Collibra

Collibra Data Intelligence Cloud

# Collibra Platform

Version 2022.10

Collibra

Collibra Data Intelligence Cloud - Collibra Platform

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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_collibra-platform.htm

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# Basic features

In this section, we describe the various basic features to make you familiar with your Collibra Data Intelligence Cloud environment. You learn where you can find everything in the user interface, how to find data, what kind of data exists in your environment and other basic manipulations.

# Collibra functionalities

In this section, you find more information about the general functionalities of Collibra Data Intelligence Cloud such as searching for data, using dashboards and the global Create button.

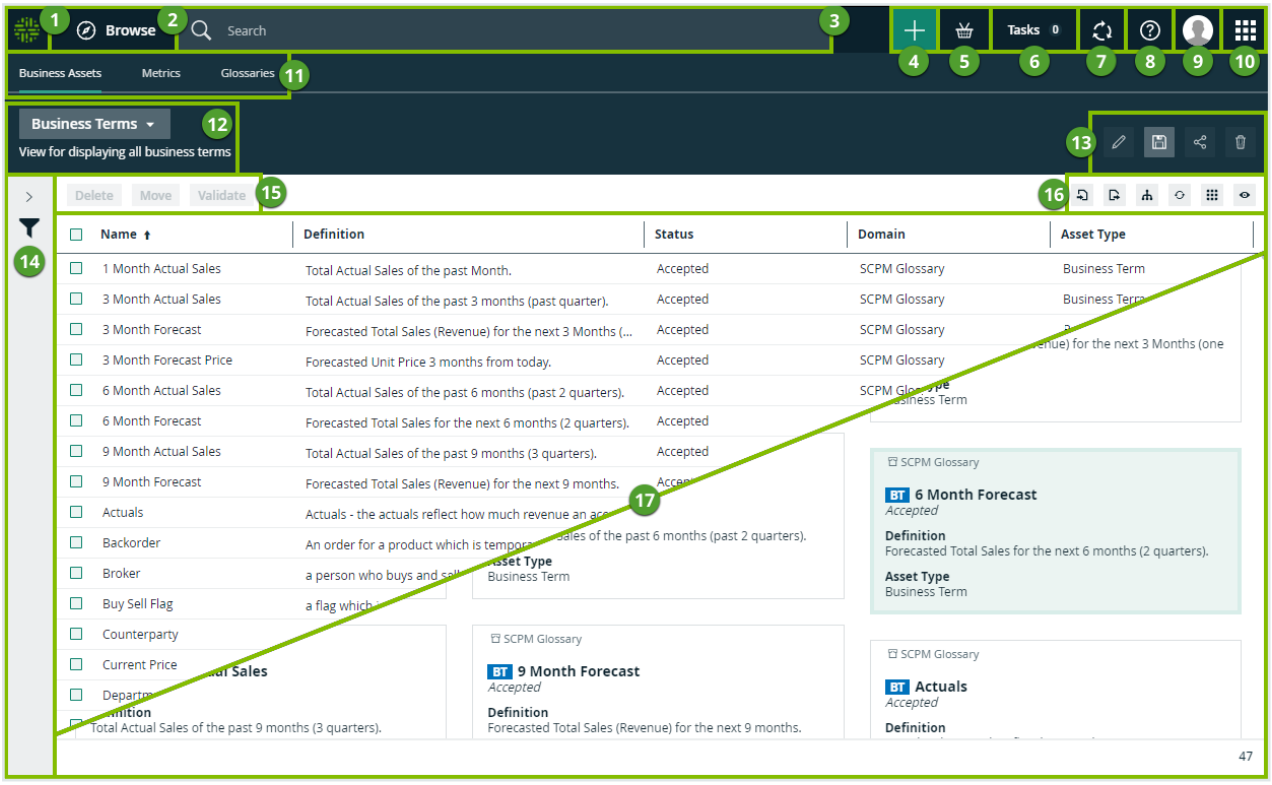
# In this chapter

## Screen elements in the user interface

The Collibra Data Intelligence Cloud user interface contains a number of common elements that appear throughout the product.

You can navigate through Collibra Data Intelligence Cloud using your mouse or keyboard. For more information, see Accessibility.

# Page layout




| No. | Element name | Description |
|---|---|---|
| 1 | Home button | Open your default dashboard. |
| 2 | Navigation browser | Open the navigation browser. |
| 3 | Search field | Search for any resource in Collibra. |
| 4 | + button | Create any resource from any location. |
| 5 | Shopping basket | Request access to data sets and reports. |
| 6 | Tasks indicator | See how many workflow tasks are awaiting your attention and manage those tasks from a the My tasks page. |

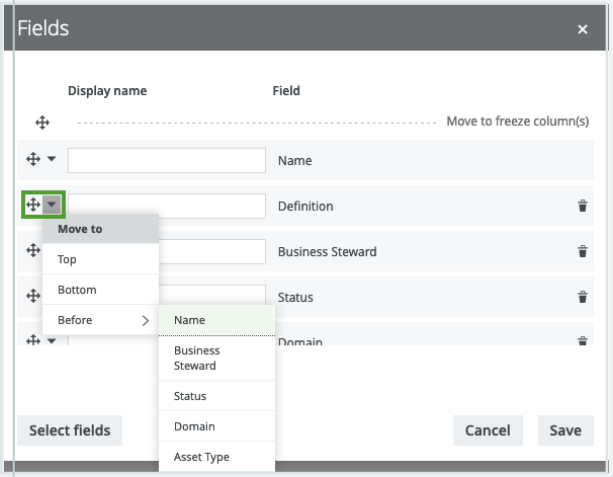
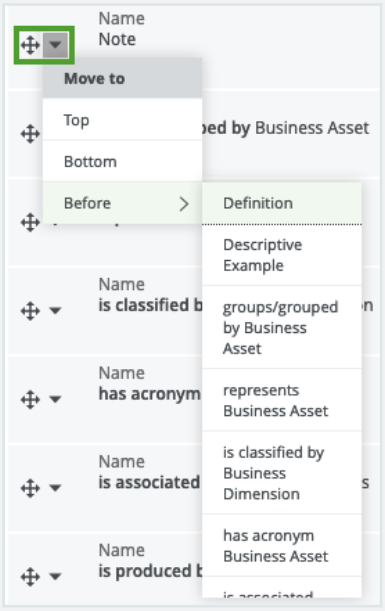
| No. | Element name | Description |
|---|---|---|
| 7 | Activities tracker | Check Collibra activities and see the history of all the jobs you started. |
| 8 | Info | Get access to the product documentation, to Collibra Product Resource Center and University and to the Collibra support portal.<br><br>Note If you have the Sysadmin role, you also have direct link to the API documentation. |
| 9 | Avatar | View and modify your profile, sign out, and report a problem. |
| 10 | Application menu | Open another application:<br>• Business Glossary: Manage your business terms.<br>• Catalog: Manage data sets.<br>• Policy manager: Manage your organization's policies.<br>• Reference Data: Manage your code values and code sets.<br>• Global view: See all assets in a single view.<br>• Data Helpdesk: Manage issues.<br>• Stewardship: Manage your tasks.<br>• Settings: Manage your data governance operating model and your users. |
| 11 | Submenu | Open one of the subpages of the current application. |
| 12 | View selector | Switch between views. |
| 13 | View toolbar | Manage the current view. |
| 14 | Filter pane | Filter the resources in the view. |

| No. | Element name | Description |
|---|---|---|
| 15 | Action toolbar | Perform actions on the assets that you selected in the view or start a workflow. |
| 16 | Content toolbar | Manage the resources in the current view. |
| 17 | Table or set of tiles | See the resources in the current view in a table or as tiles. |

## Arranging list items

On some pages and in some dialog boxes, you can arrange list items to change the order of their appearance on the page. For example when adding fields to a view or editing an asset type assignment.

Example
You can have arrangeable lists in dialog boxes and on regular pages. You can arrange the list items in the same way.

| In a dialog box | On a page |
| --- | --- |
|  |  |



## Moving items by dragging and dropping

The easiest way to move items up or down is typically by dragging and dropping:

1. Click ✣ in front of an item and hold down the mouse button.
2. Move your mouse to the desired location in the order.
3. Release the mouse button.

## Moving items via the drop-down menu

Each item also has a drop-down menu that allows you to quickly change the position of the item in the list:

1. Click ▼ in front of an item.
2. Do one of the following:
   - Click **Top** to move the item to the top of the list.
   - Click **Bottom** to move the item to the bottom of the list.
   - Point to **Before** and click an item in the list to move the current item to the position above the clicked item.

# Accessibility

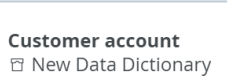
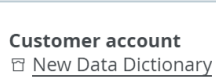
In an effort to make all Collibra applications accessible for visually or physically impaired users, all applications are gradually being upgraded to meet accessibility requirements as set out in the Section 508 Standards (US) and WCAG 2.0 (Worldwide).

Collibra has taken measures to ensure accessibility, for example:

- Icons and text have sufficient contrast with the background.
- Images have clear alternative text to facilitate the use of third-party assistive technology.
- Navigation on our pages is enhanced, for example, you can open a link in a new tab.
- You can navigate through most screen sections by keyboard.
- You can edit interface text to make messages less dependent on visual screen elements.

## Navigating using your keyboard

As part of the accessibility goals of Collibra, you can navigate using your keyboard.

<table>
<tr><th>Action</th><th>Description</th></tr>
<tr><td>Moving the focus point</td><td>The focus point indicates the current focus of your navigation. If you hover your mouse pointer over an element, you typically see the background change, or text becomes underlined.<br><br>When you use the keyboard, the same effect takes place as when you hover your mouse pointer. However, rather than moving your mouse, you can jump to the next element using the tab key on your keyboard. You can also press shift + tab to jump to the previous element.<br><br>Example
<table>
<tr><th>Type</th><th>Unfocused element</th><th>Focused element</th></tr>
<tr><td>Button</td><td> 
</td><td> 
</td></tr>
<tr><td>Link</td><td> 
</td><td> 
</td></tr>
</table>
</td></tr>
<tr><td>Clicking and activating screen elements</td><td>Press enter to activate an element when it is the focus point. This allows you to press a button or open a link, using your keyboard rather than clicking.</td></tr>
<tr><td>Opening and closing dialog boxes and pop-ups</td><td>Click any dialog box or pop-up to open it. You can navigate in the dialog boxes and pop-ups just as you would anywhere else. To close it, press escape.</td></tr>
<tr><td>Selecting and clearing check-boxes</td><td>Navigate to a checkbox and press the space bar to select it or clear it.</td></tr>
</table>

| Action | Description |
| --- | --- |
| Selecting radio buttons | Use the arrow keys on your keyboard to select radio buttons. Navigate to the radio buttons using the **tab** key, then press ←, →, ↓ or ↑ to change which radio button is selected. |
| Skipping repetitive sections | Most pages in Collibra Data Intelligence Cloud contain repetitive sections at the top of the page, such as the main menu. You can skip this section using the **Skip to content** button.<br><br>This button is the first available element when you start navigating in a repetitive section using your keyboard.<br><br>  |

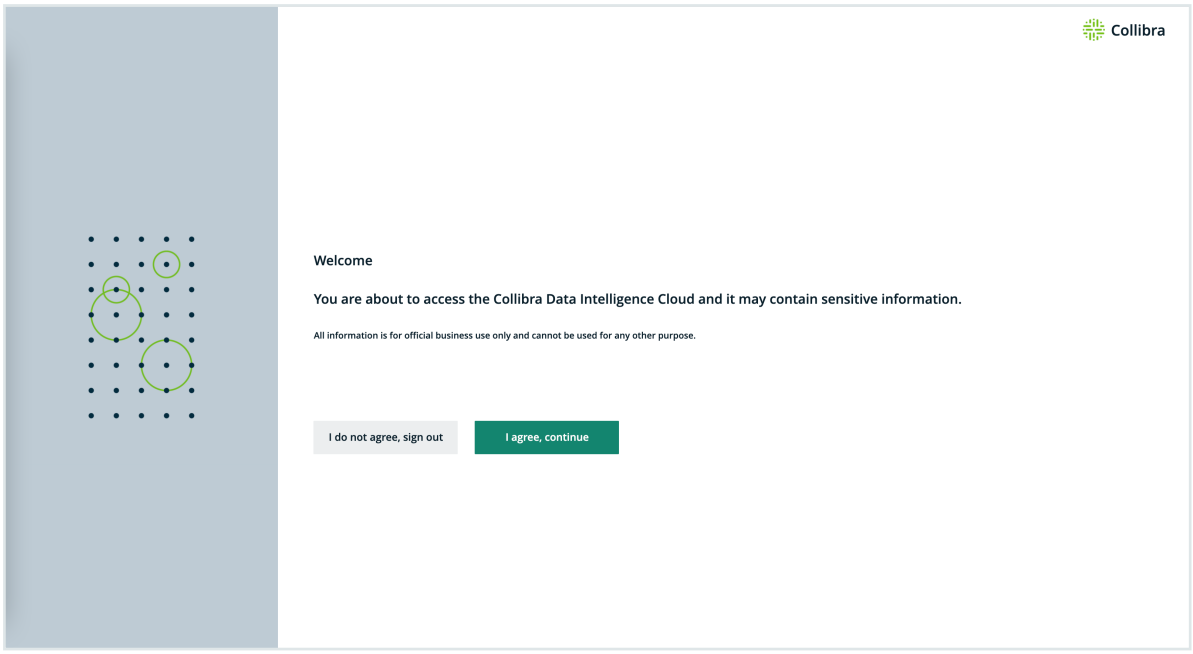
# Signing in and signing out

As soon as you have a user account, you can sign in to Collibra Data Intelligence Cloud.

## Sign in

1. Go to any page of your environment.» The Sign-in page opens.
2. Enter your username and password.

3. If a disclaimer is enabled, you have to agree with the disclaimer to sign in. If you don't agree with the disclaimer, you are signed out automatically.




Tip
- If Single Sign-On (SSO) is configured for your environment, you can be signed in automatically if you are signed in to the SSO system.
- By default, the username is case-sensitive. However, some LDAP configurations make the username not case sensitive.

## Sign out

1. Click your avatar, then **Sign out**.
   » The Sign-in page opens.

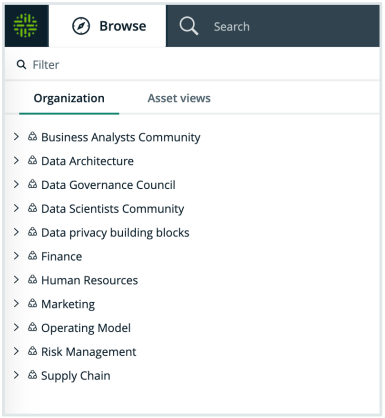
Note Depending on your environment's configuration, you may be signed out automatically if you are inactive for a certain period of time. Most of the changes you have made during your session will be saved. However, if you had a text field or dialog box open when you were signed out, that information may be lost.

# Navigating through domains and communities

The **Browse** pane provides an overview of all communities and domains.

To navigate through the communities and domains, click **Browse** in the main menu.

Initially, the browser only shows the top-level communities. To see the community's sub-communities and domains, click > in front of the community name.




Start typing in the **Search in Organization** field to search for a community or domain.

When you click a community or domain name, you navigate to the corresponding community or domain page. This page shows all details and allows you to make changes.

# The Create button

In Collibra Data Intelligence Cloud, there is a green **Create** button at the top of the screen. It enables you to create any resource from any location, if you have the correct permissions.




The following table describes the categories of resources you can create with the **Create** button:

| Item | Description |
| --- | --- |
| Suggested | A list of resources that you might want to create.<br><br>The resources available to you here depend on your location in Collibra:<br><br>• If you are on one of the submenu pages, for example, Business assets, Metrics or Glossaries, the suggested resources are specific to that submenu page.<br>• If you are on a domain page, the suggested resources are all the asset types that are assigned to the domain.<br>• If you are on a community page, the suggested resources are all the asset types that are assigned to the domains in the community.<br>• If you are on an asset page, the suggested resource is an asset of that same type.<br><br>This list is not available when you click the **Create** button from the default dashboard. |
| Recent | A list of recently created resources, most recent first. |
| Actions | A list of global workflows that have the option **Show in global create** enabled. |
| Asset | A list of all the asset types that are available in your data governance model. The list is divided into sections, according to the parent asset type, for example, Business Asset or Data Asset. |
| Organization | A list of organizational resources, such as a Community or a Business Asset Domain. |

To quickly find what you are looking for, you can type a search term in the **Filter** field. The results are based on the category you selected.

> Note You can only create assets of a certain type in a certain domain if that asset type has been assigned to that domain.
> If you try to create an asset of a type that is not assigned to the domain you are currently in, the **Domain** field in the **Create** dialog box is not automatically filled in.

# Views in Collibra

Views in Collibra Data Intelligence Cloud define how you can look at lists of assets. You can configure views to see, for example, tables or a set of tiles. A view is also the basis for Importing and exporting.

While you are working with a view, Collibra stores your view configuration when you navigate to a different page and even when you sign out. You can also undo your changes.

## Views

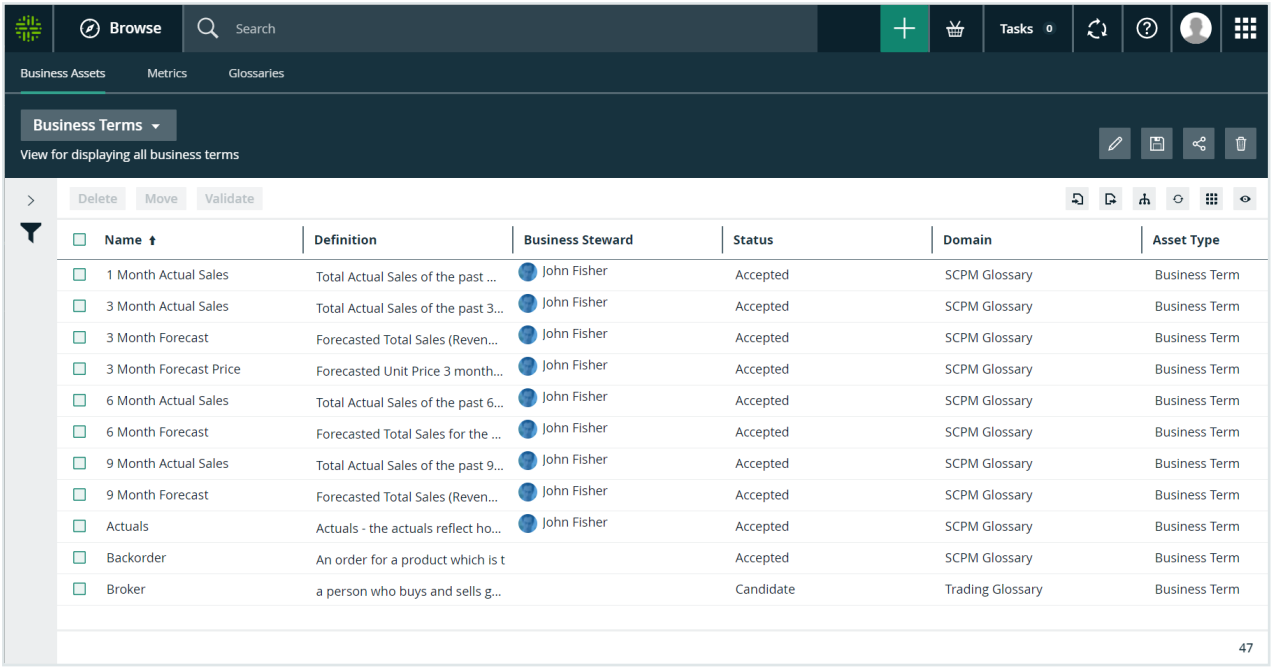
A view defines a table or set of tiles by storing the following data:

- The display mode, to specify whether assets are shown in a table or as tiles.
- Filters, to specify which assets are displayed.
- Applied sorting, to specify the order of the assets.
- Visible columns (for tables) or fields (for tiles), to specify which information about assets is displayed.
- Hierarchy, to display, optionally, a hierarchy of assets instead of a flat list (not applicable in tile display mode).

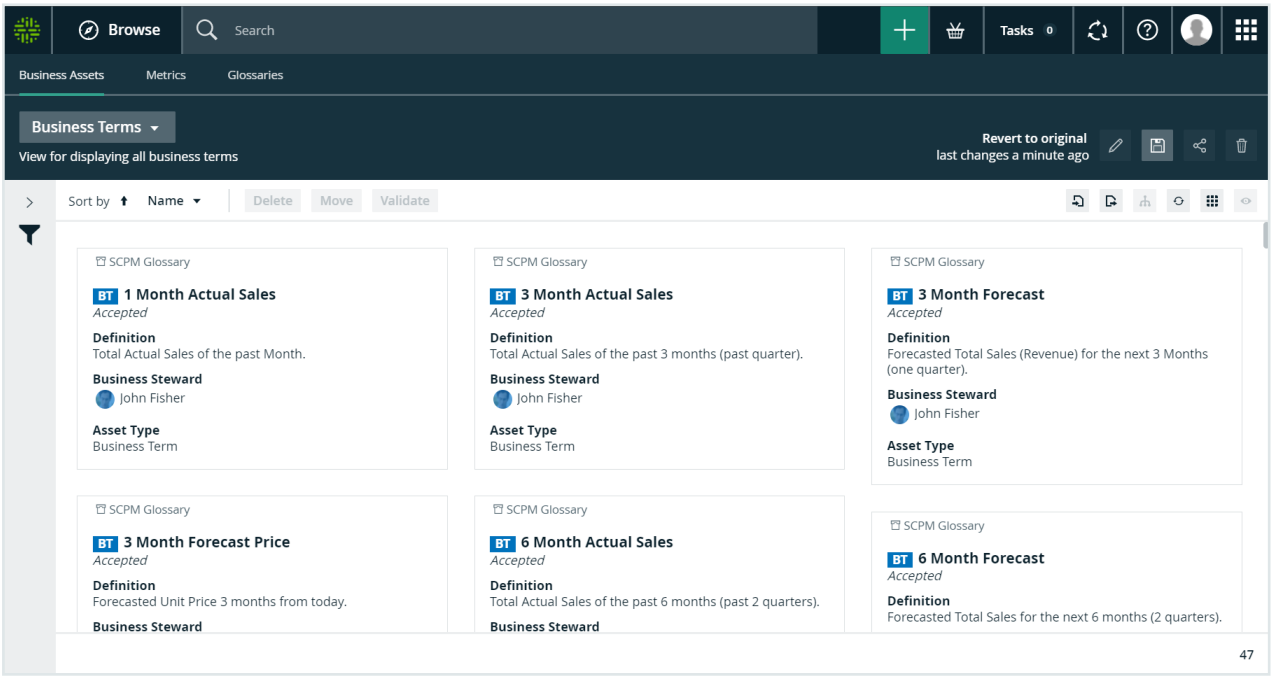
> Tip You can create as many views as you want without causing problems for Collibra's performance.

A view is also the basis for Importing and exporting.

Example of a view in table display mode:




Example of a view in tile display mode:




When you view a table or set of tiles for the first time, you are using the Collibra DGC default view, unless somebody already shared a custom view as default with you.

Each view has a unique URL. You can use this URL to open the view directly, without having to navigate to the location. For example, you can embed the view URL in a text

widget on a dashboard, in an email and so on. You can simply copy the URL from the address bar and paste it where needed.

## View types

Collibra offers different types of views:

- Dashboards
- Search filters
- Diagram views
- Relation views on an asset page
- Asset views, for example in a domain or community, in the global view and in application views.

Asset views are available in the following applications:

| Application | Tabs with a view selector |
|---|---|
| Business Glossary | • Business Assets<br>• Glossaries |
| Reference Data | • Code Values/Sets<br>• Hierarchies |
| Data Catalog | • Reports<br>• Data Sets<br>• Data Dictionary<br>• Technology Assets |
| Data Helpdesk | • Issues<br>• Data Quality |
| Data Stewardship | Business Dimensions |
| Policy Manager | Governance Assets |

## View selector and toolbar

The view selector allows you to switch between views and the view toolbar to manage the currently selected view.

It appears in views containing a table or a set of tiles.




The view bar has the following items:

| Number | Button | Description |
|---|---|---|
| 1 | n/a | The view selector shows the name and description of the current view, and allows you to choose another view. |
| 2 | | Button to edit the name and the description of the current view. |
| 3 | | Button to save changes to the current view, or to create a new view. |
| 4 | | Button to share the current view. |
| 5 | | Button to delete the current view. |

## Create a view

You can create a view, for example, if you want it to contain specific fields and display assets based on a filter.

> Tip You can create as many views as you want without causing problems for Collibra's performance.

## Steps

1. Navigate to the set of assets (in table display modes or tile display mode) for which you want to create a view.
   Example: Business Glossary
   If you want to start from the configuration of an existing view, switch to that view.
2. Set the required filters.
3. Customize the table or customize the set of tiles.
4. Optionally, enable hierarchy or wrap text (not applicable in tiles display mode).
5. On the right side of the view bar, click 🖫.
6. In the view toolbar, click 🖫, then **Save as**.
   » The **Save view as** dialog box appears.
7. Enter the required information.

| Option | Description |
|---|---|
| Name | The name of the new view. |
| Description | Optional. The description of the new view. You can add extra information about the view if necessary. |
| View sharing options | The sharing options allow you to share the view:<br>◦ **Public**: All Collibra Data Intelligence Cloud users can use the new view.<br>◦ **Private**: Only the creator of the view can use the new view.<br>◦ **Share with specific roles, groups & users**: The users with whom you want to share the new view. You can select **Roles**, **Groups** and **Users**. |
| Promote view | You can promote the view by pinning it to the view or making it the default view:<br>◦ **Default**: The new view becomes the default view when you open the table or set of tiles.<br>◦ **Pin**: The view is pinned to the view selector. |

8. Click **Save**.

## Edit a view

You can edit a view, for example, if you want it to change its name.

### Steps

1. Navigate to the set of assets (in table display mode or tile display mode) for which you want to edit a view.
   Example: Business Glossary
2. Switch to the view that you want to edit.
3. In the view toolbar, click ✎.
   » The **Edit name & description** dialog box appears.
4. Enter the required information.

| Option | Description |
|---|---|
| Name | The name of the new view. |
| Description | Optional. The description of the new view. You can add extra information about the view if necessary. |

5. Click **Save**.

## Edit a view's configuration

You can edit a view, for example, if you want it to change its fields and filters.

### Steps

1. Navigate to the set of assets (in table display mode or tile display mode) for which you want to edit a view.
   Example: Business Glossary
2. Switch to the view that you want to edit.
3. If required, do the following:
   - Edit the view's filters.
   - Customize the table or customize the set of tiles.

    - Enable hierarchy or wrap text.
4. In the view toolbar, click , then **Save**.

## Share a view

You can share a view, for example, if you want to give other users access to it.

### Steps

1. Navigate to the set of assets (in table display mode or tile display mode) for which you want to edit a view.
   Example: Business Glossary
2. Switch to the view that you want to edit.
3. On the right side of the view bar, click .
   » The **Share view** dialog box appears.
4. Enter the required information.

| Option | Description |
| --- | --- |
| View sharing options | The sharing options allow you to share the view:<br>◦ **Public**: All Collibra Data Intelligence Cloud users can use the new view.<br>◦ **Private**: Only the creator of the view can use the new view.<br>◦ **Share with specific roles, groups & users**: The users with whom you want to share the new view. You can select **Roles**, **Groups** and **Users**. |
| Promote view | You can promote the view by pinning it to the view or making it the default view:<br>◦ **Default**: The new view becomes the default view when you open the table or set of tiles.<br>◦ **Pin**: The view is pinned to the view selector. |

5. Click **Save**.

# Delete a view

You can delete a view, for example, if you no longer need it.

You can delete a view in several ways:

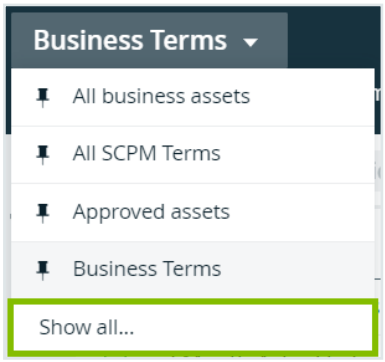
- From the view bar.
- From the overview.

## Delete a view from the view bar

1. Navigate to the set of assets (in table display mode or tile display mode) for which you want to delete a view.
   Example: Business Glossary
2. Switch to the view that you want to delete.
3. In the view toolbar, click 🗑.
   » The **Delete view <view name>** dialog box appears.
4. Click **Delete view**.

## Delete a view from the overview

1. Navigate to the set of assets (in table display mode or tile display mode) for which you want to delete a view.
   Example: Business Glossary
2. In the view selector, click ▼, then **Show all**.



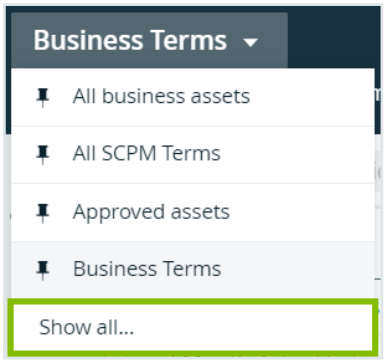

3. In the table, click 🗑 at the end of the row of the view you want to delete.
   » The **Delete view <view name>** dialog box appears.
4. Click **Delete view**.

# Pin a view to the view selector

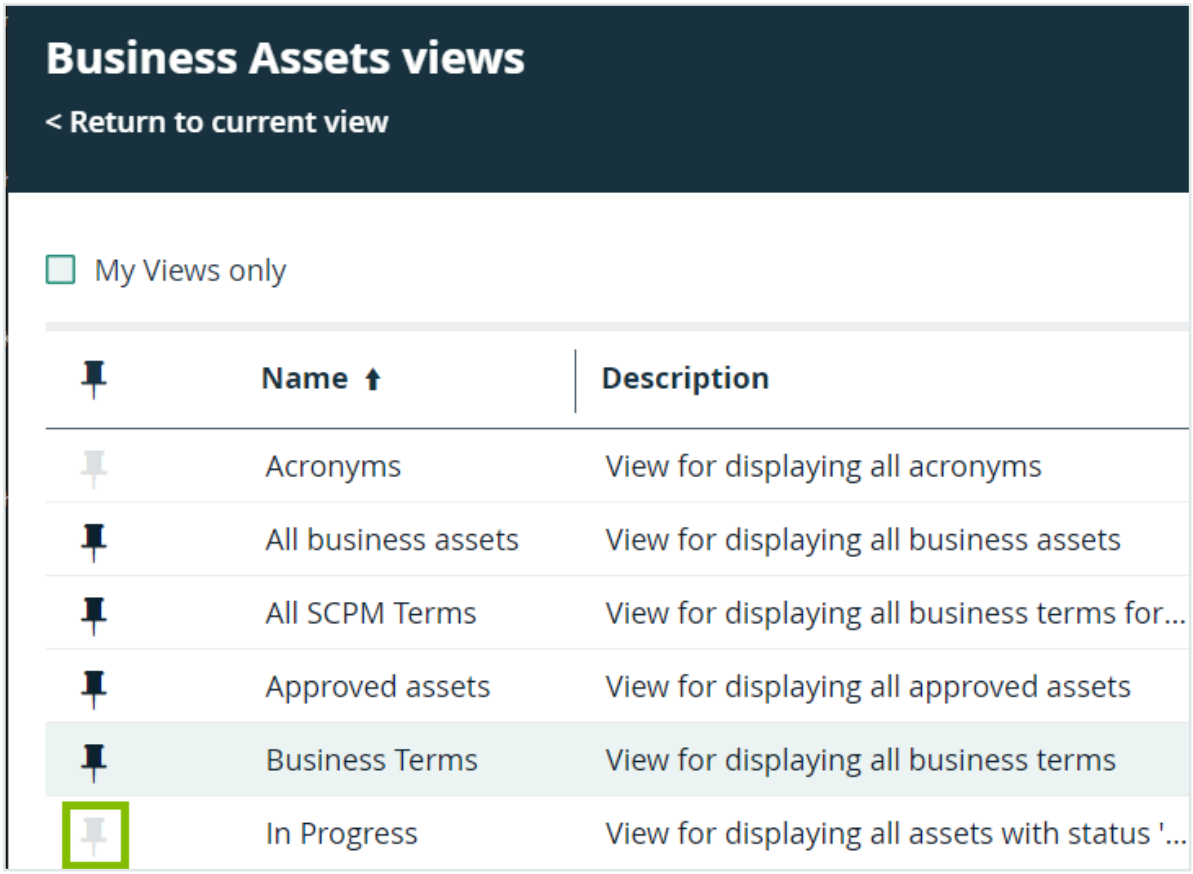
You can pin a view to the view selector if you want to make it easier to open it.

## Steps

1. Navigate to the set of assets (in table display mode or tile display mode) for which you want to edit a view.
   Example: Business Glossary
2. Click the view selector, then **Show all...**



3. In the views table, click the thumbtack ( 📌 ) to the left of the views you want to pin or unpin.




## Switch between views

You can switch between views, for example, if you want to see the information of another view.

### Steps

1. Navigate to the set of assets (in table display mode or tile display mode) for which you want to edit a view.
   Example: Business Glossary

2. In the view selector, click ▼ next to the name of the current view.
3. Do one of the following:

| If... | then... |
|---|---|
| The view you want to display is in the list, | Click the view in the drop-down menu. |
| The view you want to display is not in the list, | a. Click **Show all**.<br>b. Click the name of the view you want to display. |

## Global views

Global views enable you to show all assets of Collibra Data Intelligence Cloud in one view, regardless of their community, domain or application.

You can use all view features, such as:

- Change the display mode to table or tiles.
- Create views with different fields and filters.
- Import and export the assets or complex relations in the view.

### Open a global view

1. On the main menu, click ⠿, then ⊘ **Global view**.
2. If required, switch to another view.

## Timeout period for the loading of tables and tiles

In some cases, the loading of a table or set of tiles can take a while. This can happen if the view contains a lot of data, or if it has complex sorting and filtering applied. The timeout period is a time limit (in seconds) after which the loading task is stopped and a timeout error is shown.

If the timeout period expires before the view has loaded, you can try refreshing the view or, if applicable, simplifying its configuration by:

- Removing basic or advanced asset filters.
- Removing the sorting on multiple columns (tables only).
- Reducing the row count or tiles count.
- Reducing the number of columns (in a table) or fields (in a set of tiles).

You can configure the maximum loading time of tables.

### Configure the maximum loading time of tables

In some cases, the loading of a table or set of tiles can take a while. You can configure the maximum loading time.

> Note Depending on your environment, you have to follow this procedure either in the Services Configuration section of the Collibra settings or in Collibra Console. This topic shows the procedure in Collibra Console. If your Settings page has a **Configuration** tab, you can follow this procedure in that tab page. For more information, see the online documentation.

# Prerequisites

- You have the ADMIN or SUPER role in Collibra Console.
- You have the SUPER role in Collibra Console.

# Steps

1. Open the DGC service settings for editing:
    a. Open Collibra Console.
        » Collibra Console opens with the **Infrastructure** page.
    b. In the tab pane, expand an environment to show its services.
    c. In the tab pane, click the Data Governance Center service of that environment.
    d. Click **Configuration**.
    e. Click **Edit configuration**.
2. Go to the **Table** section.

3. Enter the required information:

| Setting | Description |
| --- | --- |
| Time limit for loading data in tables in seconds | Enter the maximum amount of seconds to load a table. If this time is exceeded, a timeout error is displayed.<br>The default value is `60`.<br>A value of `0` means that there is no time limit. |

4. Click the green **Save all** button.

# Asset filters

Asset filters enable you to quickly find the data in Collibra Data Intelligence Cloud by limiting the amount of assets shown in a table or a set of tiles. You can find the filter function on almost every page containing data.

In this section, you can learn how to work with filters.

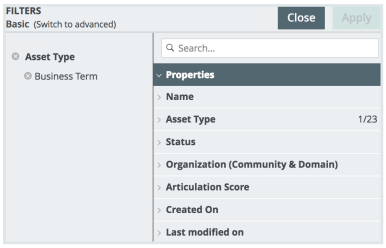
## Basic and advanced filtering

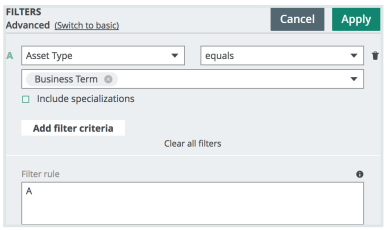
Collibra Data Intelligence Cloud has two modes for filtering data:

- **Basic**: Filter data by creating simple filter expressions that are always combined by the logical AND function.
- **Advanced**: Filter data by creating complex filter expressions. An advanced filter is a combination of filter expressions that can be combined by using the logical AND and OR functions.

In the filter pane, you can toggle between basic and advanced filtering:

**Basic filtering:** **Advanced filtering:**




When you have applied a filter, you can save the view for later usage.

## Basic filters

You can create basic filters by adding filter expressions. A filter expression is created by selecting a characteristic and assigning one or more values to it. In a basic filter, you can combine multiple expressions.

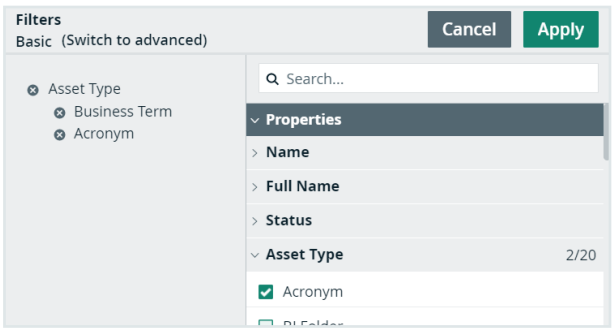
The characteristics are grouped in the following categories:

- **Properties**: All the asset properties in Collibra such as name, asset type, tags and so on.
- **Attributes**: All the asset attributes in Collibra, such as note, definition, quality and so on.
- **Relations**: All the relations in Collibra.
- **Roles**: All the resource roles that are defined in Collibra, such as Requester, Assignee, Reviewer and so on.

To add characteristics to the filter, consult Create a basic filter.

### Filter behavior

- Multiple values for one characteristic are treated as an OR clause.
  - Example:




The example filters the assets if the asset type is Acronym or Business Term.

- All the simple expressions in a basic filter are treated as an AND clause.
- You can remove a filter characteristic by clicking ⊗ next to the filter characteristic that you want to delete, or you can remove a single value from a filter characteristic by clicking ⊗ next to its value.

### Other filter aspects

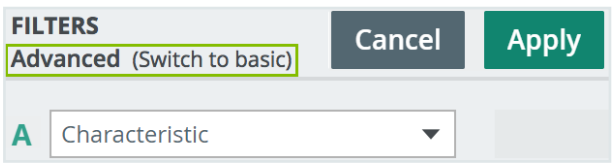
- If you use filters in hierarchy views (not available in tile display mode), Collibra only applies the filter at the 'root' (start) level of the hierarchy. Child rows are not filtered.
- In the **Roles** category of the filter characteristics, you can select one or more specific users or user groups, or *current user* to filter on the signed-in user. This has the advantage that it is not necessary to create a filter for every single user.
  - Example: Filter assets by "current user" with Reviewer responsibility: If user A is signed in, the table shows the assets for which User A has Reviewer responsibility. If user B is signed in, the table shows the assets for which User B has Reviewer responsibility.
- The **Roles** category of a basic filter does not take into account inherited responsibilities. If you want to include inherited responsibilities in the filter criteria, you can use an advanced filter.

## Create a basic filter

If you want to customize a view to make sure that you only see the assets that you really need, you can create a filter.

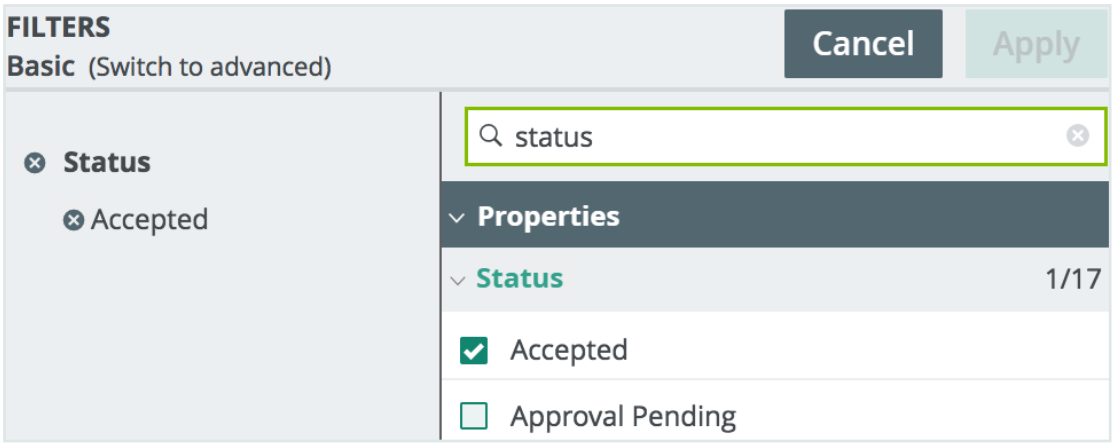
To create a basic filter, follow these steps:

1. Navigate to a table or set of tiles that contains the assets you want to see.
   Example: Business Glossary
2. In the **Filters** pane, next to filters, click **Edit**.
   Verify that you are in basic filter mode. If you aren't, click **Switch to basic**.

