



Collibra Data Intelligence Cloud

Data Governance

Collibra Data Intelligence Cloud - Data Governance

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You can find the most up-to-date technical documentation on our [Documentation Center](#) at

https://productresources.collibra.com/docs/collibra/latest/Content/to_data-governance.htm

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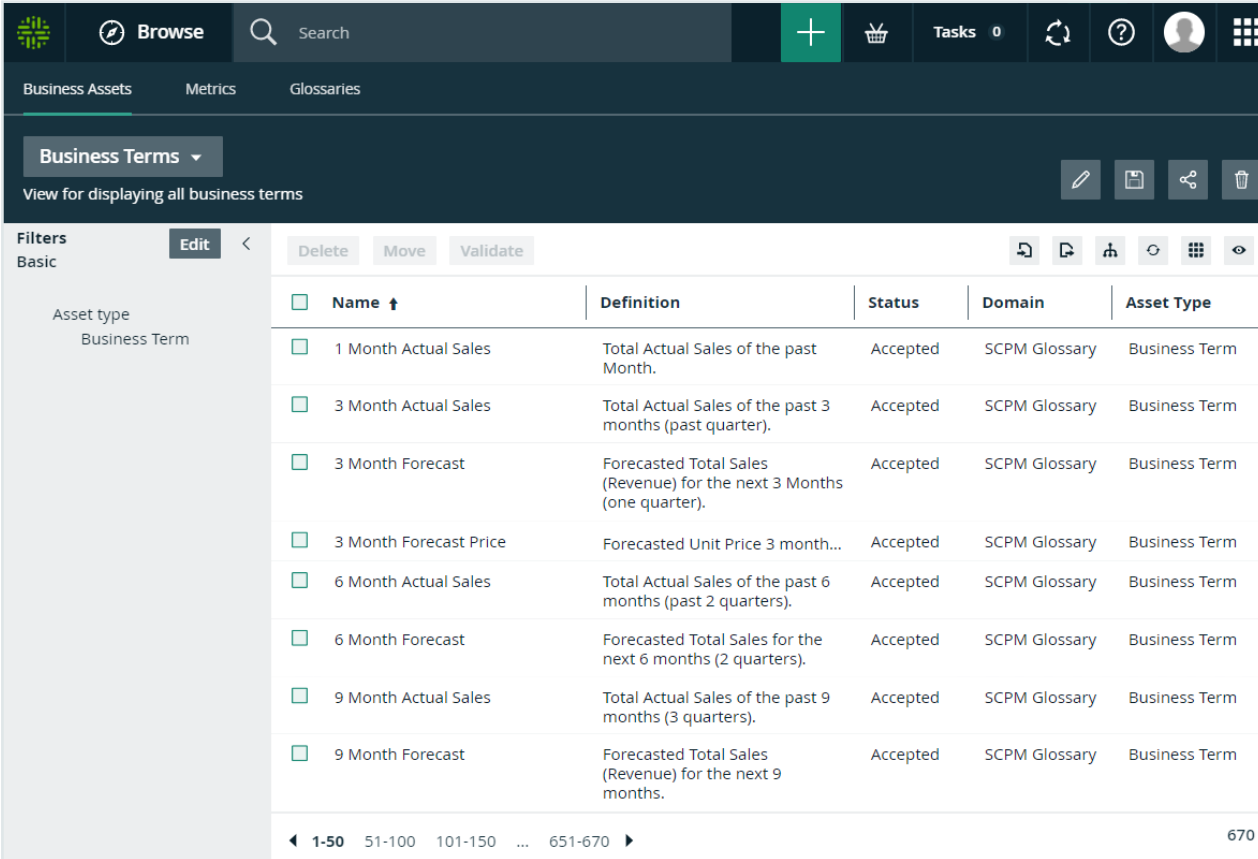
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Business Glossary

The Business Glossary application is your go-to system to govern your business terms. It contains a configurable range of asset types, their attributes, taxonomy and relations, as well as the status of their adoption. It is fully integrated with the technological assets as well as supported by Collibra's core features: reporting, traceability, comments, workflows, and so on.



The screenshot displays the Business Glossary application interface. At the top, there is a navigation bar with a 'Browse' button, a search bar, and a 'Tasks' indicator showing 0 tasks. Below the navigation bar, there are tabs for 'Business Assets', 'Metrics', and 'Glossaries'. The 'Business Terms' dropdown is selected, and a message indicates 'View for displaying all business terms'. On the left, a 'Filters' sidebar shows 'Basic' filters with 'Asset type' set to 'Business Term'. The main table lists business terms with columns for Name, Definition, Status, Domain, and Asset Type. The table contains 8 rows of data, all with a status of 'Accepted' and a domain of 'SCPM Glossary'. A pagination bar at the bottom shows the range '1-50' to '651-670' with a total of 670 items.

Name	Definition	Status	Domain	Asset Type
1 Month Actual Sales	Total Actual Sales of the past Month.	Accepted	SCPM Glossary	Business Term
3 Month Actual Sales	Total Actual Sales of the past 3 months (past quarter).	Accepted	SCPM Glossary	Business Term
3 Month Forecast	Forecasted Total Sales (Revenue) for the next 3 Months (one quarter).	Accepted	SCPM Glossary	Business Term
3 Month Forecast Price	Forecasted Unit Price 3 month...	Accepted	SCPM Glossary	Business Term
6 Month Actual Sales	Total Actual Sales of the past 6 months (past 2 quarters).	Accepted	SCPM Glossary	Business Term
6 Month Forecast	Forecasted Total Sales for the next 6 months (2 quarters).	Accepted	SCPM Glossary	Business Term
9 Month Actual Sales	Total Actual Sales of the past 9 months (3 quarters).	Accepted	SCPM Glossary	Business Term
9 Month Forecast	Forecasted Total Sales (Revenue) for the next 9 months.	Accepted	SCPM Glossary	Business Term

The Business Glossary is key for decision makers to understand their digital assets from a business perspective.

Business Glossary submenu pages

Page	Description
Business Assets	Contains a table with all the business assets in Collibra.
Metrics	Contains a variety of statistics related to how the assets of the Business Glossary are used.
Glossaries	Contains a table with all the existing glossaries (domain type) in Collibra

Packaged metamodel for the Business Glossary

The Business Glossary has specific asset types and domain types.

Asset types

The table below contains the packaged [asset types](#) that are relevant for the Business Glossary.

Domain types

The table below contains the packaged [domain types](#) that are relevant for the Business Glossary.

Workflows

The table below contains the packaged workflows that are relevant for the Business Glossary.

Name	Description
Approval Process	The Approval Process workflow allows you to approve an asset in Collibra Data Intelligence Cloud. This is a more powerful version of the Simple Approval Process.
Assessments	This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset.
Cancel Process	This process notifies the concerned users of a workflow cancellation.
Escalation Process	This process is the default mechanism for the escalation of user tasks in workflows.
Propose New Business Asset	This process facilitates the creation of new Business Assets in the Data Governance Council community.
Propose New Business Term	This process facilitates the creation of new Business Term assets in the Data Governance Council community.
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Data Intelligence Cloud.
Voting Sub-Process	<p>The Voting Sub-Process is a workflow that can be called by other workflows when users need to vote. It is used within other packaged workflows such as the Approval Process, the Simple Approval or the Issue Management workflow.</p> <p>You can use this sub-process in new custom workflows. The result is a true or false boolean that is provided to the parent workflow.</p>

Metrics pages

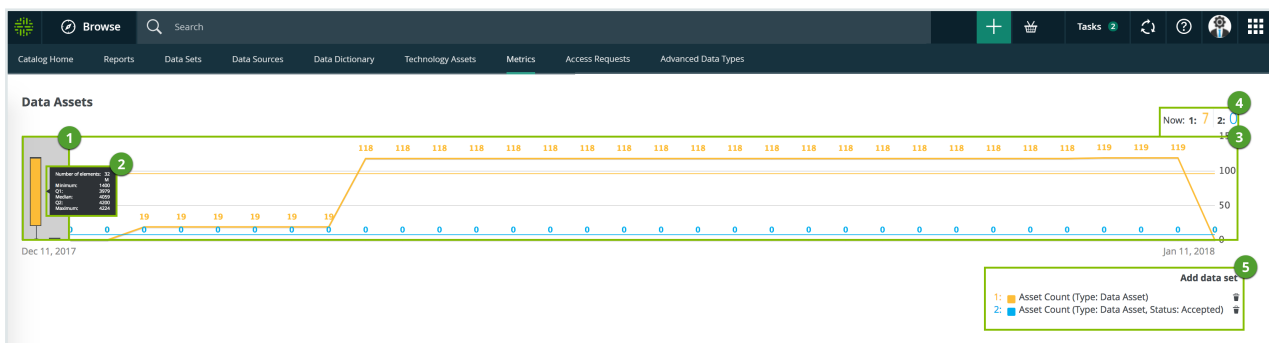
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

For each graph, you can edit the data set and the time range shown.

Note On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with **data sets** in the true context of CollibraData Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.

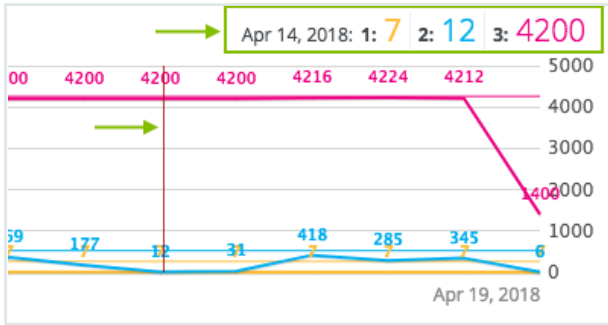
Components

The Metrics page consists of one or more graphs, their legend and some counters.



Number	Element	Description
1	Color-coded bars	<p>The color-coded bars give a quick overview of the graph.</p> <p>The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values.</p>

Number	Element	Description
2	Data set details	<p>More details about the graph.</p> <p>Hover your pointer over the color-coded bars to the left of each line of graph to view them.</p>
	Number of elements	The amount of days in the time range.
	Minimum	The lowest count on any day in the data set.
	Q1	The first quartile, meaning the lowest 25% of the data set.
	Median	The median, meaning the middle value of the data set.
	Q3	The third quartile, meaning the lowest 75% of the data set.
	Maximum	The highest count on any day in the time range.
3	Graph	<p>The actual graph. What it shows exactly, depends on the data set. For example, it can show the number of assets viewed over the last month, or the number of licenses used.</p> <div> <p>Tip You can edit the time range of the graph.</p> </div>

Number	Element	Description
4	Counts by day	<p>The counts for a specific day for each data set, by moving your mouse over the graph. The vertical red line identifies the day. The exact count for that day for each data set, is shown above the graph.</p> 
5	Legend	<p>The legend of the graph, which also allows you to add, edit and delete the data sets.</p>

Add a data set to a metrics graph

You can add a data set to a graph on the [Metrics pages](#), for example if you want to compare the amount of new assets of different types.

Steps

1. Open the product for which you want to see the metrics, for example Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Under the relevant graph, to the right, click **Add data set**.

» The filter settings appear.

4. Enter the required information:

Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Intelligence Cloud application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

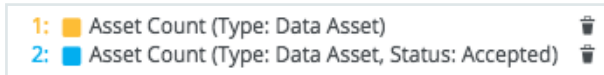
5. Click **Save data set**.

Edit a data set of a metrics graph

You can edit the data set that is shown in a graph on the [Metrics pages](#).

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click the data set you want to edit.



- » The filter configuration for the data set appears.
4. Enter the required information.

Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Intelligence Cloud application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

5. Click **Save data set**.

» The updated data set is shown in the graph.

Edit the time range of a metrics graph

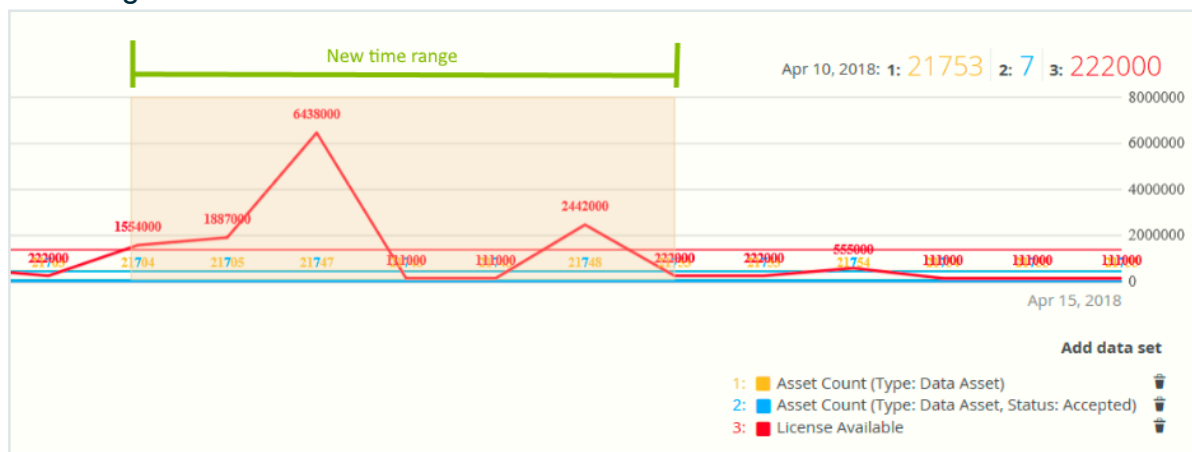
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

There are two ways to edit the time range:

- Click and drag in the graph.
- Select the dates for the graph.

Click and drag in the graph

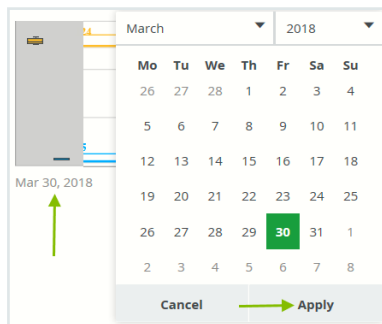
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics](#) page appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. In the relevant graph, click at (or near) the first date in your desired range, and drag to the right, toward the last date in your desired range.
 - » While you are dragging, the color changes in the graph, indicating the resulting time range.



5. Release the mouse button.
 - » The graph is adjusted to the new time range.

Select the dates for the graph

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. On the left-hand side of the graph, click the date.
 - » A date picker appears.




5. Click the first day of your desired time range, and then click **Apply**.
 - » The graph is adjusted to the date you selected.
6. On the right-hand side of the graph, click on the date.
 - » A date picker appears.
7. Click the last day of your desired time range, and then click **Apply**.
 - » The graph is adjusted to the date you selected.

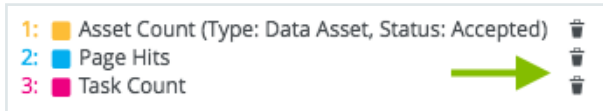
Remove a data set from a metrics graph

You can remove a data set that is shown in a graph on the [Metrics pages](#) if you don't want to see, for example, if you think there is too much information in a graph.

Note Each graph will always show at least one data set. If it only contains one data set and you want to remove it, you first have to [Add a data set to a metrics graph](#) another data set. You can then remove the other one.

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click on  next to the data set you want to delete.



- » The graph is updated.

Policy Manager

The Policy Manager application provides the key functions to adopt, implement and monitor the digital policies for the enterprise.

