题核验中，无法进行核验。

* 主键

匹配模式 ☒ 完全匹配 ☐ 包含

* 正则表达式

检查行数

Set row limits and matching behavior against requirements. For functions, select a built-in template and parameters, choose the system in associated data, and add standards or columns. Standard-based rules dynamically check mapped columns; verify that scope.

Configure data comparison

Set sources and SQL for datasets A and B and define their relationship. Compare returned results with aligned meanings, types, and filters. Distinguish extraction timing differences from business errors.

Publish and maintain rules

New rules start unpublished. Submit approval or use simplified **Save and Publish**. Unresolved issues block changes and deprecation. Permitted edits create a draft that replaces the original after approval.

Import templates, export query results, and filter by name, status, or system. Delete unpublished rules, deprecated rules, or drafts where permitted.

Check before execution

- SQL returns failures; expressions describe valid formats.
- Keys are stable and unique and support verification.
- Total and failure counts match the actual scope.
- The account has read access and the rule is published.

Next: [Create a validation task](#).