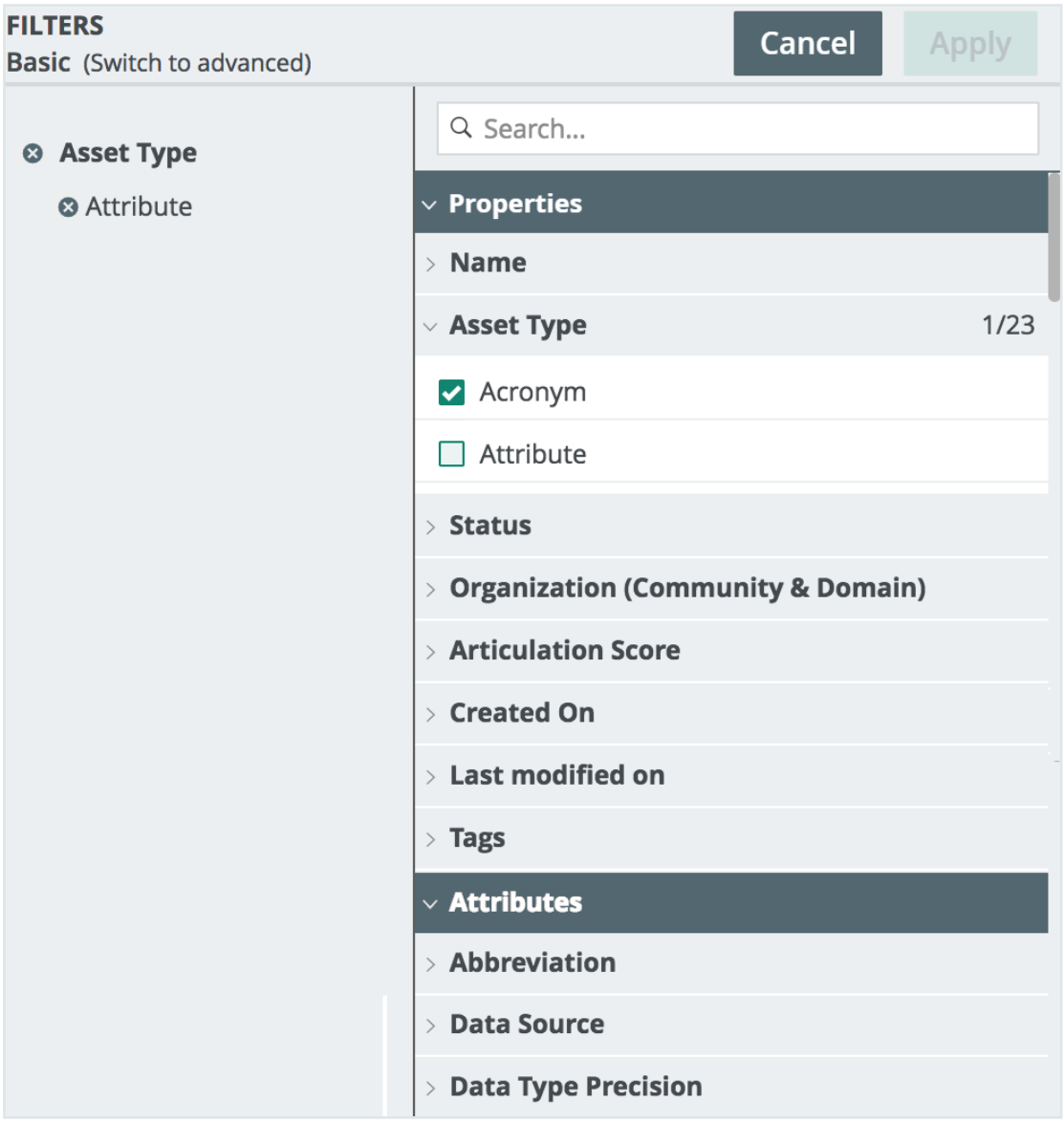



3. In the right column of the **Filters** pane, select the characteristics that you want to include in your filter.
   You can do this in different ways:

- By typing the name of what you are looking for in the search field at the top, and then selecting the characteristic.



- By going through the list while expanding or collapsing characteristics to find what you are looking for, and then selecting the values.



> Note
> - For some characteristics, you have to select the values from a predefined list, for example *Type* or *Status*.
> - For some characteristics, you have to type one or more values, for example *Name* or *Definition*.
> - Multiple values for a characteristic are treated as an OR clause.
> - All the simple expressions in a basic filter are treated as an AND clause.
> - You can remove a filter characteristic by clicking ⊗ next to the filter characteristic that you want to delete, or you can remove a single value from a filter characteristic by clicking ⊗ next to its value.

4. Click **Apply** to activate the filter or click **Cancel** to close the filter characteristics pane.

## Advanced filters

Advanced filters are like basic filters in that they consist of one or more filter clauses. Advanced filters, however, use advanced logical operators. In a basic filter clause, the logical operator is "equals". In advanced filter clauses, the operator depends on the property, characteristic or resource role that you select as the filter criterion.

The filter criteria are grouped as follows:

- **Properties**: All the asset properties in Collibra, for example name, asset type and tags.
- **Attributes**: All the asset attributes in Collibra, for example note, definition and quality.
- **Relations**: All the relations in Collibra.
- **Roles**: All the resource roles that are defined in Collibra, for example Business Steward, Requester and Assignee.

The following table shows some examples of operators, per filter criterion type:

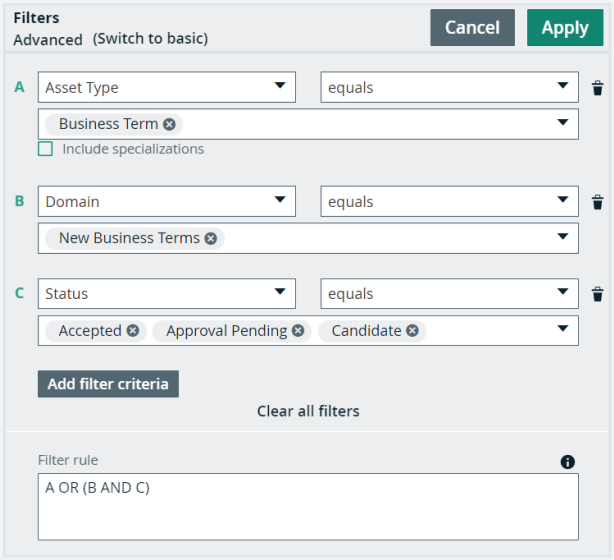
| Filter criterion type | Operators |
|---|---|
| Text, for example *Name* | • equals<br>• does not equal<br>• contains<br>• does not contain<br>• starts with<br>• does not start with<br>• ends with<br>• does not end with<br>• exists<br>• does not exist |
| Boolean, for example *Certified* | • equals<br>• does not equal<br>• exists<br>• does not exist |
| Numeric, for example *Articulation Score* | • equals<br>• does not equal<br>• less than<br>• less than or equals<br>• greater than<br>• greater than or equals |
| Date, for example *Created On* | • equals<br>• before<br>• before or equal to<br>• after<br>• after or equal to<br>• last (...) days<br>• exists<br>• does not exist |

| Filter criterion type | Operators |
| --- | --- |
| Resource role, for example *Business Steward* | • contains<br>• does not contain<br>• equals<br>• does not equal<br>• starts with<br>• does not start with<br>• ends with<br>• does not end with<br>• exists<br>• does not exist<br><br>Note If you select the logical operator "equals", you can select the value Current User, to find all assets for which you have been assigned the specified resource role. This means that users might see different results in the same view, depending on their responsibilities.<br><br>Filtering by resource role and a specific user is extended to user groups that include the specified user, for the selected resource role.<br><br>Example John Fisher is included in a user group named The Dream Team. There are a number of assets for which The Dream Team user group has been assigned as the Business Steward. If you filter a view by Business Steward, and specify the user John Fisher, all such assets will pass the filter. |

You can create a combination of clauses by using the AND and OR operators and brackets. The order of the clauses does not affect the results.

Depending on the logical operator, you can add multiple values. If you do so, the values are treated as an OR operator.

Example The filter below finds assets that meet these criteria: they have the asset type *Business Term* OR the assets have both the domain *Business Glossary* and one of these three statuses: *Accepted*, *Approval Pending* or *Candidate*.

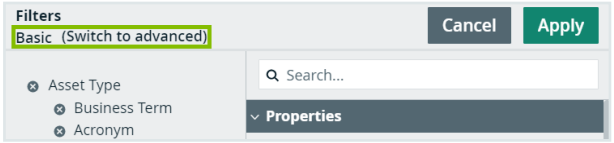



## Create an advanced filter

You can create an advanced filter to only see the assets that you need in your view.

### Steps

1. Navigate to a table or set of tiles that contains the assets you want to see.
   Example: Glossary
2. In the **Filters** pane, next to Filters, click **Edit**.
3. Ensure that you are in advanced filter mode. If you aren't, click **Switch to advanced**.



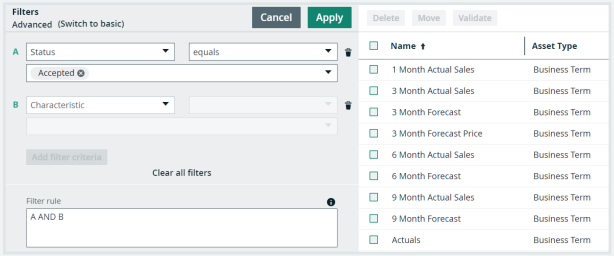

4. In the **Filters** pane, define the filter clauses.
   a. Select a characteristic from the **Characteristic** list.
   b. Select an operator.
   c. Add one or more values.

The content of the value field depends on the selected operator.

d. Click **Add filter criteria** to add the next filter clause.

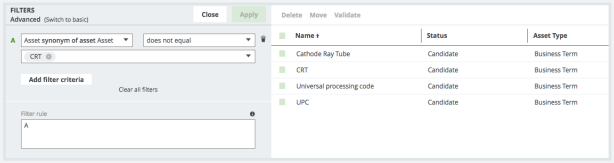
5. In the **Filter rule** field, define how the filter clauses must be interpreted. See Filter rules.
6. Click **Apply** to activate the filter or **Cancel** to discard the changes.

Tip
If you want to filter assets by relation type and use an exclusionary logic operator, such as **does not equal** or **does not contain**, you have to introduce two filter clauses, as shown in the following example.




**A**. This filter clause conveys that you only want to consider assets that have the relation type, for example, **Asset synonym of asset Asset**.

**B**. This filter clause shows, of all assets that have the filter type that is specified in clause A, for example, **Asset synonym of asset Asset** relation, only the assets for which the acronym **does not equal** a specified value, in this example **CRT**.




Without the **exists** filter clause, the filter results will include assets that do not have the **Asset synonym of asset Asset** relation type, which is not helpful.

## Filter rules

When you create an advanced filter, you can create complex filters by combining the filter clauses you created with Create an advanced filter. By default, the filter clauses are combined with the AND (conjunction) operator. However, you can also combine the clauses by using brackets and the OR (disjunction) operator.

| Operator | Explanation |
|---|---|
| AND | A result must fit all filter clauses.<br><br>Example: A AND B AND C means that only a resource that fits all three filter clauses is added to the results. |
| OR | A result must fit one of the filter clauses.<br><br>Example: A OR B OR C means that whenever a resource fits one of the three filter clauses, it is added to the results. |

A filter uses the following operator precedence to filter the data:

1. Operations inside brackets.
2. AND operations.
3. OR operations.

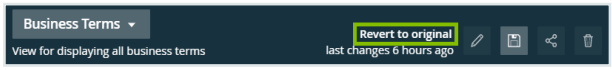
### Filter rule examples

- A OR B AND C:
  - First, check the AND operation. The result must fit clause B and C.
  - Second, combine it with clause A. The result must fit either A or the result of the AND operation.
- (A OR B) AND C:
  - First, check the operation between brackets. The result must fit either clause A or clause B.
  - Second, combine it with clause C. The result must fit clause C and the result of the operation between brackets.

## Reset a filter

If you have applied a filter and you want to return to the original view, follow these steps:

1. Open a view and apply a filter.
2. Click **Revert to original**.



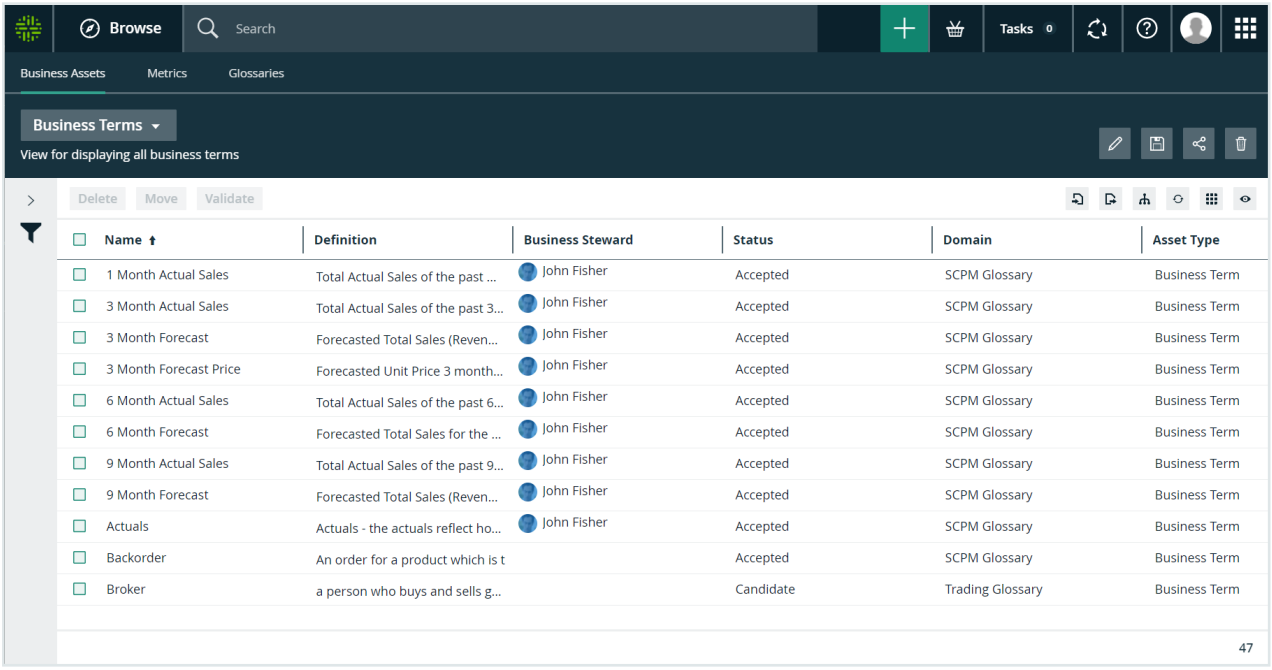
3. In the **Revert to original** dialog box, click **Revert**.
   You return to the originally selected view.

# Display modes

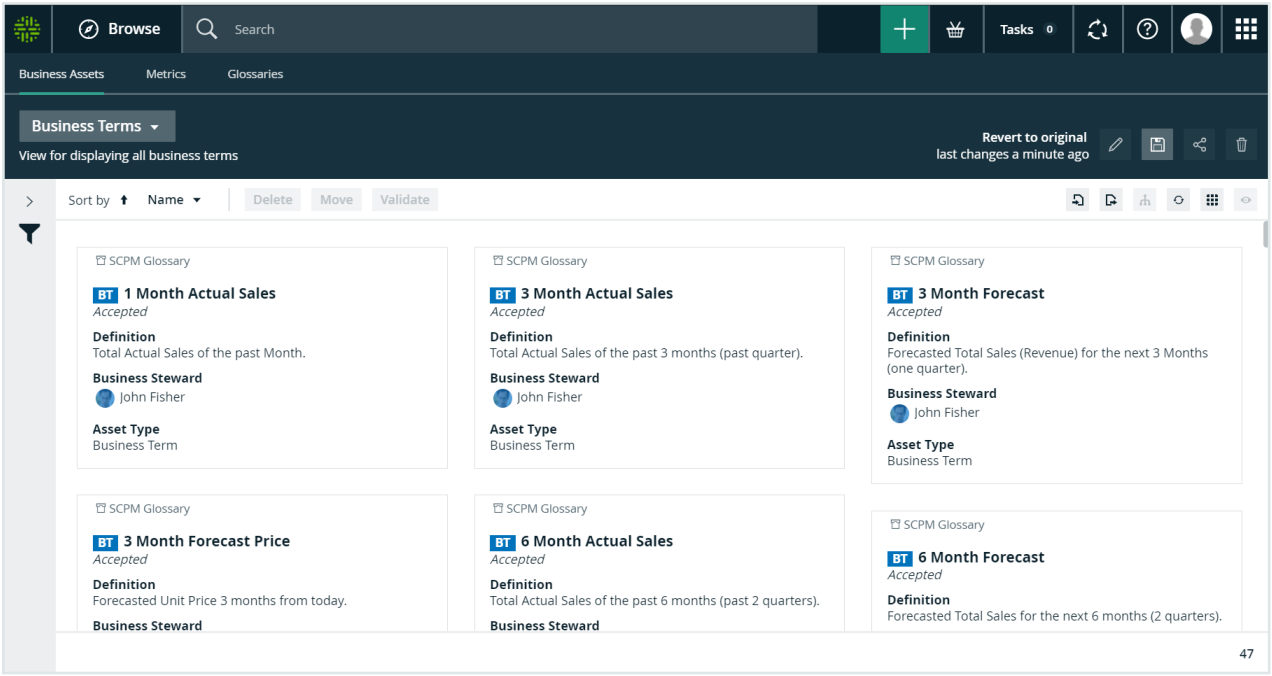
Throughout Collibra Data Intelligence Cloud, you can choose to view assets in tables (table display mode) or as sets of tiles (tiles display mode).

When assets are viewed in table display mode, each table row represents one asset. When they are shown in tile display mode, each tile represents one asset.

Example of a view in table display mode:




Example of a view in tile display mode:

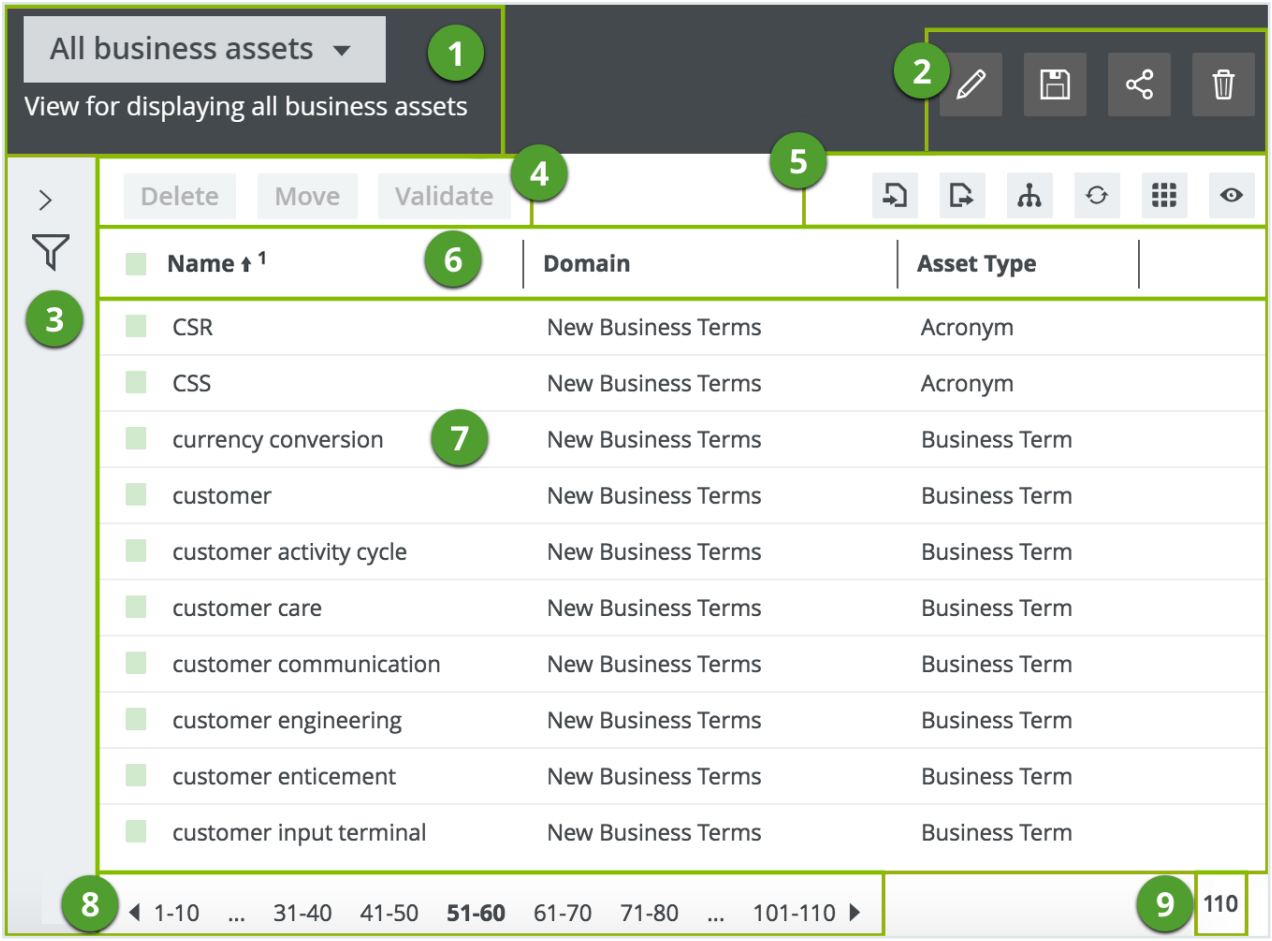



# Table display mode

When resources are viewed in table display mode, each table row represents one community, domain, asset or so forth. You can also switch to tile display mode.

## Working with tables

All tables in DGC have some common features and actions. For some tables, you can do additional actions.




| No. | Element name | Description |
|---|---|---|
| 1 | View selector | The view selector shows the name and description of the current view, and allows you to choose another view. |
| 2 | View toolbar | The view bar contains buttons to save, edit, share and delete the current view. |
| 3 | Asset filter | You can use an asset filter to limit the number of assets shown. |
| 4 | Action menu | The action toolbar contains a selection counter and actions that you can perform on assets you select in the table. |

| No. | Element name | Description |
|---|---|---|
| 5 | Table menu | The table menu contains buttons for actions that you can perform on the table. |
| 6 | Fields | The fields are the column headers.<br><br>You can customize the table to determine which fields are shown and in which order they're shown. You can also rename the field display names.<br><br>From the header, you can<br><br>• Select all visible assets.<br>• Sort on one or more columns, in ascending or descending order.<br>• Apply a column filter.<br>• Clear a column filter. |
| 7 | Body | The body of the table shows the actual content of the table in rows.<br><br>From a table, you can do the following:<br><br>• Select a row.<br>• Edit the content of one, selected or all visible cells. |
| 8 | Pages | The table pages. This section appears if the table contains more rows than you are displaying.<br><br>You can do the following:<br><br>• Define the number of rows per page.<br>• Navigate between table pages. |
| 9 | Counter | The total number of assets in the table.<br><br>If the table contains more than 10 000 rows, the counter displays **10 000 +**. Click it to see the exact count. |

## Switch to table display mode

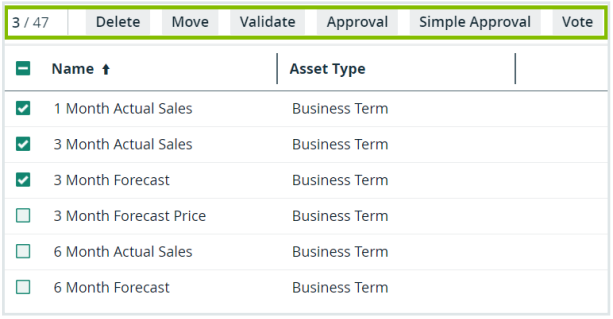
If you are in tiles display mode, you can quickly convert the set of tiles to a table.

# Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click ⠿ → **Display mode** → **Table**.

## Action toolbar

The action toolbar contains a selection counter and actions that you can perform on assets you select in the table.

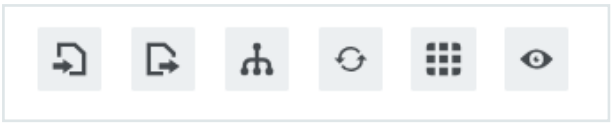



You can:

- Delete multiple assets.
- Move multiple assets to another domain.
- Validate assets.
  This is only visible if a validation rule is assigned to the asset type.
- Start an asset workflow from an asset table.
  Only workflows that apply to all the selected assets are available.

## Table content toolbar

When you are viewing assets in table display mode, the content toolbar contains buttons for actions that you can perform on the table.



The following table provides an overview of the possible actions:

| Button | Description |
|---|---|
| | Import assets or complex relations. |
| | Export assets or complex relations. |
| | Display a selection of assets as a hierarchy, or tree structure, based on their relation type.<br><br>When you select only one relation type, Collibra Data Intelligence Cloud builds the hierarchy as deeply as possible, traversing occurrences of that single relation type as often as it can.<br><br>Enable or disable hierarchies. |
| | Refresh the table. |
| | Manage columns and rows. You can add, remove and move columns and select the number of rows that are displayed on one page. See Customizing tables.<br><br>You can also switch to tile display mode. |
| | Display a preview of the selected row. You can select a row by clicking on the row itself, not the check box. |

## Select or clear rows

To edit or delete multiple rows in one go, you can select multiple rows in a table.

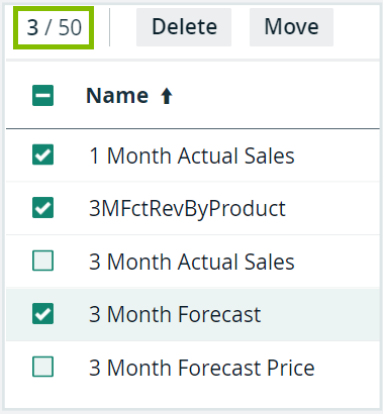
> Note Do not confuse this with highlighting a row by clicking anywhere in the row.

# Steps

1. Open a view in table display mode.
2. Do one of the following:

| If you want to... | do... |
|---|---|
| select a single row: | Click the checkbox in front of the row. |
| select all visible rows: | Click the checkbox in the header of the column. |
| clear a selected row: | Click a selected checkbox again. |

Tip In the table header, you can see how many of the available assets are selected.




## Edit cells in a table

You can edit most content in tables. You can do this for individual rows or multiple rows in one go.

# Steps

1. Open a view in table display mode.
2. Do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
3. Do one of the following:
   - If the field is a free text field, you can edit the cell by typing.
   - If the field is a drop-down list, type the new value or use the drop-down menu ▼.
   - If the field is a date, type the new date or use the date editor 🗔.
4. Do one of the following:

| If you want to change... | do... |
|---|---|
| the current row only: | a. Click ✔. |
| all visible rows: | a. Click **Apply to all visible rows**.<br>b. Click ✔. |
| selected rows: | a. Select one or more rows.<br>b. Click **Apply to all selected rows**.<br>c. Click ✔. |

## Wrap the text in a cell of a table

Collibra Data Intelligence Cloud can wrap the text in cells of tables so it appears on multiple lines inside the cell. This makes the cell content more readable.

# Wrap the text of an individual cell

1. Open a view in table display mode.
2. Hover your mouse over a cell and click ▼.

   » The height of the table row increases so the complete text in all cells in that row becomes readable.

> Note You cannot save the wrapping, so when you reload the page or open the view later, the text is no long wrapped.

# Wrap the text of all cells

1. Open a view in table display mode.
2. In the content toolbar, click ⠿ → **Wrap Text**.

   » The pagination of the table is set to 20 rows per page.

   » The height of all table rows increases so the complete text in the cells becomes readable.
3. Optionally, in the view toolbar, click 🖫, then **Save** to save the view and always wrap the text when the view opens.

## Customizing tables

If you want a table to display only the information you need about specific assets, you can change several aspects of the table.

# Add columns to a table

In Collibra Data Intelligence Cloud, a table has a default view, displaying a default set of columns. You can edit the asset view by adding columns to it.

> Note You can also show responsibilities as a column.

## Steps

1. Open a view in table display mode.
2. In the content toolbar, click ⠿ → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click **Select fields**.
   » The **Select fields** dialog box appears.
4. Select one or more items in the list.

   > Tip You can use predefined filters and the search box to quickly find columns.

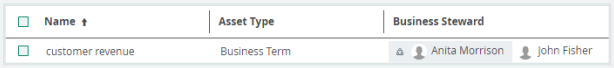
5. Click **Update**.
   » The **Select fields** dialog box appears.
6. If required, do the following:
   - Edit a column name.
   - Edit the column order.
7. Click **Save**.

# Show responsibilities in an asset table

An asset view can show the responsibilities of a resource, these responsibilities are shown per role.

If you enabled inherited responsibilities in the settings, you can show the inherited responsibilities. Inherited responsibilities have a gray background and cannot be edited in an asset view. Direct responsibilities have a white background and can be edited.

Example




# Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click **Select fields**.
   » The **Select fields** dialog box appears.
4. Select one or more roles in the list.

   Tip You can find all roles in the **Roles** tab page.

5. Click **Update**.
   » The **Select fields** dialog box appears.

   Tip If you enabled inherited responsibilities in Collibra Console, you can select **Show inherited responsibilities** to show inherited responsibilities.

6. Click **Save**.

# Edit the column order

You can edit the order in which the columns are arranged in a table.

> Note If you enable hierarchies for a table, the Name column automatically appears as the leftmost column in the table and it is frozen. More information: Freeze columns.

## Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click and drag a row up or down.
4. Click **Save**.

# Edit a column name

You can edit the column names in a table.

## Steps

1. Open a view in table display mode.
2. In the content toolbar, click ⠿ → ✎ **Edit Fields**.
   » The **Fields** dialog box appears.
3. In the **Display name** field, type a new name.
4. Click **Save**.

# Remove columns from a table

You can remove columns from tables in two ways:

## Remove columns from the **Table Columns** dialog box

Do this if you want to remove one column.

### Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. At the end of the line, click .
4. Click **Save**.

## Remove columns from the **Select Columns** dialog box

Do this if you want to remove several columns or add columns in one go.

### Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click **Select fields**.
   » The Select fields dialog box appears.
4. Clear the check box in front of one or more items in the list.

> Tip You can use predefined filters and the search box to quickly find columns.

5. Click **Update**.
6. Click **Save**.

# Change the number of rows per page

If a table contains a large amount of rows, they will be split across multiple pages. You can change the number of rows that are shown per page of the table.

## Steps

To change the number of rows per page, follow these steps:

1. Open a view in table display mode.
2. In the content toolbar, click ⠿ → **Change Rows per Page** → <number>.

# Freeze columns

Freezing columns keeps the leftmost columns in a table visible when you scroll horizontally to the right.

> Note If you enable hierarchies for a table, the **Name** column automatically appears as the leftmost column in the table and it is frozen. You can still change the column order.

## Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click for the **Move to freeze column(s)** setting, and drag it below the last column you want to freeze.
4. Click **Save**.

### Sort on one or more columns

Sorting the contents of a table helps you visualize your content and find the data you want. You can sort on one or more columns.

> Note
> - The availability of multi-column sorting and the maximum number of columns on which you can simultaneously sort depends on your organization's environment settings in Collibra Console.
> - Multi-column sorting is not available in tile display mode; however, you can sort on more than one column while in table display mode and then switch to tile display mode. The sort results will be accurately applied to the tiles. See Sort a set of tiles.

## Steps

To sort the contents of a table based on one or more columns, follow these steps:

1. Open a view in table display mode.
2. Click the column name of the column on which you want to sort.
   ⬆ appears next to the column name and the table is sorted in ascending order.
   To sort in descending order, click the column name again.
3. To sort the data on a second column, click the desired column name.
   » ⬆2 appears next to the column name and the table is sorted in ascending order.
   To sort in descending order, click the column name again.
   To remove sorting, click the column name a third time.
4. To sort the data on a third column, click the desired column name.
   » ⬆3 appears next to the column name.
   » The contents of the table are first sorted according to the first column you've selected. Within that sort result, the contents are further sorted according to the second column you've selected.
   To sort by additional columns, continue as above.

> Tip If you start sorting on a second column, the sorting icon of the first column changes into ⬆1.

### Navigate between table pages

If a table contains more rows than you are currently showing, it is split in several pages. You can navigate between these pages.

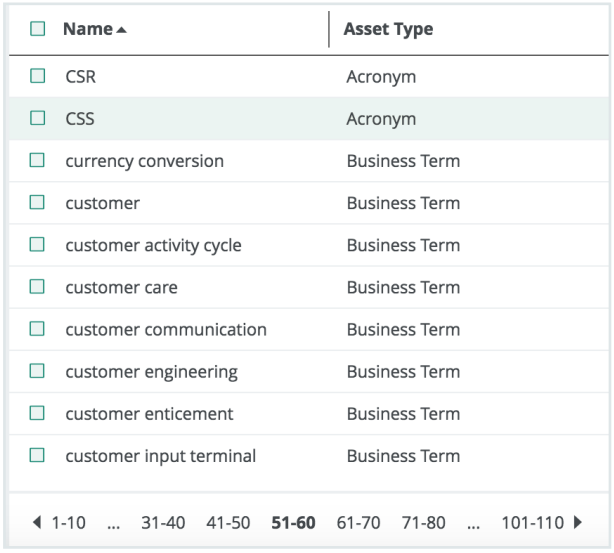
> Tip You can define the number of rows per page. More information: Change the number of rows per page.

## Steps

1. Open a view in table display mode.
2. If the table contains more rows than those displayed, the lower left corner shows the pages.
   Do one of the following:

| To navigate to... | click... |
|---|---|
| the previous page | ◀ |
| the next page | ▶ |
| the first page | the first page.<br>Example: **1-10** |
| one of the 2 previous or following pages | the desired page. |
| the last page | the last page.<br>Example: **100-110** |

Example




## Filtering tables

You can filter tables in different ways:

- Apply a column filter.
  Do this to quickly filter on a column using a simple string.
- Asset filters.
  Do this to use advanced filters.

# Apply a column filter

You can filter the content in a table using a column filter. When you apply a column filter, only rows containing the specified string are shown.

> Tip You can also use asset filters to define complex criteria. More information: Asset filters.

## Steps

To apply a column filter, follow these steps:

1. Open a table.
2. In a column header, click 🔍.
3. The column header becomes a search box.
   Type the text you want to filter on.

# Clear a column filter

After you applied a column filter, you can clear it again to make more rows visible.

# Steps

To clear a column filter, follow these steps:

1. Apply a column filter.
2. In the table name, click ⊗.

## Working with hierarchies

The hierarchy feature for asset views enables you to display a set of assets in a table as a hierarchy, or tree structure, based on the relations between the assets. You can select which relation types to display in the hierarchy.

A hierarchy is a visual representation of relations between assets, resulting in a tree-like path.

> Note Collibra Data Intelligence Cloud uses dotted lines to graphically depict the relations between the assets in the hierarchy. Small carets (triangles) depict nodes in the hierarchy that you can expand.

When you enable hierarchies, you can choose between:

- A single-path hierarchy: for each node at a certain level in the hierarchy, there is only one path to nodes at the next level.
- A multi-path hierarchy: a hierarchy in which all relations are traversed for any asset, at any depth.

> Note
> - In a hierarchy, filters are only applied at the root level.
> - You cannot export or import a hierarchy.
> - You cannot use tile display mode in a hierarchy.

Example

# Single-path hierarchy

Imagine you have assets that represent Reports. Each report asset contains Report Attribute assets.

You can depict this as a single-path hierarchy, using a single relation type:

- **[Report] contains [Report Attribute]**

In the resulting hierarchy, the maximum depth (meaning the number of relations between a root node and a leaf node) is one.

Now imagine some of those Report Attributes are represented by Business Assets, via the relation type:

- **[Data Asset] represented by [Business Asset]**

> Note Keep in mind that Report Attribute is a child asset type of Data Asset.

You can depict this with a single-path hierarchy, consisting of two relation types:

- **[Report] contains [Report Attribute]**
- **[Data Asset] represented by [Business Asset]**

The maximum depth of this hierarchy will be two.

Now imagine that your Reports are grouped into other Reports, and you want to depict this as a hierarchy, as well. You can depict this as a single-path hierarchy, using a single relation type:

- **[Report] groups [Report]**

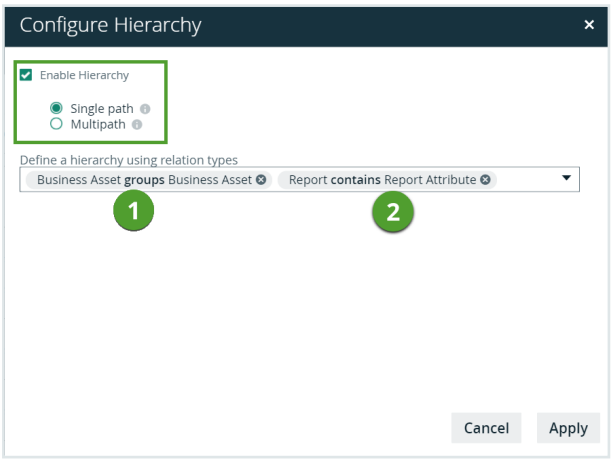
The fundamental difference between this hierarchy and the previous one is that the target asset type of the relation (Report) is the same as the source asset type (Report), which can result in a hierarchy of unlimited depth. For example:

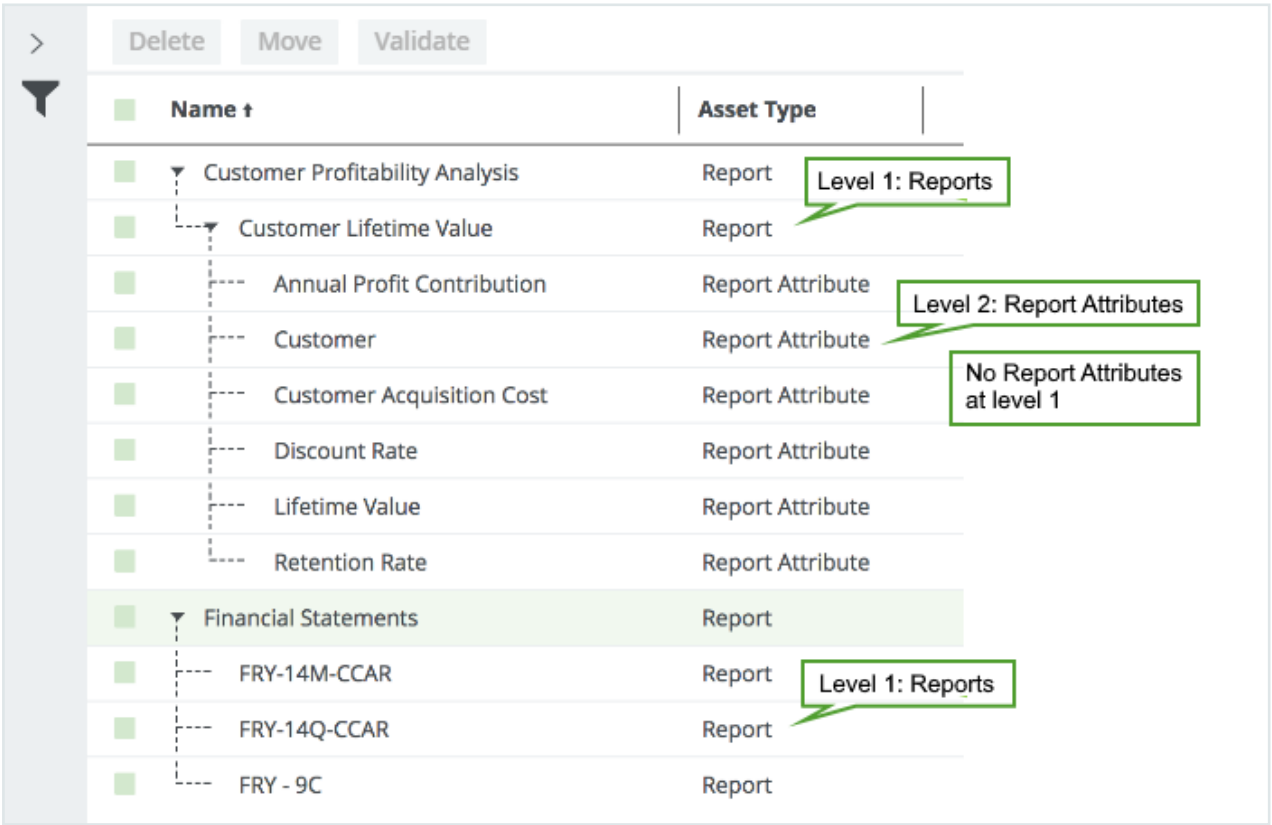
- **Report A groups Reports B and C**
- **Report B groups Reports D and E**
- **Report C groups Reports F**

This hierarchy shows the Groups relations between the Reports, but it does not show the Report Attributes contained in each Report. Single-path hierarchy does not allow for these two relation types to be simultaneously depicted in a hierarchy:

- **[Report] groups [Report]**
- **[Report] contains [Report Attribute]**

In a single-path hierarchy, each Report node acts like a junction, at which you can view the instances of one relation type or the other, but not both.