Governance Assets

Metrics

Policies & Standards ▾

View for displaying policies & standards

>

DeleteMoveValidate

↶↷👤🔄⌵👁

<input type="checkbox"/>	Name ↑	Status	Domain	Asset Type
<input type="checkbox"/>	collibra-demo-euwest2-refine...	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-demo-euwest2-refine...	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-dgc	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-dgc-2	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-mule	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-users-and...	Accepted	AWS Policies	Policy

◀ 1-50 51-100 101-125 ▶

125

With Policy Manager, Collibra Data Intelligence Cloud users can easily have:

- An overview of the enterprise's governance assets.
 - Standards, for example ISO-standards or other local standards.
 - External regulations, for example GDPR.
 - Entities, such as EBA, ISO, EC, FDA and so on.
 - Internal regulations, for example policies, goals, constraints and so on.
 - Controls, like a dissemination plan.

- Risks, evaluation and mitigation, for example privacy risk and market access risk.
- Accreditation and certificates, for example conformance certificates.
- An overview of the policy lifecycle:
 - Adoption: See the regulations and the respective regulations, paragraphs, sections, to check the adoption of the applicable regulations throughout the enterprise.
 - Compliance: Monitor how the enterprise's data governance program can be traced to the policies and if there are compliance gaps.
 - Risks: Define the risks and their mitigation rules, and trace them to the policies and data assets

Policy Manager submenu pages

Page	Description
Governance Assets	Contains a table with Governance assets.
Metrics	Contains a variety of statistics related to how the assets of the Policy Manager are used.

Packaged metamodel for the Policy Manager

The Policy Manager has specific asset types and domain types.

Asset types

The table below contains the packaged [asset types](#) that are relevant for the Policy Manager.

Domain types

The table below contains the packaged [domain types](#) that are relevant for the Policy Manager.

Workflows

The table below contains the packaged workflows that are relevant for the Policy Manager.

Name	Description
Assessments	This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset.
Cancel Process	This process notifies the concerned users of a workflow cancellation.
Escalation Process	This process is the default mechanism for the escalation of user tasks in workflows.
Propose New Governance Asset	This process facilitates the creation of new Governance Assets in the Data Governance Council community.
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Data Intelligence Cloud.
Voting Sub-Process	<p>The Voting Sub-Process is a workflow that can be called by other workflows when users need to vote. It is used within other packaged workflows such as the Approval Process, the Simple Approval or the Issue Management workflow.</p> <p>You can use this sub-process in new custom workflows. The result is a true or false boolean that is provided to the parent workflow.</p>

Metrics pages

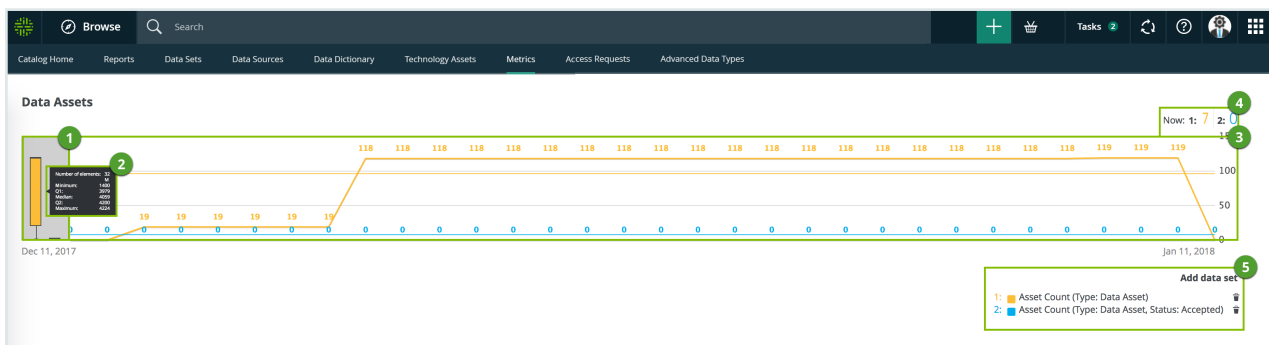
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

For each graph, you can edit the data set and the time range shown.

Note On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with **data sets** in the true context of CollibraData Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.

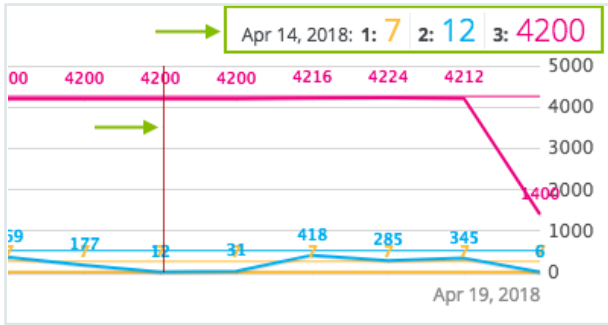
Components

The Metrics page consists of one or more graphs, their legend and some counters.



Number	Element	Description
1	Color-coded bars	<p>The color-coded bars give a quick overview of the graph.</p> <p>The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values.</p>

Number	Element	Description
2	Data set details	<p>More details about the graph.</p> <p>Hover your pointer over the color-coded bars to the left of each line of graph to view them.</p>
	Number of elements	The amount of days in the time range.
	Minimum	The lowest count on any day in the data set.
	Q1	The first quartile, meaning the lowest 25% of the data set.
	Median	The median, meaning the middle value of the data set.
	Q3	The third quartile, meaning the lowest 75% of the data set.
	Maximum	The highest count on any day in the time range.
3	Graph	<p>The actual graph. What it shows exactly, depends on the data set. For example, it can show the number of assets viewed over the last month, or the number of licenses used.</p> <div> <p>Tip You can edit the time range of the graph.</p> </div>

Number	Element	Description
4	Counts by day	<p>The counts for a specific day for each data set, by moving your mouse over the graph. The vertical red line identifies the day. The exact count for that day for each data set, is shown above the graph.</p> 
5	Legend	<p>The legend of the graph, which also allows you to add, edit and delete the data sets.</p>

Add a data set to a metrics graph

You can add a data set to a graph on the [Metrics pages](#), for example if you want to compare the amount of new assets of different types.

Steps

1. Open the product for which you want to see the metrics, for example Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Under the relevant graph, to the right, click **Add data set**.

» The filter settings appear.

4. Enter the required information:

Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Intelligence Cloud application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

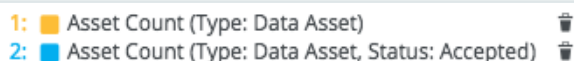
5. Click **Save data set**.

Edit a data set of a metrics graph

You can edit the data set that is shown in a graph on the [Metrics pages](#).

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click the data set you want to edit.



- » The filter configuration for the data set appears.
4. Enter the required information.

Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Intelligence Cloud application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

5. Click **Save data set**.

» The updated data set is shown in the graph.

Edit the time range of a metrics graph

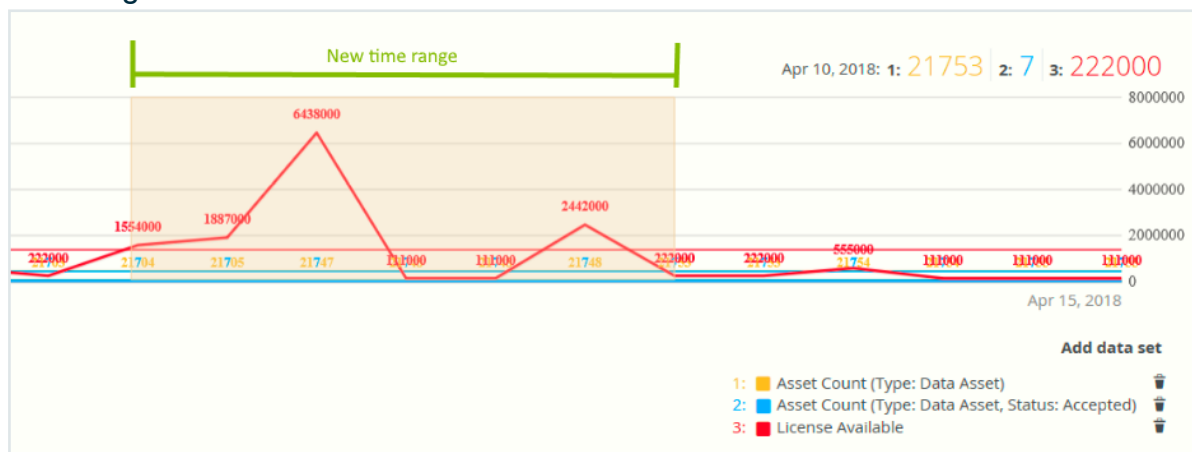
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

There are two ways to edit the time range:

- Click and drag in the graph.
- Select the dates for the graph.

Click and drag in the graph

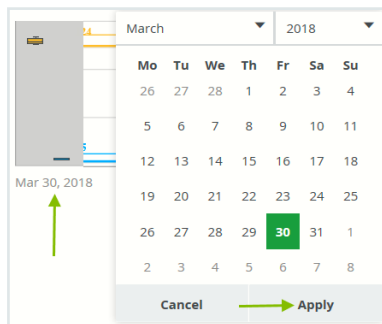
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics](#) page appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. In the relevant graph, click at (or near) the first date in your desired range, and drag to the right, toward the last date in your desired range.
 - » While you are dragging, the color changes in the graph, indicating the resulting time range.



5. Release the mouse button.
 - » The graph is adjusted to the new time range.

Select the dates for the graph

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. On the left-hand side of the graph, click the date.
 - » A date picker appears.




5. Click the first day of your desired time range, and then click **Apply**.
 - » The graph is adjusted to the date you selected.
6. On the right-hand side of the graph, click on the date.
 - » A date picker appears.
7. Click the last day of your desired time range, and then click **Apply**.
 - » The graph is adjusted to the date you selected.

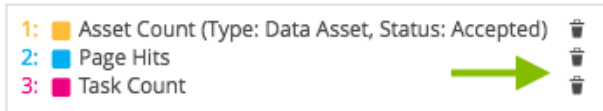
Remove a data set from a metrics graph

You can remove a data set that is shown in a graph on the [Metrics pages](#) if you don't want to see, for example, if you think there is too much information in a graph.

Note Each graph will always show at least one data set. If it only contains one data set and you want to remove it, you first have to [Add a data set to a metrics graph](#) another data set. You can then remove the other one.

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
» The [Metrics page](#) appears.
3. In the legend under the relevant graph, click on  next to the data set you want to delete.



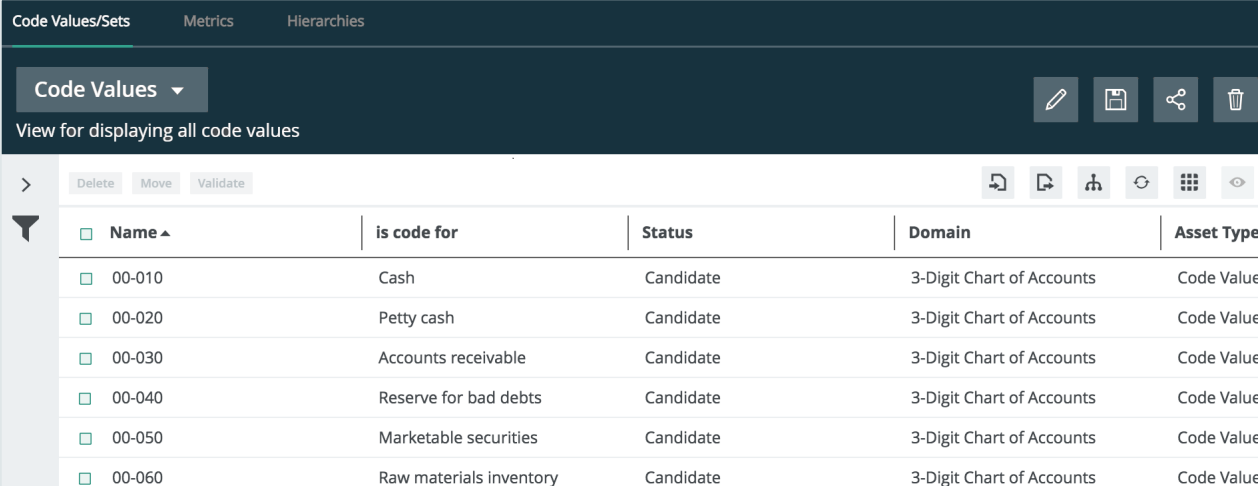
- » The graph is updated.

Reference data

Reference data is data used to classify or categorize other data. Typically, they are static or slowly changing over time. Examples of reference data include units of measurement and country codes.

Reference Data application

The Collibra Reference Data application aims at a systematic approach to manage [reference data](#), including code sets and code values. For example, you can define relations between Code Set assets and Column assets for which they are the allowed values, or between Code Value assets and the Business Assets that they represent. Additionally, you can define complex mappings between them in order to enable crosswalks from one information system to another, taking into account differences in the code sets through time.



The screenshot displays the 'Code Values/Sets' section of the Collibra Reference Data application. The interface includes a top navigation bar with 'Code Values/Sets', 'Metrics', and 'Hierarchies'. Below this, a 'Code Values' dropdown menu is visible, along with icons for edit, save, share, and delete. A message states 'View for displaying all code values'. The main area contains a table with columns: Name, is code for, Status, Domain, and Asset Type. The table lists six code values, all with a status of 'Candidate' and a domain of '3-Digit Chart of Accounts'.

Name	is code for	Status	Domain	Asset Type
00-010	Cash	Candidate	3-Digit Chart of Accounts	Code Value
00-020	Petty cash	Candidate	3-Digit Chart of Accounts	Code Value
00-030	Accounts receivable	Candidate	3-Digit Chart of Accounts	Code Value
00-040	Reserve for bad debts	Candidate	3-Digit Chart of Accounts	Code Value
00-050	Marketable securities	Candidate	3-Digit Chart of Accounts	Code Value
00-060	Raw materials inventory	Candidate	3-Digit Chart of Accounts	Code Value

Subpages

Reference Data has the following items in its submenu:

Reference data subpage	Description
Code Value/Sets	Contains a table with all Code Value and Code Set assets in Collibra.
Metrics	Contains a variety of statistics related to how the assets of the Reference Data application are used.
Hierarchies	Contains a table with all Hierarchies domains in Collibra

Packaged metamodel for the Reference Data application

The Reference Data application has specific asset types and domain types.

Asset types

The table below contains the packaged [asset types](#) that are relevant for the Reference Data application.

Domain types

The table below contains the packaged [domain types](#) that are relevant for the Reference Data application.

Workflows

The table below contains the packaged workflows that are relevant for the Reference Data application.

Name	Description
Assessments	This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset.
Cancel Process	This process notifies the concerned users of a workflow cancellation.
Escalation Process	This process is the default mechanism for the escalation of user tasks in workflows.
Propose New Code Value	This process facilitates the creation of new Code Value assets in the Data Governance Council community.
Propose New Data Asset	This process facilitates the creation of new Data Assets in the Data Governance Council community.
Propose New Governance Asset	This process facilitates the creation of new Governance Assets in the Data Governance Council community.
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Data Intelligence Cloud.
Voting Sub-Process	<p>The Voting Sub-Process is a workflow that can be called by other workflows when users need to vote. It is used within other packaged workflows such as the Approval Process, the Simple Approval or the Issue Management workflow.</p> <p>You can use this sub-process in new custom workflows. The result is a true or false boolean that is provided to the parent workflow.</p>

Reference data

Reference data is data that is used to structure and constrain other data. It is typically stable information with a known code set, which consists of code values that rarely change. As the name suggests, reference data is designed to be referenced by a wide variety of other data. This is done in order to create a standard vocabulary and structure across diverse systems and data sources.

