

Training – Data Quality Settings Module

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This document provides initial training on the Data Quality settings function within clearMDM .This document does not go into technical detail and is intended to compliment other clearMDM training modules. Existing experience of clearMDM is not required.

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Data Quality Introduction

The Data Quality function applies to the field values of the record in relation to a Rule Type which determines the quality score. In essence what this means is that when records are created within Salesforce, if a value is put into a field that has a Data Quality rule set against it a score is added to that record. When saving the record, each rule in turn will be applied to the fields.

As an example, clearMDM comes with a small number of Data Quality Rules Sets already in place.

Example:

1. Click on Settings.
2. Click on Data Quality Rule Sets.
3. Click Edit next to Account Address Quality.

The information displayed is broken down into the following (follow through each section as you read through the below):

Data Quality Rule Set Settings

- Name – This is the name you wish to give your Quality Rule Set, so for this example it is Account Address Quality.
- Order – This is the order in which the rule is run when the Data Quality function operates. In this example it is set to 1.
- Target Object – As with previous rules, this is the Target Object to be applied to.
- Is Batch Active? - This determines whether the Data Quality Rules will be run by a Batch process (Job) or not.
- Is Real-Time Active? - This basically indicates whether the rule will be applied as soon as a record is saved.

Data Quality Rules

- Is Active? – This is ticked to make sure they are specified as active for the Data Quality Rule function.
- Rule Type – It's worth going into a bit more detail at this point about the rule types available.

Rule Types

Rule Type	Description
Populated	Has a value and is not empty.
Minimum Length	Minimum number of characters the field has to be populated by.
Date Offset	Field value is within a date range from the current date, so number of days either side.
Number Range	This is where the field value is within a specific numeric range.
Phone E164 format	This is to check the phone field complies with the E164 format.
Email Format	This effectively checks that the email address is a valid email as per Salesforce definition.
Exact Match	This is where the value within the field matches exactly to a pre-determined value.
Field Match	This is where you can link a source field to a match field.
Contains	Field value contains a pre-determined value.
Regex (Regular Expression)	These are a sequence of characters that define a search pattern.

- Source Field – The field in which the rule is to be applied, which in this case is the Billing Address fields.
- Number Range From, Number Range To – Depending on the rule type selected will depend upon whether they need completing. The fields will only become enabled once the rule type that requires them is selected. In this example, the Date Offset rule has triggered the fields to be displayed.
- Score Value – Anything from 1 to 100.

Reference Rules

- Is Active? - This is ticked if the reference rule needs to be applied to the Data Quality Rule Set.
- Rule Type – there are two types to choose from. Related Records, which refers to child records existing that meet the defined filter, plus, Reference Compliance. This is where field values exist in a pre-defined list.
- Depending upon which type is selected (if at all) will enable the other fields that need completing.

Data Quality Actions

- Is Active? – This is ticked if the Data Quality Action applies to this Data Quality Rule Set.
- Action Type – Two types to select from. Field Update or Post to Chatter. Depending which one you select will depend upon the other fields being activated that will need completing.

Block Actions

- Is Active? – This is ticked if the Block Action applies to this Data Quality Rule Set.
- Block Create? – Tick this to create the block.
- Block Update? – Tick this to enable the Block Reference Field Name field to be enabled.
- Block Reference Field Name – select the field this block applies to.
- Score Value From – Enter a numeric value.
- Score Value To – Enter a numeric value.

This concludes the Data Quality Settings Training Module.

New Features

Negative Values

It is now possible to add a negative value as a Data Quality Rule as well as a positive value. This can be done through Settings, Data Quality Rule Set Settings. The value field now contains some negative values which can be added to the Quality Rule setup and which will help determine the Quality Score Metric in the Target Object.