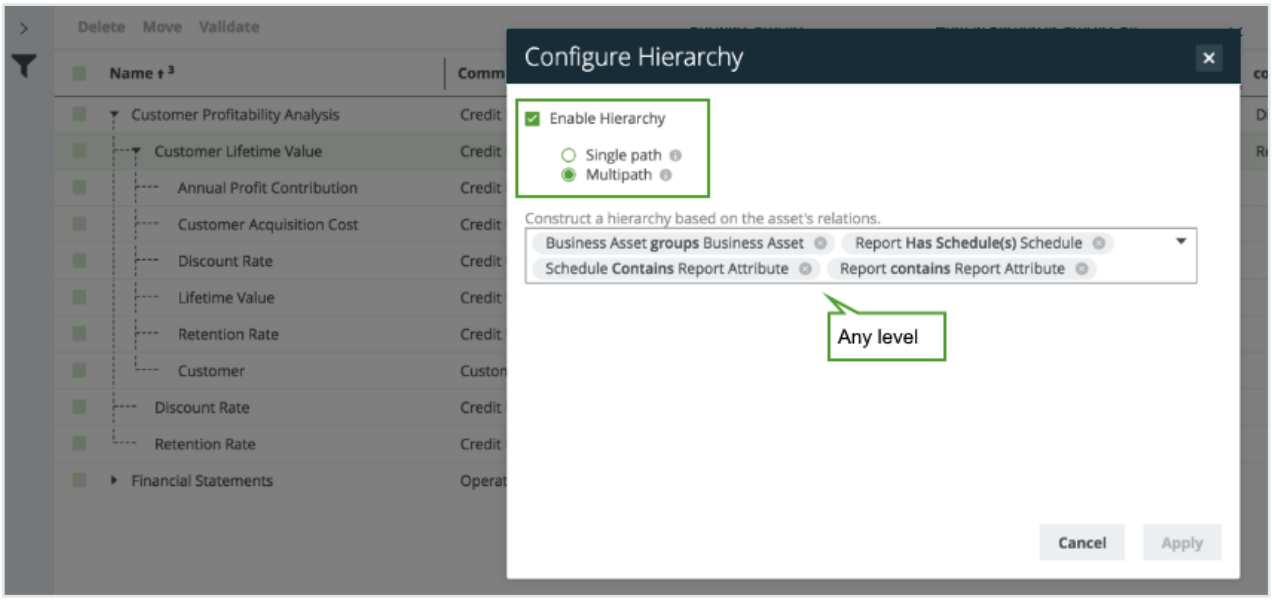


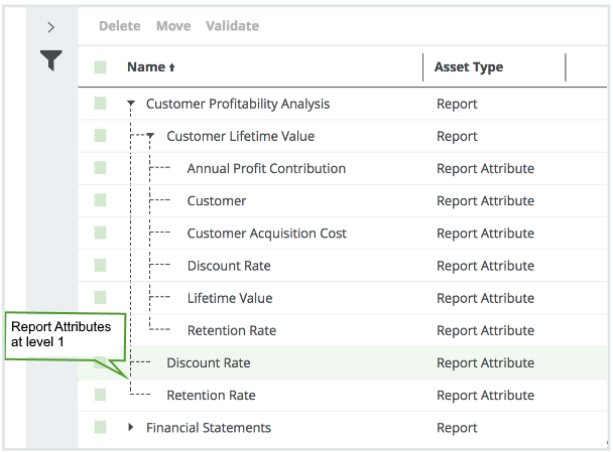



# Multi-path hierarchy

This is where multi-path hierarchy comes into play: at each junction, any relation type in the hierarchy path is traversed to find more nodes. For example, you can simultaneously view:

- **[Report] groups [Report]**
- **[Report] contains [Report Attribute]**
- **[Data Asset] represented by [Business Asset]**



# Enable or disable hierarchies

You can enable hierarchies to display an asset table in a tree structure, or disable hierarchies to display a 'flat' asset table.

## Steps

1. Open a view in table display mode.
2. In the content toolbar, click .
   » The **Configure Hierarchy** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Enable Hierarchy | Select or clear to respectively enable or disable hierarchies. |
| Single path | For each node at a certain level in the hierarchy, there is only one path to nodes at the next level. |
| Multipath | A hierarchy in which all relations are traversed for any asset, at any depth. |
| Construct a hierarchy based on the asset's relations | Enter the relation types that you want to use for your hierarchy. |

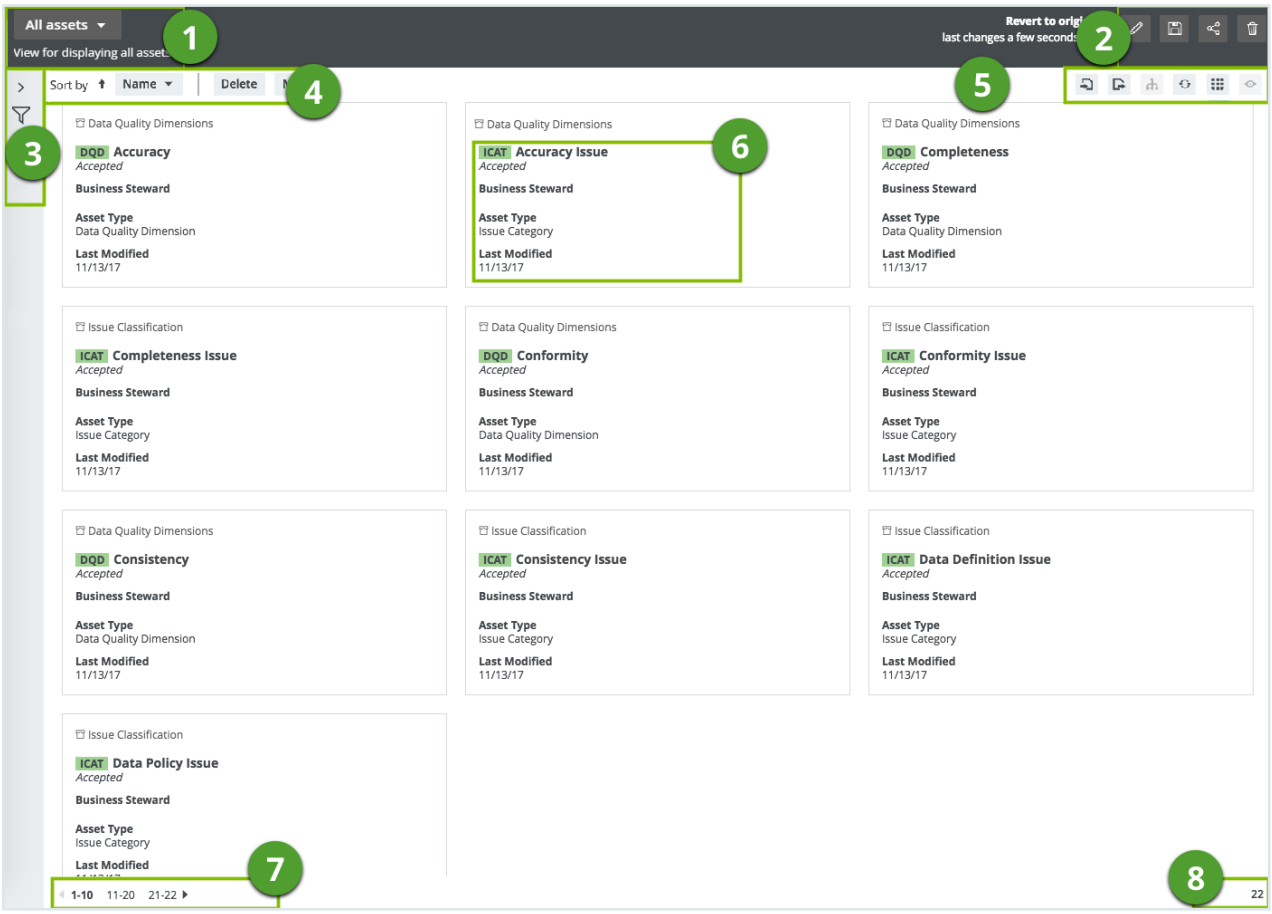
4. Click **Apply**.

### Tile display mode

When resources are shown in tile display mode, each tile represents one asset. You can also switch to table display mode.

## Working with tiles

In tile display mode, each tile represents one asset. The tiles have some common features and actions.




| No. | Element name | Description |
|---|---|---|
| 1 | View selector | The view selector shows the name and description of the current view, and allows you to choose another view. |
| 2 | View bar | The view bar contains buttons to save, edit, share and delete the current view. |
| 3 | Asset filter | You can use an Asset filters to limit the number of tiles that are displayed. |

| No. | Element name | Description |
|---|---|---|
| 4 | Tiles action menu | The tiles action menu with a selection counter and buttons that enable you to:<br>• Sort the tiles in ascending or descending order, by field.<br>• Delete multiple assets.<br>• Move multiple assets to another domain.<br>• Validate assets.<br>This is only visible if a validation rule is linked to the asset type.<br>• Start a workflow from a table.<br>Only workflows that apply to all the selected assets are available. |
| 5 | Tiles menu | The Tiles content toolbar contains buttons for actions that you can perform on the set of tiles. |
| 6 | Fields and values | Fields and values of the asset.<br>You can customize a set of tiles by adding, moving and removing fields and selecting the number of tiles that are displayed per page. |
| 7 | Pages | The tiles pages. This section appears if there are more tiles than you are displaying on one page.<br>You can:<br>• Change the number of per page.<br>• Navigate between tiles pages. |
| 8 | Counter | The total number of tiles.<br>If a set of tiles contains more than 10 000 tiles, the counter displays **10 000 +**. Click it to see the exact count. |

### Switch to tiles display mode

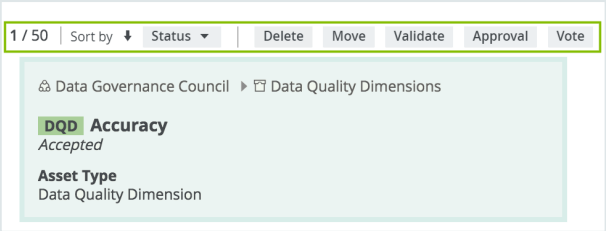
If you are in table display mode, you can quickly convert the table to a set of tiles.

# Steps

1. Open a view in table display mode.
2. In the content toolbar, click ⠿ → **Change Display Mode** → **Tiles**.

### Tiles action toolbar

The tiles action toolbar contains a selection counter and actions you can perform on selected tiles.




You can:

- Sort the tiles in ascending or descending order, by field.
- Delete multiple assets.
- Move multiple assets to another domain.
- Validate assets.
  This is only visible if a validation rule is linked to the asset type.
- Start a workflow from a table.
  Only workflows that apply to all the selected assets are available.

### Tiles content toolbar

When you are viewing assets in tile display mode, the content toolbar contains buttons for actions that you can perform on a set of tiles.



The following table provides an overview of the possible actions:

| Button | Description |
|---|---|
|  | Import assets or complex relations. |
|  | Export assets or complex relations. |
|  | Enable or disable hierarchies.<br>Note The hierarchy feature is only available in table display mode. |
|  | Refresh the table. |
|  | Manage fields and tiles count. You can customize a set of tiles by adding, moving and removing fields and selecting the number of tiles that are displayed per page.<br>You can also switch to table display mode. |
|  | Enable or disable the preview.<br>Note Preview is only available in table display mode. |

## Customize a set of tiles

If you want a set of tiles to display only the information you need about the assets, you can change several aspects of the tiles.

# Add fields to a set of tiles

In Collibra Data Intelligence Cloud, a set of tiles has a default view, displaying a default set of fields. You can add, remove and rename the fields that appear in the tiles.

> Note You can also show responsibilities as a field.

## Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click ⠿ → ✎ **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click **Select fields**.
   » The **Select fields** dialog box appears.
4. Select one or more items in the list.

   > Tip You can use predefined filters and the search box to quickly find fields.

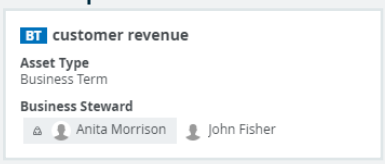
5. Click **Update**.
6. If required, do the following:
   - Change a field name.
   - Change the order of the fields.
7. Click **Save**.

# Show responsibilities in a tile set

Tiles can show the responsibilities of a resource, these responsibilities are shown per role.

If you enabled inherited responsibilities in Collibra Console, you can show the inherited responsibilities. Inherited responsibilities have a gray background and direct responsibilities have a white background.

Example




# Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click **Select fields**.
   » The **Select fields** dialog box appears.
4. Select one or more roles in the list.

   Tip You can find all roles in the **Roles** tab page.

5. Click **Update**.
   » The **Select fields** dialog box appears.

   Tip If you enabled inherited responsibilities in Collibra Console, you can select **Show inherited responsibilities** to show inherited responsibilities.

6. Click **Save**.

# Edit the order of the fields

You can edit the order in which the fields are arranged in a set of tiles.

> Note The community-domain breadcrumb will always appear at the top of the tile, followed by the asset name, status and report image, if an image has been uploaded for the asset.

## Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click and drag a field up or down.
4. Click **Save**.

# Edit a field name

You can edit the field names in a set of tiles.

## Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click ⠿ → ✎ **Edit Fields**.
   » The **Fields** dialog box appears.
3. In the **Display name** field, type a new name.
4. Click **Save**.

# Remove fields from a set of tiles

You can remove fields from a set of tiles in two ways:

- Use the **Fields** dialog box.
  Do this if you want to remove a single field.
- Use the **Select fields** dialog box.
  Do this if you want to add or remove one or more fields in one go.

# Remove fields using the **Fields** dialog box

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click for the field you want to remove.
4. Click **Save**.

# Remove fields using the **Select fields** dialog box

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click **Select fields**.
   » The **Select fields** dialog box appears.
4. Clear the check box in front of one or more items in the list.

   > Tip You can use predefined filters and the search box to quickly find fields.

5. Click **Update**.
6. Click **Save**.

# Edit the number of tiles per page

If a view contains a large amount of tiles, they will be split across multiple pages. You can change the number of tiles that are shown per page.

## Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click ⠿ → **Change Rows per Page** → <number>.

### Select multiple tiles

When you select a single tile, all of the actions available to you appear above the tiles, in the tiles action menu. The same is true when you select multiple tiles. For all of the tiles you've selected, you can perform the same actions or start a workflow.

> Note Only workflows that apply to all selected tiles are available.

## Steps

To select multiple tiles, follow these steps:

1. Do one of the following:Open a view in tiles display mode.Open an asset page with related assets shown in tiles display mode.
2. To select consecutive tiles, click the first tile, press and hold down the **Shift** key, and then select the last tile you want.
3. To select non-consecutive tiles:
   - If you're working with Windows OS, press and hold down the **Ctrl** key, and then click each tile you want.
   - If you're working with macOS, press and hold down the **Command** key, and then click each tile you want.

## Sorting tiles

Sorting tiles helps you visualize your content and find the data you want. You can sort a set of tiles in ascending or descending order, by the field of your choice.

> Tip In tile display mode, you can only sort on one field at a time, whereas in table display mode, you can sort on one or more columns simultaneously. However, if you sort on more than one column in table display mode and then switch to tiles display mode, the results of the multi-column sorting is carried over to the tiles. If you then change the sorting while in tile display mode, the sort will be based on the single field of your choice.

# Sort a set of tiles

You can sort a set of tiles by the field of your choice.

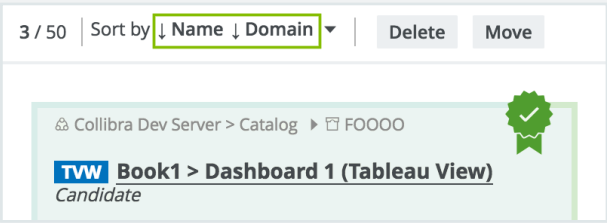
## Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.

   » By default, the tiles are arranged in descending alphabetical order, by name.
2. Do one of the following:
   - On the left, click **Name**, or if sorting has been done by another field, click that field name.
   - If you or someone else sorted on more than one column in table display mode and you then switched to tile display mode (see the note below), click ▼.

   » A drop-down menu appears, with all the fields that are currently visible for the set of tiles.
3. Select the field by which you want to sort the tiles.

   » The tiles are sorted in descending order.
4. Optionally, click ⬇ to sort in ascending order.

> Note If you or someone else sorted on more than one column in table display mode and then you switch to tile display mode, the multi-column sort is carried over to tiles. In the following example figure, the table was sorted by the **Name** and **Domain** columns before switching to tiles display mode.
>
> 
> 

### Navigate between tiles pages

If a set of tiles contains more tiles than you are currently showing, they are split across multiple pages. You can navigate between these pages.

> Tip You can change the number of tiles per page.

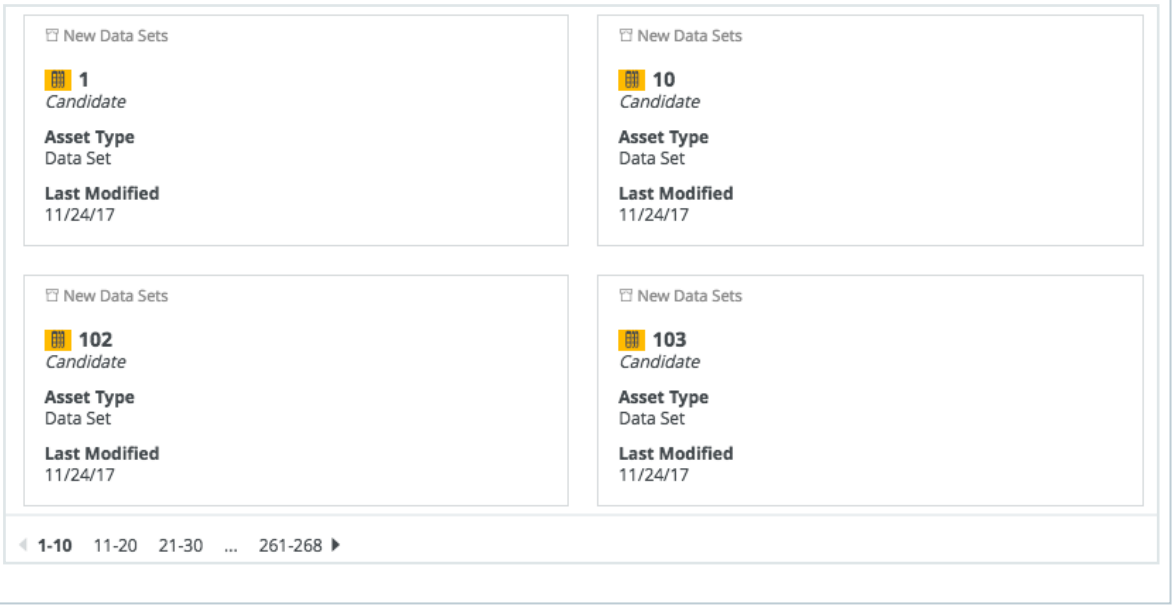
# Steps

1. Do one of the following:
   - Open a view in tiles display mode.
   - Open an asset page with related assets shown in tiles display mode.
2. If the set of tiles contains more tiles than those displayed, the lower left corner shows the number of pages.
   Do one of the following:

| To navigate to... | click... |
|---|---|
| the previous page | ◀ |
| the next page | ▶ |
| the first page | the first page.<br>Example: **1-10** |
| one of the two previous or following pages | the desired page. |
| the last page | the last page.<br>Example: **261-268** |

| To navigate to... | click... |
| --- | --- |

Example




### Filtering tiles

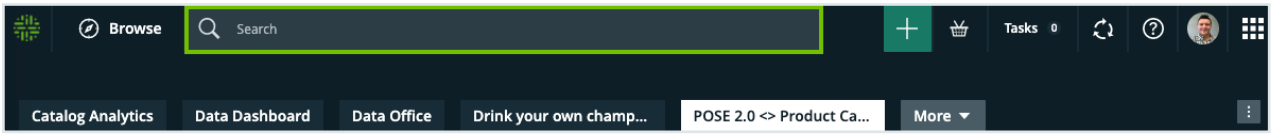
You can use advanced Asset filters to filter the tiles shown in tile display mode.

# Searching in Collibra

You can use the Search field and the Search widget to quickly find any resource in Collibra Data Intelligence Cloud, including assets, communities, domains, users, user groups and more.

Both options take you to the Search page, where you can edit your search text and work with the search results.

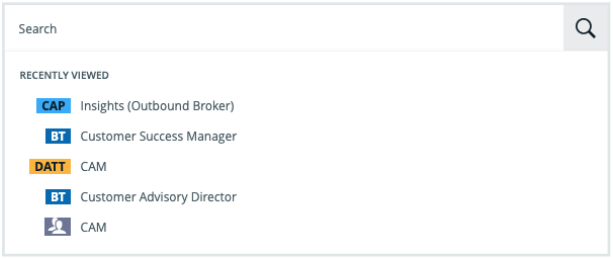
# Search field



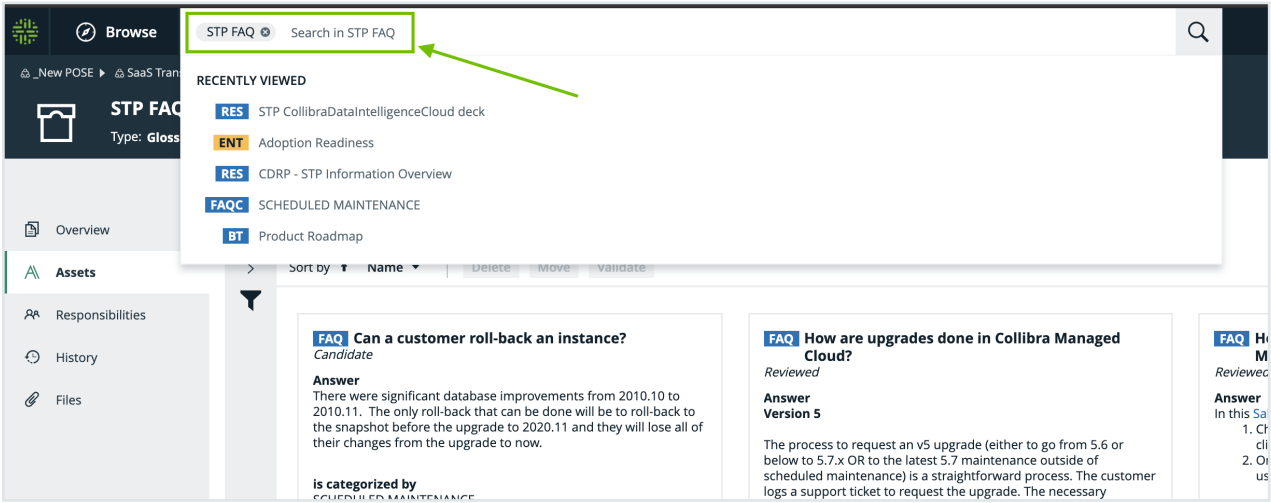

The search finds resources that contain a word that begins with your search text. For example, if you type *ca*, the search results could contain "California", "Lewis Carroll" or "Meercat".

## Recently viewed

When you click in the **Search** field, the five most recently viewed resources are shown in the quick search panel.

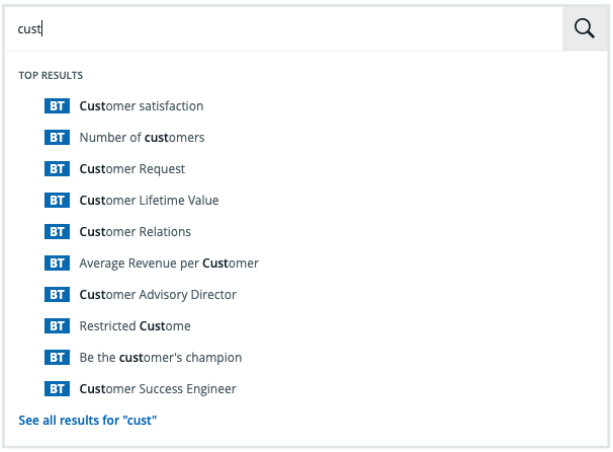



If refreshed navigation is enabled for your Collibra environment, the search results are automatically filtered by the current domain or community if you search with a domain or community page open.



## Top results

When you start typing in the **Search** field, the top 10 results are shown in the quick search panel.




> Note
> - In compiling the top results, the search engine searches for your text in the **Name** field only. As such, these results might not appear as the top results on the Search page, when you launch the search.
> - The order of the top results takes boosting into account.

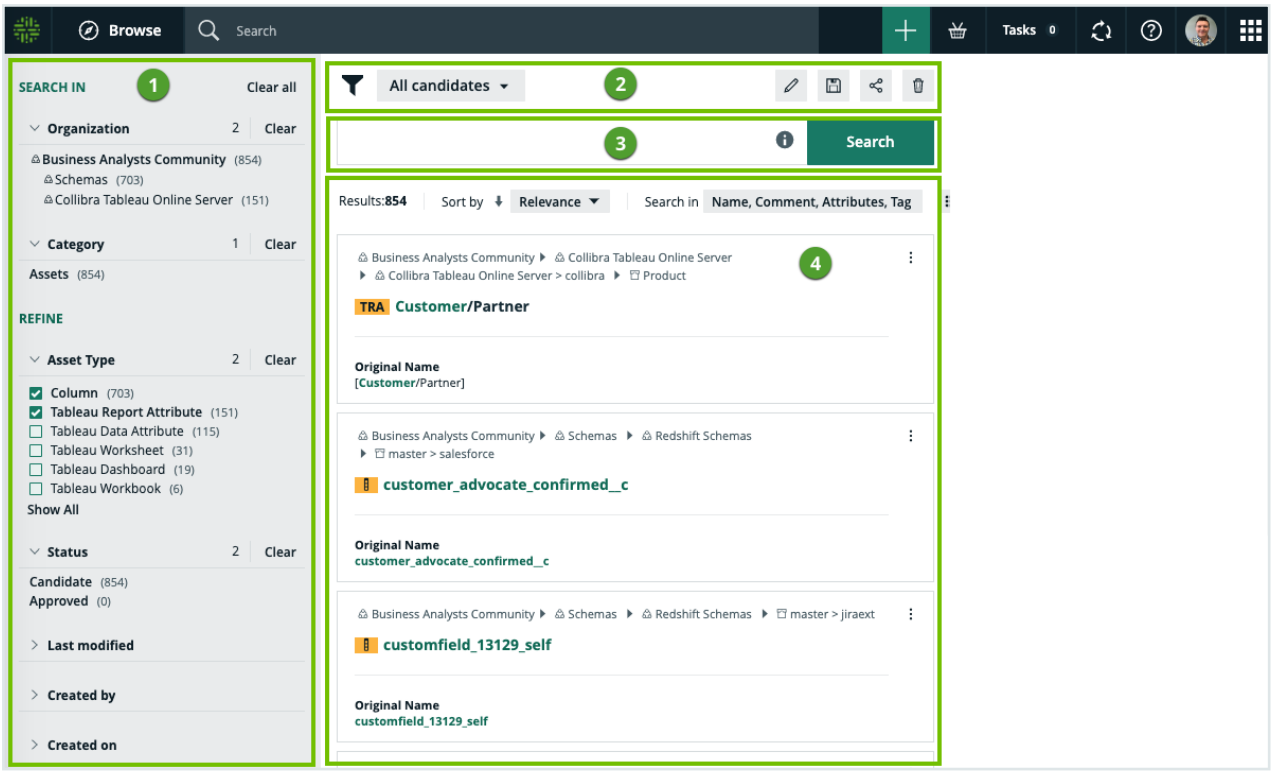
## Actions

After typing something in the **Search** field, you can do any of the following:

- Press `Enter` to start the search.
  » The Search page, with results matching your search text is shown.
- Click on an asset name, to go to the asset page.

# Search page

The **Search** page consists of the following areas:

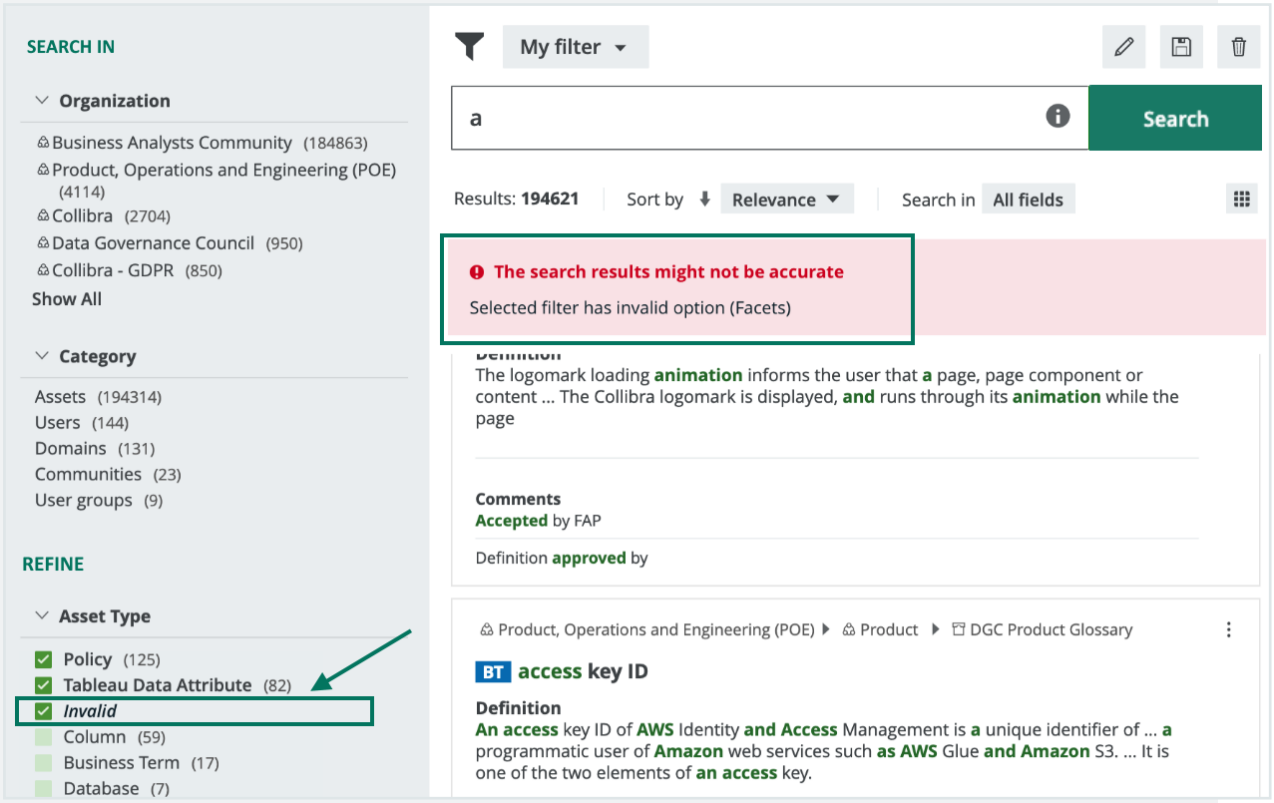



| No. | Part name | Description |
|---|---|---|
| 1 | Facet pane | A dynamically generated collection of facets that allows you to:<br>• Add and remove search fields, to expand or reduce the scope of your search.<br>• Navigate and refine the search results.<br>Note The Facet pane is only shown if your search yields results. |

| No. | Part name | Description |
|---|---|---|
| 2 | Search filters | A drop-down list of all your saved search filters, with the name of the currently applied filter shown. By default, no search filter is applied.<br><br>The buttons allow you to:<br><br>• : Create a new search filter or save a copy of an existing filter.<br>• : Edit the name and description of a search filter.<br>• : Share a search filter<br>• : Delete a search filter. |
| 3 | Search input field | Shows your search text. You can edit your search text here.<br><br>Click ⓘ for examples of how wildcards and symbols work in your search text. |

| No. | Part name | Description |
|---|---|---|
| 4 | Search results | Shows:<br>• The results that match your search.<br>• The total number or results.<br>• The applied sorting criterion and sorting order. By default, search results are sorted in order of descending relevance.<br>• The selected fields in which the search is performed. By default, all fields are searched.<br>Click ⠿ to:<br>• Add or remove fields that are shown for each search result.<br>• Edit the number of results shown per page.<br>For any result that is an asset, click the three dots ( ⋮ ) to show the workflows that are available for the asset.<br>Click the name of a search result to open its detailed page.<br>Tip In Collibra Console, you can influence the order of the search results by editing the boost factor of resources and attribute types. See also Relevance in search results. |

Note It's possible that you or another user created a search filter that includes a field or facet that no longer exists in your Collibra Data Intelligence Cloud environment. In this case, the invalid field or facet is highlighted, as shown in the following image, so that you can easily identify it and delete it from the search filter. Invalid fields and facets are ignored during search queries.




## Wildcards and symbols for searching

If you want to find a resource, but are not quite sure of its name, you can use the follow wildcards:

| Wildcard | Description |
|---|---|
| ? | Replaces any single character.<br><br>Example: by typing *?owie*, you can find Bowie, Rowie, Mowie, and so on. |

| Wildcard | Description |
|---|---|
| * | Replaces any string of characters.<br><br>Example: by typing *B*e*, you can find Bowie, Badge, Byte, and so on. |
| ~ | Represents a fuzzy search, words with spelling similar to the search query.<br><br>Example: by typing *Owi~*, you can find Ozi, Zowie, Bowie, and so on. |
| ! | Excludes words.<br><br>Example: by typing *!David Bowie*, you can find Lester Bowie, Joe Bowie and so on. |
| " " | Represents a literal search.<br><br>Example: by typing "David Bowie", you can find David Bowie and David Bowie Songs, but not David or Bowie. |

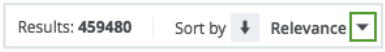
## Sort the search results

You can sort search results by the following criteria:

- Relevance
- The Name field
- The Last Modified field

### Steps

1. Perform a search via the **Search** field or Search widget.
2. On the Search page, click ▼ next to the sort field.




3. Select the basis by which to sort the search results.
   » By default, the results are sorted in descending order.
4. Optionally, click ↓ to sort in ascending order.

## What's next?

- If you sorted the search results by an attribute type that is not shown in the tiles, you can add it to the tiles, so that you can see the values that determined the sort order.
- You can create a search filter or edit an existing search filter, to save your sort settings as part of the saved filter configuration.

# Relevance in search results

By default, search results are sorted in order of descending relevance.

## What is relevance in the context of search results?

Relevance is a calculation of the similarity, measured across several lines of comparison, between your search text and the content of the resources in your Collibra environment.

In a set of search results, the relevance of each resource is represented by a positive number, or score. The higher the score, the more relevant the resource is to your search text.

## How are relevance scores derived?

To derive relevance scores, the Collibra search engine uses a combination of query clauses and boost factors.

### Query clauses

When you perform a search, the Collibra search engine queries the database, using various query clauses. Each query clause compares the similarity between your search text and your Collibra resources, along a different line of comparison.

The following are example objectives of different query clauses:

- Calculate the similarity between the spelling of your search term and the term found in a field in the database.

- Calculate how frequently your search term appears in a field. The more often it appears, the greater the relevance. A field containing five occurrences of a given term is more likely to be relevant than a field containing one occurrence of the term.
- Calculate the occurrence percentage of a term among all words in a particular field. For example, if your search term occurs twice in the 10-word description of an asset, that asset will have a higher relevance score than an asset for which your search term occurs twice in its 20-word description.

### Boosting

Search boost factors allow you to influence the order of the search results. You can edit search boost factors to increase or decrease the importance of a resource type, field or asset type, in the search ranking.

For more information on boosting, see Search boost settings.

## What is a faceted search?

The Facet pane shows the relevant criteria by which to navigate and refine the search results. We refer to these criteria as facets, and the concept of using facets to navigate and refine search results as a "faceted search".

In introducing the concept of a faceted search, it may be helpful to draw the distinction between it and a more traditional filter-based search.

### Filter-based search

Filters work by analyzing the search results and excluding resources (for example, assets, users and communities) that don't meet certain criteria.

In a filter-based search, the collection of filters that is available to you is constant. The relevance of the filters to the search results is not considered. As such, some of the filters available to you could either have no effect on the results, or reduce the results to a null set.

## Faceted search

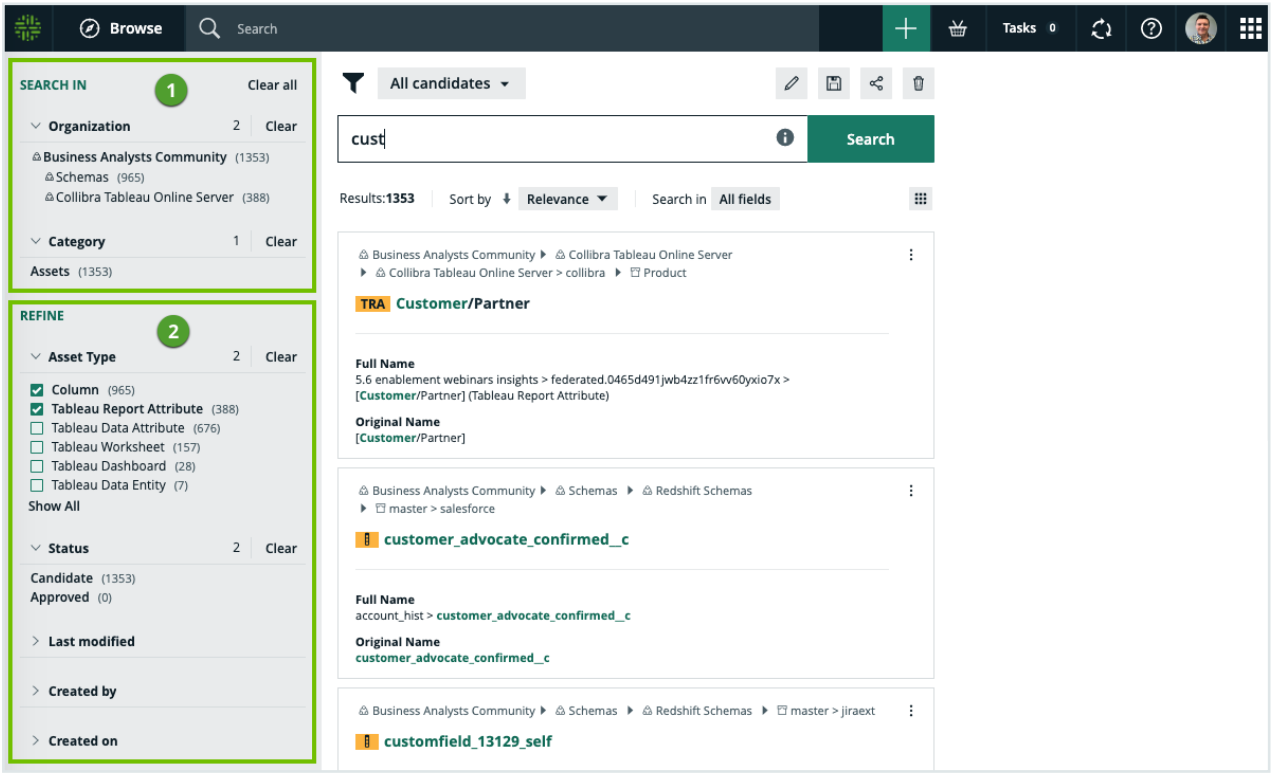
Facets are dynamically generated according to the resources that make up the search results. They allow you to narrow results by several different dimensions simultaneously.

In a faceted search, only facets that are relevant to the search results appear in the Facet pane on the Search page. As you select facets, to navigate and refine the search results, the Facet pane is automatically updated, again showing only facets that are relevant to the refined set of results.

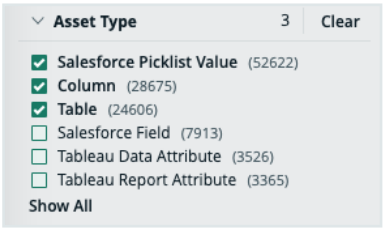
As shown in the following image, the facets in the Facet pane at any given moment include the number of resources that match both the search text and the value of the available facets. This gives you a view of the composition of the search results, and helps you avoid searches that yield no results.

# Navigating and refining the search results

The Search page offers a variety of dynamically generated facets by which to navigate and refine your search results.



<table>
<tr><th>No.</th><th>Part name</th><th>Description</th></tr>
<tr><td>1</td><td>"Search in" facets</td><td>These facets enable you to navigate to resources via organizational path or resource category.
<table>
<tr><th>Facet</th><th>Use</th></tr>
<tr><td>Organization</td><td>Navigate to resources by drilling down at the organizational level and limiting the search results to a specific community, subcommunity or domain.<br><br>If, for example, you click on a root-level community, the results will be refined to include only the resources (meaning subcommunities, domains and assets) in that community that match your search text.</td></tr>
<tr><td>Category</td><td>Navigate to a specific category of resources, such as assets, communities, domains, users or user groups.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>No.</th><th>Part name</th><th>Description</th></tr>
<tr><td>2</td><td>"Refine" facets</td><td>These facets act as filters to refine the search results.<br><br>The following table shows the packaged "refine" facets:<br><br>
<table>
<tr><th>Filter criteria</th><th>Use this to show only those search results...</th></tr>
<tr><td>Asset type</td><td>That are of a specified asset type, such as Business Term, Acronym, Column or Table.<br><br>This criterion is only applicable if you have selected the category Assets.<br><br>In the following example image, the search engine searches for your text only in assets of asset type Standard, Column and Data Set.<br><br> 
</td></tr>
<tr><td>Status</td><td>That have a specified status, such as Candidate, Accepted, Deployed or Rejected.</td></tr>
<tr><td>Last modified</td><td>That were modified within the specified time frame; within the last 24 hours, week, month or year.</td></tr>
<tr><td>Created by</td><td>That were created by the specified users.</td></tr>
<tr><td>Created on</td><td>That were created within the specified time frame; within the last 24 hours, week, month or year.</td></tr>
</table>
</td></tr>
</table>

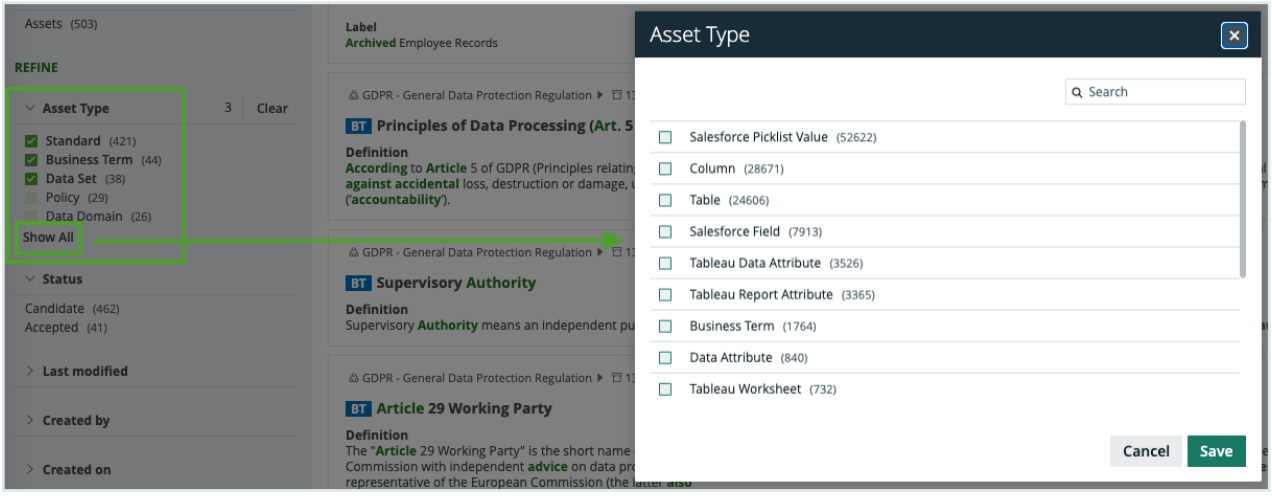
| No. | Part name | Description |
|---|---|---|
| | | <table><tr><th>Filter criteria</th><th>Use this to show only those search results...</th></tr><tr><td>Tags</td><td>That have the specified tag(s).<br><br>You can click the tag in any of the search results, to search for all domains and assets with that tag.</td></tr></table> |

## Working with facets

Click **Clear**, to clear all selections for a specific facet type.