Example

- country codes
- language codes
- product codes
- account identifiers
- ...

However, not all systems use the same versions of a code set for the same type of information. This leads to problems when these systems exchange information.

Example

The same organization could use the two-character country ISO codes for its Customer Relationship Management (CRM) system, but the three-character country ISO codes for its Enterprise Resource Planning (ERP) system.

Besides technical problems, business users may have the following questions:

- What version of the ISO country codes is used in each database?
- What is the difference between the version of ISO country codes of last year as compared to the one currently operational internally?
- If I cannot find a code for a specific account or project, whom should I report it to?

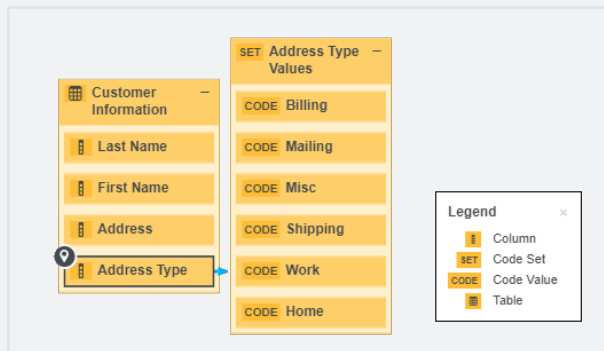
Reference Data in Collibra

The Collibra Reference Data application aims at a systematic approach to manage [reference data](#), including code sets and code values. For example, you can define relations between Code Set assets and Column assets for which they are the allowed values, or between Code Value assets and the Business Assets that they represent. Additionally, you can define complex mappings between them in order to enable

crosswalks from one information system to another, taking into account differences in the code sets through time.

Example

In the following diagram, you can see that the Customer Information table contains the Address Type column, which can only contain code values from the Address Type Values code set.



Reference data lifecycle

Reference data is relatively easy to govern because it concerns predictable data. Very often, the code sets are related to assets in the [Business Glossary](#) application..

Typically, managing reference data in Collibra Data Intelligence Cloud consists of the following phases:

Phase	Description																
1. Creation	<p>Gather all existing reference data content, analyze it and enter the relevant parts in Collibra Data Intelligence Cloud as Code Set and Code Value assets. We recommend that you use a specific Codelist domain for each code set.</p> <div><p>Tip You can create the assets manually, but usually it is easier to use the import functionality to enter thousands of assets in one go.</p></div> <p>To fully describe the code set, you can create relations between the Code Set and Code Value assets on the one hand, and other relevant assets on the other:</p> <table><tr><th>Relation type</th><th>Head assets</th><th>Tail assets</th><th>Description</th></tr><tr><td>Code Value is part of / contains Code Set</td><td>Code Value assets</td><td>Code Set asset</td><td>Relations of this type link the Code Value assets to the corresponding Code Set asset.</td></tr><tr><td>Business Term has code / is code for Code Value</td><td>Business Term asset</td><td>Code Value asset</td><td>Relations of this type link Business Term assets to Code Value assets to provide more information about the meaning of the Code Value asset.</td></tr><tr><td>Data Element allowed value set / applies to Code Set</td><td>Column asset</td><td>Code Set asset</td><td>Relations of this type describe which code set is used to restrict the possible values of a column.</td></tr></table>	Relation type	Head assets	Tail assets	Description	Code Value is part of / contains Code Set	Code Value assets	Code Set asset	Relations of this type link the Code Value assets to the corresponding Code Set asset.	Business Term has code / is code for Code Value	Business Term asset	Code Value asset	Relations of this type link Business Term assets to Code Value assets to provide more information about the meaning of the Code Value asset.	Data Element allowed value set / applies to Code Set	Column asset	Code Set asset	Relations of this type describe which code set is used to restrict the possible values of a column.
Relation type	Head assets	Tail assets	Description														
Code Value is part of / contains Code Set	Code Value assets	Code Set asset	Relations of this type link the Code Value assets to the corresponding Code Set asset.														
Business Term has code / is code for Code Value	Business Term asset	Code Value asset	Relations of this type link Business Term assets to Code Value assets to provide more information about the meaning of the Code Value asset.														
Data Element allowed value set / applies to Code Set	Column asset	Code Set asset	Relations of this type describe which code set is used to restrict the possible values of a column.														

Phase	Description			
	Relation type	Head assets	Tail assets	Description
	Data Element allowed value / allowed value for Code Value	Column asset	Code Value asset	Relations of this type describe the actual code values that are used in a column.
	The outcome consists of Code Set and Code Value assets, organized in different Codelist domains. The assets can have relations to other assets and still have the Candidate status.			
2. Completion	<p>Create responsibilities by assigning users or user groups to roles for the respective Codelist domains:</p> <ul style="list-style-type: none"> • The DataStewards improve the bulk import, and make it ready for review. They also have the final say in the approval process. • Subject Matter Experts review the correctness of the assets. • The Stakeholders comments on the assets and validate the correctness. <p>Use the Approval and Simple Approval workflows to update and approve the Code Set and Code Value assets.</p> <p>The outcome consists of Code Set and Code Value assets with the Approved status.</p>			

Phase	Description
3. Mapping	<p>The DataStewards map code values and crosswalks between corresponding Code Value assets. A Crosswalk asset may have additional attributes to describe the transformation logic. Often, this transformation logic is hidden or implicit.</p> <p>The Crosswalk assets originally also have the Candidate status, so they should also be reviewed and approved via the Approval and Simple Approval workflows.</p>
4. Publication and traceability	<p>Once you have created the required assets and added the required relations, you can use diagrams to trace the lineage.</p> <p>The approved code values can also be provided to the business users in different ways:</p> <ul style="list-style-type: none"> • You can export them in XLSX or CSV format. • The Colibra API also offers ways to push approved assets to external applications. You can configure this to take place regularly via custom workflows. <p>To indicate that the code sets are published, you can create a new status, for example Published.</p>
5. Use and maintain	<p>Finally, the business users use the published code sets in their own applications, for example in reporting software.</p> <p>Typically, there will be inconsistencies or incompleteness in the code sets. These issues can be reported, which starts a workflow to fix the issue.</p>

Approaches to reference data management

There are several general approaches to reference data management:

1. Represent the code values as attributes of a Business Asset.
2. Use relations between Code Value assets and Business Terms.

Approach 1: Code values as attributes of Business Assets

Prerequisites

- You have [created a new asset type](#) to use as the reference point for information about the code value. This is typically a child asset type of Business Asset or Business Term.
- You have [created](#) or [imported assets](#) of your new asset type for all code values.
- You have [created a custom attribute type](#) for each code set, for example ISO-2-digit, ISO-3-digit, and ISO Numeric.
- You have [assigned](#) the custom attribute types to the new asset type.

Approach

For each of the assets that represent a code value, enter the code values in the relevant attribute.

Example

Example screenshot of a software interface for managing business terms. The interface shows a header with 'Data Governance Council' and 'New Business Terms'. The main section is for 'Andorra' (Type: Business Term, Status: Accepted). It includes a sidebar with 'Add characteristic', 'Overview', 'Tags', 'Comments', 'Diagram', 'Pictures', 'Responsibilities', 'References', 'History', and 'Files'. The 'Country code' section lists 'CC-AD', 'AND', and 'AD'. The 'Tags' section states 'No value has been given yet. Double click or use the edit button.' The 'Comments' section has a text input field and shows 'There are no comments yet'.

Advantages

- This approach provides a simple overview of all code values on the asset page, which can suffice if the following conditions are met:
 - The code sets are very stable.
 - You will not add new code sets.
 - The code values do not need to be traced to other assets.
 - You don't want to reuse the codes for other assets.

Disadvantages and limitations

- This approach does not allow for traceability:
 - You cannot see that the 2-digit country code is a value from a code set, or a column in a database.
 - You cannot easily see for which other assets each 2-digit country code is used.
 - You cannot link the 2-digit country codes to 3-digit country codes. As a consequence, you also cannot represent transformation logic.

- Each code set requires a different attribute type.
- The code sets are hard to maintain, especially if the code values are updated, for example an existing value is changed or a new code value is added,

Approach 2: Code values as assets with a relation to Business Terms

Prerequisites

- You have created Business Term assets for all code values.
- You have imported all Code Value assets, for example the ISO-2-digit, ISO-3-digit, and ISO Numeric data.
- You have created a Code Set asset for each code set.
- You have created relations of the type "Code Value is part of / contains Code Set" between the Code Value assets and the Code Set assets.

Approach

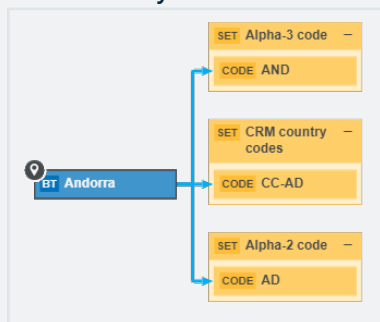
For each of the Business Term assets, you can create a relation of the type "Business Term has code / is code for Code Value" to the equivalent Code Value assets.

Example Asset Page:

The screenshot shows the 'Andorra' Business Term asset page. The top navigation bar includes a search bar, a '+', a shopping cart icon, 'Tasks 1', a refresh icon, a help icon, and a user profile for 'John Fisher'. Below the navigation bar, the page title 'Andorra' is displayed with its type 'Business Term' and status 'Accepted'. Action buttons include 'Add comment without form', 'Edit', 'Move', and 'Delete'. A progress bar shows '100%'. On the left, a sidebar contains navigation options: Overview (selected), Tags, Comments, Diagram, Pictures, Responsibilities, References, History, and Files. The main content area is titled 'has code Code Value' and contains a table with three columns: Name, Domain, and Definition. The table lists three entries: 'AD' (Alpha-2 code), 'AND' (Alpha-3 code), and 'CC-AD' (CRM country codes). Below the table, there are sections for 'Tags' (with a note that no value has been given yet) and 'Comments' (with a text input field and a note that there are no comments yet).

Name	Domain	Definition
AD	Alpha-2 code	
AND	Alpha-3 code	
CC-AD	CRM country codes	

Traceability:



Advantages

- You don't have to make any changes to the asset types or attribute types.
- Each code value is an asset in itself, so you can manage it accordingly. For example, you can assign [responsibilities](#) and approve the Code Value assets with workflows.
- You can link each Code Value asset to multiple Business Assets.
- You can create new Code Values assets when required, without having to create or edit attribute types.

- You can use traceability diagrams to visualize the links between the Business Assets and the Code Value assets.

Disadvantages and limitations

- You need to create Business Assets for all code values.
- If you also need relations between the equivalent Code Value assets, you need a lot of relations.

Map code values and crosswalks

Different systems may use different [reference data](#) for the same type of information. This leads to problems when these systems exchange information.

Example

The same organization could use the two-character country ISO codes for its Customer Relationship Management (CRM) system, but the three-character country ISO codes for its Enterprise Resource Planning (ERP) system.

Besides technical problems, business users may have the following questions:

- What version of the ISO country codes is used in each database?
- What is the difference between the version of ISO country codes of last year as compared to the one currently operational internally?
- If I cannot find a code for a specific account or project, whom should I report it to?

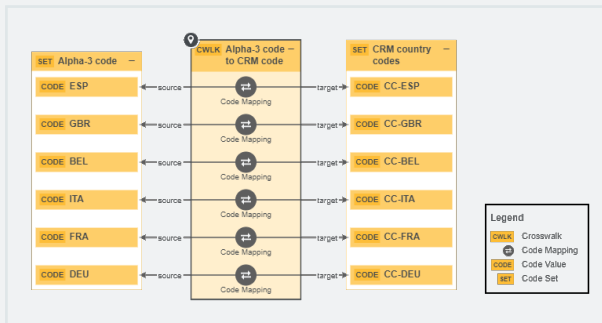
To resolve this challenge, you can map equivalent code values by means of complex relations between the corresponding Code Value assets and a Crosswalk asset, which can represent the transformation logic between the code values.

This has the following advantages:

- You can document the crosswalk between the code sets to which the code values belong.
- You can document exceptions and transformation logic between code values.

Example

A CRM system uses a modified version of the ISO 3-digit Code Set. In the CRM system, the developer added the prefix CC- to all the 3-digit ISO codes to show that they are country codes. For example, the code for Andorra is CC-AND. The mapping is always based on this Transformation Logic. This logic is important for users and should be described in Collibra Data Intelligence Cloud.



Prerequisites

- You have imported all Code Value assets, for example the ISO-3-digit, and the CRM country codes.

Steps

1. Create a Crosswalk asset to represent the mapping between the Code Set assets.
2. Create a relation of the type "Code Set source of / source Crosswalk" between the Code Set asset that contains the original code values and the Crosswalk asset.
3. Create a relation of the type "Code Set target of / target Crosswalk" between the Code Set asset that contains the resulting code values and the Crosswalk asset.
4. Create complex relations of the type "Code Mapping crosswalk" between all Code Value assets of the original code set and the corresponding Code Value assets of the resulting code set.
 - a. In the tab pane, click **Add Characteristic**.
 - b. Click **Code Mapping crosswalk**.

- c. Enter the required information.

Field	Description
source	The original Code Value asset.
target	The resulting Code Value asset.
crosswalk	The Crosswalk asset that represent the transformation.

- d. Click **Next**.
- e. If required, click **Add Characteristic > Transformation Logic** to describe the transformation.
- f. Click **Finish**.

Metrics pages

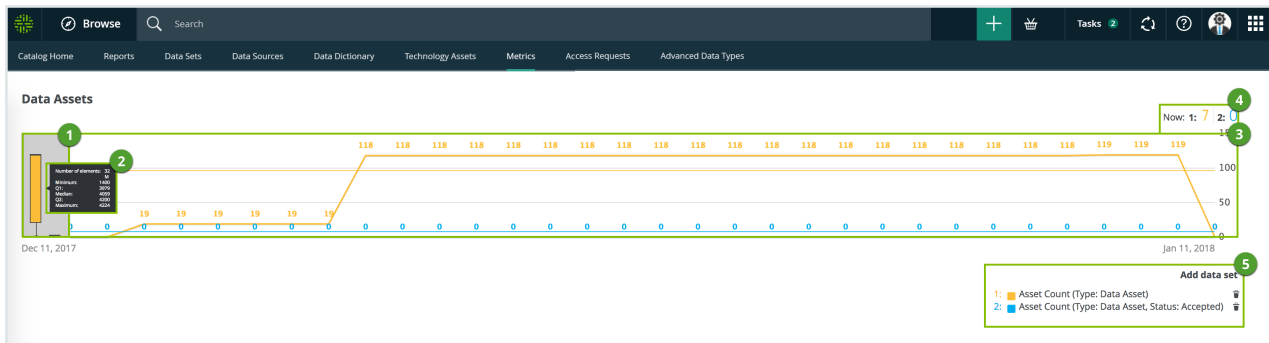
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

For each graph, you can edit the data set and the time range shown.