At the top of the page, click **Clear all**, to clear all facet type selections on the search page.

Click **Show all**, to show all the facets by which to refine the scope of your search for a particular facet type. As shown in the following example image, if there are more than 15 facets, the list will open in a dialog box.



> Note Adding and removing facets on the search page is not the same as:
>
> - Filtering the search results.
> - Adding or removing fields to a set of tiles.

## Permissions

No particular license is needed to create and manage search filters; however, certain global permissions are needed.

| Permission | With this permission, you can... |
|---|---|
| Manage and share anyone's Views, Dashboards, Search filters | Create and manage search filters for yourself and other users, and share with other users. |
| Manage your own Views, Dashboards, Search filters | Create and manage your own search filters. |
| Share your own Views, Dashboards, Search filters | Share search filters that you created. |

> Note Users are not granted permissions directly, but through global roles and responsibilities.

# Search filters

You can create a search filter from scratch. When you create a search filter, it exists only for you. However, with the correct global permission, you can share the filter with other users.

By default, no search filter is applied.

# Create a search filter

You can create a search filter from scratch.

> Note When you create a search filter, the sorting and search fields are part of the saved configuration.

## Create a search filter via the save icon

1. Perform a search via the **Search** field or Search widget.
   » The Search page appears.
2. Optionally:
   a. Navigate and refine the search results by selecting from the available facets.
   b. Sort the search results.
   c. Select the fields in which to search.
3. When you've achieved the desired results, click 💾.
4. Enter a name and description of the filter.
5. Select with whom you want to share the filter.
   - Select **Public**, to share the filter with all users.
   - Select **Private**, to share the filter with no one. This is the default setting.
   - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.
6. Click **Save**.
   » The new filter is added to your list of filters.

## Create a search filter via the "Add a new search filter" option

1. Perform a search via the **Search** field or Search widget.
   » The Search page appears.
2. Click **No search filter** ▼, and then select **Add a new search filter**.
3. Enter a name and description of the filter.
4. Select with whom you want to share the filter.
   - Select **Public**, to share the filter with all users.
   - Select **Private**, to share the filter with no one. This is the default setting.

    - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.
5. Click **Save**.
   » The new filter is added to your list of filters.

## Save a copy of a search filter

You can save a copy of any search filter, and then edit it to suit your needs.

### Steps

1. Perform a search via the **Search** field or Search widget.
2. On the Search page, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click 🖫, and then select **Save As**.
4. Enter a name and description of the filter.
5. Select with whom you want to share the filter.
    - Select **Public**, to share the filter with all users.
    - Select **Private**, to share the filter with no one. This is the default setting.
    - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.
6. Click **Save**.
   » The new filter is added to your list of filters.

> Note When you save a copy of the search filter, the sorting and search fields are part of the saved configuration, but the search text is not.

## Edit a filter's name and description

You can edit the names and descriptions of the search filters you've created.

### Steps

1. Perform a search via the **Search** field or Search widget.
2. On the Search page, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click ✎.
   » The **Edit name and description** dialog box appears.
4. Edit the name and/or the description.
5. Click **Save**.

## Edit a search filter

You can edit an existing search filter to suit your needs.

### Steps

1. Perform a search via the **Search** field or Search widget.
2. On the Search page, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. In the Facet pane, reconfigure the available facets to achieve the desired filter results.
4. Click 🖫, and then select **Save**.

## Share a search filter

Your permissions determine whether or not you can share search filters, and if so, whether you can share only filters you've created or also the filters that others have created and shared with you.

### Steps

1. Perform a search via the **Search** field or Search widget.
2. On the Search page, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click ⋖.

4. Select with whom you want to share the filter.
    - Select **Public**, to share the filter with all users.
    - Select **Private**, to share the filter with no one. This is the default setting.
    - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.
5. Click **Save**.

## Delete a search filter

If you have the SysAdmin global role, you can delete your own search filters and those that other users have created and shared with you. If you don't have the SysAdmin global role, you can only delete search filters that you've created.

### Steps

1. Perform a search via the **Search** field or Search widget.
2. On the Search page, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click 🗑.
4. Click **Delete filter** to confirm.

# Text editors

Text editors in Collibra Data Intelligence Cloud allow you to enter, format and edit text.

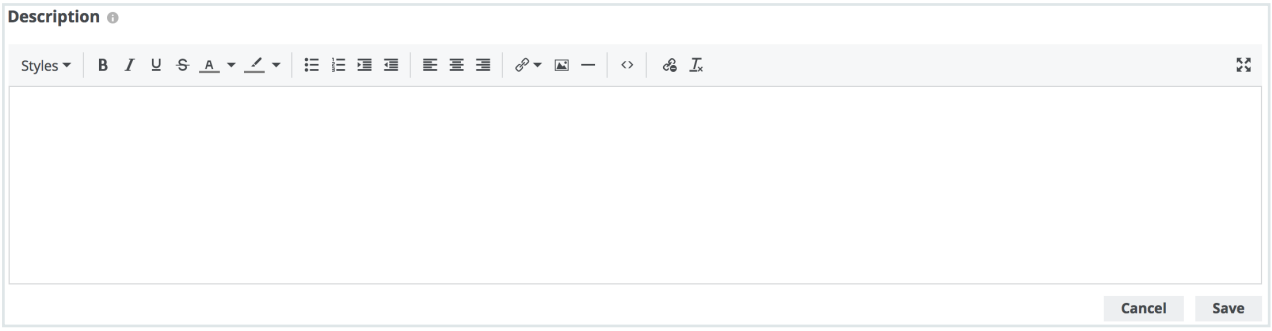
The following text editors are available throughout Collibra:

- Standard text editor.
- Mini text editor.
- Table text editor.
- Plain text editor.

## Standard text editor

The standard text editor is a rich text formatting editor. You use this editor on text widgets and asset pages to edit text attributes such as Definition and Note. It allows HTML

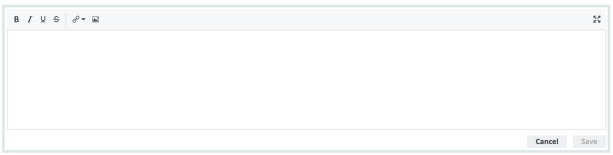
formatting and styling. For advanced formatting, you can use the toolbar or enter HTML code after clicking <> in the toolbar.




> Warning
> The standard text editor supports most HTML elements, inline CSS styling and table (< t >) structures. However, this means an attacker could potentially execute an XSS attack by injecting malicious HTML. However, when you save, the following HTML elements are removed for security reasons:
>
> - script (including JavaScript)
> - svg
> - frame
> - frameset
> - iframe
> - any event handlers
>
> Text attributes are always protected, but you can also enable this for text widgets in Collibra Console. For more information, see the Troubleshooting section.

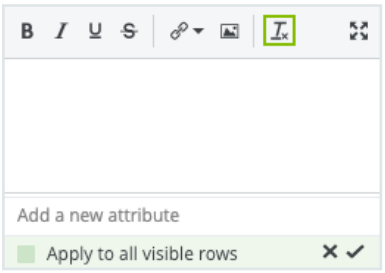
## Mini text editor

You use the mini text editor typically for comments, ratings and so on. The toolbar offers basic formatting options.



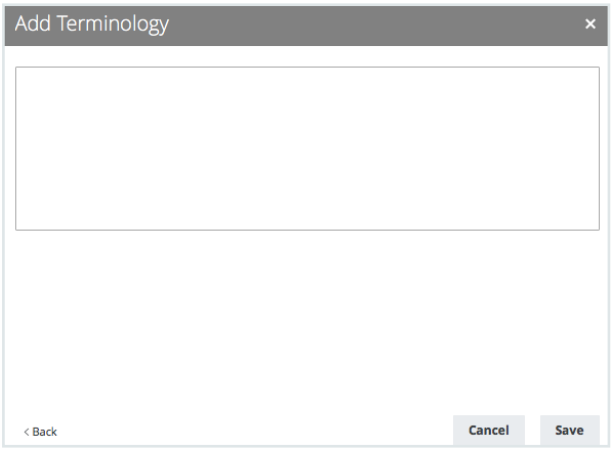
## Table text editor

The table text editor allows you to edit and format text in asset tables, The toolbar contains all the editing options of the mini text editor toolbar, plus a clear formatting option.




## Plain text editor

The plain text editor allows you to enter text without formatting.




## Use of text editors

The following table identifies where the various text editors and field are used.

| Editor | Location of use |
| --- | --- |
| Standard text editor | • Dashboard Text widget<br>• Community, domain and asset pages |

| Editor | Location of use |
|---|---|
| Mini text editor | • Comments<br>• Ratings |
| Table text editor | • Table text fields |
| Plain text editor | • Add characteristic option of an asset |

## Keyboard shortcuts

For the standard text editor, you can use the following keyboard shortcuts to edit or format your text:

| Action | PC | Mac |
|---|---|---|
| Bold | Ctrl + B | Command + B |
| Italic | Ctrl + I | Command + I |
| Underline | Ctrl + U | Command + U |
| Select all | Ctrl + A | Command + A |
| Redo | Ctrl + Y / Ctrl + Shift + Z | Command + Y / Command + Shift + Z |
| Undo | Ctrl + Z | Command + Z |
| Header 1 | Alt + Shift + 1 | Control + Option + 1 |
| Header 2 | Alt + Shift + 2 | Control + Option + 2 |
| Header 3 | Alt + Shift + 3 | Control + Option + 3 |
| Header 4 | Alt + Shift + 4 | Control + Option + 4 |

| Action | PC | Mac |
|---|---|---|
| Header 5 | Alt + Shift + 5 | Control + Option + 5 |
| Header 6 | Alt + Shift+6 | Control + Option + 6 |
| Paragraph | Alt + Shift + 7 | Control + Option + 7 |
| Keyboard focus to toolbar | Alt + F10 | Option + F10 |
| Toggle fullscreen | Alt + Shift + F | Command + Shift + F |

# Activities

An activity is a process that Collibra runs in the background. While the process is running, you can use Collibra as usual. Activities are, for example, importing and exporting assets, or registering a data source and profiling data.

## Activities lists

Activities shows a list of the most recent or ongoing activities in Collibra Data Intelligence Cloud. Every time you start a new activity, it is shown in the Activities list.

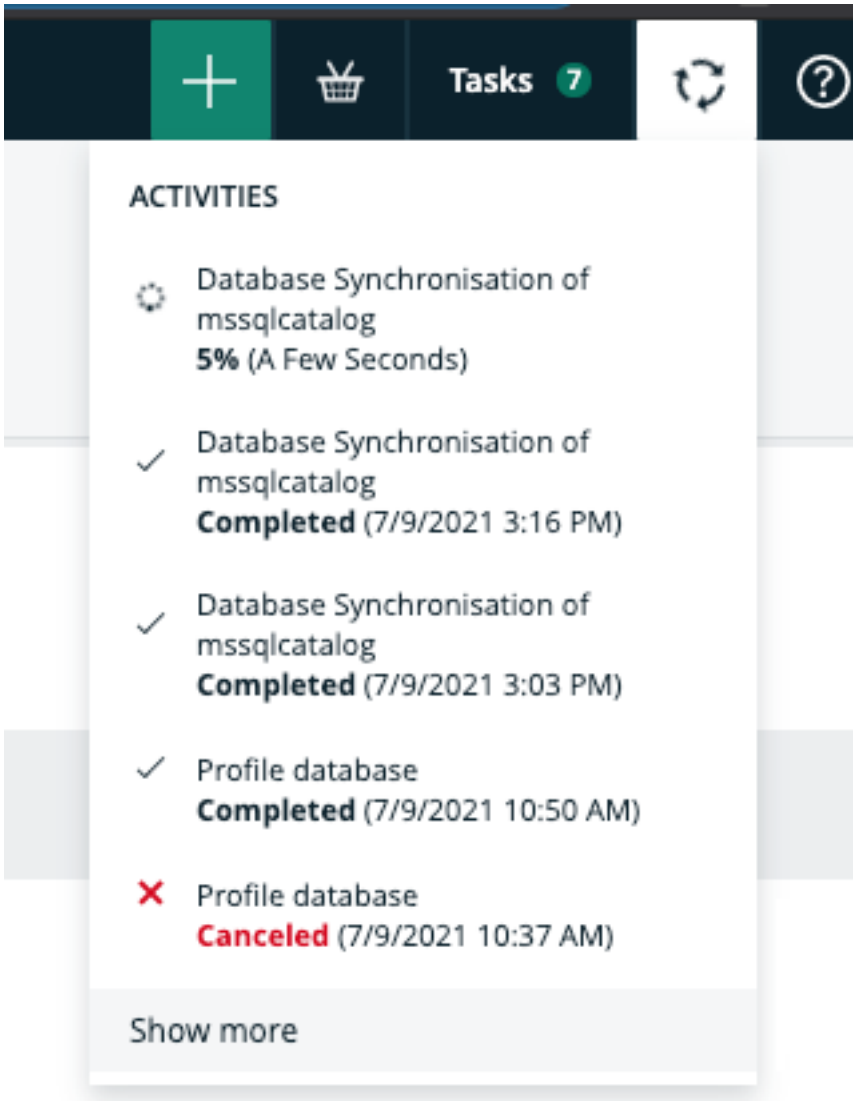
Activities lists show more information about activities, for example the creation date and the status.

There are two types of Activities lists:

- The Activities list in the main menu: A limited list with only the most recent and ongoing activities.
- The Activities list on your profile page: A list of all activities that you ever started.

## Activities list in the main menu

Activities list in the main menu only shows the most recent and ongoing activities. You can open the Activities list in the main menu by clicking ⟳. If there are activities still running, the wheel is spinning.



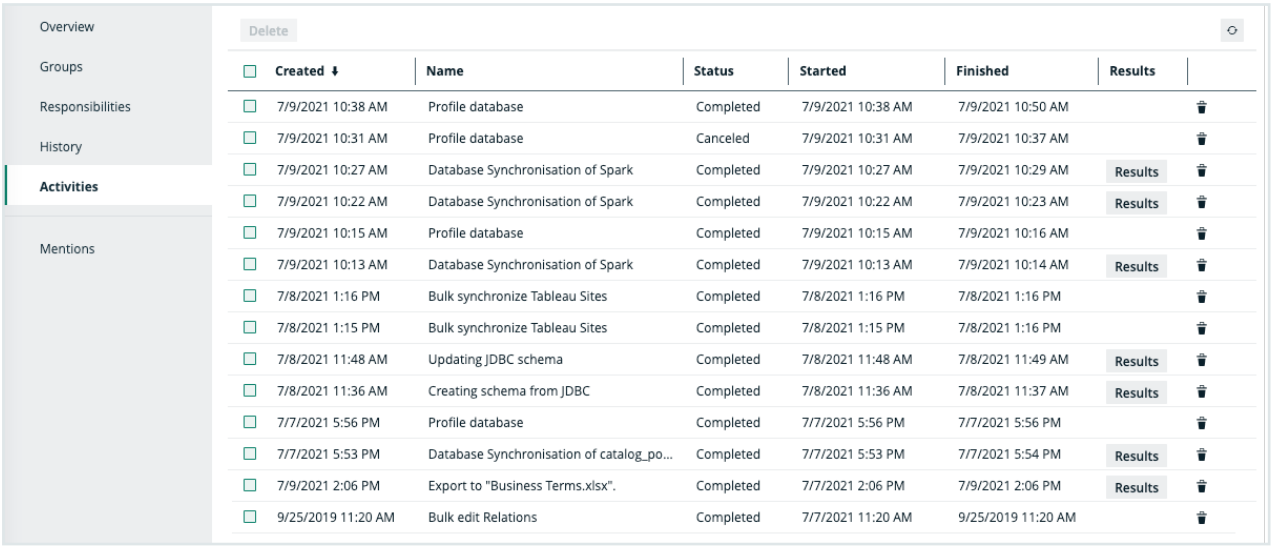

Click **Show more** to go to the Activities list on your profile page.

## Activities list on your profile page

The Activities list on your profile page contains a table with all activities. It also shows more information about each activity, for example the creation date, name, status, start, finish

and result.

You can open the Activities list by clicking **Show more** in the Activities list on the main menu or by opening your profile page and clicking the **Activities** tab.




| Column | Description |
|---|---|
| Created | The date and time that you triggered the activity. |
| Name | The name of the activity. |
| Status | The status of the activity. The following statuses can be shown:<br>• **Canceled** for canceled activities.<br>• **Canceling** for activities that are in the process of being canceled.<br>• **Completed** for completed activities.<br>• **Error** for failed activities.<br>• **Running** for activities that are still running.<br>• **Waiting** for activities that are not started yet. |
| Started | The date and time that the activity started. |
| Finished | The date and time that the activity finished. |

| Column | Description |
|---|---|
| Results | If available, a button to see the result of the activity. Depending on the activity, the result can be different.<br><br>Example If you exported assets and click **Results** in the Activities list, you download the export results. If you registered a data source in Data Catalog, a dialog box shows more information about the registration job. |
| <Column to delete an activity> | A button ( 🗑 ) to delete the activity. |

# Profile page

The profile page of a user contains all relevant information about that user.

As a user, you can only open your own profile page. As an administrator, you can also open other users' profile page.

The view bar contains some basic information about the user, such as the name, license type, required license type and email address.

The profile page contains the following tab pages:

| Tab page | Description |
|---|---|
| Overview | The overview page contains general information such as the user's account information, mail notification settings and contact information. |
| Groups | The groups page contains the user groups of which the user is a member, and allows you to add the user to or remove the user from groups. |

| Tab page | Description |
|---|---|
| Responsibilities | The responsibilities page contains the responsibilities that are assigned to the user. |
| History | The history page contains the history of the user's actions. |
| Activities | The activities pages contains the list of your activities. |
| Mentions | The mentions page contains a list of all comments in which you are mentioned. |

# Open a profile page

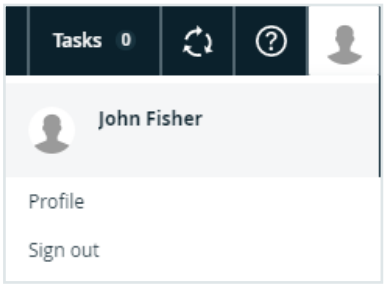
As a regular user, you can open your own profile page. Administrators can open everybody's profile page.

## Prerequisites

If you want to open the profile page of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Open your own profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.



## Open another user's profile page

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. Click the username of the user whose profile you want to open.

# Edit the user account settings

As a regular user, you can edit the settings of your own user account on your profile page. As an administrator, you can also edit other users' settings.

## Prerequisites

If you want to edit the user account settings of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the **Account** section, click .

3. Enter the required information.

| Field | Description |
| --- | --- |
| Username | Enter the username.<br><br>**Collibra username requirements**<br>◦ General requirements:<br>▪ Uniqueness: Duplicate username are not allowed, regardless of case<br>> Example `usernamecase` and `UserNameCase` are considered duplicate<br>▪ No leading or trailing spaces<br>▪ No empty usernames<br>▪ Maximum of 255 characters<br>◦ Character limitations: Usernames may only contain characters in the following Unicode categories:<br>▪ Letter<br>▪ Number<br>▪ Symbol<br>▪ Punctuation<br>▪ Non-spacing marks |
| Application Language | Choose the interface language.<br><br>As an administrator, you can add or edit interface languages. |

4. Click **Save**.

## Edit the contact information

As a regular user, you can edit contact information of your own user account on your profile page. As an administrator, you can also edit other users' contact information.

> Note You can also add new contact information.

## Prerequisites

If you want to edit the contact information of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Edit contact information from a profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. Do one of the following:
   - In the **Contact** section, click ✎.
     Do this to edit the existing fields.
   - In the **Contact** section, click **Add**.
     Do this to add a new field, or edit the existing fields.

   > Note If you edit the email address, a notification email is sent to the old email address.

3. Edit the contact information.
4. Click **Save**.

## Edit contact information from the user table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. Do one of the following:
   - Double-click a cell in the **E-mail** column.
   - Hover your mouse over a cell in the **E-mail** column and click ✎.

   > Note If you edit the email address, a notification email is sent to the old email address.

4. Click in the field and type the new email address.
5. Click ✔.

## Edit the email notification settings

You can edit the email notification settings for your own user account. As an administrator, you can also edit other users' notification settings.

If you enable notifications, you will be notified via email whenever changes are made to assets for which you have been assigned a responsibility.

> Note Only the 20 most recent changes for a given asset are shown in the notification email.

### Prerequisites

If you want to edit the email notification settings of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the **Notifications** section, click ✎.

3. Select or clear the necessary check boxes.

| Field | Explanation |
| --- | --- |
| Notify me of content updates | Specify whether or not you want to receive email notifications.<br><br>If you select this option, email notifications will be sent to the email address shown in the Contact section of your Profile page, at the specified frequency. |
| Days of the week | Receive email notifications only on the days you specify. |
| Monthly | Receive a summary email once a month. |

4. Click **Save**.

# Edit the maintenance announcement settings

You can edit the maintenance announcement settings on your profile page.

If you enable maintenance announcements, you receive notifications in Collibra about scheduled maintenance.

## Prerequisites

Usage statistics are enabled. Contact Collibra support if this is not the case.

## Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the **Scheduled Maintenance Notifications** section, click ✎.
3. Select or clear the check box.
4. Click **Save**.

# Edit user details

You can edit your own profile such as the application language, email notifications and contact email address on your profile page. You can also reset your password, you receive instructions to do so by email.

## Prerequisites

If you want to edit the user details of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the upper-right corner, click **Edit**.
   » The **Edit** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| First name | Enter the first name of the user. |
| Last name | Enter the last name of the user. |
| Email | Enter the email address on which the user receives all communication from Collibra, such as the registration mail and notifications. |
| License type | Choose the license type of the user. |

4. Click **Save**.

# Edit a user's license type

As an administrator, you can edit a user's license type via their profile page or **Users** tab page.

## Prerequisites

If you want to edit the license type of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Edit a user's license type via the profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the upper-right corner, click **Edit**.
   » The **Edit** dialog box appears.
3. In the **License** field, choose the license type of the user.
4. Click **Save**.

## Edit one or more users' license type via the Users tab page

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Users**.
   » The user table appears.
3. If required, add the **License** column.
4. Edit the cells in the **License** column.

# Asset functionalities

In this section, you find more information about the general functionalities on asset pages such as diagrams, relations and ratings.

## In this chapter

# Asset pages

An asset page contains information about one asset. An asset is a resource that is stored and managed in Collibra Data Intelligence Cloud and owned or controlled by the customer. An asset is the capital building block by which to capture information (in terms of characteristics).

## Identical asset names per domain

'Identical asset names per domain' is a feature that allows you to specify a regular **name** and a unique **full name** for an asset. If 'identical asset names per domain' is enabled for an asset type, then multiple assets of that asset type can have an identical name in a domain.

> Note All assets must have a unique full name per domain, regardless of whether or not 'identical asset names per domain' is enabled.

Technically, all assets have two names:

- A name: the regular name that is used by default in most places in the UI, such as the asset page title bar, preview panes, diagrams, search results, automatic hyper-links and relation tables.
- A full name: the fully qualified name that must be unique within a domain. It is mainly used for technical operations (through the API) and when you edit an asset whose asset type allows identical names per domain.

By default, the name of an asset is the same as its full name. Collibra Data Intelligence Cloud automatically synchronizes them, so users don't notice the difference. However, for some asset types, it may be beneficial to allow users to edit the name and full name independently of one another, and have multiple assets with an identical name in one domain. This has the following benefits:

- You can use a shorter or simpler name for an asset that has a long or complex full name. This is particularly useful in Collibra Data Catalog.

- You can use the same name for multiple assets in one domain. Keep in mind that the full name still has to be unique for each asset in a domain.

## Affected features

- The API is backward-compatible with regard to this feature, meaning the behavior of the API is not affected by whether or not 'identical names per domain' is enabled.
- Drop-down fields
  - In asset drop-down fields, you can search for an asset based on the name or the full name.
    This also includes the drop-down menus to:
    - Add manual hyperlinks to an asset in a text attribute.
    - Add (complex) relations on an asset page and in assets table.
    - Filter relations on an asset table.
    - Add data to a data set.
- Tables
  - The **Name** column contains the name. This column cannot be removed because it is used by hierarchy.
  - The **Full name** column is a regular column that is optional.
  - The relation columns contain asset names.
  - You can use both the name and full name as:
    - An advanced filter.
    - A sort option.
    - A column filter.
  - The preview pane shows the asset's name.
  - Editing cells:
    - If the asset type allows identical asset names per domain, you can edit both the name and full name of an asset, independently of one another.
    - If the asset type does not allow identical asset names per domain, editing either the name or full name changes both values.
    - Bulk editing the **Name** and **Full name** column is not possible.
- Tiles
  - The name is used in tile header.
  - **Full name** is a regular field. It can be moved, hidden and you can edit field name.
  - Name and full name are both available as a sort option.

- Diagrams
  - The default node name is the asset name. You can also use the full name (or any other property) as node name.
  - You can use **Name** and **Full Name** as a node overlay.
  - The preview shows the name of an asset.
- Export
  - The name is always exported to the **Name** column.
  - If you select **Add the characteristics needed for reimport**:
    - The full name is always exported (to uniquely identify each asset during re-import).
    - Relations are exported based on the full name: relation name [role/co-role asset type] → Full Name.
  - If you do not select **Add the characteristics needed for reimport**:
    - If the **Full name** column is added to the view, it is exported to the **Full name** column.
    - Relations are exported based on the name: relation name [role/co-role asset type] → Name.
- Import
  - Full name has to be mapped, unless you map the 'ID' column (only available in special view 'All Characteristics').
  - Full name will auto-map to the **Full name** column.
  - When you import a file that was exported pre-5.4, you have to manually map the **Full name** column of the view to the **Name** column of the import file.
  - Name will auto-map to the **Name** column.
  - Name does not have to be mapped.
  - Complex relations:
    - Relation asset full name auto-maps to **relation name [role/co-role asset type] → Full Name**.
    - When you import a file that was exported pre-5.4, you have to manually map the **Full name** column of the view to the **relation name [role/co-role asset type] → co-role/role asset type** column of the import file.
    - Relation asset display name should not be mapped.
- Search
  - Basic search: searches for assets by name.
  - Advanced search: searches for assets by name, when name is in the search criteria.

    - Currently, you can not define a search filter for the 'full name' field.
    - In the search results, the **Name** column shows the asset name.
    - The preview shows the asset name.
- Validation rules
    - To refer to the name in your validation rule scripts, use `displayName`.
    - To refer to the full name in validation rule script, use `fullName`.
    - Validation rules are backward compatible with regard to this feature, meaning a validation rule written prior to 5.4, will behave the same in 5.4.

## Actions

- Administrators can enable or disable identical asset names per domain for an asset type.

  > Note If identical asset names per domain has been enabled for an asset type and there are multiple assets in the domain with identical names, the feature can still be disabled. Collibra will simply show the full name of such assets, throughout the UI.

- You can edit the asset name and full name.
- You can add the **Full name** field to a table or tile.

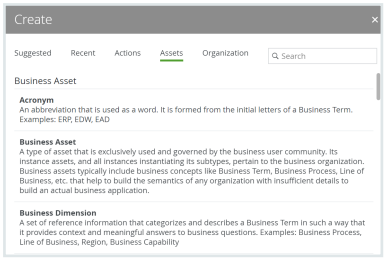
# Create an asset

In Collibra Data Intelligence Cloud, asset types have assigned domain types. You can only add assets to domains whose domain type is assigned to the asset type of the asset.

## Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the main menu, click the **Create** (+) button.
   » The **Create** dialog box appears.

3. Click the **Assets** tab.



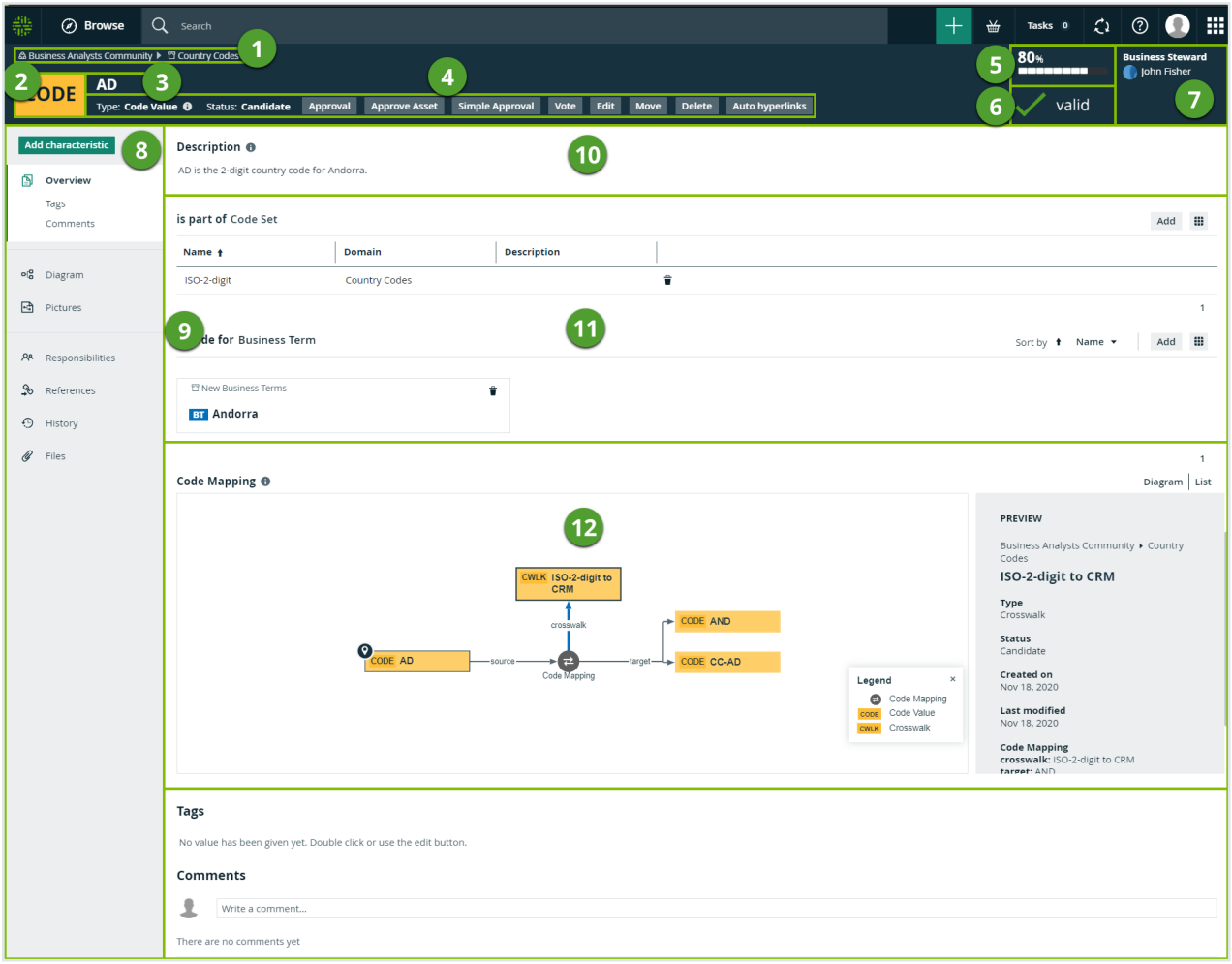

4. Click an asset type from the list.
   » The **Create Asset** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Type | The asset type of the assets that you are creating. |
| Domain | The domain to which the new assets will belong. You can only create a asset type in any domain of a domain type that is assigned to a selected asset type. |
| Name | The names of the new assets.<br><br>Tip<br>You can create multiple assets in one go.<br>To do this, press `Enter` after typing a value and then type the next. Depending on the settings, asset names may have to be unique in their domain. If you type a name that already exists, it will appear in strike-through style. |

6. Click **Create**.
   » A message at the top-right of your screen confirms that one or more assets are created.

## Asset page overview

The asset page provides an overview of information related to an asset, based on its asset type's assignment. The assignment determines which and how many elements are by default added to the asset page.

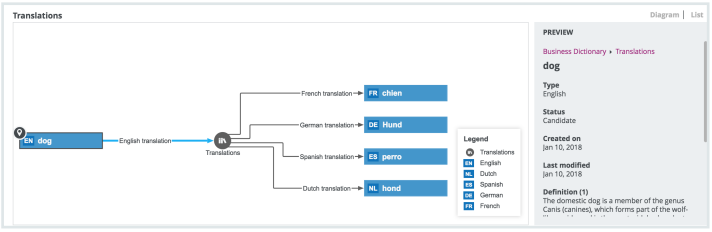



| Number | Section | Description |
|---|---|---|
| 1 | Breadcrumbs | The breadcrumbs of the current asset. |
| 2 | Asset type representation | The icon or abbreviation of the asset type.<br><br>Tip You can edit how an asset type is represented. |
| 3 | Asset name | The name of the asset. |
| 4 | Resource toolbar | Additional actions, such as editing the asset and starting a workflow. |

| Number | Section | Description |
|---|---|---|
| 5 | Articulation score | The articulation score of the asset.<br><br>Note If there are no articulation score rules assigned to the asset, the asset page does not show an articulation score. |
| 6 | Asset validation | The validation result of the validation rules assigned to the asset. |
| 7 | Stewards | The stewards of the asset.<br><br>You can see up to three stewards on the asset page. If there are more, click **See all <number>** to see them on the **Responsibilities** page. |
| 8 | Tab pane | A collapsible pane that allows you to navigate to other pages of the asset and add characteristics as specified in the assignment. |

| Number | Section | Description |
| --- | --- | --- |
| 9 | Editor | The currently selected page, in this case the **Overview** page, which contains all the attributes, relations and complex relations that have been defined for the asset and whose type was added to the relevant assignment.<br><br>If a certain attribute type has been assigned as mandatory for this asset type, this attribute is shown in the asset's **Overview** tab, even if no attribute value has been defined yet.<br><br>Tip If you want to copy and paste text from other sources into a text field, we recommend that you click <>, and then paste the text into the **Show source code** field. This will remove any unwanted formatting or tagging of the text. For detailed information, see the knowledge base article on Collibra Support Portal. |

| Number | Section | Description |
|---|---|---|
| 10 | Attribute | An attribute is a characteristic of an asset containing information about the asset. This information can be in various formats, depending on the attribute kind:<br>• True/False: A binary choice.<br>• Date: The format of the date depends on the user's locale settings.<br>• Multiple selection: One or more values from a predefined list.<br>• Number: If this is a fraction, the decimal separator shown in the UI is decided by the user's locale settings, usually a comma or a dot.<br>• Selection: One value from of a predefined list.<br>• Text: which may also include images and hyperlinks.<br>Note If a text attribute does not have any value, it shows the message **No value has been given yet**. If a text attribute has an empty value, it shows a message **Empty value**. Text attributes can have up to 100.000 bytes. |
| 11 | Relation | Relations of the same type are shown in a list. You can show the list in different display modes:<br>• Table: You can also choose the columns, or sort and filter their content.<br>• Tiles: You can choose which fields to display and determine how many tiles to display. |

| Number | Section | Description |
|---|---|---|
| 12 | Complex relation | Complex relations of the same type can be shown in different ways:<br>• Table: You can show related assets in a table. This is the default way. You can edit this table in the same way you can any other table.<br>• Diagram: You can show complex relations as a diagram to visualize the underlying relations. You can scroll through the diagram and move nodes, but you cannot edit the diagram as extensively as you can via the diagram view.<br>Example<br>  |

## Relation views

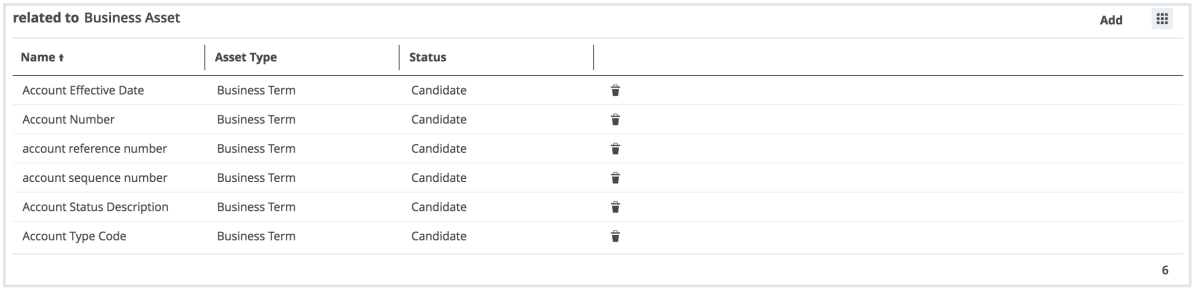
The asset page provides an overview of information related to an asset, based on its asset type's assignment. This includes the relations and complex relations.

> Warning You only see complex relations if you have permission to view all assets of the complex relation.

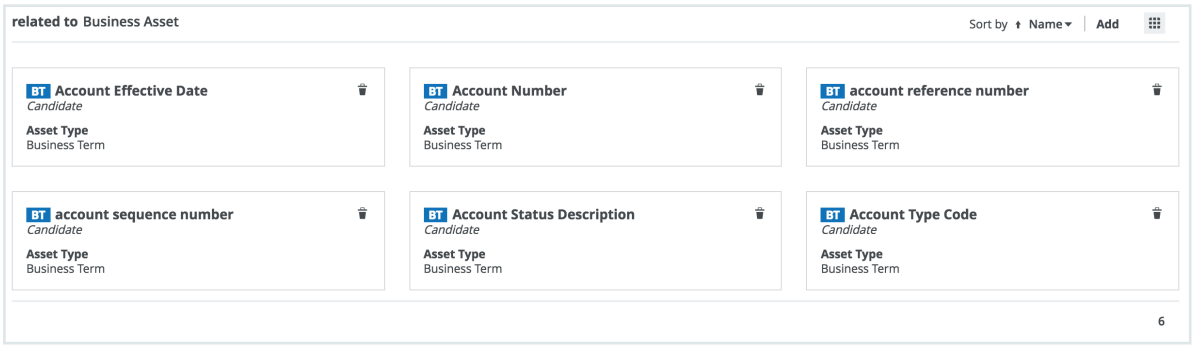
### Display modes

All relations and complex relations of the same type are displayed in a separate section with the relation type as section title. Each section can be shown in different display modes:

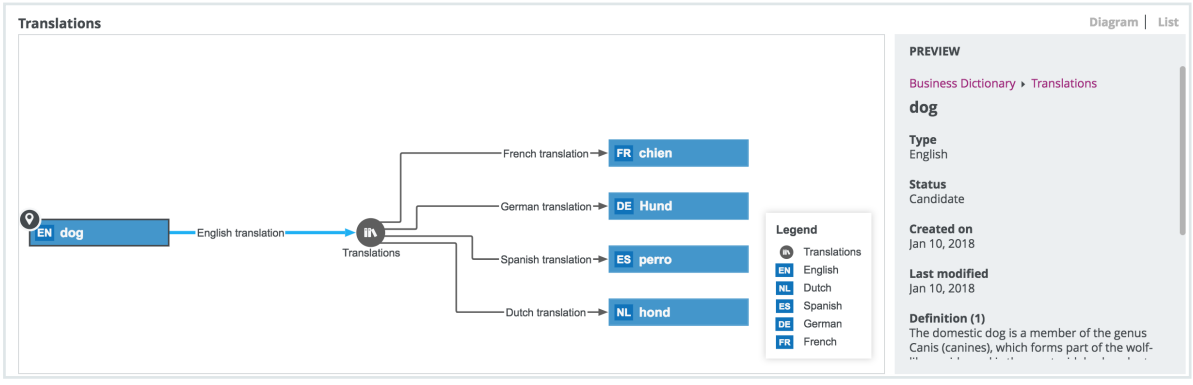
- Table: By default, related assets are shown in a table. You can edit this table in the same way you can any other table.
  Example




- Tiles: You can show the related assets as a set of tiles. You can edit this set of tiles in the same way you can any other set of tiles.
  Example




- Diagram: You can show complex relations as a diagram to visualize the underlying relations. You can scroll through the diagram and move nodes, but you cannot edit the diagram as extensively as you can via the diagram view.
  Example



### Saving and sharing the layout of relation views

For each relation type and complex relation type, there is a default layout of the relation view. Similar to regular views, you can change most elements of the layout:

- The fields.
- The display mode: table or tiles.
- The sorting and sort direction.
- The tiles or rows per page.
- If the assets are shown in table display mode, the width of each column.

If you make changes, Collibra automatically saves the layout.

If you have the **Manage shared Views, Dashboard and Search Filter** global permission, you can also override the layout of this relation type or complex relation type for all users by clicking ⠿ → **Save for all users**. The previous layout of other users is lost. However, all users can still make fresh changes.

## Print an asset page or save as a PDF file

You can print an asset page or save it as a PDF file to share information about an asset outside of Collibra Data Intelligence Cloud, for example for audit, reporting or security purposes.

> Note
> Not all information is printed:
>
> - Relations are represented by a simple list, with the relation type as the header. Only the names of the related assets are printed in the list. The other fields of the related assets, for example their domains and asset types, are not printed. Additionally, only the related assets of the first page of the relation table are printed. The other related assets are not printed.
> - Complex relations are not printed.
> - Comments are not printed.
> - Attachments are not printed.
> - Attributes that were never given a value (except for tags) are not printed.

### Steps

1. Open an asset page.
2. In the resource toolbar, click .
   » The print preview and the **Print** dialog box appear.
3. If required, change the print settings, such as the printer or paper size.
4. Depending on your browser and print settings, click **Save** or **Print**.

## Edit an asset

You can edit an asset to suit your needs.

### Steps

1. Open an asset page.
2. In the resource toolbar, click **Edit**.

3. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the asset.<br><br>If identical asset names per domain is disabled for this asset type, the name of an asset must be unique in its domain. If it is disabled and you type an existing name, an error message will appear below this field. |
| Full name | The full name of the asset. The full name of an asset must always be unique in its domain.<br><br>This field is only available if identical asset names per domain is enabled for this asset type.<br><br>Warning Do not edit the full name of assets needed to synchronize or refresh data sources. This may cause unexpected results and break the synchronization or refresh process. |
| Type | The asset type. |
| Status | The status of the asset. |

4. Click **Save**.

## Edit the name of an asset

You can edit the name of an asset in different ways:

- From the asset page.
- By editing the name cell in an asset view.