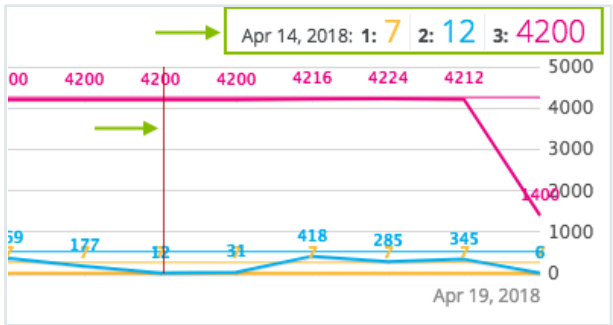
Note On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with [data sets](#) in the true context of CollibraData Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.

Components

The Metrics page consists of one or more graphs, their legend and some counters.



Number	Element	Description
1	Color-coded bars	<p>The color-coded bars give a quick overview of the graph.</p> <p>The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values.</p>
2	Data set details	<p>More details about the graph.</p> <p>Hover your pointer over the color-coded bars to the left of each line of graph to view them.</p>
	Number of elements	The amount of days in the time range.
	Minimum	The lowest count on any day in the data set.
	Q1	The first quartile, meaning the lowest 25% of the data set.
	Median	The median, meaning the middle value of the data set.
	Q3	The third quartile, meaning the lowest 75% of the data set.
	Maximum	The highest count on any day in the time range.

Number	Element	Description
3	Graph	<p>The actual graph. What it shows exactly, depends on the data set. For example, it can show the number of assets viewed over the last month, or the number of licenses used.</p> <p>Tip You can edit the time range of the graph.</p>
4	Counts by day	<p>The counts for a specific day for each data set, by moving your mouse over the graph. The vertical red line identifies the day. The exact count for that day for each data set, is shown above the graph.</p> 
5	Legend	<p>The legend of the graph, which also allows you to add, edit and delete the data sets.</p>

Add a data set to a metrics graph

You can add a data set to a graph on the [Metrics pages](#), for example if you want to compare the amount of new assets of different types.

Steps

1. Open the product for which you want to see the metrics, for example Business Glossary.

2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Under the relevant graph, to the right, click **Add data set**.
 - » The filter settings appear.
4. Enter the required information:

Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Intelligence Cloud application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

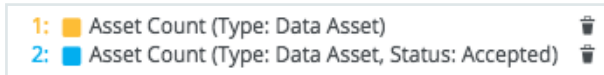
5. Click **Save data set**.

Edit a data set of a metrics graph

You can edit the data set that is shown in a graph on the [Metrics pages](#).

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click the data set you want to edit.



- » The filter configuration for the data set appears.
4. Enter the required information.

Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Intelligence Cloud application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

5. Click **Save data set**.

» The updated data set is shown in the graph.

Edit the time range of a metrics graph

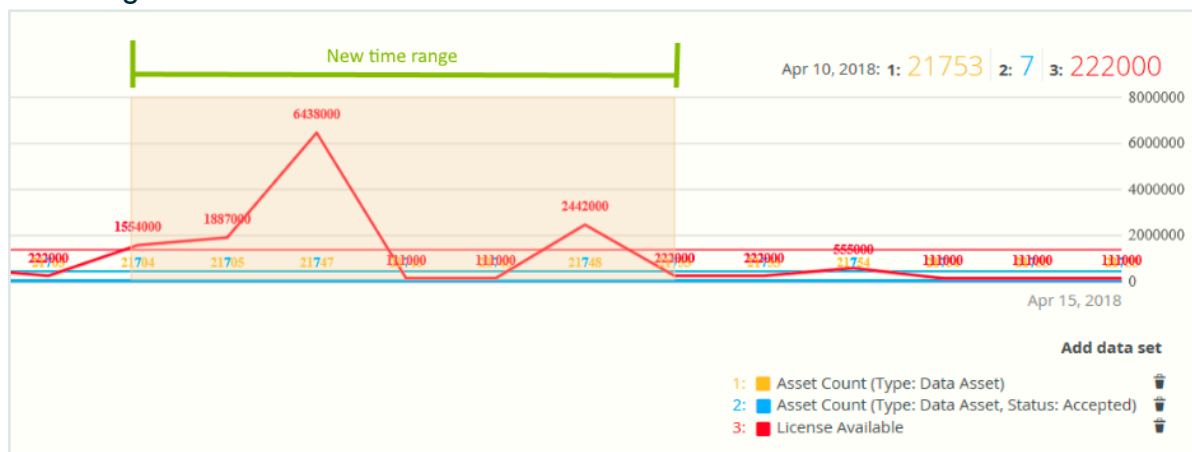
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

There are two ways to edit the time range:

- Click and drag in the graph.
- Select the dates for the graph.

Click and drag in the graph

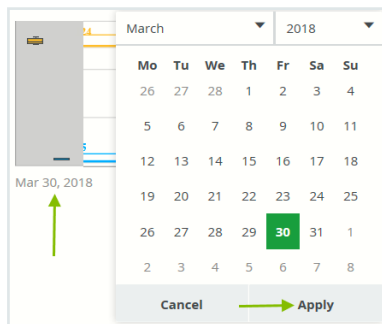
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics](#) page appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. In the relevant graph, click at (or near) the first date in your desired range, and drag to the right, toward the last date in your desired range.
 - » While you are dragging, the color changes in the graph, indicating the resulting time range.



5. Release the mouse button.
 - » The graph is adjusted to the new time range.

Select the dates for the graph

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. On the left-hand side of the graph, click the date.
 - » A date picker appears.




5. Click the first day of your desired time range, and then click **Apply**.
 - » The graph is adjusted to the date you selected.
6. On the right-hand side of the graph, click on the date.
 - » A date picker appears.
7. Click the last day of your desired time range, and then click **Apply**.
 - » The graph is adjusted to the date you selected.

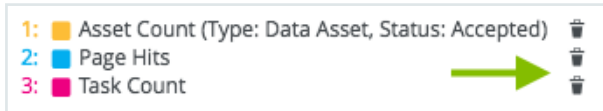
Remove a data set from a metrics graph

You can remove a data set that is shown in a graph on the [Metrics pages](#) if you don't want to see, for example, if you think there is too much information in a graph.

Note Each graph will always show at least one data set. If it only contains one data set and you want to remove it, you first have to [Add a data set to a metrics graph](#) another data set. You can then remove the other one.

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click on  next to the data set you want to delete.



- » The graph is updated.

Collibra Assessments

Assessments help you to validate the risks related to data subjects' personal data as a result of your business processes. They are an integral part of every privacy program.

Collibra Assessments enables you to design, publish and archive assessment templates. Users can then [conduct](#) assessments and submit them for review and approval or rejection.

Enable or disable Collibra Assessments

Collibra Assessments is packaged with Collibra Data Intelligence Cloud and is enabled by default.

If you are using an on-premises version of Collibra, you can disable and enable Collibra Assessments on your own. If you are using a cloud version of Collibra, you need to open a ticket with your Collibra representative.

Note If you disable Collibra Assessments, the [packaged resources](#) remain in your Collibra environment. We recommend that you do not delete them, in case you decide to re-enable the feature at a later date.

Steps

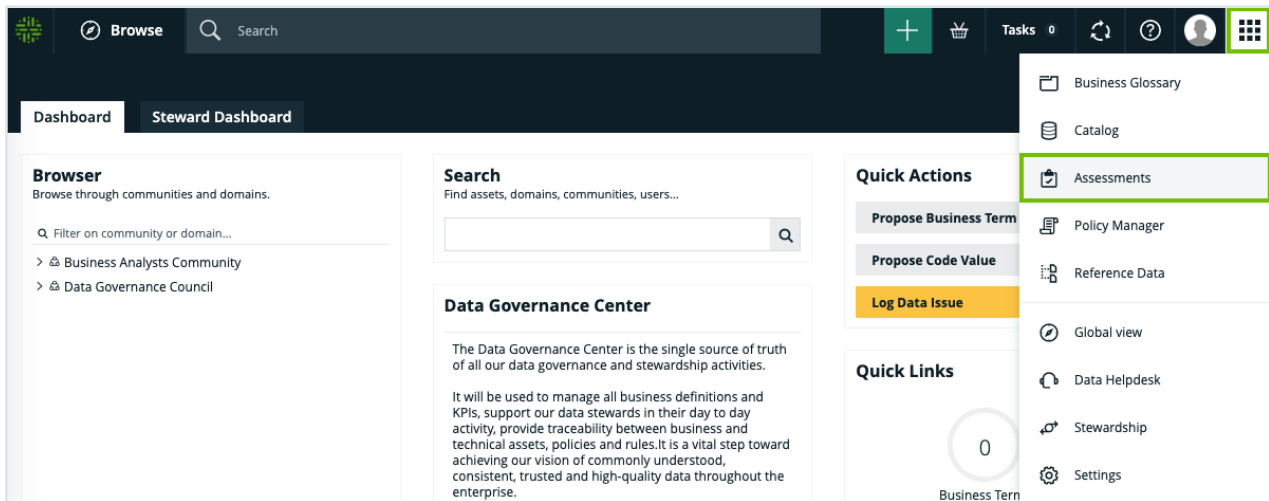
1. Open Collibra Console.
 - » Collibra Console opens with the **Infrastructure** page.
2. In the tab pane, expand an environment to show its services.
3. In the tab pane, click the Data Governance Center service of that environment.
4. Click **Infrastructure configuration**.
5. Click **Edit configuration**.
6. In the tab pane, click **JVM configuration**.


7. Scroll to the bottom, and in the empty field, enter one of the following:
 - `-Dfeature.assessments=false`, to disable the feature.
 - `-Dfeature.assessments=true`, to enable the feature.
8. Click the green **Save all** button.
9. Restart your Colibra environment.

Open Colibra Assessments

To open Colibra Assessments, you need a [global role](#) that has the Assessments [global permission](#).

On the main menu, click , then click **Assessments**.



If the Assessments feature is not shown when you click , that means the feature is not enabled.

Data privacy-related assessments

You can use [Collibra Assessments](#) to create your own templates to assess any of the assets in your Collibra Data Intelligence Cloud environment. This section, however, focuses on the data privacy use cases.

Collibra Assessments comes with templates that address the following assessment types:

Type	Description
Privacy Impact Assessment	Covers use cases for DPIA, PIA, and all variations
Validation Test Assessment	Covers various types of threshold assessments, to determine the need for a DPIA, PIA or another assessment.
Balancing Test Assessment	Covers use cases for determining the legitimate interest of a business process and similar use cases.

Assessments-related resources

When you install Collibra Data Intelligence Cloud, the following assessments-related resources are created in your environment.

New Assessments domain

The New Assessments domain:

- Is in the Data Governance Council community.
- Is of the domain type Assessment Review Register.

- Can be selected as the destination for new Assessment Review assets, when submitting assessments.

Tip Ensure that the [required responsibilities](#) exist for the New Assessments domain.

Assessment Review asset type

When you [submit](#) an assessment for review, if the template used had the [Governance option](#) selected, an Assessment Review asset is created in the domain of your choice.

Relation type

Head	Role	Co-role	Tail
Asset	is assessed by	assesses	Assessment Review

Required license, permissions and responsibilities

To use Collibra Assessments, you need:

- An Author [license](#).
- Certain permissions.
- A [responsibility](#), to act on the permissions conveyed via the resource role.

Responsibilities and permissions

To submit an assessment, you need an Author license and a resource role that has the following resource permissions for the domain you specify when submitting an assessment:

- Asset > add
- Attribute > add

Tip Some packaged resource roles are configured with the necessary resource permissions, for example: Business User and Business Steward.


Workflow requirements

Warning When you [submit](#) an assessment for review, if the template used had the [Governance option](#) selected, an Assessment Review asset is created in your Collibra environment. For the [Assessments Approval workflow](#) to work, a Business Steward (by default) must be assigned to the domain you specify when submitting an assessment. If the workflow was configured for a different resource role, the domain must have a responsibility created for that resource role.

Assessments landing page

The landing page is the hub from which you can:

- Access the template gallery.
- Conduct an assessment.
- View a list of all existing assessments and details, including the template used to conduct the assessment, the status of the assessment and the date on which the assessment was last updated.

 Assessments Template Gallery

Conduct assessments

Start

Assesses	Assessment Template	Status	Updated on ▲
Direct Marketing	DPIA	Submitted	16-Feb-2021
Adzilla	Data Transfer Impact Assessment	Submitted	12-Feb-2021
Company social media channels development	Datepicker test	Submitted	08-Feb-2021

Working with templates

A template is a set of questions designed to elicit information during an assessment. When [conducting](#) an assessment, users provide information via the [questions](#) you add to the templates.

An assessment template can serve as an approved assessment from which to launch an assessment, or a starting point from which to design customized templates.

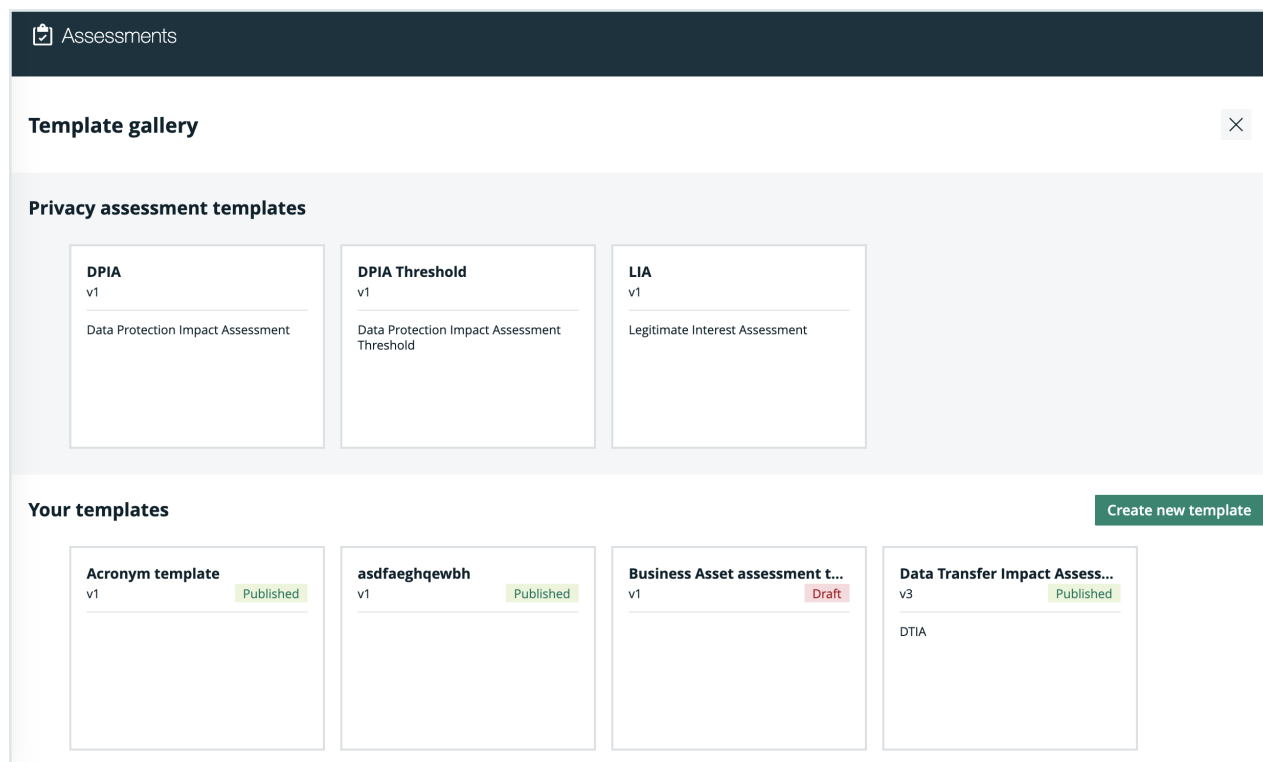
Data Privacy comes packaged with templates that you can use as is, or [copy](#) and [edit](#) to suit your needs. All versions of the templates are stored in the DGC database.

You can [publish](#) your custom templates to make them available for use throughout your organization.

Template gallery

The template gallery is a collection of all packaged data privacy assessment templates and those you've [created](#).

- The packaged templates appear in the **Privacy assessment templates** section.
- Custom templates, meaning those that you've created, including copies of the packaged templates, appear in the **Custom templates** section.



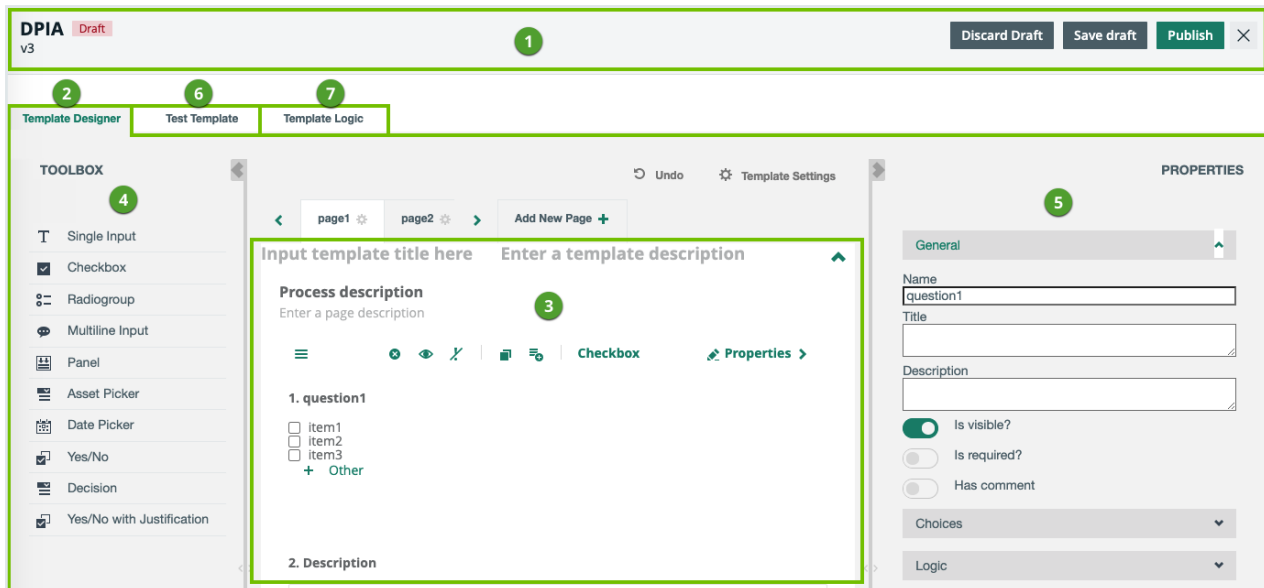
Each template is shown as a tile, with the following details:

- The title of the template.
- The status of the template, either Draft or Published.
- A description of the template (optional).
- The version of the template.

Note The packaged templates can be [copied](#), but not edited. Therefore, they are always v1 and always have the Published status.

Template editor

The template editor enables you to [copy](#) the packaged data privacy assessment templates and design your own custom templates.



No.	Part name	Description
1	Action bar	<ul style="list-style-type: none"> • Template title, status and version number • Buttons to copy the template, discard or save drafts, and publish assessments. <p>Note The availability of the buttons depends on the type of template (packaged or customized) and the status of the template.</p>
2	Template Designer tab	<ul style="list-style-type: none"> • The toolbox and properties sections. • Tabs for the various pages in your template. • Undo button, to reverse the last edit you made to the template. • Template Settings button, for quick access to the template title, description and the target asset type to be assessed.
3	Building area	The body of the Template Designer tab, where you add and work with questions.
4	Toolbox	A set of question types, such as checkbox, comment and date picker.

No.	Part name	Description
5	Properties	Context-specific settings, based on the active page or question in the questions building area.
6	Test Template tab	A viewer that allows you to view the result of your work in the Template Designer tab. You can respond to your questions to test, for example, how the configured logic will work when conducting an assessment.
7	Template Logic tab	A view on all logic conditions configured in the template. You can also add , edit and delete logic conditions in this tab.

Create a template


Although there is no strict procedure, the following steps describe the basic flow in creating a new [template](#), adding questions to the building area and configuring properties.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and click **Create new template**.
 - » A new template opens.
2. In the **Properties**, enter a title for your new template.
3. Optionally, in the **Properties**:
 - Add a description for your new template.
 - [Specify](#) a target asset type to be assessed.
 - Select or clear the **Governance** checkbox, to enable or disable the [Governance option](#) for any assessments that will be conducted from this template.

4. In the building area of the [Template Designer tab](#), click  and enter a page title and page description for Page 1.
5. In the [toolbox](#), click a question type, to add a question to the building area, or click and drag into the building area.
6. Configure the [question settings](#).
7. In the **Properties**, [configure](#) logic conditions for the question.
8. Add more pages and more questions, as necessary.

Note Each page in a template appears as a separate section in the assessment.

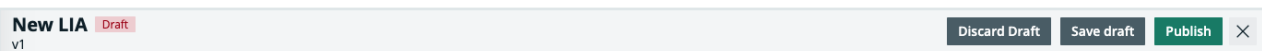
9. In the [action bar](#), click **Save draft**.
 - » The template appears in the **Custom templates** section of the template gallery, as a v1 template with the Draft status.

What's next?

- [Publish](#) the template.
- [Export](#) the template.

The action bar

The action bar allows you to control your draft templates and publish them for use throughout your organization.



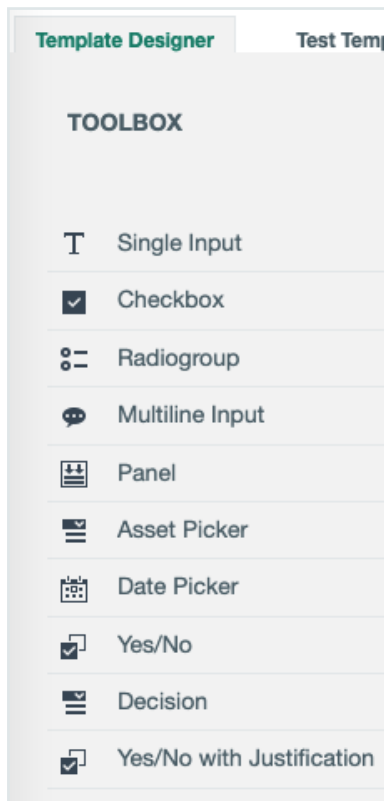
Note The availability of the buttons depends on the type of template (packaged or customized) and the status of the template.

Element	Description
Name	The name of the template.
Status	Status of the open template: Draft or Published .

Element	Description
Discard draft	<p>Revert to the previous version of a template, regardless of the status of the template and whether or not you made any changes to it.</p> <div> <p>Note</p> <ul style="list-style-type: none"> • If you revert to a previous version of a v1 template, it is permanently deleted from the template gallery. All published versions, however, remain archived in the DGC database. • The packaged templates can be copied, but not edited. Therefore, they are always v1 and always have the Published status. They cannot be deleted. </div>
Save draft	<p>Save any changes you've made to the template.</p> <ul style="list-style-type: none"> • If the status of the template was Draft, the status and the version number are unchanged. • If the status of the template was Published, the status becomes Draft and the version number increases incrementally, even if you made no changes to the template.
Publish	<p>Set the status of the template to Published.</p> <ul style="list-style-type: none"> • If the status of the template was Draft, the status becomes Published and the version number is unchanged. • If the status of the template was Published, the status remains Published, but the version number increases incrementally, regardless of whether or not you made changes to the template.
Copy template	<p>Make a copy of a packaged template. The copy is added to Custom templates section, as a v1 with the Draft status.</p>
✕	<p>Close the template without saving any changes you may have made. The status and the version number of the template are unchanged.</p>

The toolbox

In the [Template Designer tab](#), the toolbox contains various question types, such as Single input, Yes/No and Checkbox. You use these question types to add questions and statements to the building area, to elicit input from the user conducting an assessment.



Tip

- Click a question type to add it to the current page or click and drag to a specific location on the page.
- You can also [add](#) a question to the toolbox.

Question type	Allows you to...
Single Input	Enter a single line of text.
Checkbox	Select one or more of the predefined values.

Question type	Allows you to...
Radiogroup	Select only one of the predefined values.
Multiline Input	Enter multiple lines of text.
Panel	<p>Frame two or more questions, typically in reference to another question.</p> <div> <p>Tip Let's imagine you have a Radiogroup question that asks if the organization has identified all Controllers. The possible responses are "Yes" and "No". You could then:</p> <ul style="list-style-type: none"> • Follow this question with a Panel that contains three additional Controller-specific questions. • Configure a logic condition so that the Panel and the three questions it frames appear if the response to the Radiogroup question is "No". </div>
Asset Picker	Select one or more assets of a predefined asset type.
Date Picker	Enter a date.
Yes/No	Select "Yes" or "No".
Decision	<p>Return the value "Yes" or "No", based on the scoring of Yes/No questions and a scoring threshold.</p> <p>For more information, see Working with scores and decisions.</p>
Yes/No with Justification	Select "Yes" or "No" and enter a free-text justification.

Specifying an asset type for a template

When you [create](#) a template, you can specify a target asset type to be associated with the template. In this case, when a user selects the template for conducting an assessment, the

accompanying drop-down list on the landing page will include all approved assets of the that asset type, in your Collibra Data Intelligence Cloud environment.

You can specify an asset type for a template when you:

- [Copy](#) a packaged template.
- [Create](#) a new template.
- [Edit](#) a custom template.

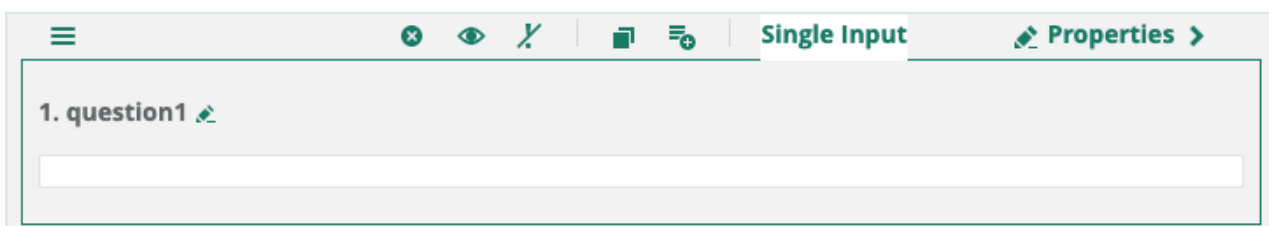
Important If you don't specify an asset type for a template, you will not be able to select an asset to assess, when conducting the assessment. Instead, you will enter a short description of what you want to assess and then [conduct the assessment without an underlying asset](#). When you submit the assessment for review, an Assessment Review asset is created in your Collibra environment, but without a relation to an underlying asset.












Note You can still conduct an assessment without selecting an underlying asset, even if you specify a target asset type for the selected template.




Working with questions

The [toolbox](#) contains a number of question types, such as checkboxes, text boxes and date pickers. You use these question types to add questions and statements to the building area, to elicit input from the user conducting an assessment.

Click a question in the building area to view the available settings.



Icon button	Description
	<p>Edit the title.</p> <p>The edit icon appears when you hover over the question title. Alternatively, you can provide a title in the Properties.</p>
	<p>Click and drag the question to a different location on the page.</p> <div> <p>Tip To move a question to another page, you can:</p> <ol style="list-style-type: none"> 1. Click  to add the question to the toolbox. 2. Go to the page on which you want to add the question. 3. Drag the question from the toolbox to the page. </div>
	<p>Delete the question from the building area.</p> <div> <p>Tip If you think you might want to use the question at a later time, or add it to another page, you can click , to add the question to the toolbox. Deleting a question from the building area does not delete it from the toolbox.</p> </div>
	<p>Specify whether or not the question title is visible.</p>
 	<p>Specify whether a response to the question is optional or mandatory.</p> <p>Click to toggle between the two conditions.</p> <p>: Optional (default)</p> <p>: Mandatory</p>
	<p>Copy the question. The copy appears directly below the active question.</p>

Icon button	Description
	<p>Add the question to the toolbox.</p> <div> <p>Note You can add up to three questions, for a total of 13 question types in the toolbox. If you have 13 questions types and you add another one, the last question type in the toolbox is overwritten.</p> </div>
<p>Question type label, for example</p> <p>Single Input</p>	<p>The question type.</p> <p>For some question types, you can click this button to toggle between two similar question types. Specifically:</p> <ul style="list-style-type: none"> • If the question type is Single input, you can click this button to change it to a Comment, and vice versa. • If the question type is Checkbox, you can click this button to change it to a Radiogroup, and vice versa.
 Properties >	Click to show the question properties in the Properties .
	Click to add another choice to radiogroup or checkbox question.

Add a question to the toolbox

The [toolbox](#) includes a set of question types. You can customize the toolbox by adding up to three questions from the building area. These question can then be reused throughout your template.

Tip This is helpful if, for example, you [configure](#) a checkbox question with the following values:

- Successfully implemented
- Partially implemented or planned
- Not yet implemented or planned
- Not applicable


If you then add the question to the toolbox, you can reuse the question throughout your template, without having to configure the values each time.

Note Any questions you add are not saved in the toolbox when you close the template, even if you save the changes you made in the template.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open a template, or [create](#) a new template.
2. Click on a question in the building area or add one to the building area.
3. Configure the question to suit your needs.
4. Click .

» The question is added to the toolbox, as an additional question type.

Note You can add up to three questions, for a total of 13 question types in the toolbox. If you have 13 questions types and you add another one, the last question type in the toolbox is overwritten.





Configure values for checkbox a radiogroup questions

You can configure the values for checkbox and radiogroup [questions](#).

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open a template, or [create](#) a new template.
2. Click the relevant question or add a new question to the building area.
3. Do any the following:
 - Click  next to a value, to edit the label.
 - Click  next to a value and drag to reorder it among the other values.
 - Click  next to a value, to delete it.
 - Click  to add another value.
 - In **Properties**, expand the **Choices** section and select **Has other item**, to allow users to select the value "Other" and add free-text clarification.

Yes/No question scores and decisions

You can configure a series of Yes/No questions, followed by a Decision question, so that when an assessment is conducted, the responses to the Yes/No questions determine the value shown in the Decision question.

You can [assign](#) weighted values, or scores, to Yes/No questions in your template. Then, if the response to a question is "Yes", the specified score is added to a total score. If the response is "No", the specified score is not added to the total score.