Tip If Identical asset names per domain is enabled for the relevant asset type, you can also edit the asset's full name.

## Edit the name of an asset from the asset page

1. Open an asset page.
2. In the resource toolbar, click **Edit**.
   » The **Edit <asset name>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the asset.<br><br>If identical asset names per domain is disabled for this asset type, the name of an asset must be unique in its domain. If it is disabled and you type an existing name, an error message will appear below this field. |
| Full name | The full name of the asset. The full name of an asset must always be unique in its domain.<br><br>This field is only available if identical asset names per domain is enabled for this asset type.<br><br>Warning Do not edit the full name of assets needed to synchronize or refresh data sources. This may cause unexpected results and break the synchronization or refresh process. |

4. Click **Save**.

# Identical asset names per domain

'Identical asset names per domain' is a feature that allows you to specify a regular **name** and a unique **full name** for an asset. If 'identical asset names per domain' is enabled for an asset type, then multiple assets of that asset type can have an identical name in a domain.

Note All assets must have a unique full name per domain, regardless of whether or not 'identical asset names per domain' is enabled.

Technically, all assets have two names:

- A name: the regular name that is used by default in most places in the UI, such as the asset page title bar, preview panes, diagrams, search results, automatic hyperlinks and relation tables.
- A full name: the fully qualified name that must be unique within a domain. It is mainly used for technical operations (through the API) and when you edit an asset whose asset type allows identical names per domain.

By default, the name of an asset is the same as its full name. Collibra Data Intelligence Cloud automatically synchronizes them, so users don't notice the difference. However, for some asset types, it may be beneficial to allow users to edit the name and full name independently of one another, and have multiple assets with an identical name in one domain. This has the following benefits:

- You can use a shorter or simpler name for an asset that has a long or complex full name. This is particularly useful in Collibra Data Catalog.
- You can use the same name for multiple assets in one domain. Keep in mind that the full name still has to be unique for each asset in a domain.

## Affected features

- The API is backward-compatible with regard to this feature, meaning the behavior of the API is not affected by whether or not 'identical names per domain' is enabled.
- Drop-down fields
  - In asset drop-down fields, you can search for an asset based on the name or the full name.
    This also includes the drop-down menus to:
    - Add manual hyperlinks to an asset in a text attribute.
    - Add (complex) relations on an asset page and in assets table.
    - Filter relations on an asset table.
    - Add data to a data set.
- Tables
  - The **Name** column contains the name. This column cannot be removed because it is used by hierarchy.
  - The **Full name** column is a regular column that is optional.
  - The relation columns contain asset names.

    - You can use both the name and full name as:
        - An advanced filter.
        - A sort option.
        - A column filter.
    - The preview pane shows the asset's name.
    - Editing cells:
        - If the asset type allows identical asset names per domain, you can edit both the name and full name of an asset, independently of one another.
        - If the asset type does not allow identical asset names per domain, editing either the name or full name changes both values.
        - Bulk editing the **Name** and **Full name** column is not possible.
- Tiles
    - The name is used in tile header.
    - **Full name** is a regular field. It can be moved, hidden and you can edit field name.
    - Name and full name are both available as a sort option.
- Diagrams
    - The default node name is the asset name. You can also use the full name (or any other property) as node name.
    - You can use **Name** and **Full Name** as a node overlay.
    - The preview shows the name of an asset.
- Export
    - The name is always exported to the **Name** column.
    - If you select **Add the characteristics needed for reimport**:
        - The full name is always exported (to uniquely identify each asset during re-import).
        - Relations are exported based on the full name: relation name [role/co-role asset type] → Full Name.
    - If you do not select **Add the characteristics needed for reimport**:
        - If the **Full name** column is added to the view, it is exported to the **Full name** column.
        - Relations are exported based on the name: relation name [role/co-role asset type] → Name.
- Import
    - Full name has to be mapped, unless you map the 'ID' column (only available in special view 'All Characteristics').

    - Full name will auto-map to the **Full name** column.
    - When you import a file that was exported pre-5.4, you have to manually map the **Full name** column of the view to the **Name** column of the import file.
    - Name will auto-map to the **Name** column.
    - Name does not have to be mapped.
    - Complex relations:
        - Relation asset full name auto-maps to **relation name [role/co-role asset type] → Full Name**.
        - When you import a file that was exported pre-5.4, you have to manually map the **Full name** column of the view to the **relation name [role/co-role asset type] → co-role/role asset type** column of the import file.
        - Relation asset display name should not be mapped.
- Search
    - Basic search: searches for assets by name.
    - Advanced search: searches for assets by name, when name is in the search criteria.
    - Currently, you can not define a search filter for the 'full name' field.
    - In the search results, the **Name** column shows the asset name.
    - The preview shows the asset name.
- Validation rules
    - To refer to the name in your validation rule scripts, use `displayName`.
    - To refer to the full name in validation rule script, use `fullName`.
    - Validation rules are backward compatible with regard to this feature, meaning a validation rule written prior to 5.4, will behave the same in 5.4.

## Actions

- Administrators can enable or disable identical asset names per domain for an asset type.

  > Note  If identical asset names per domain has been enabled for an asset type and there are multiple assets in the domain with identical names, the feature can still be disabled. Collibra will simply show the full name of such assets, throughout the UI.

- You can edit the asset name and full name.
- You can add the **Full name** field to a table or tile.

# Move an asset to another domain

You can move a single asset to a different domain.

> Note If an asset is moved to a domain in another scope, its assignment of its assets may change.

## Move a single asset from the asset page

1. Open an asset page.
2. In the resource toolbar, click **Move**.
   » If you cannot see the Move button then click More → Move.
3. In the **Move** dialog box, click the new domain.
4. Click **Save**.

## Move multiple assets from a domain page

1. Open a domain page.
2. In the tab pane, click **Assets**.
3. Select the assets you want to move.
4. In the action toolbar, click **Move**.
5. In the **Move selected assets** dialog box, select the new domain.
6. Click **Save**.

## Move multiple assets from the global view

1. Open the global view.
2. Select the check boxes in front of the assets you want to move.
3. In the action toolbar, click **Move**.
4. In the **Move selected assets** dialog box, click the new domain.
5. Click **Save**.

# Delete an asset

This section describes how to delete an asset in table display mode and tile display mode.

Tip You can also delete multiple assets at once.

Warning Deletion is permanent, you cannot undo it. If you delete a configuration asset of a data source, you also delete its configuration. Register your data source again to create a new configuration asset or contact support for more information.

## Via an asset page

1. Open an asset page.
2. Do one of the following:
   - In the resource toolbar, click **More** > **Delete**.
   - In the resource toolbar, click **Actions** > **Delete**.
3. Click **Delete**..

## Delete an asset from a view

### In table display mode

1. Open a view in table display mode.
2. If necessary, filter using a table filter or a column filter to easily find the asset.
3. Select the check box in front of the asset you want to delete.
4. In the action toolbar, click **Delete**.
   » The **Delete assets** dialog box appears.
5. Click **Delete**.

### In tile display mode

1. Open a view in tile display mode.
2. If necessary, filter using a tile filter or a field filter to easily find the asset.
3. Select the tile you want to delete.
4. In the action toolbar, click **Delete**.
   » The **Delete assets** dialog box appears.
5. Click **Delete**..

## Delete multiple assets

This section describes how to delete multiple assets at once, in table display mode and tile display mode.

> Note Deletion is permanent, you cannot undo it.

### Delete multiple assets in table display mode

1. Open a table.
2. If necessary, filter the table using a table filter or a column filter.
3. Select the check boxes in front of the assets you want to delete.

   > Tip You can select all the visible assets at once by clicking the check box next to the **Name** column header.

4. In the action toolbar, click **Delete**.
   » The **Delete assets** dialog box appears.
5. Click **Delete**.

### Delete multiple assets in tile display mode

1. Open a set of tiles.
2. If necessary, filter the tiles using a tile filter or a field filter.
3. Select the tiles you want to delete.
4. In the action toolbar, click **Delete**.
   » The **Delete assets** dialog box appears.
5. Click **Delete**.

# Characteristics

Characteristics is a generic term for attributes, relations and complex relations.

## Add characteristics to an asset

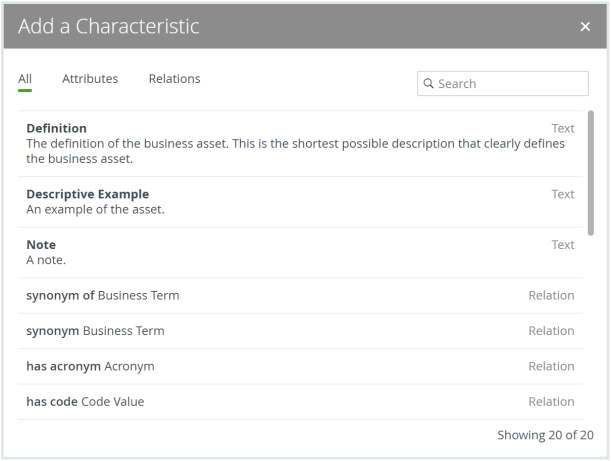
You can add a characteristic to an asset to add additional information about it.

## Prerequisite

You have assigned the characteristic type to the relevant assignment of the asset's type.

## Steps

1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
   » The **Add a characteristic** dialog box appears.




3. In the **Add a Characteristic** dialog box, do one of the following:

| If ... | then ... |
|---|---|
| You want to add an attribute: | Click **Attributes**. |
| You want to add a relation: | Click **Relations**. |
| You want to filter the characteristics: | a. Click **All**.<br>b. Click in the **Search** field.<br>c. Start typing the name of the characteristic that you want to add. |

> Note If the characteristic type is not in the list, it is not in the asset type's assignment.

4. Enter the required information.

   > Note The required information depends on the characteristic that you are adding.

5. Click **Save**.

## Edit asset characteristics

You can edit characteristics of an asset. The procedure you should follow depends on the type of characteristic you want to edit.

| If ... | then ... |
|---|---|
| you want to edit an attribute: | 1. Open an asset page.<br>2. Double-click the attribute or click ✎ .<br>3. Edit the attribute.<br>4. Click **Save**. |
| you want to edit a relation: | 1. Delete the existing relation.<br>2. Create a new relation. |
| you want to edit a complex relation: | 1. Open an asset page.<br>2. Go to the complex relation you want to edit.<br>3. Click ✎ to change one of more relations.<br>» The **Edit Complex Relation** dialog box is shown.<br>4. Edit the content of the complex relation, to meet your needs.<br>Note On the right, the minimum and maximum amount of items that are required are shown.<br>5. Click **Next** and then **Finish**. |

| If ... | then ... |
| --- | --- |

> Note If the characteristic type is not in the list, it is not in the asset type's assignment.

## Remove asset characteristics

You can remove an asset characteristic as long as the minimum number of occurrences in the assignment has not been reached.

1. Open an asset page.
2. At the end of the line, click 🗑.
   » A dialog box appears.
3. Click **Delete**.

> Note These steps can be used to remove attributes, relations or complex relations

## Attributes and attribute types

An attribute is a characteristic that describes an asset by means of an individual field. The attribute's kind defines the class of information that the attribute contains.

### About attributes and attribute types

An attribute is a characteristic that describes an asset by means of an individual field. The attribute's kind defines the class of information that the attribute contains.

You can add an attribute to an asset if the attribute's type is in the relevant assignment of the asset's type.

#### Examples of attributes and attribute types

The following table contains attribute types and a description of the attribute that can be added to an asset.

| Attribute type | Description of the attribute | Example of an attribute |
|---|---|---|
| Definition | The description with background information on the asset | Asset: Customer Definition: A person, company or organization that purchases a commodity or service. |
| Last Review Date | The date on which the asset was reviewed. | 02/05/2020 |
| Frequency | The rate at which an asset changes over a particular period of time. | Daily |
| Rows Failed | The number of rows that failed a rule. | 15 |
| Personally Identifiable Information | A boolean field to indicate whether an asset contains personally identifiable information. | True |

## Kinds of attribute types

Attribute types can contain different kinds of information, for example, free text, dates and numbers.

| Field | Description |
| --- | --- |
| Date | A date value. If you edit attributes of this type, you can pick a date using the date selector.<br><br>Note The date format that is displayed in the UI, can be different depending on the language settings in your user profile. For example, dd/mm/yyyy or yyyy/mm/dd. |
| Multiple Selection | A field that allows multiple values that you can select from a predefined list. |
| with values | The values from which you can select one or more. |
| Number | A number, or a number with a fraction. |
| Only integers. (..., -2, -1, 0, 1, 2, ...) | Checkbox to only allow integer numbers.<br><br>Note Numeric values are stored as Floating Point values (IEEE 754 standard), which are not able to represent all numbers accurately. Due to this technical constraint, rounding issues occur for both negative and positive numbers.<br>The bigger the number, the more noticeable the rounding issue. |
| Metric | Checkbox to make this attribute type a metric. This allows you to assign this attribute type as a metric when you create a data quality rule. |
| Selection | A field that allows a single value that you can select from a predefined list. |
| with values | The values from which you can select one. |
| Text | Textual input which may contain formatting. |
| Plain Text | Checkbox to disable formatting. |

| Field | Description |
|---|---|
| True/False | A binary option that allows you to indicate whether something is true or false. |
| Metric | Checkbox to make this attribute type a metric. This allows you to assign this attribute type as a metric when you create a data quality rule. |

> Note An attribute can contain up to 100.000 bytes, which corresponds to roughly up to 100 000 characters in the source code of the attribute.

## Add an attribute

You can add attributes to an asset to describe that asset.

### Prerequisites

The attribute's type is in the relevant assignment of the asset's type.

> Tip If the minimum cardinality of the relevant attribute type is greater than 0, or if an attribute of that type already exists, the asset page always contains an attribute field for the attribute type.

### Add an attribute from an asset page

1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
   » The **Add a characteristic** dialog box appears.
3. In the **Add a Characteristic** dialog box, click the **Attributes** tab.
   » The **Add <attribute type>** dialog box appears.

4. Enter the value of the attribute.

   > Example If you want to add a Description attribute, enter the description that you want to add to the asset.

5. Click **Save**.

## Add an attribute from a table

1. Open a view in table display mode.
2. If required, add the column of the attribute type to the table:
   a. Above the table, to the right, click ⠿ → ✎ **Fields**.
   b. Click **Select fields** → **Attributes**.
   c. Select the relevant attribute types.
   d. Click **Update**.
   e. Click **Save**.
3. Do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
4. Enter the required information.
5. Do one of the following:

| If you want to change... | do... |
|---|---|
| the current row only: | a. Click ✔. |
| all visible rows: | a. Click **Apply to all visible rows**.<br>b. Click ✔. |
| selected rows: | a. Select one or more rows.<br>b. Click **Apply to all selected rows**.<br>c. Click ✔. |

# Edit an attribute

You can edit the value of an attribute.

> Example You can edit the definition of an asset.

If you delete an attribute value from an attribute type of the Selection or Multiple Selection kind, then you can no longer edit the values of the attributes of that type without removing those invalid values. We recommend that you remove invalid attribute values from the attributes before removing them from the attribute type.

## Edit an attribute from the asset page

1. Open an asset page.
2. Double-click the attribute or click ✎ .
3. Edit the attribute.
4. Click **Save**.

## Edit an attribute from a table

1. Open a view in table display mode.
2. If required, add the column of the attribute type to the table:
   a. Above the table, to the right, click ⠿ → ✎ **Fields**.
   b. Click **Select fields** → **Attributes**.
   c. Select the relevant attribute types.
   d. Click **Update**.
   e. Click **Save**.
3. Do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.

4. Enter the required information.
5. Do one of the following:

| If you want to change... | do... |
|---|---|
| the current row only: | a. Click ✔. |
| all visible rows: | a. Click **Apply to all visible rows**.<br>b. Click ✔. |
| selected rows: | a. Select one or more rows.<br>b. Click **Apply to all selected rows**.<br>c. Click ✔. |

## Delete an attribute

You can delete attributes as long as the minimum number of occurrences has not been reached.

If you delete an attribute value from an attribute type of the Selection or Multiple Selection kind, then you can no longer edit the values of the attributes of that type without removing those invalid values. We recommend that you remove invalid attribute values from the attributes before removing them from the attribute type.

### Delete an attribute from an asset page

1. Open an asset page.
2. At the end of the line, click 🗑.
   » A dialog box appears.
3. Click **Delete**.

### Delete an attribute from a table

1. Open a view in table display mode.
2. If you don't see the column of the attribute type, add it to the table:
   a. Above the table, to the right, click ⠿ → ✎ **Fields**.
   b. Click **Select fields** → **Attributes**.
   c. Select the relevant attributes.
   d. Click **Update**.
   e. Click **Save**.
3. Click 🗑 next to the attribute that you want to delete.
   » The **Delete <attribute>** dialog box appears.
4. Click **Yes**.
   » The attribute field is now empty.

## Relations and relation types

A relation is a characteristic that describes how two assets relate to each other. The relation's type defines the relation and determines which assets can be related.

### About relations and relation types

A relation is a characteristic that describes how two assets relate to each other. The relation's type defines the relation and determines which assets can be related.

You can add a relation between assets if the relation's type is in the relevant assignment of the asset's type.

### Elements in a relation type

A relation type has four elements:

| Element | Description |
|---|---|
| Head | Asset type of assets that can be the head of the relation. |
| Tail | Asset type of assets that can be the tail of the relation. |

| Element | Description |
| --- | --- |
| Role | The description of the relation type going from the head asset to the tail asset. |
| Co-role | The description of the relation type going from the tail asset to the head asset. |

Note Relations are bidirectional. For example, in the relation type "Table is part of/contains Database", the Table asset is part of the Database asset, and the Database asset contains the Table asset.

## Add a relation

You can add a relation to link two assets.

### Prerequisites

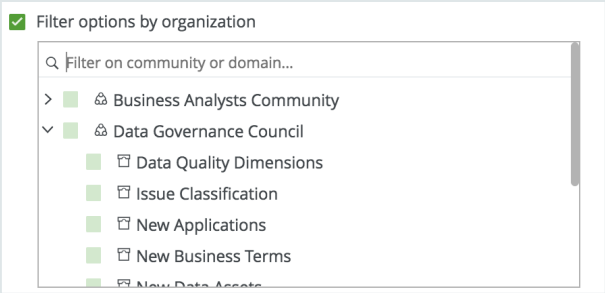
The relation's type is in the relevant assignment of the asset's type.

Tip If the minimum cardinality of the relevant relation type is greater than 0, or if a relation of that type already exists, the asset page always contains a relation table for the relation type.

### Add a relation from the asset page

1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
   » The **Add a characteristic** dialog box appears.
3. Click **Relations**.
4. Search for and click **<the relation type that you want to create>**.
   » The **Add relation type <asset type>** dialog box appears.

5. Enter the required information.

| Option | Description |
|---|---|
| Assets | The name of the related asset. |
| Filter suggested assets by organization | Option to filter the suggestions based on selected communities and domains.<br><br>If this option is selected, the organization tree appears. You can then filter and select domains and communities.<br><br>  |
| Start date | Optionally enter the date on which the relation between the assets becomes applicable. |
| End date | Optionally enter the date on which the relation between the assets is no longer applicable. Leave this field empty to create a permanent relation. |

6. Click **Save**.

## Add relations from a table

1. Open a view in table display mode.
2. If you don't see the column of the relation type, add it to the table:
   a. Above the table, to the right, click ⠿ → **Fields**.
   b. Click **Select fields** → **Relations**.
   c. Select the relevant relation types.
   d. Click **Update**.
   e. Click **Save**.

3. Do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
4. Enter one or more assets.
5. Do one of the following:

| If you want to change... | do... |
|---|---|
| the current row only: | a. Click ✔. |
| all visible rows: | a. Click **Apply to all visible rows**.<br>b. Click ✔. |
| selected rows: | a. Select one or more rows.<br>b. Click **Apply to all selected rows**.<br>c. Click ✔. |

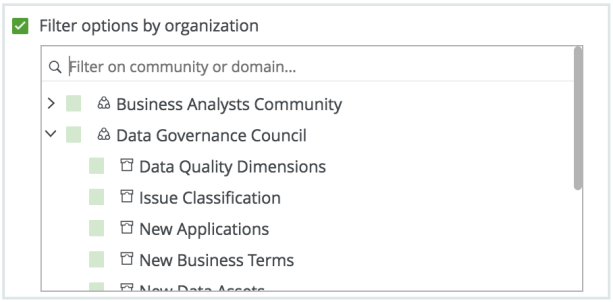
## Edit a relation

You cannot edit a relation, but you can delete the existing relation and create a new one.

### Edit a relation from an asset page

1. Delete the existing relation.
   a. Open an asset page.
   b. At the end of the line, click 🗑.
      » A dialog box appears.
   c. Click **Delete**.
2. Add a new relation.
   1. Open an asset page.
   2. In the tab pane, click **Add Characteristic**.
      » The **Add a characteristic** dialog box appears.
   3. Click **Relations**.

4. Search for and click **<the relation type that you want to create>**.
   » The **Add relation type <asset type>** dialog box appears.
5. Enter the required information.

| Option | Description |
|---|---|
| Assets | The name of the related asset. |
| Filter suggested assets by organization | Option to filter the suggestions based on selected communities and domains.<br><br>If this option is selected, the organization tree appears. You can then filter and select domains and communities.<br><br>  |
| Start date | Optionally enter the date on which the relation between the assets becomes applicable. |
| End date | Optionally enter the date on which the relation between the assets is no longer applicable. Leave this field empty to create a permanent relation. |

6. Click **Save**.

## Edit a relation from a table

1. Open a view in table display mode.
2. If required, add the column of the relation type to the table:
   a. Above the table, to the right, click ⠿ → **Fields**.
   b. Click **Select fields** → **Relations**.
   c. Select the relevant relation types.

   d. Click **Update**.
   e. Click **Save**.
3. Do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
4. Remove or add one or more assets.
5. Do one of the following:

| If you want to change... | do... |
|---|---|
| the current row only: | a. Click ✔. |
| all visible rows: | a. Click **Apply to all visible rows**.<br>b. Click ✔. |
| selected rows: | a. Select one or more rows.<br>b. Click **Apply to all selected rows**.<br>c. Click ✔. |

## Delete a relation

You can delete relations between two assets as long as the minimum number of occurrences in the assignment has not been reached.

### Delete a relation from an asset page

1. Open an asset page.
2. At the end of the line, click 🗑.

   » A dialog box appears.
3. Click **Delete**.

> Note If view your relation in tile display mode, the 🗑 is in the upper-right corner.

### Delete a relation from a table

1. Open a view in table display mode.
2. If you don't see the column of the relation type, add it to the table:
   a. In the content toolbar, click ⠿ → ✎ **Edit Fields**.
      » The **Fields** dialog box appears.
   b. Click **Select fields** → **Relations**.
   c. Select the relevant relation types.
   d. Click **Update**.
   e. Click **Save**.
3. Do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
4. Remove one or more assets from the cell.
5. Do one of the following:

| If you want to change... | do... |
|---|---|
| the current row only: | a. Click ✔. |
| all visible rows: | a. Click **Apply to all visible rows**.<br>b. Click ✔. |
| selected rows: | a. Select one or more rows.<br>b. Click **Apply to all selected rows**.<br>c. Click ✔. |

## Complex relations and complex relation types

A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist

independently. The complex relation's type defines the relations and attributes the complex relation can have.

## About complex relations and complex relation types

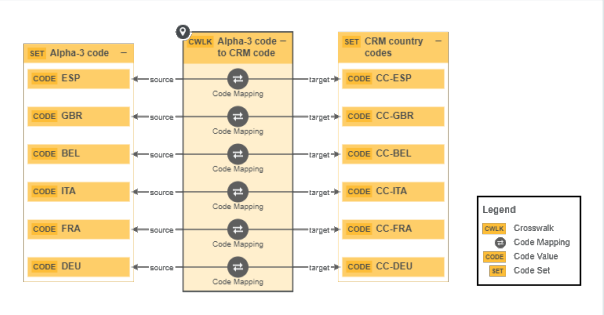
A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The complex relation's type defines the relations and attributes the complex relation can have.

You can add a complex relation between assets if the complex relation's type is in the relevant assignment of the asset's type.

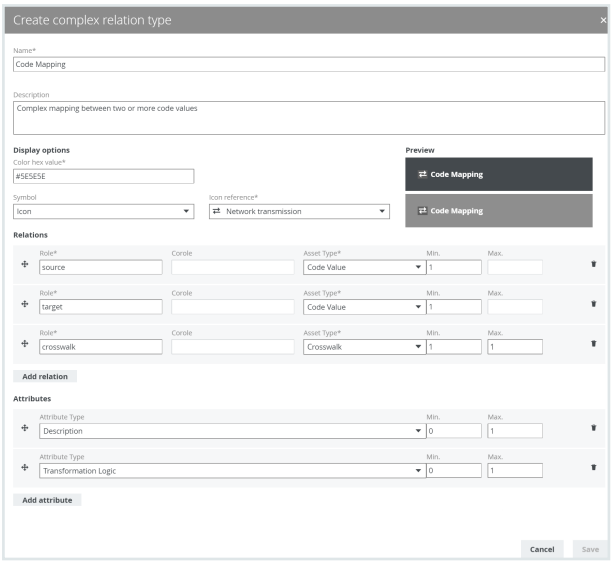
> Note A complex relation cannot have more than 32,767 relations to assets.

### Example

When you add a complex relation, you add one or more relations between the assets and the complex relation itself. The assets of those relations are always the head of the relation, while the complex relation is always the tail.




The following example creates a complex relation type called *Code Mapping*, with three relation types (*source*, *target* and *crosswalk*) and two attribute types (*Description* and *Transformation Logic*).




For each relation type in the complex relation type, you can select head assets. Above the fields, you can see the minimum and maximum occurrences for each relation type. For each selected head asset, a relation of the relevant type is created between the head asset and the complex relation. You can also add attributes to the complex relation.

### Cardinality of relation types and attribute types in complex relation types

With complex relations, you can associate two or more assets in a relation and add attributes to the complex relation. When you create a complex relation type, you set the cardinality of the relation types and attribute types to determine how many relations and attributes you can or must provide when you create a complex relation of that type.

> Tip For every complex relation type, at least one relation type must have a minimum cardinality of 1 or greater.

## Add a complex relation to an asset

You can add a complex relation to an asset, to create a link between two or more assets and add attributes.

> Tip If you want to add many complex relations, you can also import them.

## Prerequisites

The complex relation's type is in the relevant assignment of the asset's type.

> Tip If the minimum cardinality of the relevant complex relation type is greater than 0, or if a complex relation of that type already exists, the asset page always contains a complex relation table for the complex relation type.

## Steps

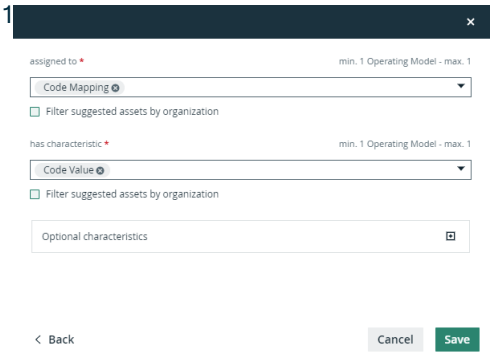
1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
   » The **Add a characteristic** dialog box appears.
3. In the **Add a Characteristic** dialog box, click the **Relations** tab.
4. Select a relation of the type **Complex Relation**, for example, *Field Mapping Target*.
   » The **Add <complex relation type>** dialog box appears.
5. Enter the required information.
   The available fields depend on the configuration of the complex relation type.
   See an example.[1]

   > Tip The minimum and maximum amount of assets that you can add is displayed in the right upper corner of every relation field. If there is no maximum amount, the maximum amount of assets to add in the relation was not set.

6. Click **Finish**.

---

1



## Edit a complex relation

You can edit a complex relation, for example if you want to edit its legs or attributes.

### Steps

1. Open an asset page.
2. Find the complex relation you want to edit.
3. Click to change one of more relations or attributes.
   » The **Edit Complex Relation** dialog box appears.
4. Enter the required information.
   The required fields depend on the configuration of the complex relation type.
5. Click **Save**.

## Delete a complex relation

You can delete a complex relation between two or more assets as long as the minimum number of occurrences in the assignment has not been reached.

### Steps

1. Open an asset page.
2. At the end of the line, click .
   » A dialog box appears.
3. Click **Delete**.
   » The complex relation is deleted.

# Hyperlinking

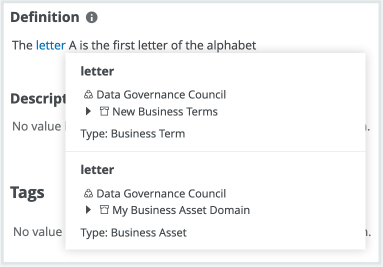
In Collibra Data Intelligence Cloud, you can manually create hyperlinks in text attributes or enable automatic hyperlinking to easily navigate from asset to asset or from an asset to a website.

# Automatic hyperlinking

In Collibra, every asset is a potential "target" of a hyperlink. If the name of an asset is mentioned somewhere in a text attribute of another asset, that mention automatically gets a hyperlink to the corresponding asset. Collibra keeps all hyperlinks up to date when you edit your data.

You can enable or disable automatic hyperlinking at the different levels:

- Environment: Contact Collibra support if you want to enable or disable automatic hyperlinking in your entire environment.
- Domain: If automatic hyperlinking is enabled in Collibra Console, you can enable or disable it on the domain level. Because every asset is a possible target, automatic hyperlinking can lead to an excessive amount of hyperlinks, which can negatively affect performance. Therefore, by default, automatic hyperlinking is disabled for all domains. However, you can enable it.
- Individual assets: An asset may have a common word as its name, for example, "is", "a", "or" or "and". When that happens, you don't want hyperlinks to this asset because it would lead to a lot of useless hyperlinks. Therefore, you can exclude such assets from automatic hyperlinking.

> Note  If there are assets with identical names, they are all shown in a pop-up when you click the link. Then, you can click one to open its asset page.
>
> 
> 

After importing data or after a backup has been restored, Collibra triggers a rebuild of the automatic hyperlinks. You can also rebuild the hyperlinks manually.

> Tip  By default, automatic hyperlinking is not case sensitive. For example, an asset 'Nato' will also be hyperlinked if it is mentioned as 'NATO', and vice versa. Contact Collibra support to change case-sensitivity for automatic hyperlinking.

## Manual hyperlinking

You can use manual hyperlink if you want a hyperlink to or from a specific asset. This is particularly useful if automatic hyperlinking is disabled, or if the link text does not match the name of the target asset.

> Tip You can also manually create hyperlinks to web addresses.

## Disable automatic hyperlinking to a specific asset

You can disable automatic hyperlinking at domain level and asset level.

Contact Collibra support if you want to enable or disable automatic hyperlinking for your entire environment.

An asset may have a common word as its name, for example, "is", "a", "or" or "and". When that happens, you don't want hyperlinks to this asset because it would lead to a lot of useless hyperlinks.

You can still manually create hyperlinks that target the asset.

### Steps

1. Open an asset page.
2. In the toolbar, click, **Auto hyperlinks**.
   » The **Auto hyperlinks** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| No Automatic Hyperlink | Collibra Data Intelligence Cloud will not create automatic hyperlinks to this asset. |

4. Click ✕ to close the dialog box.

## What's next?

All automatic hyperlinks to the asset are removed and Collibra Data Intelligence Cloud no longer creates automatic hyperlinks to the asset.

If you enable automatic hyperlinking to the specific asset again, you have to rebuild the hyperlinks.

# Enable automatic hyperlinking in a domain

Automatic hyperlinking is especially useful for linking to Business Term assets. But as every asset is a possible target, automatic hyperlinking can lead to an excessive amount of hyperlinks, which can negatively affect performance. Therefore, by default, automatic hyperlinking is disabled for all domains.

Nevertheless, you can enable automatic hyperlinking at the domain level.

> Tip You can use the Manage auto hyperlinks workflow to enable or disable automatic hyperlinking in bulk.

## Prerequisites

Automatic hyperlinking is enabled. Contact Collibra support if this is not the case.

## Steps

1. Go to the domain page of the domain for which you want to enable automatic hyperlinking.
2. In the resource toolbar, click **Actions** → **Auto hyperlinks**.

» The **Auto hyperlinks** dialog box appears.

3. Enter the required information.

| Field | Description |
|---|---|
| No Automatic Hyperlink | Collibra will not create automatic hyperlinks to assets in this domain when its name occurs in a text attribute of another asset. You can use this option when the asset name is a common word like ‘and’, ‘or’, ‘it', etc. You can still create manual hyperlinks to this asset. |

Once you make a change the dialogue box closes automatically.

### What's next?

Rebuild the hyperlinks to automatically create the hyperlinks to all the assets in the domain.

## Delete an automatic hyperlink

Collibra Data Intelligence Cloud can automatically create hyperlinks to assets. However, you can delete some or all of the hyperlinks without touching other potential automatic hyperlinks to the destination asset.

### Steps

1. Open an asset page.
2. Click in the text field with an automatic hyperlink.
3. Select the text.
4. In the **Edit** toolbar, click (**Remove autohyperlink**).
   » The hyperlink is removed.
5. Click **Save**, to save the content of the text field.

## What's next?

The automatic hyperlink is removed, but if you edit the text field again and you add the same text, the automatic hyperlink will again be created. If the hyperlinks are rebuilt, for example after restoring a backup, the hyperlinks may reappear.

> Tip To prevent an automatic hyperlink to a specific asset, you have to disable automatic hyperlinking for the target asset or the domain of the target asset.

# Create a hyperlink to an asset

You can manually create hyperlinks to assets.

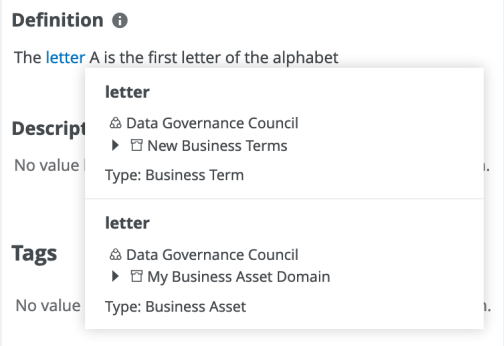
> Tip Collibra Data Intelligence Cloud can also create hyperlinks automatically.

## Steps

1. Open an asset page.
2. Double-click a text attribute, for example the definition, to edit the text.
3. Select the text to transform into a hyperlink.
4. On the **Edit** toolbar, click (**Insert/edit link**) → **Link to asset**.
5. In the **Assets** field, start typing the name of the asset to which you want to link. The assets are filtered as you type.

   > Tip To help you identify the correct asset, the domain of each asset is shown below the asset name.

6. Click the asset to which you want to link.

> Note You can link to multiple assets, in which case, all links are shown when you click the link. You can then select which one to follow.
>
> 
> 

7. Click **Save**, to save the hyperlink.
8. Click **Save**, to save the content of the text field.

## Create a hyperlink to a web address

In addition to creating hyperlinks to other assets in your environment, you can also create hyperlinks to web addresses. When you click the hyperlink, it will automatically open in a new tab.

### Steps

1. Open an asset page.
2. Double-click a text attribute or click ✎ to edit the text.
3. Select the text to transform into a hyperlink.
4. On the **Edit** toolbar, click 🔗 (**Insert/edit link**) → **Link to URL**.

5. Enter the required information.

| Setting | Description |
| --- | --- |
| URL | The target website of the hyperlink.<br><br>If you don't start the URL with http:// or https://, the system will ask if it has to add http://. If you don't add either prefix, Collibra Data Intelligence Cloud will consider the URL content an asset.<br><br>> Note You will only see this field if the hyperlink you edit is a link to a URL. |
| Text to display | The display text that will be visible in the attribute. By default, this is the text that you selected. |

6. Click **Save**, to save the hyperlink.
7. Optionally, edit the source code so that the hyperlink automatically opens in a new tab when you click it.
   a. Click **Source code** (<>).
   b. Type `target ="_blank"` after the href attribute.

      > Example `Click <a xml="lang" href="https://productresources.collibra.com/" target="_blank">here</a> for more information.`

   c. Click **Save**.
8. Click **Save**.

## Edit a manually created hyperlink

After you have created a hyperlink, you can always edit it afterwards.

> Note Automatic hyperlinks cannot be edited.

## Steps

1. Open an asset page.
2. Double-click a text attribute or click in the text field that contains the hyperlink that you want to edit.
3. Click anywhere on the hyperlinked text and click **Edit**.
4. Update the link:
   a. Enter the required information.

| Field | Description |
|---|---|
| URL | The target website of the hyperlink.<br><br>If you don't start the URL with http:// or https://, the system will ask if it has to add http://. If you don't add either prefix, Collibra Data Intelligence Cloud will consider the URL content an asset.<br><br>> Note You will only see this field if the hyperlink you edit is a link to a URL. |
| Assets | The target assets of the hyperlink.<br><br>The assets are filtered as you type. Click the asset to which you want to link.<br><br>> Note You will only see this field if the hyperlink edit is a link to an asset. |
| Text to display | The display text that will be visible in the attribute. By default, this is the text that you selected. |

   b. Click **Save**.
5. Click **Save**.

# Remove a manually created hyperlink

You can remove manually created hyperlinks in text attributes.

### Steps

1. Open an asset page.
2. Click ✎ in the text field that contains the hyperlink that you want to remove.
3. Click anywhere on the hyperlinked text and click **Unlink**.
   » The hyperlink is removed. If the hyperlink pointed to many assets, all links are removed.
4. Click **Save**, to save the content of the text field.

# Ratings

Ratings enable users to subjectively rate the quality of an asset, using a five-star rating system, and write a free-text review of the asset, in support of the rating provided.

Unlike objective parameters such as data quality, certifications and articulation scores, ratings are purely subjective assessments of data quality.

## Enabling ratings

Ratings are enabled by asset type. When ratings are enabled for a particular asset type, users can rate any asset of that asset type.

## Permissions

No particular license is needed to rate assets or to edit or delete ratings; however, certain resource permissions are needed.

| Permission | With this resource permission, you can... |
|---|---|
| Rating > Add | • Rate any asset of an asset type for which the feature is enabled.<br>• Edit or delete your own ratings. |
| Rating > Modify | • Edit other users' ratings. |
| Rating > Remove | • Delete other users' ratings. |

Note
- Users are not granted permissions directly, but through global roles and responsibilities.
- Guest users can see all ratings and reviews, but cannot provide ratings or reviews of their own.
- Adding, editing and removing ratings doesn't change assets, so their last modified date will not be updated.

## Actions

- View ratings.
- Enable or disable ratings.
- Rate an asset.
- Edit a ratings.
- Delete a rating.
- Delete all ratings of assets of a specific type.

## Enable or disable ratings

You can enable and disable ratings via the asset type pages, in ⚙ **Settings**.

Enabling ratings for a particular asset type is not inherited by children asset types. The feature has to be manually enabled for each child asset type.

By default, ratings are enabled for asset types **Data Set** and **Report** and their children asset types. Ratings are disabled, by default, for all other packaged asset types and any asset types you create.

Warning Ratings cannot be disabled for a specific asset type if user ratings exist for any assets of that asset type. In other words, all user ratings for all assets of a specific asset type must be manually deleted before ratings can be disabled for that asset type.

### Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the upper-right corner, click **Edit**.
   » The **Edit <asset type>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Enable ratings | Select to allow users to rate assets.<br><br>Ratings enable users to subjectively rate the quality of an asset, using a five-star rating system, and write a free-text review of the asset, in support of the rating provided. |

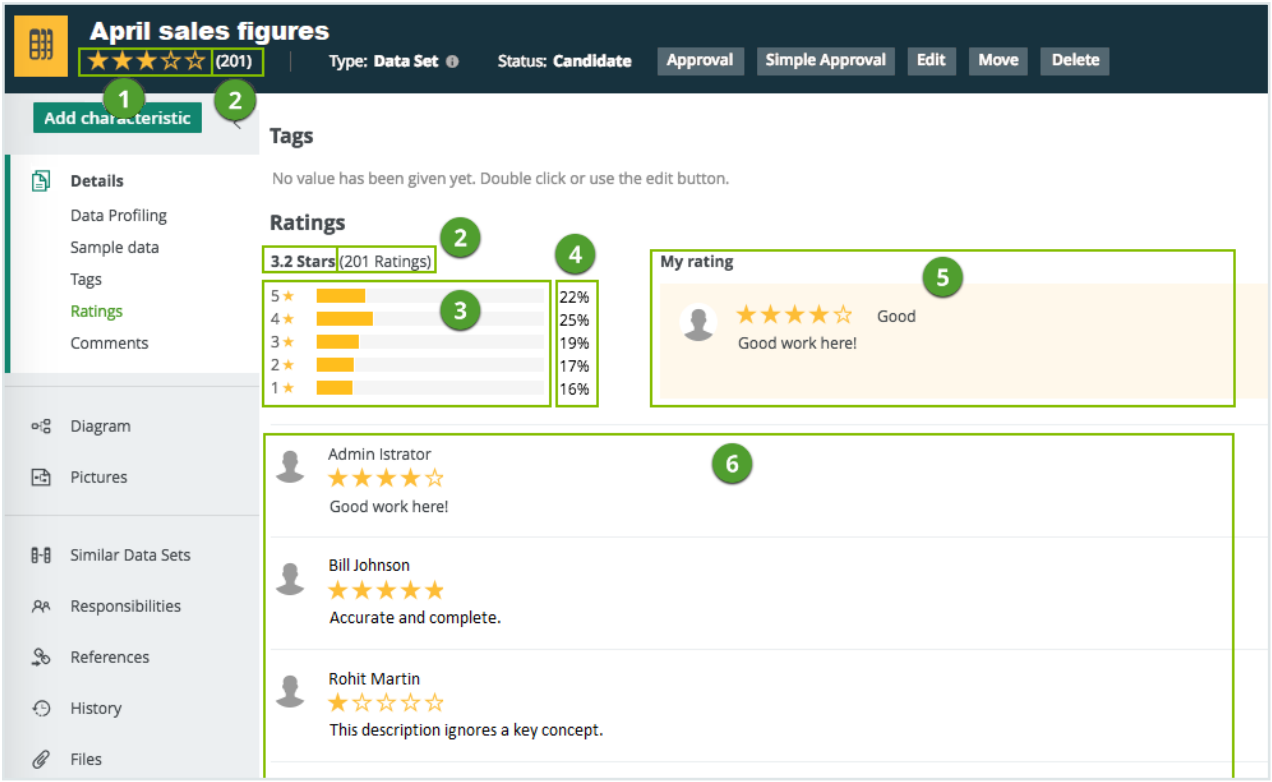
4. Click **Save**.