If the total score reaches a specified scoring threshold:

- Your Decision question returns the value "Yes", as the final decision.

Final Decision

18. Is a DPIA required for the Business Process asset?

Yes

- When the assessment is submitted for review, the assessment details page includes a button by which you can launch the resulting assessment, as specified when configuring the Decision question.

For more information on question types, see [The toolbox](#).

Example

In this example, you design a template with the following:

- Yes/No questions and properties:

Question type	Title	Score property
Yes/No	Does the processing activity present a high level of risk for the rights and freedoms of the concerned data subjects?	2
Yes/No	Does the processing activity make innovative use of new technological or organizational solutions?	1
Yes/No	Does the processing activity match or combine data sets?	1

- Decision question and properties:

Question type	Title	Score threshold property	Assessment template property
Decision	Is a DPIA required for the Business Process asset?	2	DPIA

Result

During an assessment, the scores are added for each question to which the response is "Yes". If the total is less than 2, the decision for the question "Is a DPIA required for this asset?", is "No". If the sum is equal or greater than 2, the decision is "Yes".

Configure Yes/No question scores and decisions

You can assign weighted scores to [Yes/No questions](#) in your template. The scores are used to determine the decision shown to the user in your Decision question.

For more information on question types, see [The toolbox](#).

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open a template, or [create](#) a new template.
2. Add Yes/No questions to the template, or work with the existing Yes/No questions.
You can also use Yes/No with Justification questions.

3. For the relevant Yes/No questions, specify the following properties:

Property	Description
Title	<p>The question or statement.</p> <p>Example "Does the processing activity present a high level of risk for the rights and freedoms of the concerned data subjects?"</p>
Score	<p>The score for the question or statement.</p> <p>Note The score is added to the total if the user responds "Yes" to the question. If the user responds "No", the score is ignored.</p>

4. In a Decision question, specify in the following properties:

Property	Description
Title	<p>The question that appears in the final decision. Consider the fact that the decision value shown in the final decision will be "Yes" or "No".</p> <p>This should be in the form of a question. If the score threshold is met, the value returned is "Yes". If not, the value returned is "No".</p> <p>Example "Is a DPIA required for the Business Process asset?"</p>
Score threshold	<p>The limit at, or beyond, which the Decision question returns the value "Yes".</p>

Property	Description
Assessment template	<p>The assessment that should be conducted if the scoring threshold is met.</p> <div> <p>Note</p> <p>When the assessment is submitted for review, the assessment details page includes a button to launch the assessment you specify here.</p> </div>

Properties

The **Properties** section on the [Template Designer tab](#) contains context-specific settings, based on the active page or question in the questions building area.

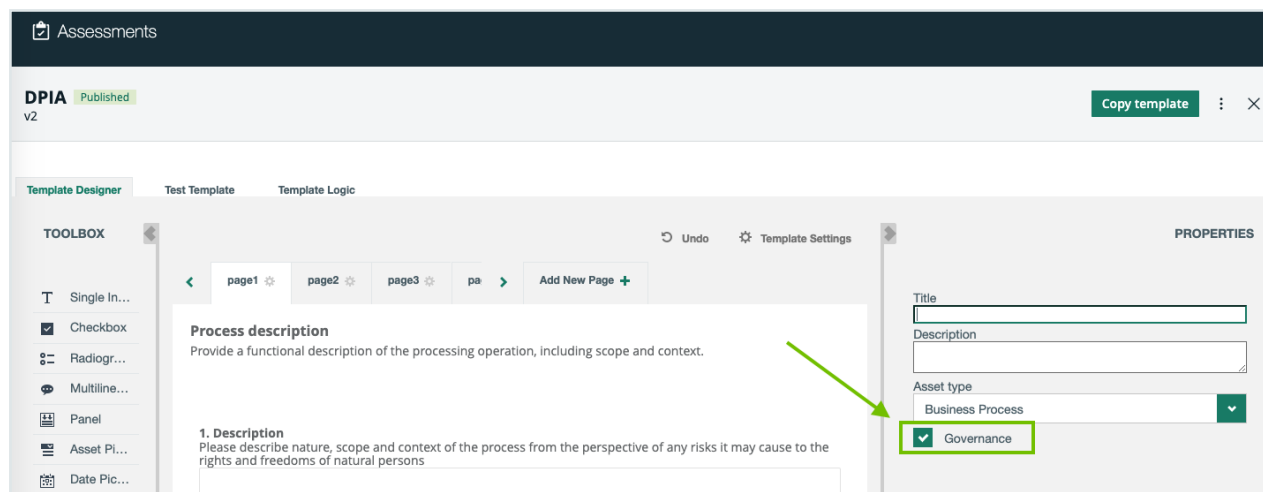
Property	Description
General	
Name	<p>The ID of a question.</p> <p>Applies only to questions, not pages.</p>
Score	<p>The score allows you to give weighted importance to questions.</p> <p>This property is used in conjunction with the "Score threshold" and "Assessment template" properties described in this table.</p> <p>For more information, see Working with scores and decisions.</p>
Title	<p>The title of the template, page or question.</p> <p>The title of a question is the actual question or statement put forth in the assessment, for example "Have you identified all Controllers?"</p>
Description	A description of the template, page or question.

Property	Description
Governance	The Governance option determines whether or not an assessment conducted from a specific template will create an asset in your Colibra environment and trigger the Assessments Approval workflow. See Governance for assessments .
Auto number questions	Determines whether or not the questions in your template are automatically numbered in the order they are arranged in the building area.
Is visible?	Determines whether or not the question is visible during an assessment.
Is required?	Determines whether the question is optional or mandatory, when conducting an assessment.
Input placeholder	Allows you to enter text that appears in a text field. The text is overwritten when the user enters text in the field.
Has comment	Determines whether or not a free-text field is available, allowing users to enter a comment pertaining to the question.
Comment text	Text that accompanies a free-text field that is available to users if you enable the "Has comment" property.
Score threshold	<p>The value at, or above which, the accompanying Decision question returns a "Yes" value.</p> <p>This is property is used in conjunction with the "Score" and "Assessment template" properties described in this table.</p> <p>For more information, see Working with scores and decisions.</p>

Property	Description
Assessment template	<p>The template to use for the assessment that should be conducted if the value in the "Score threshold" property is reached.</p> <p>This is property is used in conjunction with the "Score" and "Score threshold" properties described in this table.</p> <p>For more information, see Working with scores and decisions.</p>
Choice	
Has other Item	Allows you to select the value "Other" and add free-text clarification.
Logic	<p>Allows you to define the logic for the selected question.</p> <p>See:</p> <ul style="list-style-type: none"> • Logic settings in the Template Designer tab • Logic settings in the Template Logic tab

Governance for assessments

The Governance option determines whether or not an assessment conducted from a specific template will create an asset in your Collibra environment and trigger the Assessments Approval workflow. The Governance option is available in the [Properties](#) section on the [Template Designer tab](#).



What happens if the Governance option is selected or cleared?

Selected/Cleared	Description
Selected	<p>When you conduct an assessment that uses the template, the Submit button is available.</p> <p>When you click Submit:</p> <ul style="list-style-type: none"> • The status of the assessment changes from Draft to Submitted. • An Assessment Review asset with the Under Review status is created in the domain of your choice, in your Collibra environment. • The Assessments Approval workflow is triggered and a task is assigned to the Business Steward. <p>Tip You can configure the Assessments Approval workflow so that the task is assigned to a different resource role.</p>

Selected/Cleared	Description
Cleared	<p>When you conduct an assessment that uses the template, the Complete button is available.</p> <p>When you click Complete:</p> <ul style="list-style-type: none"> • The status of the assessment changes from Draft to Completed. • No asset is created in your Colibra environment. • The Assessments Approval workflow is not triggered.

Configuring logic for questions and pages in a template

For each question or page in a [template](#), you can configure logic, whereby if certain conditions are met, a specified action occurs.

You can [create](#), [edit](#) and [delete](#) logic conditions using:

- The [logic settings in the Template Designer tab](#).
- The [logic settings in the Template Logic tab](#).

Note

- Any logic that you configure for a given question overrides the **Is visible?** and **Is required?** settings that you may have set in the **General** section in **Properties**.
- Any logic that you configure via the Template Designer tab appears in the Template Logic tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the Template Designer tab and do not appear in the Template Logic tab.

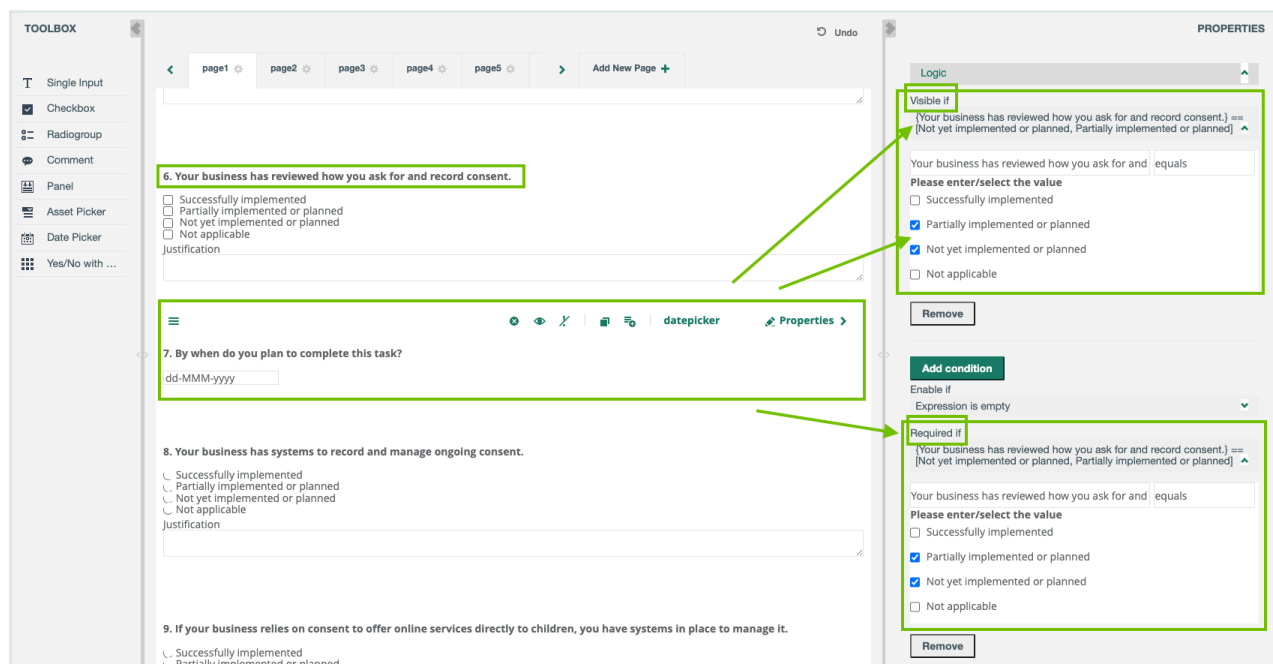
Example

Question 6 in your template, a checkbox question type, asks if your organization has reviewed how they ask for and record consent.

Question 7, a date picker question type, asks by when the task will be complete. If the response to Question 6 is "Successfully implemented" or "Not applicable", there is no need to show Question 7.

Therefore, you configure the logic for Question 7, as follows:

- **Visible if:** If the user responds to Question 6 with "Partially implemented or planned" or "Net yet implemented or planned", Question 7 is shown.
- **Required if:** Furthermore, if either of those values are selected for Question 6, Question 7 is a required question.



Create a logic condition for a question or page

There are two ways to create [logic conditions](#) in your template.

- [Via the Template Designer tab](#)
- [Via the Template Logic tab](#)

Note Any logic that you configure via the Template Designer tab appears in the Template Logic tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the Template Designer tab and do not appear in the Template Logic tab.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Via the Template Designer tab

1. Go to the [template gallery](#) and open a template.
2. Click the question or page tab for which you want to create a logic condition.
3. In the **Properties**, expand the **Logic** settings.
4. Expand the settings for the relevant logic option:
 - a. Visible if
 - b. Enable if
 - c. Required if
5. In the **Select question...** field, select the question to which the user's response can trigger the action.

Note The questions are ordered alphabetically, not in the order of which they appear in the template.

6. Click **equals**, and then select a logical operator.

Note Not all logical operators are applicable to all question types.

7. Enter or select a value.

Via the Template Logic tab

Note You can only create page-related logic conditions via the Template Design tab.

1. Go to the [template gallery](#) and open a template.
2. Click the **Template Logic** tab.
 - » A list of all logic conditions configured for the template is shown.

3. Specify the conditions:

- a. Click **Add New**.
- b. In the **Select question...** field, select the question to which the user's response can trigger the action.

Note The questions are ordered alphabetically, not in the order of which they appear in the template.

- c. Click **equals**, and then select a logical operator.

Note Not all logical operators are applicable to all question types.

- d. Enter or select a value.

4. Specify the action that occurs if the conditions are met:

- a. In the **Select an action to add...** drop-down list, select an action type.
- b. In the **Select question...** drop-down list, select the question that will be affected if the conditions are met.

5. Do one of the following:

- Click **Save and return**, to save the configurations and return to the list of logic conditions.
- Click **Save**, to save your configurations.
- Click **Return without saving**, to discard your configurations and return to the list of logic conditions.

Edit a logic condition for a specific question

There are two ways to edit the [logic conditions](#) in your template.

- [Via the Template Designer tab](#)
- [Via the Template Logic tab](#)

Note Any logic that you configure via the Template Designer tab appears in the Template Logic tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the Template Designer tab and do not appear in the Template Logic tab.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).


Via the Template Designer tab

1. Go to the [template gallery](#) and open a template.
2. Click the question for which you want to edit the logic.
3. In the **Properties**, expand the **Logic** settings.
4. Expand the settings of the condition you want to edit.
5. Edit the condition to suit your needs.

See [Logic settings in the Template Designer tab](#).

Via the Template Logic tab

Note You can only edit page-related logic conditions via the Template Design tab.

1. Go to the [template gallery](#) and open a template.
2. Click the **Template Logic** tab.
 - » A list of all conditions configured for the template is shown.
3. Click  next to the condition you want to edit.
4. Edit the condition to suit your needs.

See [Logic settings in the Template Logic tab](#).
5. Do one of the following:
 - Click **Save and return**, to save the configurations and return to the list of logic conditions.
 - Click **Save**, to save your configurations.
 - Click **Return without saving**, to discard your configurations and return to the list of logic conditions.

Delete a logic condition for a specific question

There are two ways to delete the [logic conditions](#) in your template.

- [Via the Template Designer tab](#)
- [Via the Template Logic tab](#)

Note Any logic that you configure via the Template Designer tab appears in the Template Logic tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the Template Designer tab and do not appear in the Template Logic tab.

Prerequisites


You have a [global role](#) that has the Assessments [global permission](#).

Via the Template Designer tab

1. Go to the [template gallery](#) and open a template.
2. Click the question for which you want to configure logic.
3. In the **Properties** section, expand the **Logic** settings.
4. Expand the settings for the condition you want to delete.
5. Click **Remove**.

Via the Template Logic tab

Note You can only delete page-related logic conditions via the Template Design tab.

1. Go to the [template gallery](#) and open a template.
2. Click the **Template Logic** tab.
 - » A list of all conditions configured for the template is shown.
3. Click  at the end of the row of the condition you want to delete.

Logic settings in the Template Designer tab

The following image shows the logic settings in the **Template Designer** tab.

Logic

Visible if 1
Expression is empty

Select question... 2 equals 3
Please enter/select the value
4

Remove

Add condition

Enable if 1
Expression is empty

Required if 1
Expression is empty

Number	Setting	Description
1	Visible if	<ul style="list-style-type: none"> • If the conditions are met, the question is shown in the assessment and you can respond to it. • If the conditions are not met, the question is not shown in the assessment. <p>Note This logic condition overrides the Is visible? setting in the General section in Properties.</p>
	Enable if	<ul style="list-style-type: none"> • If the conditions are met, the question is enables, meaning you can respond to it. • If the conditions are not met, the question is disabled, meaning you cannot respond to it.
	Required if	<ul style="list-style-type: none"> • If the conditions are met, the question is mandatory and is identified by an asterisk (*). You must respond to mandatory questions before you can submit the assessment for review. • If the conditions are not met, the question is optional. You can submit the assessment for review without having responded to optional questions. <p>Note This logic condition overrides the Is required? setting in the General section in Properties.</p>

Number	Setting	Description
2	Select question...	The question that determines whether or not the action will happen.
3	Logical operator	<p>All or some of the following, based on the question type of the selected question.</p> <ul style="list-style-type: none"> • is empty • is not empty • equals (default) • not equals • any of • all of
4	Value	The response to the question that determines whether or not the action will happen.

Logic settings in the Template Logic tab

The following image shows the logic settings in the **Template Logic** tab.

The screenshot displays the 'Define condition(s)' and 'Define action(s)' sections of the Template Logic tab. In the 'Define condition(s)' section, there is a text input field labeled 'End date' (1) containing 'dd-MM-yyyy' (3), followed by an 'equals' operator (2). Below this is an 'Add condition' button. In the 'Define action(s)' section, there is a 'Question visibility' dropdown (4) set to 'visible' (indicated by a green checkmark), with a note: 'Make the question visible when the logic expression returns true. Otherwise keep it invisible.' Below this is a 'Select question...' dropdown (5).

Number	Field	Description
1	Select question...	<p>The question that determines whether or not the action will occur.</p> <p>Note In the previous example image, the "End date" question has been selected in order to show the Please enter/select the value field, which only appears once a question is selected.</p>
2	Logical operator	<p>All or some of the following, based on the question type of the selected question.</p> <ul style="list-style-type: none"> • is empty • is not empty • equals (default) • not equals • any of • all of
3	Please enter/select the value	The response to the question that determines whether or not the action will occur.
4	Select an action to add...	<p>The action that occurs if the conditions are met.</p> <p>Note In the previous example image, the "Question visibility" action has been selected in order to show the Select question... field, which only appears once an action is selected.</p>
5	Select question...	The question that is subject to the action.

Copy a packaged template

You can copy any of the packaged [templates](#).

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open the packaged template that you want to copy.
2. In the **Properties**, enter a title for your new template.
3. Optionally, in the **Properties**:Add a description for your new template.[Specify](#) a target asset type to be assessed.Select or clear the **Governance** checkbox, to enable or disable [governance](#) for any assessments that will be conducted from this template.
4. Click **Copy template**.
 - » The new template opens automatically. The template is also added in the **Custom templates** section of the template gallery, as a version 1, with the Draft status.

What's next?

- [Edit](#) the template.
- [Publish](#) the template.
- [Export](#) the template.

Edit a template

You can edit any of your custom [templates](#).

Tip You cannot edit the packaged templates, but you can [copy](#) them and edit the new templates.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open one of your customized templates.
2. Edit the template to suit your needs.
3. Click **Save draft**.
 - » If the template you edited:
 - Had the Draft status, the status remains Draft and the version number remains the same.
 - Had the Published status, the status becomes Draft and the version number increases incrementally.

Discard a draft version of a template

If one of your custom templates has the Draft status, you can revert to the previous published version.

Note

- You can only revert to the previous version of a template that has the Draft status. Once a template has the Published status, you can [delete](#) it, but you cannot revert to a previous version.
- All versions of a template are archived in the DGC database, even versions that have been deleted from the template gallery.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open a template that has the Draft status.
2. Click **Discard Draft**.
 - » The draft is deleted and the previous published version becomes available.

Delete a template

You can delete any of your custom [templates](#). You cannot delete the packaged templates.


Note Any assessments in draft that were started using a deleted template will not be affected. You can complete the assessment and submit it when you're ready. You cannot, however:

- Conduct new assessments using a deleted template.
- Copy an assessment that used a deleted template.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open the custom template that you want to delete.
2. In the upper-right corner, click , and then click **Delete**.
 - » The **Confirm delete** dialog box appears.
3. Click **Delete** to confirm.

Publish a template

Although it is more likely that you will publish [templates](#) that have the Draft status, you can also publish templates that have the Published status.

If you publish:

- A template that has the Draft status, the version number is unchanged, but the status becomes Published.
- A template that has the Published status, the status remains Published, but the version number is incrementally updated, even if you didn't edit the template.

Note When [conducting](#) an assessment, in the drop-down list of available assessment types, only the latest versions of published templates are available. If a user starts conducting an assessment with version 1 of a specific template, the template remains unchanged throughout the assessment, even if newer versions of the template have since been published.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open a template.
2. Optionally, edit the template to suit your needs.
3. Click **Publish**.
 - » The status of the template is Published and it is made available throughout your organization.

Export a template

You can export any of the custom templates in the [template gallery](#). You can then [import](#) the templates to another Collibra environment. This is particularly useful for importing/exporting templates from a testing environment to a production environment.


Note You can only export templates that have the Published status.

Tip You can't export the packaged templates, but you can [copy](#) them and then export the copies.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the [template gallery](#) and open the custom template that you want to export.
2. In the upper-right corner, click , and then click **Export**.
 - » The template is exported to your hard drive as a JSON file.

What's next?

[Import](#) the template to another Collibra environment.


Import a template

You can import the custom templates that you've [exported](#). This is particularly useful for importing/exporting templates from a testing environment to a production environment.

Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- You've exported a custom template (JSON file) to your hard drive.

Steps

1. Go to the [template gallery](#).
2. In the **Custom templates** section, click , and then click **Import template**.
 - » The **Import template** dialog box appears.
3. Do one of the following:
 - a. In the **Import template** dialog box, click **Upload template**, and then select the template you want to upload.
 - b. Find and drag the template you want to upload into the **Import template** dialog box.
4. If a template of the same name already exists in your environment, you are prompted enter a new name for the template you're importing.
5. Click **Import**.
 - » The template is added to the template gallery. It retains its Published status.

Important Version control when importing and exporting templates is currently not supported. As such, no matter the version of an exported template, all imported templates are v1.

Working with assessments

Assessments help you to validate the risks related to data subjects' personal data as a result of your business processes. You can conduct, edit and submit assessments of your assets. The Business Steward (by default) then reviews and approves or rejects the assessment.

Tip You can [configure](#) the Assessments Approval workflow so that the task is assigned to a different resource role.

Conduct an assessment

You can conduct [assessments](#) of the assets in your Collibra Data Intelligence Cloud environment.

Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- To submit an assessment, by which an Assessment Review asset is created in your Collibra Data Intelligence Cloud environment, you need a [global role](#) that has the Policy Manager [global permission](#). This does not apply if you complete the assessment, as no Assessment Review asset is created in your environment.

Steps

1. Go to the Collibra Assessments [landing page](#)
2. Select the template that you want to use for your assessment.
3. Select the asset that you want to assess.

The drop-down list includes assets of a [specified](#) asset type, in your Collibra Data Intelligence Cloud environment. If no drop-down list of assets appears, that means no asset type was specified for the template.

Tip You can also [conduct](#) an assessment [without identifying an underlying asset](#). In this case, select the **I do not have a <asset type> yet** checkbox, and then enter a description of what you want to assess.

4. Click **Start**.
5. If an existing assessment exists, in Draft status, for the combination of template and Business Process asset that you selected, the Existing draft dialog box appears. In this case, do one of the following:
 - Click **Discard existing and conduct new**, to delete the draft and conduct a new assessment.
 - Click **Open existing draft**, to continue with the existing assessment.
6. Respond to the assessment questions.
7. Do one of the following:
 - Click **Save draft**.
 - Click **Submit**. The **Submit** button is available if the [Governance option](#) is selected in the template used for the assessment.
Then, in the **Submit assessment** dialog box:
 - i. Select the domain in which you want the Assessment Review asset to be created.
 - ii. Click **Submit**.
 - Click **Complete**. The **Complete** button is available if the [Governance option](#) is cleared in template used for the assessment.
Then, in the **Complete assessment** dialog box, click **Confirm**.

What's next?

See [What happens when you save, complete or submit an assessment?](#).

Conduct an assessment without an underlying asset

It is perhaps more likely that you will first onboard assets, and then use Collibra Assessments to assess various aspects of those assets. You can, however, conduct an [assessment](#) before you onboard assets; in other words, conduct an assessment without specifying an underlying asset. This can be helpful if you want to use an assessment to help guide the onboarding of an asset.

Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- To submit an assessment, by which an Assessment Review asset is created in your Collibra Data Intelligence Cloud environment, you need a [global role](#) that has the Policy Manager [global permission](#). This does not apply if you complete the assessment, as no Assessment Review asset is created in your environment.

Steps

1. Go to the Collibra Assessments [landing page](#)
2. Select the assessment template you want to use for your assessment.
3. Select the **I do not have an asset yet** checkbox.
4. In the **Describe what you want to assess field**, briefly describe your objective.
5. Click **Start**.
6. Respond to the assessment questions.
7. Do one of the following:
 - Click **Save draft**.
 - Click **Submit**. The **Submit** button is available if the [Governance option](#) is selected in the template used for the assessment.
Then, in the **Submit assessment** dialog box:
 - i. Select the domain in which you want to the Assessment Review asset to be created.
 - ii. Click **Submit**.
» An Assessment Review asset is created in your Collibra environment, but without a relation to an underlying asset.
 - Click **Complete**. The **Complete** button is available if the [Governance option](#) is cleared in template used for the assessment.
Then, in the **Complete assessment** dialog box, click **Confirm**.

What's next?

See [What happens when you save, submit or complete an assessment?](#)

Edit an assessment

You can edit any [assessment](#) that has the Draft status.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to edit.
 - » The [assessment details page](#) opens.
3. Click **Edit Draft**.
4. Edit the responses to the assessment questions. You can also edit the name of the assessment.
5. Do one of the following:
 - Click **Save draft**.
 - [Complete or submit](#) the assessment.

What's next?

See [What happens when you save, complete or submit an assessment?](#).

Copy an assessment


You can copy any [assessment](#) that has the Draft status. The new assessment will be an exact copy, including all responses that were entered in the assessment you are copying.

Note You can only copy an assessment if the template used is still the latest version of the template. If a new version of a template is created, regardless of its status, you can no longer copy an assessment that was started with the previous version.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to copy.
 - » The [assessment details page](#) opens.
3. Click  in the upper-right corner, and then click **Copy**.
 - » A new assessment, with the Draft status, opens immediately. You can verify this by the **Created on** time stamp, which reflects the current time and date. The new assessment also appears in the list of assessments on the landing page.

What's next?

You can [edit](#), [submit](#) or [delete](#) the assessment.

Complete or submit an assessment

You can complete or submit any [assessment](#) that has the Draft status.

Important The [Governance option](#), as set in the [template](#) that was used for your assessment, determines whether or not an Assessment Review asset is created in your Collibra environment. It also determines whether the **Submit** button or the **Complete** button is available when you are conducting an assessment.

Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- To submit an assessment, by which an Assessment Review asset is created in your Collibra Data Intelligence Cloud environment, you need a [global role](#) that has the Policy Manager [global permission](#). This does not apply if you complete the assessment, as no Assessment Review asset is created in your environment.

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to submitmark obsolete.
 - » The [assessment details page](#) opens.
3. Click **Edit Draft**.
4. Optionally, edit the responses to the assessment questions.
5. Do one of the following:
 - Click **Submit**. The **Submit** button is available if the [Governance option](#) is selected in the template used for the assessment.
Then, in the **Submit assessment** dialog box:
 - i. Select the domain in which you want to the Assessment Review asset to be created.
 - ii. Click **Submit**.
 - Click **Complete**. The **Complete** button is available if the [Governance option](#) is cleared in template used for the assessment.
Then, in the **Complete assessment** dialog box, click **Confirm**.

What's next?

For details on the interaction between Collibra Assessments and Collibra Data Intelligence Cloud when you submit an assessment, see [What happens when you save, complete or submit an assessment?](#).

Delete an assessment


You can delete any [assessment](#), regardless of its status.

Note If you delete a submitted assessment, the linked Assessment Review asset will not be deleted. You need to manually [delete](#) it in your Collibra Data Intelligence Cloud environment.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to delete.
 - » The [assessment details page](#) opens.
3. Click  in the upper-right corner, and then click **Delete assessment**.
 - » The **Delete assessment** dialog box appears.

Tip If you are deleting a submitted assessment, you can click the link in the dialog box to open the Assessment Review asset in your Collibra environment. There, you can delete the asset.

4. Click **Delete** to confirm.
 - » The assessment is deleted from the DGC database and removed from the list of assessments on the landing page.

Mark an assessment obsolete

You can mark obsolete any [assessment](#) that has the Submitted status.


- The status of the Assessment Review asset that was created in your Collibra environment also becomes Obsolete.
- Obsolete assessments remain in the list of assessments on the landing page.

Note Currently, you cannot [delete](#) assessments that have the Obsolete status.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to mark obsolete.
 - » The [assessment details page](#) opens.
3. Click  in the upper-right corner, and then click **Mark as obsolete**.
 - » The **Mark as obsolete** dialog box appears.
4. Click **Mark** to confirm.

What happens when you save, complete or submit an assessment?

This section addresses the interaction between Collibra Assessments and your Collibra Data Intelligence Cloud environment, when you:

- Save a draft of an assessment.
- Complete an assessment.
- Submit an assessment for review.

Important The [Governance option](#), as set in the [template](#) that was used for your assessment, determines whether or not an Assessment Review asset is created in your Collibra environment. It also determines whether the **Submit** button or the **Complete** button is available when you are conducting an assessment.

Save a draft of an assessment

When you are conducting an assessment, and you click **Save draft**:

- The assessment:
 - Is added to the list of assessments on the [landing page](#).
 - Has the Draft status. You can continue to [edit](#) and save it.
- Nothing happens in your Collibra Data Intelligence Cloud environment; an Assessment Review asset is only created when you submit an assessment for review.

Complete an assessment

When you are conducting an assessment, and you click **Complete**:

- The assessment:
 - Is added to the list of assessments on the landing page.

Tip Click the assessment to open the [details page](#).

- Has the Completed status. It can no longer be edited.
 - Is stored in the DGC database, with all pertinent information, such as the creation date and the user who submitted the assessment.
- Nothing happens in your Colibra Data Intelligence Cloud environment.

Submit an assessment for review

When you are conducting an assessment, and you click **Submit**:

- The assessment:
 - Is added to the list of assessments on the landing page.

Tip Click the assessment to open the [details page](#).