# View ratings

If ratings are enabled for an asset type and one or more ratings has been provided for an asset of that type, the associated ratings activity appears in several places in the UI.

## On an asset page

Ratings information appears on the asset page of any asset with one or more ratings.

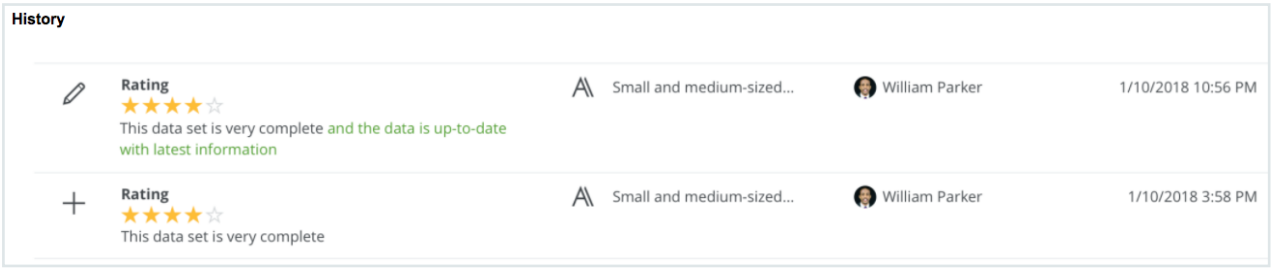



| No. | Description |
|---|---|
| 1 | The average of all user ratings for that asset. |
| 2 | The total number of ratings. |
| 3 | A horizontal bar chart showing the distribution of ratings. |
| 4 | The percentage of total votes per number of stars. |
| 5 | Your rating and review. |
| 6 | Other users' ratings and reviews, ordered from newest to oldest. |

## In the History tab

User ratings and any edits to, or deletions of, ratings are shown in the History tab page of the relevant:

- Asset pages.
- User profiles.
- Community pages.
- Domain pages.

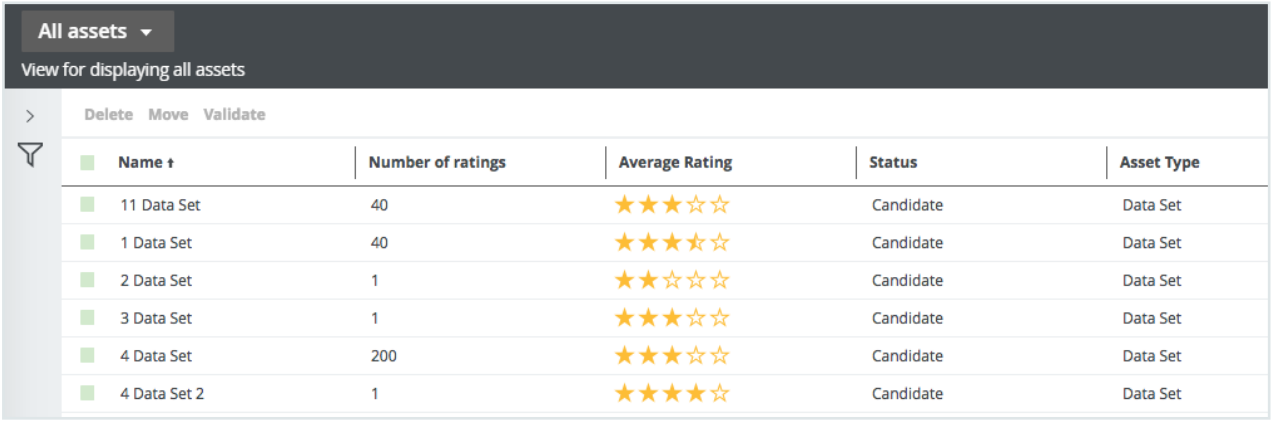



### In an asset table or set of tiles

There are two fields related to ratings that can be shown in an asset table or set of tiles:

- **Average rating**: The average of all user ratings for each asset.
- **Number of ratings**: The total number of ratings for each asset.

You can sort on these two fields and filter them.




## Rate an asset

You can rate any asset of an asset type for which ratings have been enabled.

Ratings can only be given via asset pages.

You can edit or delete your ratings at any time.

## Steps

1. Open an asset page.
2. In the **My rating** section, click the star that corresponds most closely to your opinion of the quality level of the asset.
   The rating range is from one to five stars, with five representing the highest level of quality and one representing the lowest.
3. Optionally, enter a review of the asset in the text field.

   > Tip This collaborative feature is intended to help an organization improve the quality of its data and help users trust the quality of the data. As such, if you provide a rating of three stars or fewer, we strongly encourage you to provide a review, to help the owner understand how the quality of the asset might be improved.

4. Click **Save**.
   » The average user rating is recalculated.

# Edit a rating

If, for any reason, your opinion of the quality of an asset changes, you can edit or delete the ratings you've given, at any time. With the correct resource permissions, you can also edit other users' ratings.

## Steps

1. Open an asset page.
2. If required, edit your own :
   a. In the **My rating** section, click ✎.
   b. Make the necessary changes:
      - Click the star that corresponds most closely to your opinion of the quality level of the asset.
      - Edit your review, if relevant.
   c. Click **Save**.
      » The average user rating is recalculated.

3. If required, edit another user's rating:
    a. In the **Rating** section, click ✎ next to the rating you want to edit.
    b. Make the necessary changes:
        - Click the star that corresponds most closely to the other user's opinion of the quality level of the asset.
        - Edit the review, if relevant.
    c. Click **Save**.
        » The average user rating is recalculated.

## Delete a rating

If, for any reason, your opinion of the quality of an asset changes, you can edit or delete the ratings you've given, at any time. With the correct resource permissions, you can also delete other users' ratings. This can be helpful if one or more previous ratings and reviews are no longer relevant.

### Steps

1. Open an asset page.
2. If required, delete your own rating:
    a. In the **My rating** section, click 🗑.
    b. Click **Delete**, to confirm.
        » The average user rating is recalculated.
3. If required, delete another user's rating:
    a. In the **Ratings** section, click 🗑 next to the rating you want to delete.
    b. Click **Delete**, to confirm.
        » The average user rating is recalculated.

## Delete all ratings

You can delete all ratings of all assets of an asset type in one go. This is mainly helpful if you want to disable ratings for that asset type.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the upper-right corner, click **Delete ratings**.
   » The **Confirm deletion** dialog box appears.
3. Click **Delete ratings**.

# Asset tags

To categorize assets, you do not only have strictly governed metadata, but you also have tags, which are labels of your own choice.

In this section, you learn more about tags and how you manage them.

## Tags

A tag is a piece of metadata that is used to label an asset, to help categorize the asset. You can use the same tag for all the assets that belong to the same category of a business, for example, finance. Although the tags are stored in the Collibra Data Intelligence Cloud database, they are not strictly governed by Collibra.

You can:

- Search for assets with a specific tag by clicking the tag on an asset page or on the tags overview page.
- Select the Tag facet on the Search page, to navigate search results.

- Use tags in filter clauses.
- Import and export tags.

> Note
> - You can only add tags to assets, not to domains or communities.
> - Adding, editing and removing tags doesn't change assets, so their last modified date will not be updated.

## Tag names

Tag names must meet the following requirements:

- Tag names are case sensitive.
  For example, you can have the tag names *Car* and *car*. However, the tag suggestion is not case sensitive, for example, typing *car* suggests both "Car" and "car".
- Tag names cannot contain spaces.
- Underscore (_) is allowed.

  > Note  If you upgrade to 5.6 or newer, spaces in tags are automatically replaced by underscores. Possible duplicate tags due to this renaming, will be merged.

- The maximum length of the tag name is 250 characters.

## Permissions

The following table shows the permissions you need to manage tags:

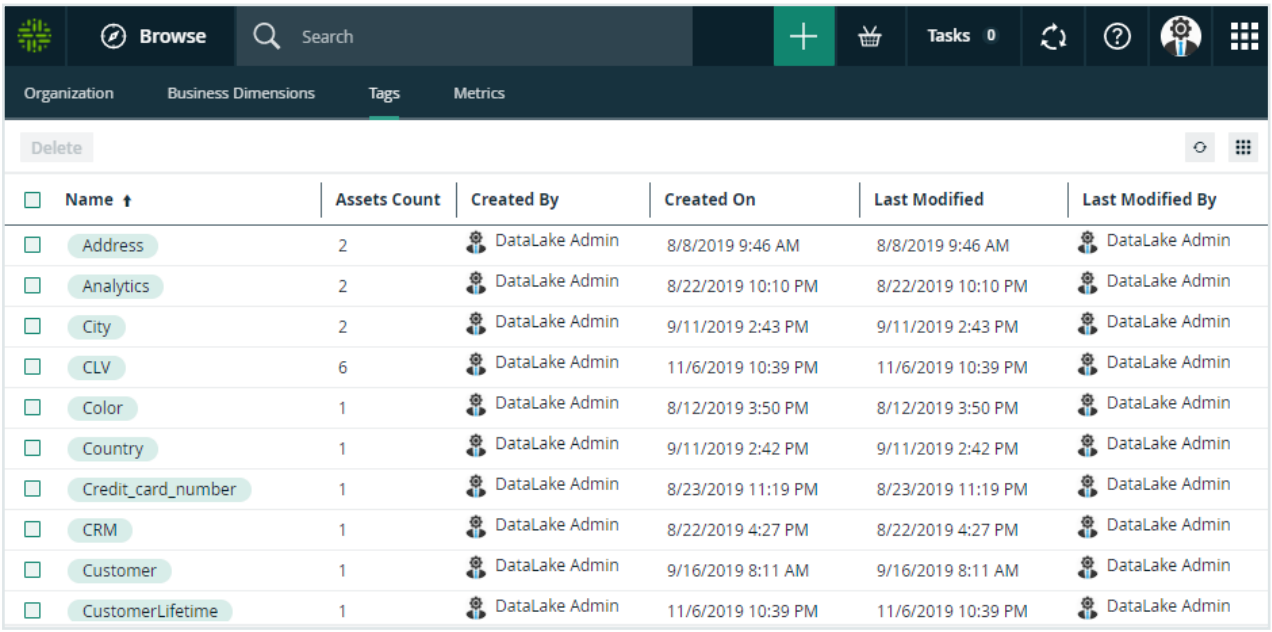
- On asset pages.
- On the tags overview page.

| Page | Permission | |
|---|---|---|
| Asset page | Resource | **Update:** Add and remove tags.<br><br>To grant this permission to a role, see Enable permission to use tags.<br><br>> Note The role to which you grant this permission needs at least view access to the corresponding asset type. See Responsibilities. |
| Tags overview page | Global | **Manage tags:** Edit, merge and delete tags. This permission allows admin and super users to manage all tags.<br><br>**View tags:** View the tags overview page. |

# Tags overview page

The tags overview page provides an overview of all the tags in Collibra Data Intelligence Cloud.

With the right permissions, you can view, delete, edit, and merge tags.



By default, the tags table shows the **Name** column and the **Created By** column. You can add more columns. The following table describes all available columns.

| Column | Description |
|---|---|
| Assets Count | Total number of assets to which a specific tag has been applied. |
| Created By | The user who created the tag. |
| Created On | The date on which the tag was created. |
| Last Modified | The date and time when the tag was last modified. |
| Last Modified By | The user who last modified the tag. |
| Name | Name of the tag. Tag names cannot contain spaces and the maximum length is 250 characters. The underscore ( _ ) character is allowed. |

## Search by tags

You can search for all assets for which a specific tag has been applied, by clicking the tag on an asset page or the tags overview page. The search results are shown on the Search page.

## Edit a tag on the tags overview page

If you have the correct resource permission, you can edit an existing tag on the tags overview page.

### Steps

1. On the main menu, click ⠿, then **Stewardship**.
2. In the submenu, click **Tags**.
   » The **Tags** overview page opens.
3. Hover your mouse over the name of a tag.

4. Click edit to the right of the tag name.
5. Edit the name.
6. Click ✓.

## Merge tags on the tags overview page

You can merge tags on the tags overview page. You merge tags by changing the name of a tag to that of another existing tag.

### Steps

1. On the main menu, click , then **Stewardship**.
2. In the submenu, click **Tags**.
   » The **Tags** overview page opens.
3. Hover your mouse over the name of a tag.
4. Click edit to the right of the tag name.
5. Change the name of the tag to that of another existing tag.
6. Click ✓ to the right of the tag.
   » The **Merge tags confirmation** dialog box appears.
7. Click **Merge**.

## Delete a tag from the tags overview page

You can delete one or more tags from the tags overview page.

### Steps

1. On the main menu, click , then **Stewardship**.
2. In the submenu, click **Tags**.
   » The **Tags** overview page opens.
3. Select the checkboxes to the left of the tags you want to delete.
4. In the resource toolbar, click **More** > **Delete**.

# Add a tag to an asset on an asset page

You can add a tag to an asset on an asset page.

## Steps

1. Open an asset page.
2. Double-click in the **Tags** section, or click ✎ on the right-hand side of the section.
3. Type the text for your tag and press `Enter`.

   Tip
   - As you type, already existing tags that match what you are typing are suggested. If you want to use a suggested tag, you can click on it. Otherwise, you can ignore the suggestions.
   - You can add as many tags as you want.

4. Click **Save**.

# Add a tag to an asset in an asset table or set of tiles

You can add a tag to an asset in a table.

## Steps

1. Open any set of assets in table display mode.
2. Double-click in the **Tags** column, or click ✎ on the right-hand side of that column.

   If you do not see the **Tags** column, add it to the table. See Customizing tables.
3. Type the text for your tag and press `Enter`.

   Tip
   - As you type, already existing tags that match what you are typing are suggested. If you want to use a suggested tag, you can click on it. Otherwise, you can ignore the suggestions.
   - You can add as many tags as you want.

4. Click ✔.

# Delete a tag from an asset on an asset page

You can delete a tag from an asset on an asset page.

### Steps

1. Open an asset page.
2. Double-click in the **Tags** section, or click on the right-hand side of the section.
3. Click next to the tags that you want to delete.
4. Click **Save**.

## Delete a tag from an asset in an asset table

You can delete a tag from an asset in an asset table.

### Steps

1. Open any set of assets in table display mode.
2. Double-click in the **Tags** column, or click on the right-hand side of that column.

   If you do not see the **Tags** column, add it to the table. See Customizing tables.
3. Click next to the tags that you want to delete.

   If you want to delete the tags from all assets that are visible on the page, select the **Apply to all visible rows** check box.
4. Click ✔.

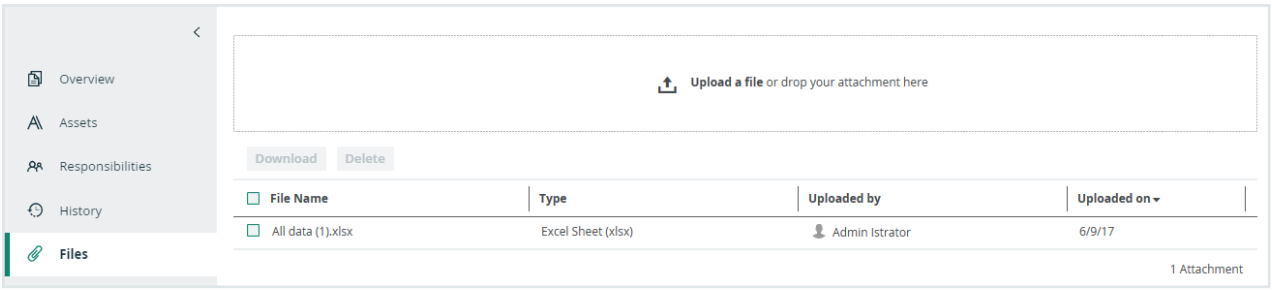
# Attachments

You can add attachments to communities, domains and assets. Examples of attachments are reference materials or other documents that are related to the resource.

## Attachments

An attachment is a file that you upload via an asset page, domain page or community page. You can use this to add reference materials or other documents that are related to the resource.

You can find attachments on the community, asset or domain page → **Files**.




Note

- Adding and removing attachments doesn't modify assets, so their last modified date will not be updated.
- Uploading attachments is restricted by the file upload settings, which determine the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings.

# Add attachments

You can add files to an asset, domain or community as attachments.

Note

- Adding and removing attachments doesn't change assets, so their last modified date will not be updated.
- Uploading attachments is restricted by the file upload settings, which determine the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings.

## Steps

1. Open a community, domain or asset page.
2. In the tab pane, click **Files**.
3. Upload a file in one of the following ways:
   - Drag and drop the file in the upload area.
   - Click **Upload a file**, browse to the location of the file and click **Open**.

   » The file is displayed in the table.

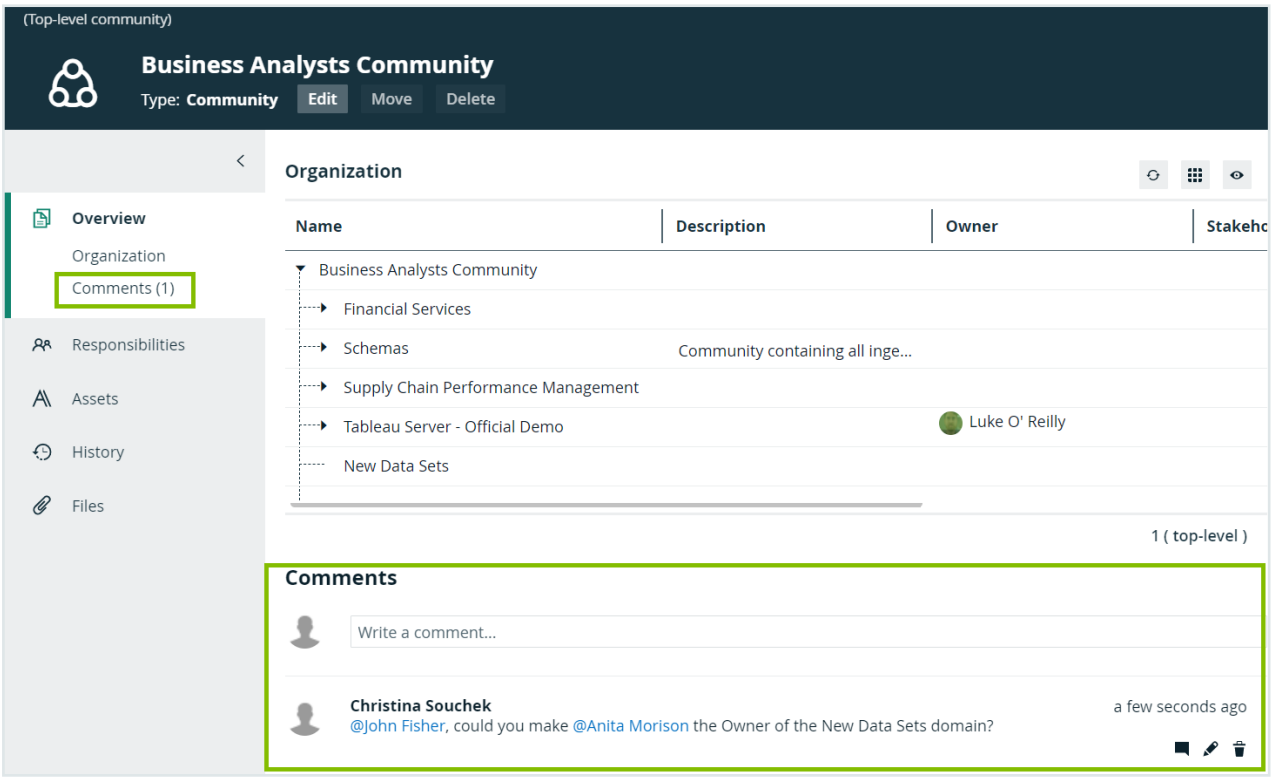
# Comments

You can add comments to communities, domains and assets. For example, you can discuss the attributes or propose related assets.

## Comments

You can find comments on the community, asset or domain page → **Overview** or **Details** tab → **Comments**.

Next to adding comments, you can also reply to other comments ( ), edit your own comments ( ) or delete comments ( ) with the buttons that are displayed to the right of the comment.




> Note Adding, editing and removing comments doesn't change assets, so their last modified date will not be updated.

# Add comments

If you want to add a comment to a community, domain or asset, for example to discuss the desciption.

> Note  Adding, editing and removing comments doesn't change assets, so their last modified date will not be updated.

## Steps

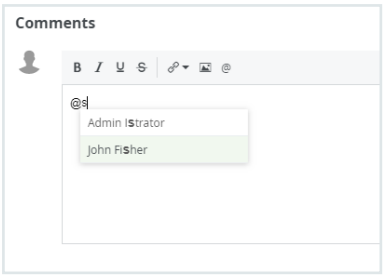
1. Open a community, domain or asset page.
2. Do one of the following:
   - In the tab pane, click **Overview**.
   - In the tab pane, click **Details** → **Comments**.
3. Type your comment in the **Comments** field.
   You can use the text editing tools to format your comment, to add links and images or to mention users.
4. Click **Save**.

# User mentioning

User mentioning is a useful way to draw the user's attention to a page or comment. When you mention a user, they will receive an email which contains the content of the comment in which they are mentioned and a direct link to the asset page.

## Mentioning users

To mention a user in a comment, you type the @ symbol followed by the user's first name, last name or username. Matching names appear as you start typing a name, even if the typed character is not the first character as shown in the following example.

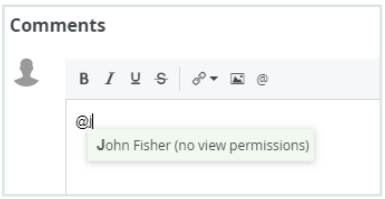



If the first name and or last name is available, these will be used to address the user, if those are not available, then the username will be used.

> Note If a user is deleted, all the mentions are replaced by @Deleted User.

## View permissions

If you mention a user who does not have the view permission on the asset, it will be indicated when you select the user.

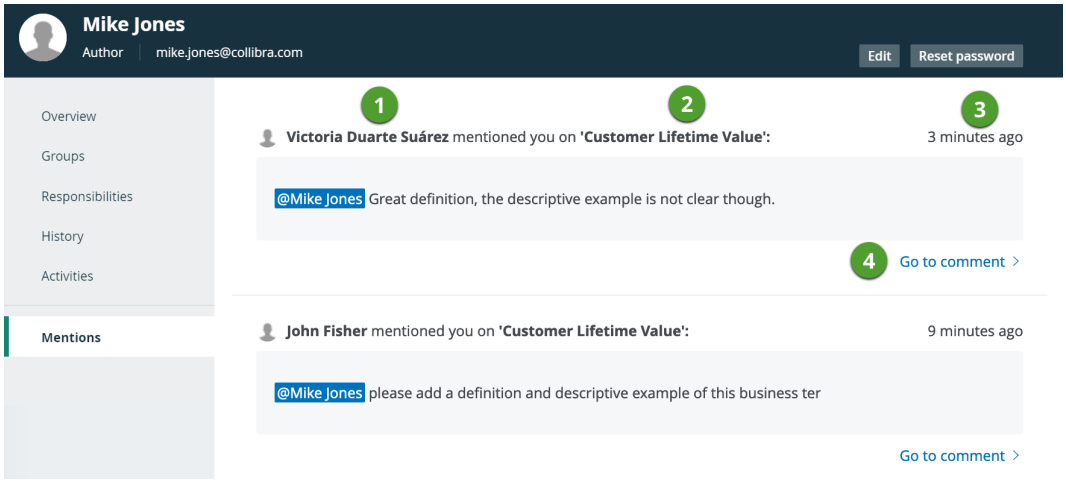



As a mentioned user, if you open the link in a mail, you see a Not authorized message if you don't have the permission to view the asset.

## List of user mentions

To see all the comments in which you are mentioned, go to your own profile page and select **Mentions** in the tab pane.

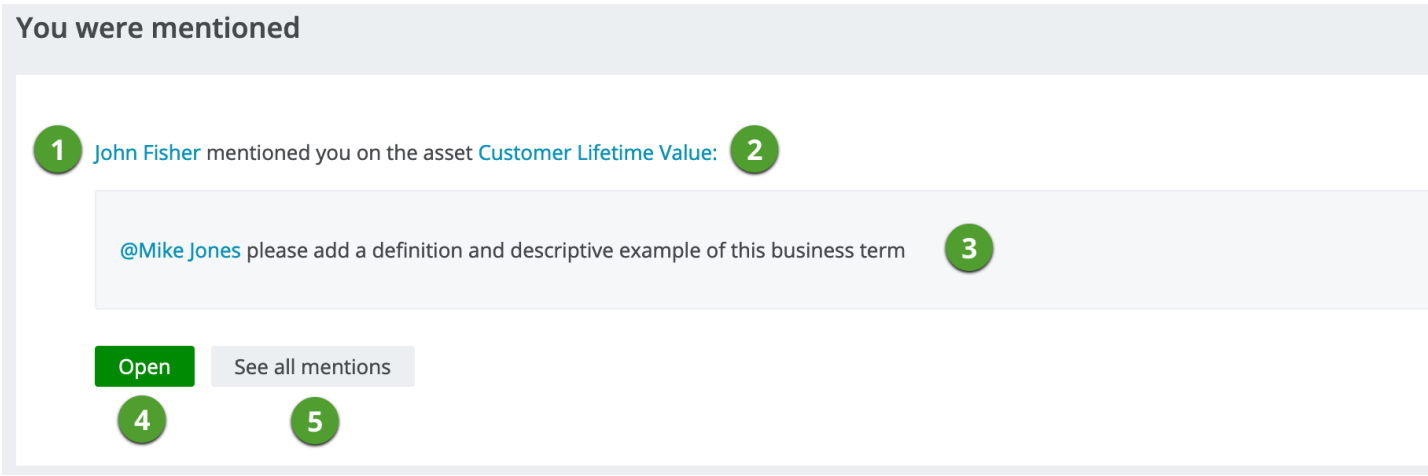
You cannot see somebody else's list of mentions.




| Item | Description |
| --- | --- |
| 1 | The name of the user who has mentioned you. This can be the full name, first or last name or the username of that user, depending on which information is available. |
| 2 | The name of the asset to which a comment is added. |
| 3 | The time when the comment has been added. |
| 4 | The direct link to go to the comment on the asset page. The comment will be highlighted on the asset page. |

## Email content

When you add a comment to an asset page, you can also mention users. Users who are mentioned, will receive an email.




| Item | Description |
|---|---|
| 1 | The user who mentioned you in a comment, this can be the first name/last name or username.<br>If you click the name, you go to the user's page in Collibra. |
| 2 | The asset name to which a comment has been added in which you are mentioned.<br>If you click the name, you go to the asset page in Collibra. |
| 3 | The full content of the comment in which you are mentioned.<br>If you click your name, you go to your own user page in Collibra. |
| 4 | The button to open the comment in your Collibra environment. |
| 5 | The button to open the list of comments in which you are mentioned. You have to sign in with your own account to see this list. |

# Responsibilities

Responsibilities are used to assign a resource role to one or more users and/or user groups. Based on their responsibilities, users can act on the permissions conveyed to

them via the resource role.

## Responsibilities

A responsibility is the assignment of one or more users and/or user groups to a resource role for a resource.

Based on their responsibilities, users can act on the permissions conveyed to them via the resource role.

Child resources always inherit the responsibilities from their parent resources:

- If the resource is a community, the responsibilities are inherited by subcommunities, domains and assets in the community. For example, if you are a Business Steward for a certain community, you are a Business Steward for all the subcommunities, domains and assets inside that community.
- If the resource is a domain, the responsibilities are inherited by the assets in the domain.
- If the resource is an asset, the responsibilities only apply to the asset itself, because assets never have children.

Example
Suppose the following setup:

- Anita Morrison is assigned the Community Manager resource role for a community called "Enterprise".
- John Fisher is assigned the Business Steward resource role for a domain called "Critical Data Elements" in the "Enterprise" community.
- Joanna Zhou is assigned the Owner resource role for a domain called "Critical Data Elements" in the "Enterprise" community.
- William Parker is assigned the Owner resource role for an asset called "Customer Revenue" in the "Critical Data Elements" domain.

This leads to the following responsibilities:

| Resource | Direct responsibilities | Inherited responsibilities |
|---|---|---|
| Enterprise community | • Anita Morrison as Community Manager | • None |
| Critical Data Elements domain | • John Fisher as Business Steward<br>• Joanna Zhou as Owner | • Anita Morrison as Community Manager |
| Customer Revenue asset | • William Parker as Owner | • Anita Morrison as Community Manager<br>• John Fisher as Business Steward<br>• Joanna Zhou as Owner |

Note You can view direct and inherited responsibilities of a resource in different places.

## View responsibilities for a resource

You can view the responsibilities for a resource in the following locations:

- In the **Responsibilities** tab of a resource.
- In any view that displays communities, domains or assets, in the specific column or field for that role.

a. Open any view in table or tiles mode.
b. Do one of the following:
   - In tile mode: add the required fields.
   - In table mode, add the required column.

> Note
> - Each role has its own field or column.
> - Depending on the settings in Collibra Console, you may also see the inherited responsibilities.

- In the **Responsibilities** tab of a user's profile page.

> Tip You can also view your own responsibilities.

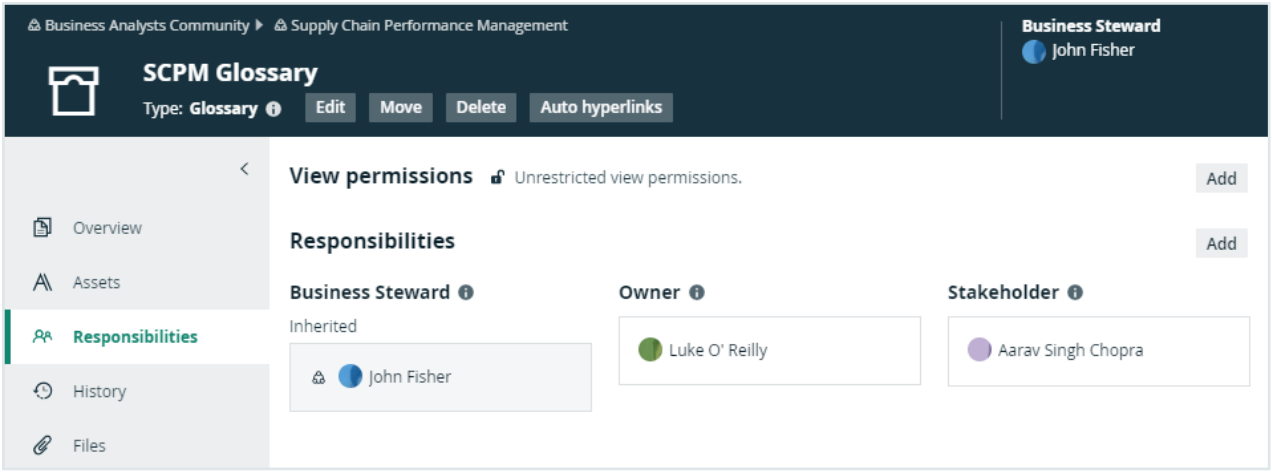
a. Open a profile page.
b. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.

- In the **Responsibilities** tab of a user group page.
  a. Open a group page.
     i. On the main menu, click , then **Settings**.
        » The Collibra settings page opens.
     ii. Click **Users and groups**.
        » The users and groups settings appear on the **Users** tab page.
     iii. In the tab pane, click **Users** → **Groups**.
        » The user group table appears.
  b. In the tab pane, click **Responsibilities**.
     » The Responsibilities page appears.
- In the **Preview** pane of an asset, for example on an asset page.

> Note The preview pane only shows the direct responsibilities.

## The Responsibilities page

The **Responsibilities** page shows the view permissions and the responsibilities of a resource.




The background colors of the responsibilities show where the responsibility comes from.

| Color | Description |
|---|---|
| Gray | The user or group inherited the role. |
| White | The user or group was directly assigned to this role for the resource. |

If a user or group has a responsibility but not the required view permissions, a warning appears in the box. For example, a user was assigned the Steward role for a resource but does not have view permissions for it.

For information on view permissions, see the Collibra Data Intelligence Cloud Administration Guide.

## Create a responsibility

You can create a responsibility:

- By assigning a resource role to a user or user group on the responsibilities page of a resource.
- By adding a user in the table column of a role.
- By editing an existing responsibility.

> Important For optimal performance and ease of use, we recommend that you create responsibilities mainly on domains and communities and not directly on

assets. Creating responsibilities directly on large amounts of assets may lead to decreased performance.

## Assign a resource role to a user or user group on the responsibilities page

1. Open a community, domain or asset page.
2. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
3. Above the table, to the right, click **Add**.
   » The **Add responsibilitiy** dialog box appears.
4. Enter the required information.

| Option | Description |
|---|---|
| Role | Enter the role that you want to assign to a user or group for this resource. |
| People | Enter the users and user groups to which you want to assign a role for this resource. |

5. Click **Add**.
   » The users or groups with the assigned role are now displayed in the **Responsibilities** table.

Tip
- If you want to assign a user or user group a resource role that other users or groups already have for this resource, you can click and add them in the **People** field in the **Assign role** box.
- If there are only inherited roles, is not available.

## Assign a role to a user or user group for a resource from a table

1. Open a table that displays communities, domains or assets.
2. If required, add the column of the role that you want to assign to the user.

3. Do one of the following:
   - Double-click a cell in the column of the role.
   - Hover your mouse pointer over a cell in the column and click ✎.
4. Click in the field and enter the user or user group.
5. If required, select **Apply to visible rows**.
   This will create the responsibilities for all visible users.

   > Tip You can filter the columns first, to assign a role to a user for specific resources in one go.

6. Click ✔.

## Edit a responsibility

You can edit a responsibility:

- by deleting it and creating a new one.
- in an asset table.

> Note You cannot edit inherited responsibilities.

### Edit a responsibility in a table

1. Open a table that displays communities, domains or assets.
2. If required, add the column of the role that you want to edit.

   > Warning Depending on the settings in Collibra Console, you may also see the inherited responsibilities. You cannot edit these inherited responsibilities.

3. Do one of the following:
   - Double-click a cell in the column of the role.
   - Hover your mouse over a cell in the column and click ✎.
4. Edit the responsibility:
   - Click in the field and enter a new user or user group.
   - Click ⊗ next to the user or user group to remove the user or user group.
   - If required, select **Apply to visible rows**.
     This will edit the responsibilities of all visible users.

> Tip You can filter the columns first to assign a user to specific resources in one go.

5. Click ✔.

# Delete a responsibility

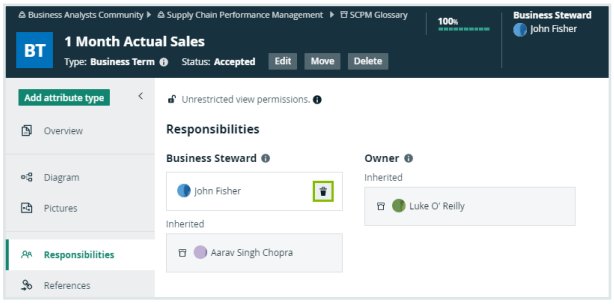
You can delete a responsibility:

- From the responsibilities page of a resource.
- From a table.

> Note You cannot delete inherited assignments.

## Delete a responsibility from the responsibilities page of a resource

1. Open a community, domain or asset page.
2. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
3. In the **Responsibilities** table, click 🗑 next to the name of the user or group that you want to remove.




4. Click **Delete** to confirm.

## Delete responsibilities for a resource from a table

1. Open a table that displays communities, domains or assets.
2. If required, add the column of the role that you want to edit.

   > Warning Depending on the settings in Collibra Console, you may also see the inherited responsibilities. You cannot delete these inherited responsibilities.

3. Do one of the following:
   - Double-click a cell in the column of the role.
   - Hover your mouse over a cell in the column and click ✎.
4. In the cell editor, click ⊗ next to the user or user group.
5. If required, select **Apply to visible rows**.
   This will delete the responsibilities from all visible users.

   > Tip You can filter the columns first to assign a user to specific resources in one go.

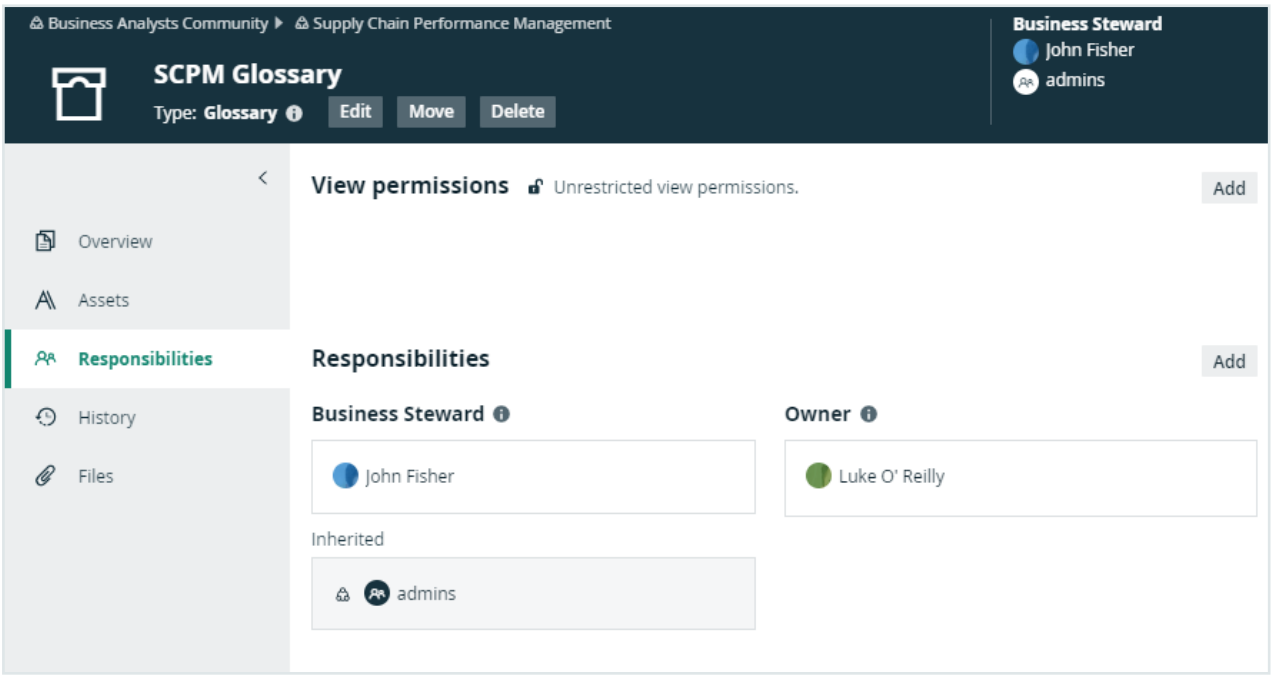
6. Click ✔.

# View permissions

A view permission is the right to see a resource and its children. It determines which users can see and work with which resources. You assign a view permission to users or user groups on domain or community level. Consequently, only these users can see the resources and their children, including the assets. This also includes relations to assets: if you do not have view permissions for an asset, you don't see the relations to that asset, for example in views or on the asset page of the related assets.

## Understanding view permissions

By default, all users can see all resources. You can tell that there are no view permissions if **Unrestricted view permissions** is in the View permissions section of the resource's Responsibilities page.




If you add users or user groups to the view permissions of a resource, only those users or groups can view the resource and its children.

All child resources inherit the view permissions from parent resources. Once you have added users or user groups to the view permissions of a resource, you cannot create view permissions for any of its child or parent resources.

You can recognize inherited view permissions by their gray background.

> Note
> - A user with the System Administration global permission, for example via the Sysadmin global role can see all views in Collibra, even if they are not shared.
> - A user with the Manage all views permission can see only views that are shared.

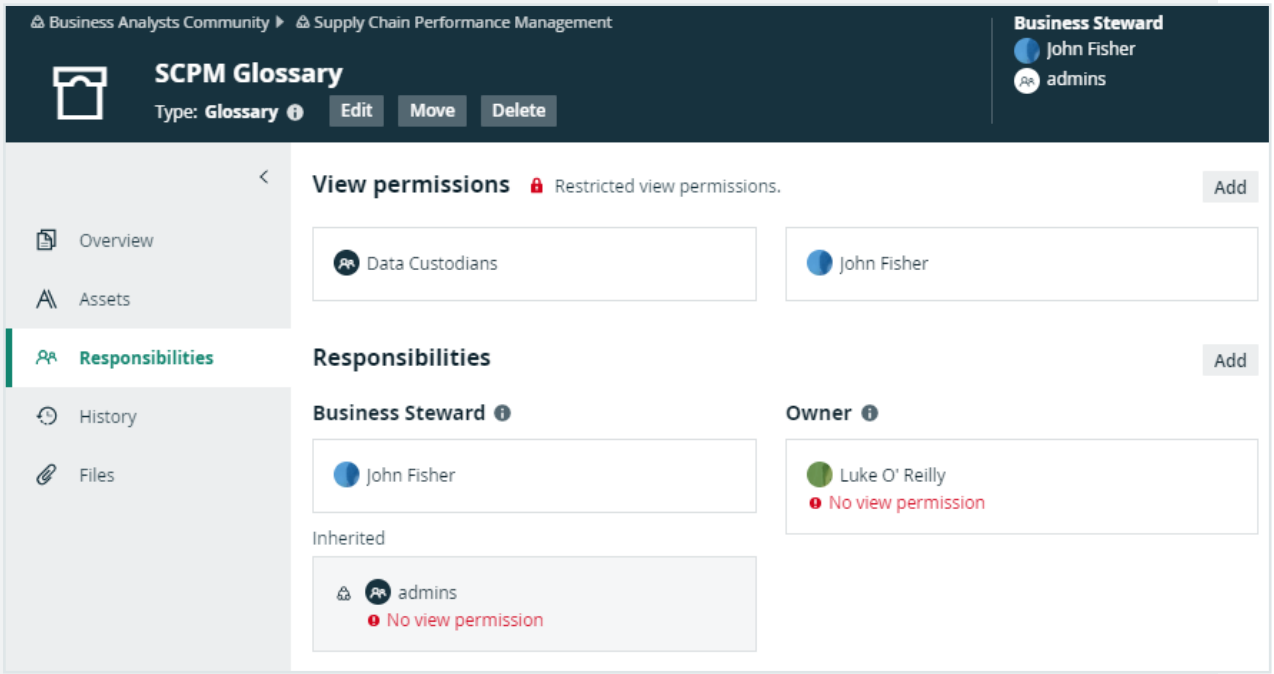
## Impact of view permissions on responsibilities

View permissions affect responsibilities. If a user has a responsibility for a certain resource, but does not have view permission, that user cannot act upon that responsibility. The responsibility becomes inactive, due to the lacking view permission.