- Has the Submitted status. It can no longer be edited.
 - Is stored in the DGC database, with all pertinent information, such as the creation date and the user who submitted the assessment.
- An Assessment Review asset with the Under Review status is created in the domain you specified, in your Colibra Data Intelligence Cloud environment.
 - All responses to assessment questions are captured as attributes of the Assessment Review asset.
 - The Assessment Review asset is related to the underlying asset via the relation type *[Asset] is assessed by / assesses [Assessment Review]*, unless the assessment was [conducted without an underlying asset](#).

Tip On the assessment details page, click **View submission** to open the Assessment Review asset page in your Colibra environment.

- The [Assessments Approval workflow](#) is triggered. The workflow notifies the Business Steward (by default) that an assessment is ready for review.

Note If the Business Steward (default) responsibility does not exist for the domain, the Assessment Review is still created, but the Assessments Approval workflow is not triggered. You can configure the workflow so that the task is assigned to a different resource role.

Assessment details page

When you [conduct](#) an assessment and click either **Save draft** or **Submit for review**, a link to the assessment is added to the [landing page](#). You can click the assessment to open the details page.

The assessment details page:

- Shows the responses to all answered questions.
- Identifies the time and date on which the assessment was started.
- Identifies the time and date on which the last changes were made to the assessment.

Note You cannot edit an assessment with the Submitted or Completed statuses.

- Includes, for assessments that have the Draft status, an **Edit draft** button.
- Includes, for assessments that have the Published status:
 - A button to launch a follow-up assessment, if the template that was used included a [Yes/No and Decision questions](#) and the score threshold was reached.
 - A **View submission** button, to access the Assessment Review asset page in your Collibra Data Intelligence Cloud environment.

Note If, by chance, the Assessment Review asset was deleted from your Collibra environment:

- The status of the assessment remains Submitted.
- Clicking the **View submission** button will result in a "Entity not found" error.

The following example image shows the assessment details page of a published assessment, in which it was determined, by the responses to Yes/No questions, that a DPIA assessment should be conducted for the underlying asset.

Assessments

DPIA Threshold Submitted

Let's see how this works

[View assessment asset page](#) ✕

<p>Is your processing activity necessary for compliance with a legal obligation, or for the performance of a public interest task, and can be linked to a prior general impact assessment of that activity in the context of the adoption of its legal basis?</p> <p>✓ Yes</p>	<p>Is the processing activity very similar to another one with similar high risks, for which a DPIA has already been performed?</p> <p>Not specified</p>	<p>Created on 05-Feb-2021 10:32</p> <p>Last updated on 05-Feb-2021 10:32</p>
<p>Is the processing activity included in the list published by the regulator that exempts the process from a DPIA?</p> <p>Not specified</p>	<p>Does the processing have a legal basis in the European Union, and was a DPIA performed in the context of this legal basis?</p> <p>Not specified</p>	

Final Decision

Is a DPIA required for the Business Process asset?

Yes [Conduct DPIA assessment](#)


Download a PDF of an assessment

You can download a PDF of any [assessment](#), regardless of its status. The PDF captures all of the information shown on the [assessment details page](#).

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. Go to the Colibra Assessments [landing page](#).
2. Click the assessment for which you want to download a PDF.
 - » The assessment details page opens.
3. Click  in the upper-right corner, and then click **Download PDF**.
 - » The PDF is downloaded to your hard drive.

Approve or reject an assessment

When you submit an [assessment](#) for review, an Assessment Review asset is created in the domain of your choice, in your Collibra Data Intelligence Cloud environment.

The Business Steward (by default) for the domain is notified that there is an assessment to review and a workflow task prompts the review and approval or rejection of the Assessment Review asset.

Important This does not apply to assessments for which the [Governance option](#) was cleared in the template used for the assessment. In that case, no asset is created in your Collibra environment and no workflow is triggered.

Tip You can [configure](#) the Assessments Approval workflow so that the task is assigned to a different resource role.

Note Neither the Assessment Review asset nor the submitted assessment can be edited.

Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

Steps

1. In your Collibra environment, go to **My Tasks** and click the relevant task.



- » The task is shown in the sidebar.

2. Review the assessment details, as necessary.

Tip To review the assessment details, you can:

- In the sidebar, click the Assessment Review asset name to go to the asset page.
- Click **View details in assessment app** to review the details in Collibra Assessments.

3. In the sidebar, click **Approve** or **Reject**.

Result

- The status of the Assessment Review asset becomes Approved or Rejected, accordingly.
- The status of the assessment in Collibra Assessments remains Submitted, regardless of whether the assessment is approved or rejected.

The Assessments Approval workflow

This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset. You can [configure](#) the workflow to work with a resource role other than the Business Steward.

Warning For the Assessments Approval workflow to work, a Business Steward (by default) must be assigned to the domain you specify when submitting an assessment. If the workflow was configured for a different resource role, the domain must have a responsibility created for that resource role.

Important The Assessments Approval workflow is relevant and triggered only if the [Governance option](#) is selected in the template that was used for your assessment.

Assessments workflow description

When you submit an assessment for review:

- An Assessment Review asset with the Under Review status is created in the domain you specified, in your Collibra Data Intelligence Cloud environment.
- The Assessments Approval workflow is triggered. The workflow notifies the Business Steward (by default) that an assessment is ready for review.

Note Neither the Assessment Review asset nor the submitted assessment can be edited.

Important The Assessments Approval workflow is not relevant and not triggered if the [Governance option](#) is cleared in the template that was used for your assessment.

Relevant resource roles

The following table shows the relevant resource role and the workflow tasks they can carry out.

Resource role	Task	Required
Business Steward (by default)	<ul style="list-style-type: none"> • Review assessment • Approve or reject assessment 	Yes

Workflow initiator

The workflow starts when you submit an assessment for review.

Status progression of the Assessment Review asset in your Collibra environment

Status	Description
Under Review	The initial status of the Assessment Review asset.

Status	Description
Approved	The assessment is approved.
Rejected	The assessment is rejected.

Note Once the Assessment Review asset is approved or rejected, it cannot be edited.

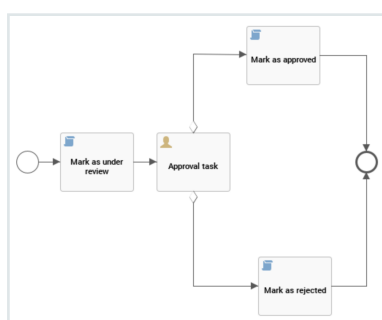
Status progression of the assessment in Collibra Assessments

Condition	Status
Any user starts an assessment.	Draft
Any user submits an assessment for review. Note The Submit button is available if the Governance option is selected in the template used for the assessment.	Submitted
Any user completes an assessment. Note The Complete button is available if the Governance option is cleared in the template used for the assessment.	Completed
The Assessment Review asset in your Collibra environment is approved.	Submitted

Condition	Status
The Assessment Review asset in your Collibra environment is rejected.	Obsolete

Assessments workflow walk-through

Diagram



Start the workflow

When you [submit](#) an assessment for review in Collibra Assessments:

- An Assessment Review asset with the Under Review status is created in the domain you specified, in your Collibra Data Intelligence Cloud environment.
- The Assessments Approval workflow is triggered.

In Collibra Assessments, click **View submission**, to open the Assessment Review asset page in your Collibra environment.

Review the assessment

Any user can:

- Review the Assessment Review asset and its attributes, in your Collibra environment.

- Click the **view details in assessment app** link on the Assessment Review asset page, to view the assessment details in Colibra Assessments.

Approve or reject the assessment

As the Business Steward (by default), when you open the Assessment Review asset page, a workflow task prompts you to approve the assessment.



Click **View task**.

Tip You can also access the task via the My Tasks page. In the side pane, click **More**, and then click **View task**.

The **Approval task** dialog box prompts the Business Steward (by default) to approve or reject the assessment.

A dialog box titled 'Approval task' with a close button (x) in the top right corner. The text inside says 'Please review this assessment and approve or reject it.' followed by 'What is your reason for approving/rejecting?' and a text input field. At the bottom, there are two buttons: 'Reject' and 'Approve'.

If the assessment is approved, the status of the Assessment Review asset becomes **Approved**.

If the assessment is rejected, the status of the Assessment Review asset becomes **Rejected**.

Assessments Approval workflow configuration

Access the workflow configuration via ⚙ **Settings** → **Workflows** → **Definitions** → **Assessments Approval**.

Description

Notifies the Business Steward that an Assessment Review asset is ready for review, and prompts the Business Steward to approve or reject the asset.

Edit

Start Label

Assessments Approval

Edit

Applies To

Asset

Add Rules Edit

Asset type ↑	With status	In community/domain	Actions
Assessment Review	New		

1 Rule

Variables

These variables are accessible in the workflow.

Edit

Name	Description	Value
assessmentAssignee	Assessment Assignee	role(Busi...
statusId_underReview	Please provide the id of the status that indicates the assessment n...	0000000...
statusId_approved	Please provide the id of the status that indicates the asset has bee...	0000000...
statusId_rejected	Please provide the id of the status that indicates the asset has bee...	0000000...
attrTypeId_approvalDate	Please provide the id of the attribute type that indicates when an ...	0000000...
approvalTaskDueDate	The due date expressed in duration for task 'approvalTask'.	B1M
approvalTaskTaskNotificationEnabled	Send notification emails for task 'approvalTask'.	true

Start Events

Asset Added
An asset was added to the glossary.

Edit

Roles

Start workflow
There are no roles selected.

Stop workflow
There are no roles selected.

Reassign tasks
There are no roles selected.

Other

☐ Any signed in user can start the workflow.
Any signed in user can start a workflow, independent of the role that user has.

☒ Perform candidate user check on workflow start.
Workflow will fail to initialize if it contains a task without any candidate user.

☒ This workflow can only run once at the same time on a specific resource.

☐ Lock resource
This workflow cannot run with other workflows on the same resource simultaneously.

☐ Show in global create.

Applies to

This workflow applies to the following asset types:

Asset type	Restriction	Remark
Assessment Review	None	None

Note When you select a parent asset type, it includes all of its children. For example, if you select **Business Asset**, the workflow also applies to **Business Term** because it is a type of **Business Asset**.

Configuration variables

You can edit the configuration variables directly from the workflow definition page by clicking in the upper-right corner of the variables table.

Variable	Description	Default value
assessmentAssignee	<p>The resource role to which the task is assigned when the workflow is triggered.</p> <div> Warning For the workflow to work, the resource role specified here must be present as a responsibility in the domain specified when submitting an assessment. </div>	role(Business Steward)
statusId_underReview	The UUID of the status that indicates the assessment needs to be reviewed before approval.	00000000-0000-0000-0000-000000005020
statusId_approved	The UUID of the status that indicates the asset has been approved.	00000000-0000-0000-0000-000000005025
statusId_rejected	The UUID of the status that indicates the asset has been rejected.	00000000-0000-0000-0000-000000005010

Variable	Description	Default value
attrTypeId_approvalDate	The UUID of the attribute type that indicates when an assessment review was approved.	00000000-0000-0000-0000-00000000272
approvalTaskDueDate	The due date expressed in duration for task 'approvalTask'.	B1M
approvalTaskTaskNotificationEnabled	Send notification emails for task 'approvalTask'.	True
approvalTaskEscalationDuration	The escalation time duration for task 'approvalTask'.	B1M
approvalTaskEscalationType	The escalation type for task 'approvalTask'.	Mail

Start label

The start label is the name of the workflow when it is visible as a button on a resource page or in the drop-down list when you add it as a button on a dashboard. You can find the **Start Label** section in the upper-right corner of the workflow definition page.

Default value: Assessments Approval

Click **Edit** to edit the label.

Start Event

A start event is an event that triggers the workflow, for example starting the workflow when an asset is created.

By default, this workflow is configured to start when an asset is added. Specifically, the workflow starts when an assessment is submitted and the Assessment Review asset is created in your Collibra environment.

Roles

The roles define the permissions to manage the workflow. For example, if a certain tasks must be urgently executed but the responsible person is on sick leave, a user with the defined role can reassign that task to somebody else.

Action	Roles
Start workflow ¹	There are no roles selected.
Stop workflow ²	There are no roles selected.
Reassign tasks ³	There are no roles selected.

Other

The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any guest user can start the workflow.	No
Any signed in user can start the workflow.	No

¹The button with the start label is available to users with these roles.

²The option to cancel the workflow is available to users with these roles.

³The option to reassign the task is available to users with these roles.



Setting	Enabled
Perform candidate user check on workflow start.	Yes
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

Configure the resource role for the Assessments Approval workflow

By default, the [Assessments Approval workflow](#) is configured to work with the Business Steward resource role. You can configure it to work with any resource role.

Warning For the Assessments Approval workflow to work, the resource role that you configure here must be assigned to the domain you specify when submitting an assessment.




Steps

1. On the main menu, click , then  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Workflows**.
 - » The [Workflows](#) settings page appears on the **Definitions** tab page.
3. Click the Assessments Approval workflow.
4. In the **Variables** section, click **Edit**.
 - » The **Variables** dialog box appears.
5. In the variable **Assessment Assignee** field, enter the resource role to which the review task should be assigned, for example: *role(Privacy Steward)*.
6. Scroll to the bottom of the **Variables** dialog box, and then click **Submit**.

Customize the Assessments Approval workflow


You can customize the Assessments Approval workflow. Follow this procedure to ensure that your customizations are not overridden if we need to update the packaged workflows.

Steps

1. On the main menu, click , then  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Workflows**.
 - » The [Workflows](#) settings page appears on the **Definitions** tab page.
3. Click **Assessments Approval**.
4. In the top-right corner of the page, click , to disable the workflow.
5. In the tab pane, click **Flow**.
6. Copy all of the code of the workflow definition.
7. Paste the code into the text editor of your choice, and then edit the code to suit your needs.

Warning You must edit the process id and the process name. They must both be unique.

```
<?xml version="1.0" encoding="UTF-8"?>
<definitions xmlns="http://www.omg.org/spec/BPMN/20100524/MODEL" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:flowable="http://flowable.org/bpmn" xmlns:bpmndi="http://www.omg.org/spec/BPMN/20100524/DI" xmlns:omgdc="http://www.omg.org/spec/DD/20100524/DI" xmlns:design="http://flowable.org/design" typeLanguage="http://www.w3.org/1999/XMLSchema"
  expressionLanguage="http://www.w3.org/1999/XPath" targetNamespace="http://www.collibra.com/apiv2" design:palette="f
  <process id="assessmentsWorkflow" name="Assessments Approval" isExecutable="true" flowable:candidateStarterGroups
    <documentation>Notifies the Business Steward that an Assessment Review asset is ready for review, and prompts t
    <extensionElements>
      <design:stencilid><![CDATA[BPMNDiagram]]></design:stencilid>
      <design:language><![CDATA[English]]></design:language>
      <design:creationdate><![CDATA[2020-12-08T14:11:49.406Z]]></design:creationdate>
```

8. Save your text file with the file extension BPMN.
9. Go back to the Workflows settings page and the **Definitions** tab, which shows the full list of workflows in your Collibra environment.
10. Near the top of the page, click **Upload a file**, to search for your workflow BPMN file, or drag and drop your file into the upload box.
 - » Your workflow is uploaded to the Workflows settings page.
11. In the table row with your uploaded workflow, click , to enable the workflow.

Tip After you've uploaded your customized workflow, you can edit the start event, the resource roles associated with the workflow and configure other settings to suit your needs.