To activate the responsibility, you have to create the view permission for this resource or a parent resource.

Example
In the example below, Luke O'Reilly is the Owner of the SCPM Glossary domain, but he does not have the view permission to see the domain. As a consequence, he cannot see the assets or act on his responsibility. On the Responsibilities page, his responsibility shows an error message to clearly show that there is a problem. You can solve the problem in one of the following ways:

- Create a view permission for Luke.
- Add Luke to the user group that has a view permission.
- Delete all view permissions, so that everyone can see the assets.
- Delete Luke's responsibility as Owner and pick another person for that role.




## Create a view permission

You can create a view permission if you don't want all users to see certain resources.

### Prerequisites

- You have a resource role with the Edit View Permissions resource permission, for example Community Manager.

- None of the parent communities or children of the current resource have a view permission.

### Steps

1. Open a community or domain page.
2. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
3. Above the table, to the right, click **Add**.
   » The **Add view permissions** dialog box appears.
4. In the **Users or Groups** field, start typing the name of the user or user group.
5. Select a user or user group from the suggestions.
6. Click **Add**.

## Delete a view permission

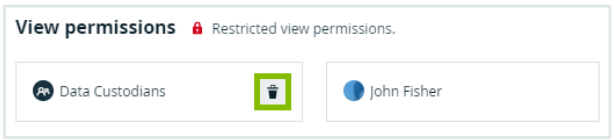
You can delete a view permission if you want to change which users are allowed to see certain resources.

### Prerequisites

- You have a resource role with the Edit View Permissions resource permission, for example Community Manager.
- One or more users or user groups have a view permission on the resource.

### Steps

1. Open a community or domain page.
2. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
3. In the View Permissions section, click next to the name of the user or group that you want to remove.




   » A confirmation message appears.

4. Click **Delete**.
   » One view permission is deleted, so only the remaining users or user groups can see this resource and its children.
   » If you deleted the last view permission, all users can now see this resource and its children.

# Asset data quality

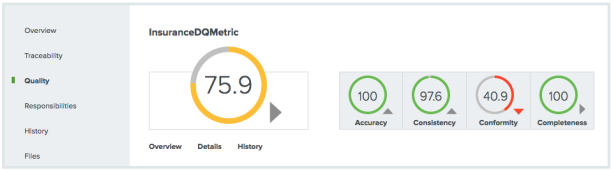
The **Quality** page of an asset makes data quality results of an asset available to the business stakeholders. The dashboard aggregates the following values:

- Collected over time on attributes.
- Aggregated from different assets along a number of predefined relations.

The assets for which these data quality dashboards are available and how the values are aggregated are defined in data quality rules, which can be edited on the **Data Quality Rule** tab on the **Settings** page. For the following examples, a data quality rule exists on business terms, aggregating values from data quality rules related to these business terms.

## Asset quality

The assets for which the quality dashboard is available have an extra option in their tab menu, namely **Quality**. The dashboard displays the aggregated passing fraction (quality score) for the asset in the form of ring charts.




Each ring chart shows the quality score in the form of:

- A quality score as a percentage.
- A color code indicating the quality of this passing fraction:
  - Red: 0-50%
  - Orange: 50-85%
  - Green: 85 - 100%

- An arrow indicating the trend of the score compared to the previous measurement.

The first ring chart shows the general score of the asset. The ring charts next to it show subscores for a specific dimension, such as **Accuracy**, **Conformity**, **Completeness** and **Consistency**. Only values that belong to that specific dimension are then taken into account. The dimensions to use are configured in the metric group. In this example, it is the relation: **Data Quality Rule** is Classified By **Data Quality Dimension**.

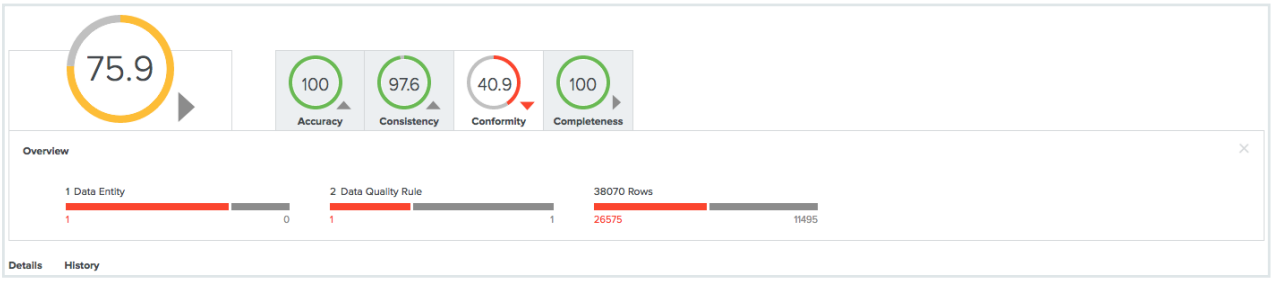
Underneath the top pane, three selection boxes are available. They display an extra overview, details and history pane, respectively.

To close a pane, click ✖ in the upper-right corner of the pane.

## Data quality overview pane

The **Overview** pane shows more information about each level in the aggregation path for the selected general score or dimension. For each level, it shows the number of involved assets of a certain type and what their results are: failing (red) or passing (gray). It also shows the total number of rows, the number of failing rows (red) and the number of passing rows (gray) that resulted in the given scores.

In the following example, the **Conformity** dimension consists of a total of 38 070 rows, 26 575 of which were failing. Two **Data Quality Rules** were involved, one of which was failing. And these **Data Quality Rules** were used by one **Data Entity**, which has an aggregated failing result.

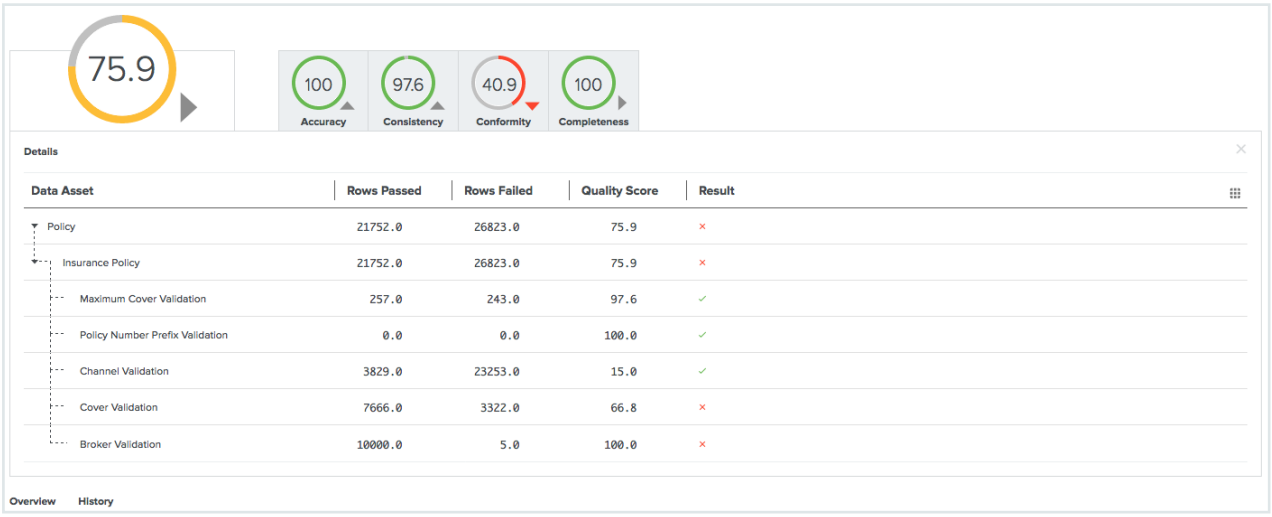



## Asset quality details pane

The **Details** pane shows more information about all the assets involved in a table format.

For each asset, a row with the following default columns is shown:

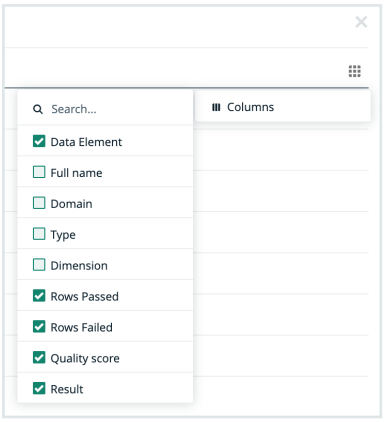
- **Data Asset**: The data asset signifier
- **Rows Passed**: The number of passing rows, aggregated as a sum of the passing rows of the underlying assets
- **Rows Failed**: The number of failing rows, aggregated as a sum of the failing rows of the underlying assets
- **Quality Score**: The score aggregated as an average of the quality scores of the underlying assets
- **Result** (failing or passing): The aggregated result as a logical conjunction of the results of the underlying assets.




Some extra columns can be displayed in this table by clicking ⠿ → **Columns**.

These include:

- **Full name**: The unique full name of the asset.
- **Domain**: The domain to which the asset belongs.
- **Type**: The type of the asset.
- **Dimension**: The dimension that applies to these assets, if any. Dimensions are used to calculate the subscores, as mentioned earlier.




## Asset quality history

The **History** pane shows the evolution of the quality score over time, for up to one month in the past.

You can display the date and the score for a specific period at the top right of the pane by hovering your pointer over that period.

When you select a period by clicking on it, the top left corner of the pane shows a trend of the score compared to the period before it.




# Validation rules

Validation rules are special assets of the type **Validation Rule**. They allow you to verify whether assets meet certain criteria. They have a special attribute **Validation Script**, which contains a validation script that evaluates assets of the types to which the validation rule is assigned.

## Administrator actions

- Create a domain of the type **Validation rule domain**.
- Create a validation rule.
- Edit a validation rule.
- Delete a validation rule.
- Assign a validation rule to an asset type.
- Change the order of validation rules.
- Unassign a validation rule from an asset type.

## User actions

- Validate assets.
- View the validation result.
- Revalidate an asset.

## Executing validation rules

You can execute validation rules in many ways:

- Validate assets
  Do this to manually validate assets.
- Revalidate an asset
  Do this after editing an invalid asset.
- Automatically.
  You can configure a workflow to start a validation on given events. For example when a asset is added or an attribute is edited.
  To configure triggers on certain events, see Getting started with workflows.

### Validation logging

Collibra Data Governance Center can write extensive log messages from the execution of validation rules. These messages are written to the **dgc.log** file.

If the execution of a validation rule fails, analyzing the log is probably the most thorough approach.

For more information on how to configure validation logging, see Logging.

> Tip When contacting support regarding a problem with validation, attach the log file to the ticket.

## Validate assets

Validating an asset executes all validation rules assigned to the asset type. If an asset does not meet all validation rules, the asset is invalid.

You can see the validation result on:

- An asset page's title bar.
- As a column, when viewing assets in table display mode.
- As a field, when viewing assets in tiles display mode.
- As an overlay in a traceability diagram.

After validation, the **dgc.log** file will also contain more extensive messages. For more information on how to configure validation logging, see Logging.

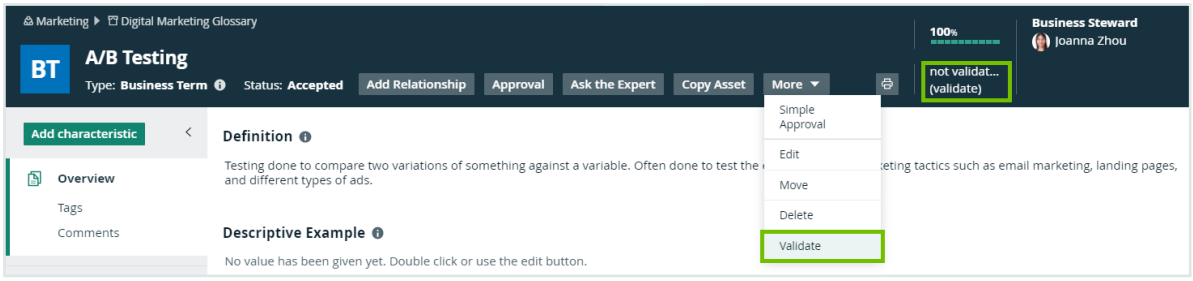
> Note By default, validation is not automatically triggered when an asset is edited, so you have to revalidate it after editing an asset. However, you can create a workflow for this. To configure validation on certain events, see Getting started with workflows.

### Prerequisites

- Either of the following:
  - You have a resource role with the Validation Execution resource permission, for example Community Manager.
  - You have a global role that has the Manage all resources global permission.

### Validate an asset from the asset page

1. Open an asset page.
2. In the resource toolbar, click **(validate)**.




### Validate one or more assets from an asset table

1. Open a set of assets in table display mode.
2. Select checkboxes in front of the assets you want to validate.
3. In the action toolbar, click **Validate**.

### Validate one or more assets from a set of tiles

1. Open a set of assets in tile display mode.
2. Select the assets you want to validate.
3. In the action toolbar, click **Validate**.

## Revalidate an asset

You can revalidate assets that were previously validated to see whether they meet the validation rules that are assigned to the asset type.

Validating an asset executes all validation rules that are assigned to the asset types. If an asset does not meet all validation rules, the asset is invalid.

You can see the validation result:

- An asset page's title bar.
- As a column, when viewing assets in table display mode.
- As a field, when viewing assets in tiles display mode.
- As an overlay in a diagram.

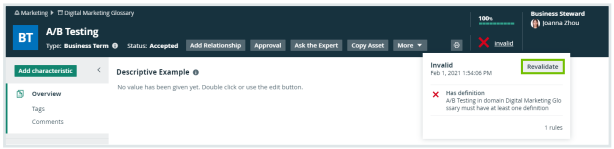
> Note You can create a workflow to automatically revalidate assets. To configure validation on certain events, see Getting started with workflows.

## Prerequisites

- Either of the following:
  - You have a resource role with the Validation Execution resource permission, for example Community Manager.
  - You have a global role that has the Manage all resources global permission.

## Revalidate an asset from the asset page

1. Open an asset.
2. In the upper right corner, click ✓ **valid** or ✕ **invalid**.
3. Click **Revalidate**.



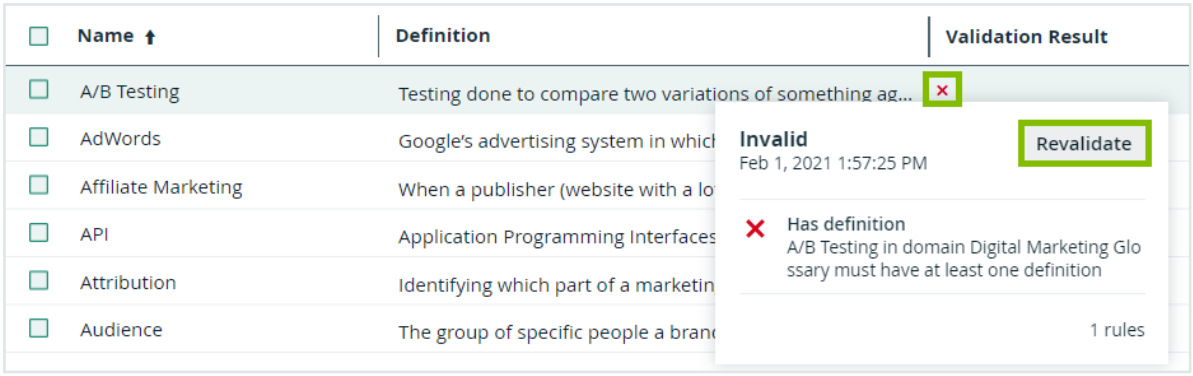

## Revalidate one or more assets from an asset view

1. Open an asset table.
2. Select checkboxes in front of one or more assets.
3. In the action toolbar, click **Validate**.

## Revalidate an asset from an asset view

1. Open an asset table.
2. If you don't see the **Validation Result** column, add it to the table.
   More info on adding columns to a table: Customizing tables.
3. Click ✓ or ✕.
   You can see the validation result of each validation rule.

4. Click **Revalidate**.



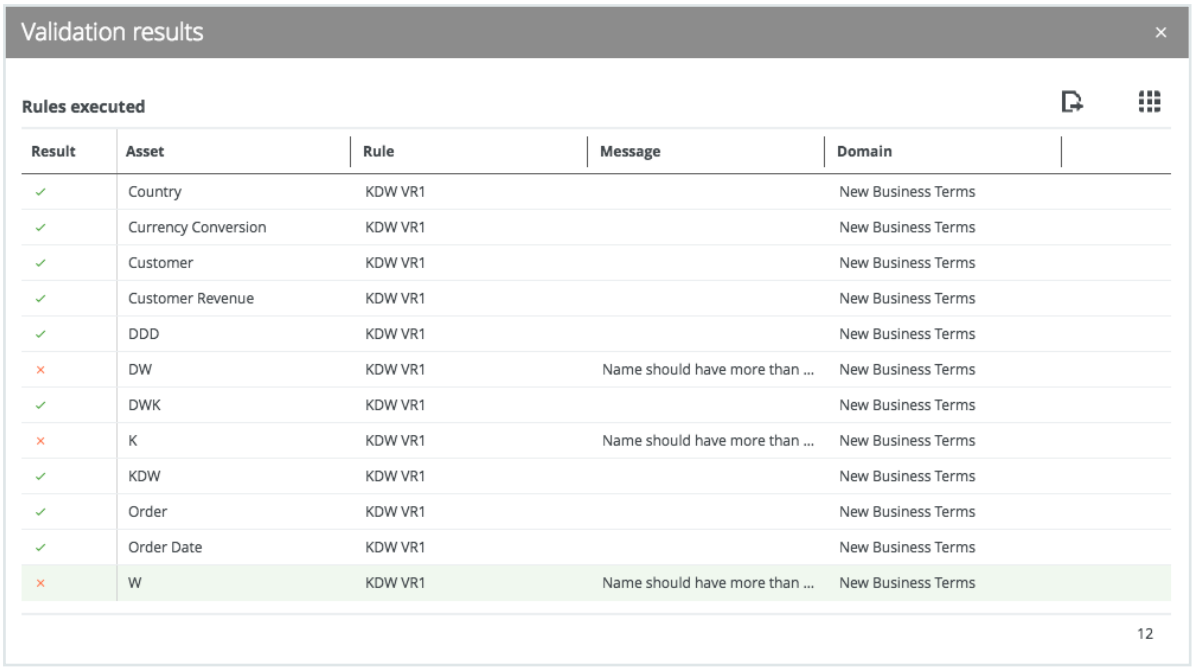

# View the validation result

After validating or revalidating assets, you can view the result and make changes where necessary.

## View the validation result from the activities list

1. Open the activities list.
   » In the table, you see the validations.
2. In the results column, click **Result**.
   » The **Validation results** dialog box appears.

   Example




3. The results column shows ✓ or ✕ to indicate whether they are respectively valid or invalid.

> Tip If you want to fix invalid assets, you can open them by clicking them.

## View the validation result on the asset page

1. Open an asset page.
2. In the upper right corner, you see ✓ **valid** or ✕ **invalid**.

## View the validation result in an asset table

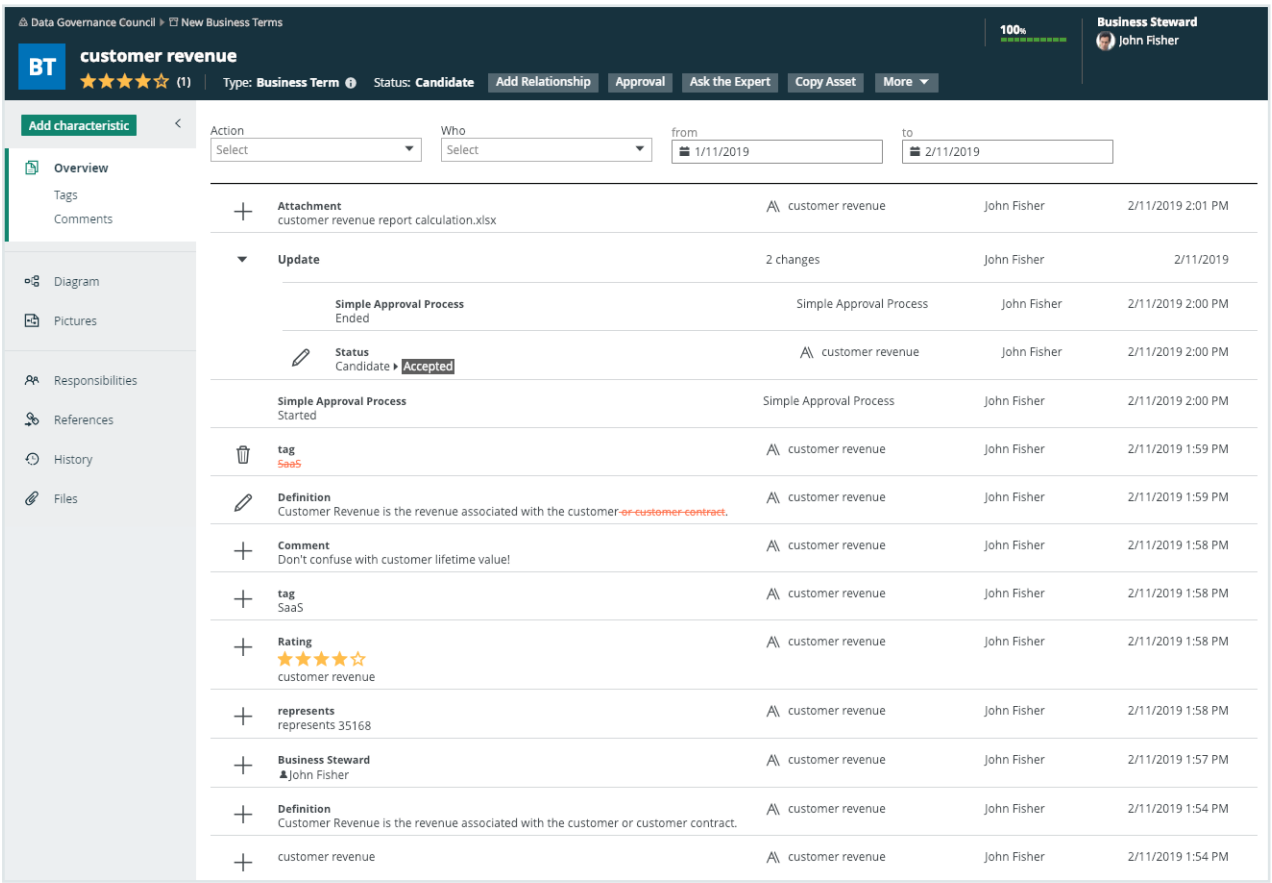
1. Open an asset table.
2. If you don't see the **Validation Result** column, add it to the table.
   More info on adding columns to a table: Customizing tables.
3. Click ✓ or ✕.
   » You can see the validation result of each validation rule.

# History in Collibra

Collibra Data Intelligence Cloud automatically keeps a history of users and resources such as assets, domain and communities. This history keeps track of most changes to that resource and its children, as well as who made the changes.

> Example
> Users can provide a definition of a business term, edit its name, move it to a new domain, and change the status. These changes are in the history of the affected assets, their parent domain, all parent communities and the history of the users themselves.

You can view the history of any resource in the **History** tab of the resource's page, as shown in the following image.



# History page

The History page provides an overview of the history of a user or a resource and its children. For examples, it contains all actions related to the following:

- Creating, editing and deleting resources.

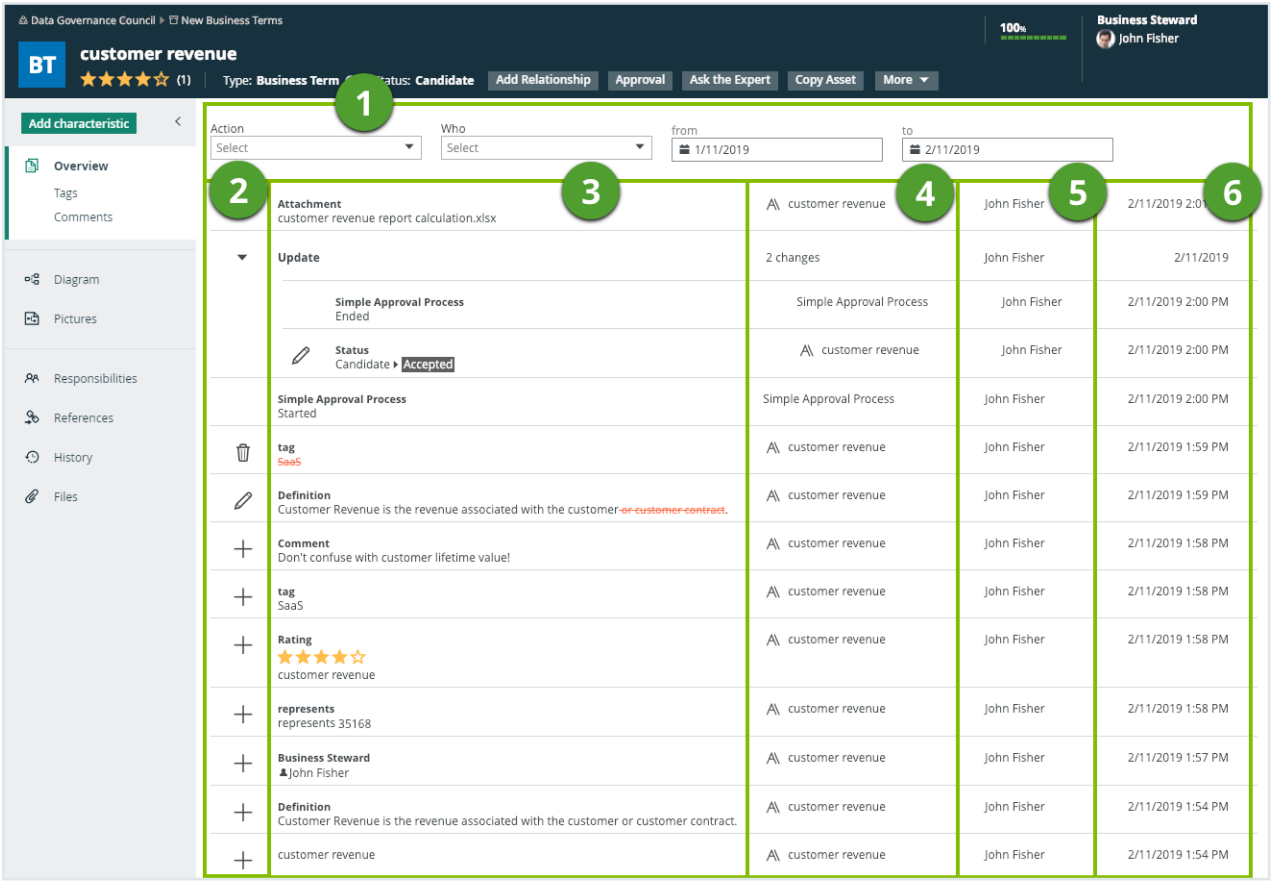
  > Note
  > In some cases, an edit is logged as a delete plus a create.
  > For example, if you edit a Description attribute of a Data Usage complex relation, the original Description attribute is deleted, and a new Description attribute is created with the new content.

- Moving assets to a different domain.
- Adding, editing and removing characteristics.
- Changes to the asset status.
- Social features such as comments, tags and ratings.
- Uploading and deleting attachments.
- Workflows and the resulting changes.
- Creating, editing and deleting responsibilities.

  > Note
  > - The history does not show changes to inherited responsibilities.
  > - The history does not show changes to the view permissions.

- In the case of the user history, adding and removing the user to or from user groups.

> Tip Some actions do not change the last modification date of an asset. See here for actions that do change the last modification date and actions that don't.




| Column | Content |
|---|---|
| 1 | The filter that allows you to filter the history based on the type of action, the user or a time period. |
| 2 | The icon that represents the type of action that was applied to the resource:<br>• +: Added information.<br>• ✎: Edited information.<br>• 🗑: Deleted information.<br>• ▶: Multiple changes in one go. Click the icon to expand and show the individual changes |
| 3 | The summary of the action. |
| 4 | The name of the affected resource. |

| Column | Content |
|---|---|
| 5 | The user who applied the action. |
| 6 | The date and time when the action was applied. |

## View the history of a resource

You can view the change history of an asset, domain or community.

### Steps

1. Open an asset page.
2. In the tab pane, click **History**.
   » The history is shown in a table.

> Note By default, the filter only shows the 10 latest changes in the last month.

3. If required, do one of the following:
   a. Click **Load More** below the table to load more history items.
   b. Edit the filter criteria above the table to see only specific history items.

| Criterion | Description |
|---|---|
| Action | Choose one of the actions:<br>■ **Add**<br>■ **Edit**<br>■ **Delete**<br><br>The effect of this filter criterion depends on the resource:<br>■ For assets, this includes action that affect an attribute.<br>■ For domains, this includes actions affecting the domain itself, but also actions affecting assets in the domain.<br>■ For communities, this includes actions affecting the community itself, but also actions affecting assets, domains and subcommunities of the community. |
| Who | Choose a user whose actions you want to see. |
| from | Choose the start date of the period of which you want to see the actions.<br><br>The default value of this criterion is one month before the current date. |
| to | Choose the end date of the period of which you want to see the actions.<br><br>The default value of this criterion is the current date. |

   c. Remove the **Action** or **Who** filter criteria by deleting the value in the filter box using the `Delete` key of your keyboard.

# About the last modification date

The last modification date shows the date of the last modification to an asset. Not all modifications to an asset will change this date. On this page, you see an overview of actions that change the last modification date and actions that don't.

## Actions that change the last modification date

- Asset property changes:
  - Asset (full) name
  - Asset display name
  - Asset status
  - Move asset to another domain
  - Exclude or include asset from auto-hyperlinking
- Asset attribute changes:
  - Add new attribute
  - Edit attribute value
  - Delete an attribute
- Other:
  - Validation result
  - Articulation score

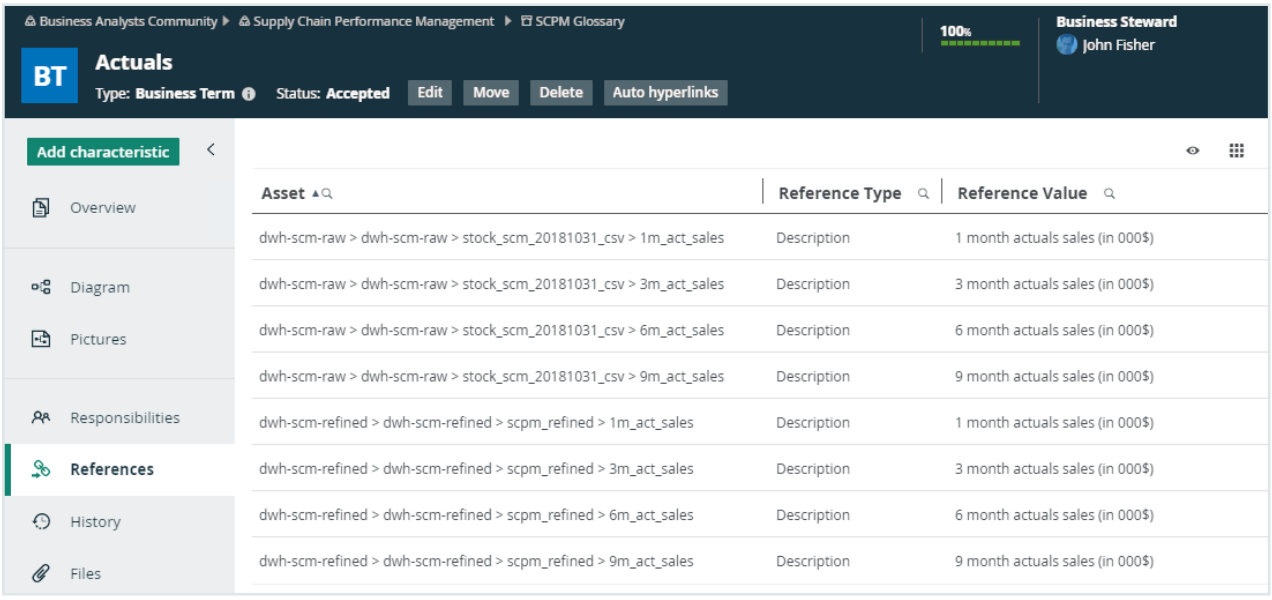
## Actions that don't change the last modification date

- Asset relations:
  - Add a relation to an asset
  - Remove a relation from an asset
- Asset responsibilities:
  - Grant a new role to a user or user group
  - Remove a user or user group
- Collaborative actions:
  - Add or remove tags
  - Add or remove ratings
  - Start workflows
  - Task completion
  - Add, edit or remove comments

- Other:
  - Add attachment
  - Take diagram picture

# References tab of an asset page

The **References** tab of an asset page shows a table with assets that have at least one string attribute or comment containing the name of the asset that you have currently opened.




By default, the table shows the **Asset**, **Reference Type**, and **Reference Value** columns. You can, however, add more columns.

The following table describes the available columns.

| Column | Description |
|---|---|
| Asset | The full name of the asset that references the opened asset. |
| Reference Type | The type of the attribute that references the opened asset. |

| Column | Description |
| --- | --- |
| Reference Value | The text of the attribute that references the opened asset. |
| Status | The status of the asset that references the opened asset. |
| Type | The type of the asset that references the opened asset. |

# Importing and exporting

The import and export functionality in Collibra Data Intelligence Cloud are useful to respectively quickly add or update content and to transfer data to an external file or system.

## Importing

The import functionality allows you to create or edit data in bulk in Collibra Data Intelligence Cloud.

By importing, you can create and edit communities, domains, assets, mappings or complex relations and their characteristics such as attributes, relations and tags from a view.

> Tip If you want to edit a lot of assets in one go, you can perform the so-called export/import roundtrip. First create a view that contains all the assets and characteristics that you want to edit, then export the assets from that view. You can then edit the exported file, and import the assets back into the same view. Collibra will automatically map the characteristics during the import, implementing your changes.

For example, you can use the import functionality to do the following:

- Create assets in a new or existing domain.
- Add and edit characteristics of existing assets.

- Edit the display name or full name of existing assets.
- Move assets to a new or existing domain.

> Tip You can also use the import functionality for integrations and synchronization with external systems. Instead of manually importing and exporting assets, you can use the Import REST API to automate the workflow. Visit the Developer Portal to learn more.

> Note Exporting and importing assets and complex relations is restricted by the file upload settings, which define the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings. The default maximum file size is 512 MB.

> Note When importing very large Excel files, you may encounter the following error: *Tried to read data but the maximum length for this record type is 100,000,000.* To bypass this known limitation, split the Excel in files with no more than 100,000 rows or use CSV.

## Import assets

You can import assets with the import functionality. For example, this is useful if you have a list of business terms in Excel and you want to manage them in Collibra Data Intelligence Cloud.

> Tip If you want to edit a lot of assets in one go, you can perform the so-called export/import roundtrip. First create a view that contains all the assets and characteristics that you want to edit, then export the assets from that view. You can then edit the exported file, and import the assets back into the same view. Collibra will automatically map the characteristics during the import, implementing your changes.

> Note Exporting and importing assets and complex relations is restricted by the file upload settings, which define the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings. The default maximum file size is 512 MB.

## Prerequisites

You have prepared an Excel or CSV file for upload:

- Only the essential sheets, columns and rows remain.
- Numbers that have to be interpreted as text are preceded by a single quotation mark.
- Dates are formatted as yyyy-mm-dd.

> Note Importing data from a large Excel file can consume a lot of memory. We advise you to import from CSV instead of Excel, or to limit the Excel file to only contain the data you really need.

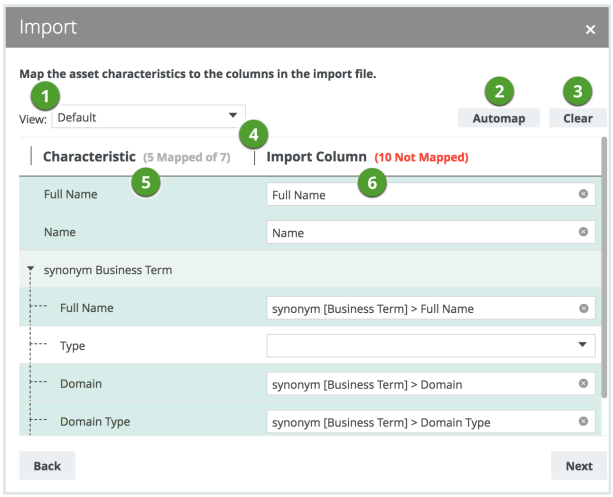
## Steps

1. Open a view.
2. Above the table, to the right, click → **Assets**.
   » The **Import** dialog box appears.
3. Click **Select File** and choose the appropriate Excel or CSV file for upload.
4. Click **Next**.

5. If you chose a CSV File, do the following:
    a. Enter the required information.

| Field | Description |
|---|---|
| Column Separator | The character used to delimit the columns in the CSV file. |
| Quote | The character before and after a string to capture the entire cell. |
| Escape Character | The character that is used to use the column separator or quote character as plain text. |

    b. Click **Next**.
6. Manage the mapping of the columns of the import file and the view's fields.
    a. The **Import mapping** dialog box appears and Collibra tries to map the fields of the view automatically to the columns in the import file, based on the names of the fields and columns.



| Number | Field | Description |
|---|---|---|
| 1 | View selector | The view selector allows you to choose a view whose characteristics will appear in the list.<br><br>Tip You can also choose **All characteristics** to show all characteristics. |
| 2 | Automap | Button to let Collibra automatically map all fields of the view to the columns in the import file, based on the names of the characteristics and columns. |
| 3 | Clear | Button to clear all mapped characteristics in the **Import Column**. |
| 4 | Mapping table | This table enables you to map characteristics of the view to columns of the import file.<br><br>Each row has a background color to indicate whether a characteristics is mapped or not.<br><br>■ Dark green: The characteristic is mapped to a column in the import file.<br>■ Light green: The relation is mapped partially. This means not all underlying fields are mapped.<br>■ White: The characteristic is not mapped. |

| Number | Field | Description |
|---|---|---|
| 5 | Characteristic | This column contains the available characteristics. Depending on the selection in the view selector, it contains either the characteristics of the selected view, or all characteristics. For relations, a hierarchy is displayed. |
| 6 | Import Column | This column should contain fields in which you can choose columns of the import file to map to a characteristic of the view. |

b. If required, choose another view in the view selector.

> Tip Choose **All characteristics** to show all characteristics. In most cases, this makes it easier to map all characteristics.

c. Click **Automap** to let Collibra map all visible columns automatically.
d. If required, manually map columns to another characteristic.

7. Click **Next**.
   » The **Import options** appear.

8. Enter the required information.

| Setting | Result |
| --- | --- |
| Create new assets and domains if non-existent. | If assets or domains do not exist, Collibra creates them.<br>Collibra creates a new domain and top-level community if the following conditions are met:<br>◦ You mapped columns of the import file to the domain, domain type and community characteristics of the view.<br>◦ The columns contain a domain and/or community name that doesn't exist yet. |
| How do you want to handle existing assets? | |
| Replace them with the new assets. (=> delete + create) | If assets exist, Collibra deletes them first and creates them again based on the import file. |
| Update the name, properties and attributes. | If assets exist, Collibra compares the attributes and updates them if necessary. |
| How do you want to handle mapped attrib-utes? | |
| Replace them with new attributes. (=> delete + create) | If attributes exist, Collibra deletes them and creates them again based on the import file.<br>Select this option if you want to update existing, or add new attributes, such as a definition. |

| Setting | Result |
| --- | --- |
| Create as new attributes. | If attributes exist, Collibra creates another instance of the attributes based on the import file.<br>Select this option if you do not want to edit the existing attributes, but always want to create new attributes. This could result in multiple instances of the same attributes, such as a definition. |
| Delete existing assets from the domain that are not in the file. | Collibra deletes the assets that are not in the import file. |
| Test Import | Collibra first simulates an import without affecting the data to give you an overview of how the actual import would affect the data. After the overview, you can proceed with the import, go back to change the options or cancel the import. |

9. Click the **Test Import** button.
   » The test results appear.
10. If everything looks okay, click **Import**.
    If it doesn't, close the dialog box to cancel the import or click **Back** to change the mapping or import options.
    » The import results appear.
11. Click **Close**.

> Note When importing very large Excel files, you may encounter the following error: *Tried to read data but the maximum length for this record type is 100,000,000.* To bypass this known limitation, split the Excel in files with no more than 100,000 rows or use CSV.

## Import complex relations

You can import complex relations with the import functionality. For example, this is useful if you want to create a lot of complex relations in one go.

Tip If you want to edit a lot of assets in one go, you can perform the so-called export/import roundtrip. First create a view that contains all the assets and characteristics that you want to edit, then export the assets from that view. You can then edit the exported file, and import the assets back into the same view. Collibra will automatically map the characteristics during the import, implementing your changes.

Tip For importing complex relations using an Excel file, see the knowledge base on the Collibra Support Portal.

Note Exporting and importing assets and complex relations is restricted by the file upload settings, which define the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings. The default maximum file size is 512 MB.

## Prerequisites

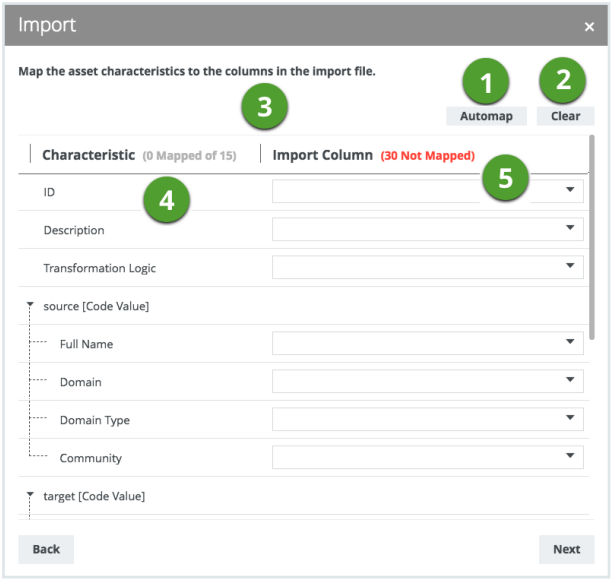
You have prepared an Excel file for upload:

- Only the essential sheets, columns and rows remain.
- Numbers that have to be interpreted as text are preceded by a single quotation mark.
- Dates are formatted as yyyy-mm-dd.
- The related assets to connect for a single complex relation must be specified in a single cell.
- Your import file has the correct structure to import complex relations.

## Steps

1. Open a view.
2. Above the table, to the right, click → **Complex Relations**.
   » The **Import** dialog box appears.
3. Click **Select File** and choose the appropriate Excel file for upload.
4. Click **Next**.
5. Select the complex relation type that you want to import.

6. Click **Next**.
7. Manage the mapping of the columns of the import file and the view's fields.
    a. The **Import mapping** dialog box appears and Collibra tries to map the fields of the view automatically to the columns in the import file, based on the names of the fields and columns.




| Number | Field | Description |
|---|---|---|
| 1 | Automap | Button to let Collibra automatically map all fields of the view to the columns in the import file, based on the names of the characteristics and columns. |
| 2 | Clear | Button to clear all mapped characteristics in the **Import Column**. |

| Number | Field | Description |
|---|---|---|
| 3 | Mapping table | This table enables you to map characteristics of the view to columns of the import file.<br><br>Each row has a background color to indicate whether a characteristics is mapped or not.<br><br>■ Dark green: The characteristic is mapped to a column in the import file.<br>■ Light green: The relation is mapped partially. This means not all underlying fields are mapped.<br>■ White: The characteristic is not mapped. |
| 4 | Characteristic | This column contains the available characteristics. Depending on the selection in the view selector, it contains either the characteristics of the selected view, or all characteristics. For relations, a hierarchy is displayed. |
| 5 | Import Column | This column should contain fields in which you can choose columns of the import file to map to a characteristic of the view. |

b. If required, choose another view in the view selector.

> Tip Choose **All characteristics** to show all characteristics. In most cases, this makes it easier to map all characteristics.

c. Click **Automap** to let Collibra map all visible columns automatically.
d. If required, manually map columns to another characteristic.

8. Click **Next**.
   » The **Import options** appear.
9. Enter the required information.

| Setting | Result |
| --- | --- |
| Test Import | Collibra first simulates an import without affecting the data to give you an overview of how the actual import would affect the data. After the overview, you can proceed with the import, go back to change the options or cancel the import. |

10. Click the **Test Import** button.
    » The test results appear.
11. If everything looks okay, click **Import**.
    If it doesn't, close the dialog box to cancel the import or click **Back** to change the mapping or import options.
    » The import results appear.
12. Click **Close**.

> Note When importing very large Excel files, you may encounter the following error: *Tried to read data but the maximum length for this record type is 100,000,000.* To bypass this known limitation, split the Excel in files with no more than 100,000 rows or use CSV.

## Import file structure of a complex relation

You can define multiple relations with the same role.

The different assets to relate to are formatted as a comma-separated list in a single cell.

This means that:

- For every role in the complex relation type, you have to specify the **Asset** column. Fill in a comma-separated list of the asset names to connect to the complex relation with that role. If there is an asset in the import file that does not exist, it is created automatically.

- If an asset name contains a comma, you can use double quotes around the asset names to ignore the comma as a separator.
  For example, to refer to an asset named **last name, first name**, the name has to be written as **"last name, first name"**.
- If your asset names have commas as well as double quotes, you can change the standard behavior of the double quote by using a backslash (\).
  For example, to refer to an asset called **last name "," first name**, the name has to be written as **"last name \",\" first name"**.
- If you specify the domain names for mapped assets, you also have to use a comma-separated list in the **Domain** column, even if the domain is the same for all the assets.
- If you have to specify the domain and community for the relation assets as well, it is important that the size and order of the comma-separated lists for all three aspects (asset name, domain, community) is the same.
- If the referred assets are not all in the current domain, you can specify one or more domains to search in, by mapping the **Domain** characteristic to a column containing a comma-separated list of domain names. If there is a domain in the import file that does not exist, it is created automatically.
- If the referred domains are not all in the current community, you can specify one or more communities to search in, by mapping the **Community** characteristic to a column containing a comma-separated list of community names.

# Exporting

The export functionality makes it easy to transfer data from Collibra to an external file or system.

You can export assets or complex relations to a CSV or XLSX file. The exported file is very similar to the data you view in the table on the screen.

All relevant properties of a table are taken into account in an export:

- Filters: Determine which assets are exported.
- Columns: Determine which information about assets is exported.
- Sorting: Determine the order in which the assets are exported.

> Note Exporting and importing assets and complex relations is restricted by the file upload settings, which define the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings. The default maximum file size is 512 MB.

# Export assets

You can export assets from a view. For example, this is useful if you want to create an overview in Excel.

> Note Exporting and importing assets and complex relations is restricted by the file upload settings, which define the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings. The default maximum file size is 512 MB.

## Steps

1. Navigate to the asset table that you want to export.
   Example: Business Glossary
2. Above the table, to the right, click > **Assets**.
   » The **Export** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| View | Choose the view that you want to export.<br><br>By default, your current view is filled in as view to export. |

| Field | Description |
|---|---|
| Add the characteristic needed for reimport. (ID, Domain, Community, ...) | Select this option if you want to reimport the export file later.<br><br>By default, the export file only contains the characteristics that are displayed in the view. If you select this field, the export file will contain additional columns that are needed for the reimport. |
| Remove text formatting | Select this option to remove any formatting of attributes in the export file.<br><br>Important When you reimport a file with this option selected, the columns are not automatically mapped to prevent overwriting formatted text. If you manually map the columns, you lose the text formatting |
| File name | Type the name of the export file.<br><br>By default, the name of the export file is set to the name of the view. |
| File type | Choose the file type of the export.<br><br>By default, the exported file type is **Excel**, but you can change it to **CSV**. |
| Sheet name | Type the name of the sheet in the export file.<br><br>This option only appears if you select **Excel** as the **File type**. |
| Character selector | Select the characters you want to use as the **Separator**, **Quote** and **Escape**.<br><br>This option only appears if you select **Excel** as the **File type**. |

4. Click **Export**.
   » A progress message is displayed. You can send this message to the background by closing it.

» When the export is finished, the export file is downloaded according to the settings of your web browser.

5. Close the progress message.

Note You can access the export file after finishing the export process by going to **Settings** → **Activities** and then clicking **Results** alongside the export action.

## Export complex relations

You can export complex relations. They have to be represented differently in a table structure than assets. For that reason, the export of complex relations is handled differently.

> Note Exporting and importing assets and complex relations is restricted by the file upload settings, which define the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings. The default maximum file size is 512 MB.

### Steps

1. Navigate to the asset table that you want to export.
   Example: Business Glossary
2. Above the table, to the right, click > **Complex Relations**.
   » The **Export** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Complex Relation Type | Choose the type of the complex relations that you want to export. |

| Field | Description |
|---|---|
| Add the characteristic needed for reimport. (ID, Domain, Community, ...) | Select this option if you want to reimport the export file later.<br><br>By default, the export file only contains the characteristics that are displayed in the view. If you select this field, the export file will contain additional columns that are needed for the reimport. |
| Remove text formatting | Select this option to remove any formatting of attributes in the export file.<br><br>Important When you reimport a file with this option selected, the columns are not automatically mapped to prevent overwriting formatted text. If you manually map the columns, you lose the text formatting |
| File name | Type the name of the export file.<br><br>By default, the name of the export file is set to the name of the view. |
| File type | Choose the file type of the export.<br><br>By default, the exported file type is **Excel**, but you can change it to **CSV**. |
| Sheet name | Type the name of the sheet in the export file.<br><br>This option only appears if you select **Excel** as the **File type**. |
| Character selector | Select the characters you want to use as the **Separator**, **Quote** and **Escape**.<br><br>This option only appears if you select **Excel** as the **File type**. |

4. Click **Export**.
   » A progress message is displayed. You can send this message to the background by closing it.

» When the export is finished, the export file is downloaded according to the settings of your web browser.

5. Close the progress message.

Note You can access the export file after finishing the export process by going to **Settings** → **Activities** and then clicking **Results** alongside the export action.

## Export dialog box for complex relations

| Field | Description |
|---|---|
| Complex Relation Type | The complex relation type that you want to export. |
| Add the characteristic needed for reimport. (ID, Domain, Community, ...) | By default, the export file only contains the characteristics that are displayed in the view. By selecting this check box, you can add a column for ID characteristics. These characteristics help to identify specific resources during an import. |
| Remove text formatting. | By default, the export file contains the raw content of text attributes, including text markup. By selecting this check box, you can remove most of the text formatting from exported attributes.<br>If you choose to remove text formatting, it is better not to import the unformatted text. To prevent the overwriting of formatted text, Collibra ensures that the column names are not automatically mapped while you are importing a file that was exported without text formatting. |
| File name | By default, the name of the export file is set to the name of the view. You can give the file any name you like, however. |
| File type | By default, the exported file type is **.xls**, but you can change it to **.csv** if you prefer. |
| Sheet name | Name of one of the sheets in an Excel or CSV file. |

# Update complex relations in bulk

If you want to make changes to multiple complex relations of the same type at once, follow these steps:

1. Export complex relations.
2. In the exported file, make the necessary changes.

   > Warning Do not change the ID values.

3. Save and close the file.
4. Import the complex relations.
   In the mapping step, also map the **ID** field to the **Business Term Mapping - id** column in your exported file.

# Diagrams

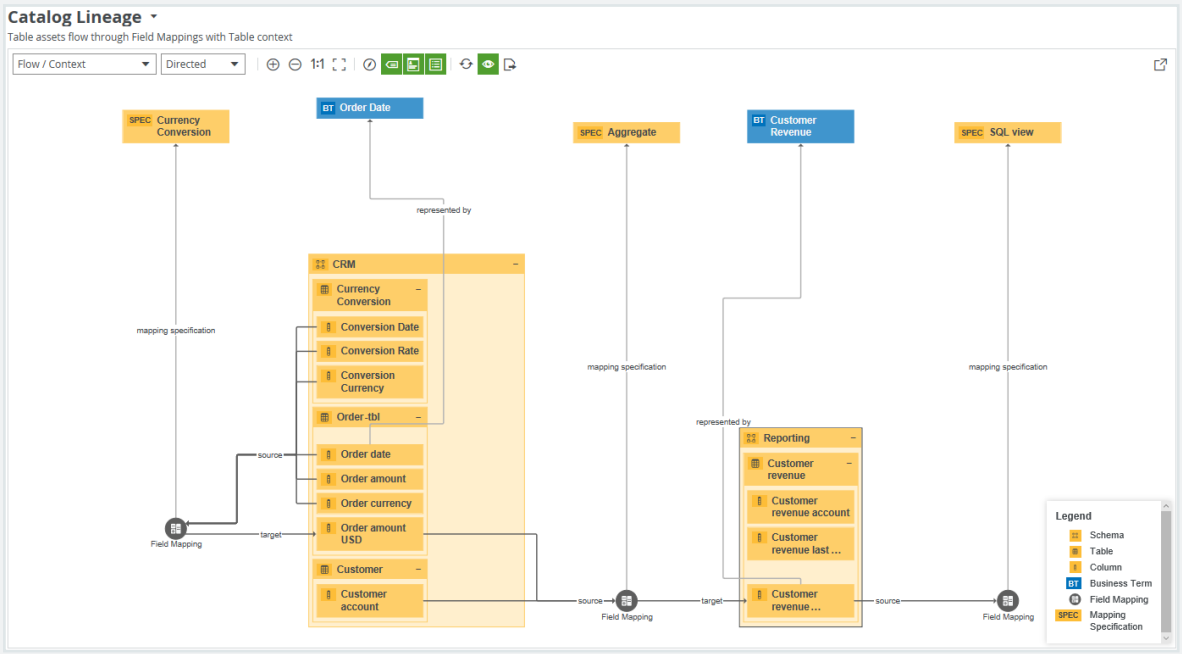
Diagrams allow you to show and interact with many assets and relations in an easy-to-read way. A diagram helps you to quickly see to which other assets a specific asset is related. Two assets are related if you can navigate from one to the other by traversing one or more relations.

You can find a diagram in the tab pane of every asset page.

You can work with diagrams in the diagram editor, to determine how a diagram is shown. Collibra Data Intelligence Cloud comes with several packaged diagram views for common use cases. You can also create and share your own diagram views.

For complete information on diagrams, see the Documentation Center.

Example
The image below shows a diagram with assets, relations and complex relations.




# In this chapter

## Diagram and diagram view terminology

To work with diagrams and diagram views, you have to understand the following concepts.

| Concept | Description |
|---|---|
| Diagram | The diagram that results from applying a diagram view to a given asset. It sometimes also called "result diagram". |

| Concept | Description |
|---|---|
| Diagram view | A kind of query that determines which nodes and edges have to be shown in a diagram for a given asset.<br><br>The diagram view also determines how the nodes and edges are shown.<br><br>You can define multiple diagram views for the same asset type. |
| Loop | A diagram view that contains a path that revisits the same node. For example, [Business Asset] groups [Business Asset], or [Data Element] sources [Field Mapping], [Field Mapping] targets [Data Element].<br><br>A diagram view with a loop can lead to a diagram that has very long paths. |
| Node | In a diagram, a node is an asset or a complex relation.<br><br>Note<br>• The node for an asset is depicted by a rectangle.<br>• The node for a complex relation is depicted by a circle or a rectangle with rounded corners. |
| Boxed node | A node that is contained inside a boxing node. For example, a Column asset can be boxed by a Table asset. |
| Boxing node | A node that contains one or more boxed nodes. If it is expanded, you can see the boxed nodes. If it is collapsed, you cannot see the boxed nodes.<br><br>For example, a Table asset can box multiple Column assets. |
| Locked node | A collapsed boxing node that cannot be expanded. |

| Concept | Description |
| --- | --- |
| Incoming relation | An incoming relation of a node is when the selected node is the tail side of the relation type, in other words, an edge for which this node is the 'to' node.<br><br>For example, the relation [Business Term] has code / is code for [Code Value] is incoming for a Code Value. |
| Outgoing relation | An outgoing relation of a node is when the selected node is the head side of the relation type, in other words, an edge for which this node is the 'from' node.<br><br>For example, the relation [Business Term] has code / is code for [Code Value] is outgoing for a Business Term. |
| Edge | In a diagram, an edge is a directed relation between two nodes. The word 'directed' indicates that the direction in which the relation is used is relevant for the diagram.<br><br>An edge is normally depicted by an arrow between two nodes. The arrow points to the 'to' node. It can also be represented by means of boxing and boxed nodes, in which one node contains the other. |
| Flow | The entire course of nodes and edges from the start node to the end node. |
| Context | A collection of nodes that does not belong in the flow. The nodes have an incoming edge from a flow node. For example, nodes that represent a System asset can be context nodes. |
| Overlay | An overlay is a characteristic of a node that is shown in the diagram. Overlays are added in a diagram view and can be shown or hidden via the diagram toolbar. |
| Traversal strategy | The logic that describes which relations and assets are included in the diagram. |

# Nodes and edges

Nodes and edges are the fundamental building blocks of diagrams and diagram views:

- In diagrams, nodes are rectangles or circles that represent, respectively, assets or complex relations. Edges represent relations between assets or between assets and complex relations.
- In diagram views, nodes are rectangles or circles that represent, respectively, asset types or complex relation types. Edges represent relation types between asset types or between asset types and complex relation types.

Both nodes and edges can be represented in different ways in diagrams and diagram views.

Relations connect assets, or assets and complex relations. In diagrams, this is represented by edges that connect nodes. Each node can have incoming and outgoing edges:

- An edge of a node is incoming if that node is the 'to' node of the edge. This depends on the relation type and the direction of the edge:
  - The node is the tail side of the relation type, and the edge has the role direction.
  - The node is the head side of the relation type, and the edge has the co-role direction.
- An edge of a node is outgoing if that node is the 'from' node of the edge. This depends on the relation type and the direction of the edge:
  - The node is the head side of the relation type, and the edge has the role direction.
  - The node is the tail side of the relation type, and the edge has the co-role direction.

Example
Consider the diagram below:




- The red node represents a Tableau Data Source asset.
- The blue node represents a Tableau Workbook asset.
- The arrow edge between the nodes represents a relation of the type "Tableau Data Source is source of / is source for Tableau Workbook".
  - The edge is outgoing for the Tableau Data Source node.
  - The edge is incoming for the Tableau Workbook node.

## Node and edge styles

Edges represent relations, which in turn describe a link between assets. To represent the meaning of those links in a diagram, edges can be represented in different ways. Depending on the meaning of the relation, you can choose which edge style suits best.

- Arrow: The most basic way to represent an edge is by means of an arrow. This representation is ideal for visualizing flows and causal relations.

  Example

- Boxed and boxing: Many relation types are used to describe a part-whole relation, such as "Tableau Project groups / is grouped by Report". For that reason, you can also represent the relation between those assets as boxing nodes and boxed nodes.

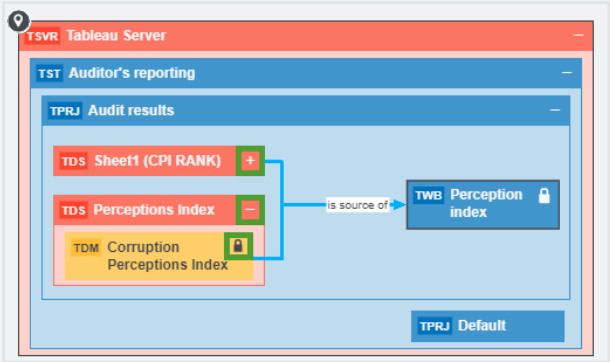
  A node that has an outgoing edge of the boxing style, becomes a boxing node. For the boxed node, the same edge is an incoming edge of the boxed style. Additionally, one boxing node could contain several boxed nodes, which have edges of their own.

  Boxing nodes can be expanded or collapsed:

  - An expanded boxing node shows its boxed nodes.
    You can collapse them by clicking − in the upper right corner of the node.

- A collapsed boxing node does not show its boxed nodes. As a consequence, if the hidden boxed nodes have arrow edges to nodes that are not contained by the boxing nodes, the diagram shows them as arrow edges of the boxing node. You can expand them by clicking + in the upper right corner of the node.
- A locked node is a collapsed node that cannot be expanded.
  You can recognize locked boxing nodes by the 🔒 in the upper right corner. You can still explore the nodes to see the edges.

Example




## Duplicate nodes

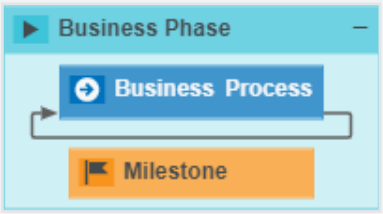
In some cases, the same asset might be represented by more than one node. In other words, there are two nodes representing the same asset, on the same diagram. This can be caused by several of reasons, but the most common reason is that an asset matches more than one node of the diagram view.

A node in a diagram view represents an asset type or a complex relation type. In the result diagram, this node represents an asset of that asset type or an asset of a child asset type. As a result, if a diagram view contains a node for an asset type and a node for its child asset types, the result diagram may contain an asset of the child asset type that matches both nodes of the diagram view. Therefore, the asset node is duplicated.

Example
Suppose the following situation;

- The Business Process asset type has two child asset types: Business Phase and Milestone.
- You have the following assets:
  - Business Process asset: Define Strategy
  - Business Phase asset: Plan
  - Milestone asset: Validate Strategy
- Your assets have the following relations:
  - Plan Business Phase has subprocess Define Strategy Business Process
  - Plan Business Phase has Milestone: Validate Strategy Milestone
  - Define Strategy Business Process Next: Validate Strategy Milestone
- The diagram view configuration is the following:
  - The Business Process node has a boxing edge: Business Process has subprocess Business Phase.
  - The Business Phase node has two boxing edges:
    - Business Phase has subprocess Business Process 2
    - Business Phase has Milestone
  - Business Process 2 node has an arrow edge: Business Process 2 Next Business Process 2.

This leads to the following diagram view:



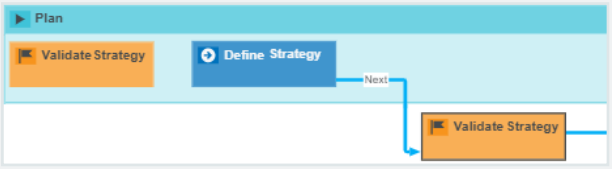

Because the Business Process asset type has two child asset types that are also on the diagram view, the result diagram can have duplicate nodes. In the example below, the Validate Strategy asset, of the Milestone asset type, is represented by two separate nodes.

Because Milestone is a child asset type of Business Process, Milestone assets can match both Milestone nodes and Business Process nodes. Furthermore, the Validate Strategy Milestone asset has two separate incoming edges:

- The Plan Business Phase has Validate Strategy Milestone, with the boxing style.

- The Define Strategy Business Phase asset Next Validate Strategy, with the arrow style.

Therefore, the Validate Release Strategy Milestone node is duplicated:




## Diagram layouts

Diagram layouts determine the location of nodes and edges in a diagram, but do not change which nodes and edges are shown.

You can select a diagram layout in the diagram toolbar.

| Diagram layout | Description |
|---|---|
| **Flow / Context** | Nodes and edges are shown in a flow and a context region.<br><br>In the flow region, nodes are shown mostly from left to right.<br><br>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the **Context** checkbox in the node properties form.<br><br>If there are no nodes in the context region, this layout produces the same result as **Hierarchy left -> right**.<br><br>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region. |
| **Hierarchy left - right** | Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout. |

| Diagram layout | Description |
|---|---|
| **Hierarchy top - down** | Nodes and edges are shown in a flow, from top to bottom. |
| **Hierarchy bottom - up** | Nodes and edges are shown in a flow, from bottom to top. |
| **Circular** | Nodes and edges are arranged in a circular fashion.<br>Boxing nodes are not supported in this layout, therefore:<br>• The diagram is completely redrawn.<br>• The explored nodes are removed from the diagram.<br>• The nodes expand or collapse to their initial state.<br>• Returning to a layout that supports boxing nodes completely redraws the diagram. |
| **Radial** | Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.<br>Boxing nodes are not supported in this layout. This has the same consequences as described for the **Circular** layout. |
| **Smart Organic** | Nodes and edges are distributed in a well-balanced manner, with few edge crossings. |

## Traversal strategies

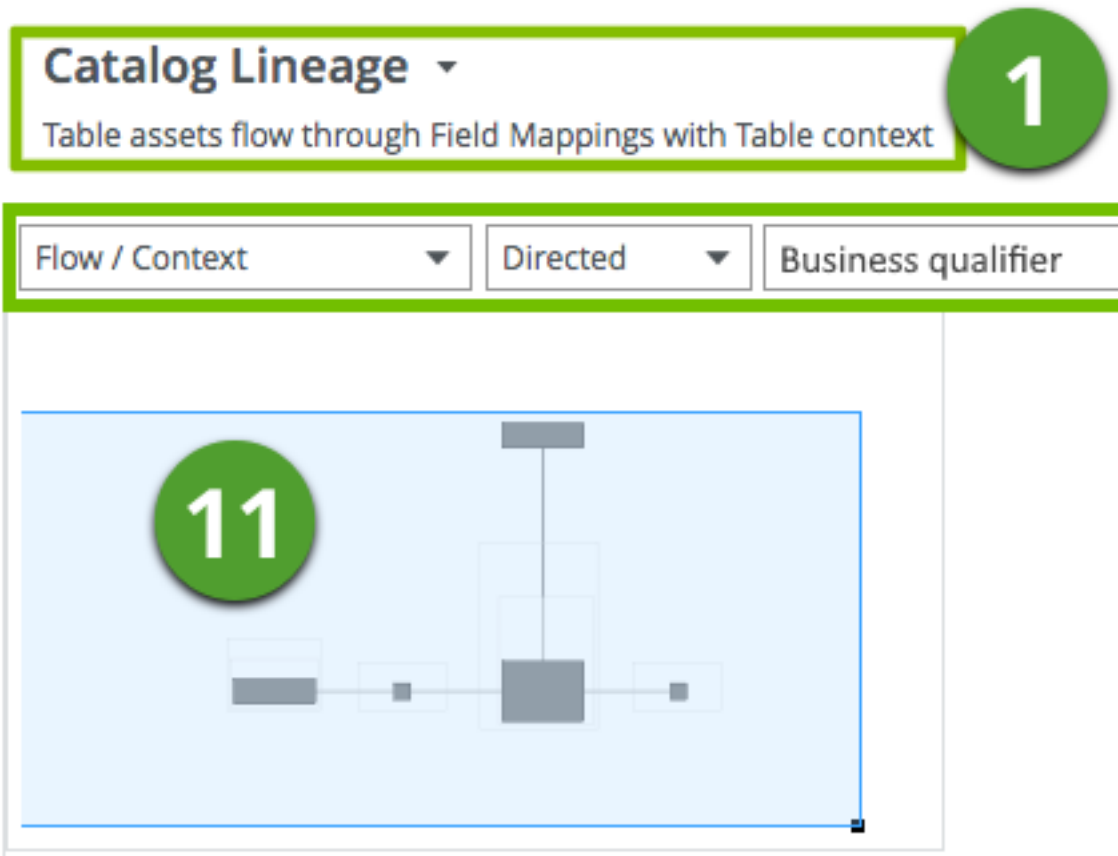
A traversal strategy determines which nodes and edges are traversed and displayed in a diagram.

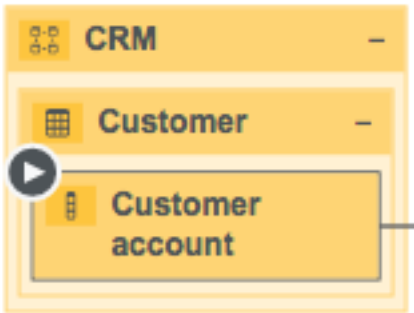
The diagram view determines the initial traversal strategy, but you can select another one in the diagram toolbar.

| Traversal strategy | Description |
|---|---|
| **End-to-end** | For the start node, Collibra Data Intelligence Cloud traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.<br><br>For each encountered node, Collibra traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.<br><br>This is the default traversal strategy. |
| **Upstream** | For the start node, only the incoming edges are traversed and shown.<br><br>For each node encountered, only the incoming edges are traversed. |
| **Downstream** | For the start node, only the outgoing edges are traversed and shown.<br><br>For each node encountered, only the outgoing edges are traversed. |
| **Complete** | For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram.<br><br>For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node.<br><br>Warning This strategy can result in a very large diagram that can take a long time to load. |

# Diagram editor

The diagram editor allows you to view and edit diagrams.


Catalog Lineage
Table assets flow through Field Mappings with Table context
1
Flow / Context
Directed
Business qualifier
5
11


CRM
Customer
Customer account

| No | Name | Description |
|---|---|---|
| 1 | View title | The name and description of the current diagram view.<br><br>You can select a different view from a list of pinned and applicable views for an asset of this type. You can open the list of views when you click the view name and then **Show all**. |
| 2 | Diagram toolbar | The toolbar to work with the diagram. |
| 3 | View bar menu | The buttons to manage the diagram view. |
| 4 |  | The button to create a new diagram view, starting from the selected node. |
| 5 |  | The button to edit the current diagram view. |
| 6 |  | The button to edit the name and description of the current diagram view. |
| 7 |  | The button to save the diagram view as a new view. |
| 8 |  | The button to share the diagram view. |
| 9 |  | The button to delete the diagram view. |
| 10 | Diagram | This is the actual depiction of the traceability of the current asset, according to the selected diagram view. |
| 11 | Overview (  ) | The box to zoom and navigate a diagram that is too large to fit the screen.<br><br>You can move it to anywhere in the diagram. |

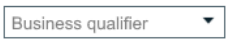
| No | Name | Description |
|---|---|---|
| 12 | Legend | The legend explains the color codes and symbols of the items in the diagram. You can move it to anywhere in the diagram.<br><br>For each asset type and complex relation type that is visible on the diagram, the legend shows the color and symbol, followed by the name of the type.<br><br>If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend.<br><br>Tip Click a row in the legend to select all occurrences of that type in the diagram. You can use this to expand or collapse all nodes of the same type. |
| 13 | Preview panel | The preview panel with information about the selected node. |

## Diagram toolbar

The toolbar of the diagram editor helps you to edit settings that apply to the entire diagram.




| Button | Name | Description |
|---|---|---|
| Hierarchy left - right | Layout | Select a layout. The layout determines the location of nodes and edges, but does not change which nodes and edges are shown. |
| End-to-end | Traversal strategy | Select a traversal strategy to change which nodes and edges are shown in the diagram. |

| Button | Name | Description |
|---|---|---|
|  | Flow depth | Specify the flow depth, meaning the flow relation path length from the start flow node set to any other flow node. |
|  | Business qualifier | Filter a diagram to contain only assets that are qualified by a chosen business qualifier. |
|  | Zoom in | Zoom in on the diagram. |
|  | Zoom out | Zoom out of the diagram. |
|  | Zoom to readable value | Zoom the diagram to a size that is readable. |
|  | Shrink to fit | Zoom the diagram to a size that fits the screen. |
|  | Overview | Show or hide the overview inset that enables you to zoom and navigate. |
|  | Labels | Show or hide the labels of the edges and complex relations. |
|  | Overlays | Show or hide overlays for all nodes in the diagram.<br>If the view does not have any defined overlays, the button is grayed out. |
|  | Export | Export the diagram as a PDF or SVG file to your default downloads folder. |
|  | Redraw | Discard all the changes that you made to the diagram and restore it to the initial state. |

| Button | Name | Description |
|---|---|---|
| | Legend | Show or hide the legend panel containing the explanation of the nodes.<br><br>The legend explains the color codes and symbols of the items in the diagram. You can move it to anywhere in the diagram.<br><br>For each asset type and complex relation type that is visible on the diagram, the legend shows the color and symbol, followed by the name of the type.<br><br>If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend.<br><br>Tip Click a row in the legend to select all occurrences of that type in the diagram. You can use this to expand or collapse all nodes of the same type. |
| | Preview | Show or hide the preview panel on the right side of the screen. It contains information about the characteristics of the currently selected node (asset or complex relation). |
| | Filter | Enable or disable all filters in the diagram view.<br><br>If the view does not have any defined filters, the button is grayed out. |
| | Picture | Create a picture based on the diagram. |
| | Find | Find a node in the diagram. |
| | Fullscreen | Show the current diagram in full-screen mode. The button changes to , to exit full-screen mode. |

# The diagram preview panel

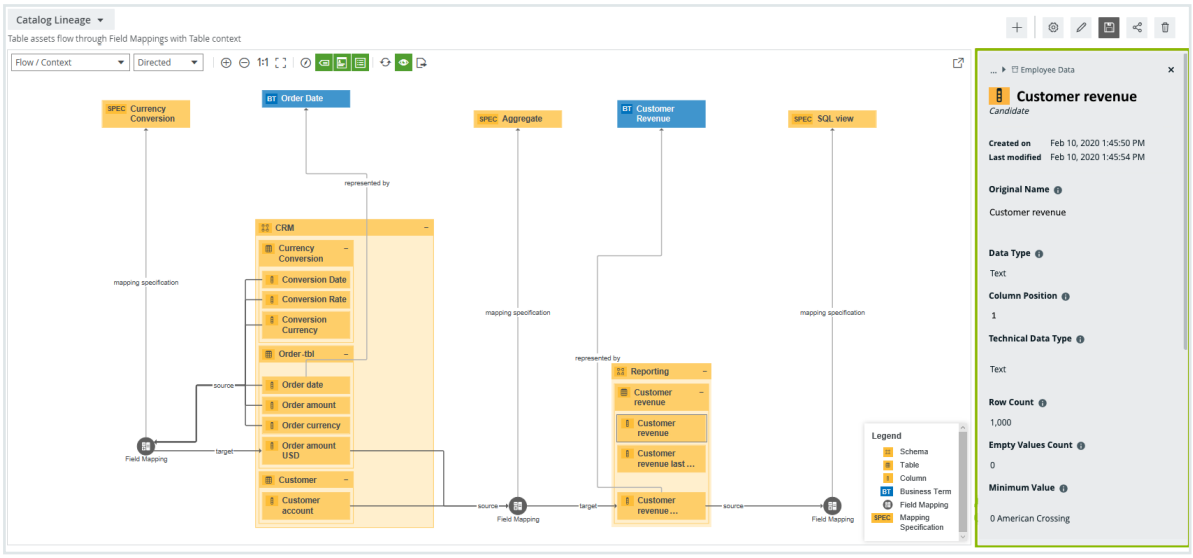
The preview panel offers a quick overview of the node that you select in the diagram. The content of the preview panel depends on the type of node that you select in the diagram:

| Assets | Complex relations |
| --- | --- |
| • Breadcrumbs<br>• Name of the asset<br>• Asset type code or icon, as described in Edit an asset type's representation.<br>> Tip You can hover over the code or icon to view the asset type.<br>• Status<br>• Created on<br>• Last modified<br>• All assigned characteristics<br>• Tags | • All assigned characteristics<br>• Last modified by (user), with date and time<br>• Created by (user) |

## To open or close the diagram preview panel

1. Open a diagram.
2. On the diagram toolbar, click .

3. Optionally, click the node that you want to preview.
   » The preview panel appears or disappears.




# Working with diagrams

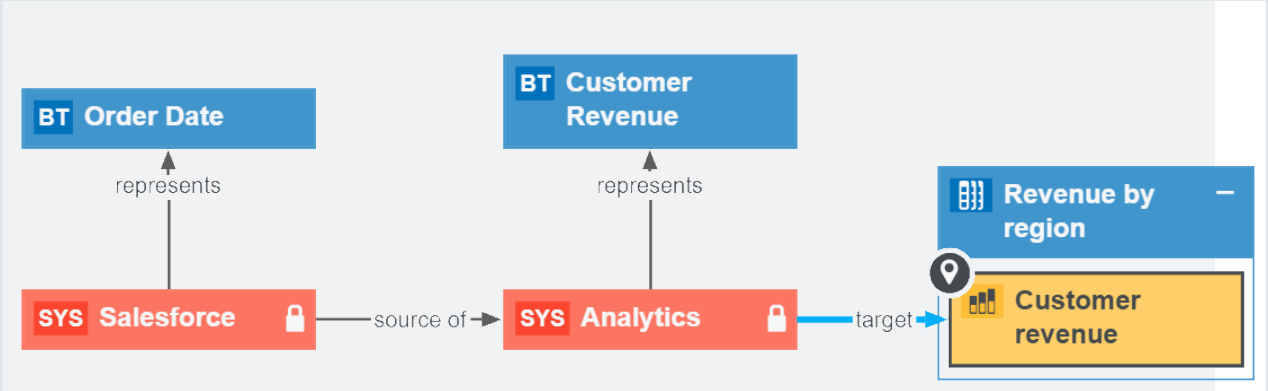
The diagram is a feature to show and interact with many assets and relations in an easy-to-read diagram. The diagram helps you to quickly see to which other assets a specific asset is related. Two assets are related if you can navigate from one asset to another by traversing one or more relations.

## Summary diagrams

Depending on the diagram view, diagrams can contain a large number of nodes and edges. Opening a diagram with many nodes can take a long time. All nodes and edges are important to render the diagram correctly, but you don't always need to see every single node. Often, the diagram is only used to show the high-level outcome.

Summary diagrams contain high-level nodes that are locked. Locked nodes are boxing nodes that cannot be expanded. The low-level boxed nodes and their edges are taken into account to show the edges of the locked nodes, but the diagram requires less loading time.

Example
The following example shows a summary diagram that contains two locked nodes, representing System assets. These System assets can have a lot of relations. In a regular diagram this would take a lot of time to load. However, because these nodes are locked on this summary diagram, it loads faster.




# Open a diagram

You can open a diagram of an asset to visualize its relations.

## Steps

1. Open an asset page.
2. In the tab pane, click **Diagram**.
   » The diagram appears in the default diagram view.
3. If necessary, select a different diagram view.

Tip If a diagram exceeds the size or time limit set by your administrator, an error notification is shown. In this case, you can try to edit the diagram view to reduce the number of nodes and edges or ask your administrator to increase the diagram limits.

# Open another node's diagram

You can open a diagram for another node in the diagram you have currently open. This action also opens the asset page of the selected node.

> Tip You can return to the initial diagram by using the back button of your browser.

## Steps

1. Open a diagram.
2. Select a node.
3. In the context menu, point to **Start here**.
   » The available diagram views appear.
4. Click one of the diagram views.
   Clicking **Start here** opens another node's diagram in the same diagram view.
   » The diagram view of selected node's asset page appears.

# Open a business qualifier diagram

You can open a business qualifier diagram, meaning a diagram that contains only assets or complex relations that are qualified by a chosen Business Qualifier asset.

## Prerequisites

- The Diagrams Business Qualifier Filter is enabled in Collibra Console.
- A **Filtering by business qualifier** option (either Optional or Mandatory) is selected for at least one node in the selected diagram view.
- Either the start node is a Business Qualifier asset, or both of the following are true:
  - The start node matches a view node that has a **Filtering by business qualifier** option (either Optional or Mandatory) selected.
  - The start node has at least one Business Qualifier path.

## Steps

1. Open the asset page of a Business Qualifier asset.
2. In the tab pane, click **Diagram**.
   » The diagram appears in the default diagram view.
3. If necessary, select a different diagram view.
   » The diagram view must be a business qualifier view, meaning a view with at least one node for which a **Filtering by business qualifier** option is selected.
4. In the Diagram toolbar, click , to enable all filters in the diagram view.
5. In the Business Qualifier drop-down list, select the relevant Business Qualifier asset.
   » The diagram is filtered to contain only the assets or complex relations that are qualified by the selected Business Qualifier asset.

# Open an asset page from a diagram

You can open an asset page while you are viewing a diagram without closing it.

## Steps

1. Open a diagram.
2. Right-click the node of which you want to view the asset page.
3. In the context menu, click **Open in new tab**.
   » The asset page opens on the diagram page.

# Find node in a diagram

You can search a diagram for a specific node.

## Steps

1. Open a diagram.
2. On the toolbar, click .
   » The search box appears.
   
   
3. Start typing in the search box.
   » The counter next to the search box indicates how many matches are found.

» The first match is selected in the diagram.

> Tip You can use the arrows to navigate between the matches.

# Export a diagram

You can export a diagram to a PDF or SVG file.

## Steps

1. Open a diagram.
2. Make the necessary changes to the diagram.
   a. Select a view.
   b. Select a layout.
   c. Select a traversal strategy.
   d. Filter by business qualifier. See Work with filters in a diagram view.
   e. Adjust the flow depth.
   f. Zoom in or out.
   g. Explore nodes.
   h. Expand or collapse nodes.
   i. Trace a path between nodes.
   j. Move nodes, enable or disable labels, the legend, and so on.
3. On the toolbar, click and select **PDF** or **SVG**.
   » The resulting file is automatically downloaded to your default downloads folder.
   » The default file name is **diagram.pdf** or **diagram.svg**.

# Start a workflow for a node in the diagram

You can start a workflow from nodes in a diagram, if the workflow is assigned to the relevant asset type.

## Steps

1. Open a diagram.
2. Select a node.
3. In the context menu, point to **Actions**.
   » A submenu appears with the available workflows.
4. Click the workflow that you want to start.

> Note
> - Workflows that have already been started are not listed.
> - If there are no workflows available, **Actions** is grayed out.

# Edit a diagram

You can edit a diagram to represent the nodes as clearly as possible.

## Steps

1. Open a diagram.
2. Make the necessary changes to the diagram.
   a. Select a view.
   b. Select a layout.
   c. Select a traversal strategy.
   d. Filter by business qualifier. See Work with filters in a diagram view.
   e. Adjust the flow depth.
   f. Zoom in or out.
   g. Explore nodes.
   h. Expand or collapse nodes.
   i. Trace a path between nodes.
   j. Move nodes, enable or disable labels, the legend, and so on.

## Select a diagram layout

You can select a diagram layout to change the way nodes are shown in a diagram.

## Steps

1. Open a diagram.
2. On the toolbar, click the layout box and select a layout.

| Diagram layout | Description |
|---|---|
| **Flow / Context** | Nodes and edges are shown in a flow and a context region.<br><br>In the flow region, nodes are shown mostly from left to right.<br><br>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the **Context** checkbox in the node properties form.<br><br>If there are no nodes in the context region, this layout produces the same result as **Hierarchy left -> right**.<br><br>> Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region. |
| **Hierarchy left - right** | Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout. |
| **Hierarchy top - down** | Nodes and edges are shown in a flow, from top to bottom. |
| **Hierarchy bottom - up** | Nodes and edges are shown in a flow, from bottom to top. |

| Diagram lay-out | Description |
|---|---|
| **Circular** | Nodes and edges are arranged in a circular fashion.<br><br>Boxing nodes are not supported in this layout, therefore:<br><br>◦ The diagram is completely redrawn.<br>◦ The explored nodes are removed from the diagram.<br>◦ The nodes expand or collapse to their initial state.<br>◦ Returning to a layout that supports boxing nodes completely redraws the diagram. |
| **Radial** | Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.<br><br>Boxing nodes are not supported in this layout. This has the same consequences as described for the **Circular** layout. |
| **Smart Organic** | Nodes and edges are distributed in a well-balanced manner, with few edge crossings. |

> Tip You can go back to the initial diagram by clicking ⟳. Keep in mind that all your changes are discarded if you do this.

## Select a traversal strategy

You can select a traversal strategy to determine which nodes and edges are traversed and displayed in a diagram.

> Note If you change the traversal strategy, the diagram is completely redrawn and explored nodes are removed.

## Steps

1. Open a diagram.
2. On the diagram toolbar, click the traversal strategy box and select a traversal strategy.

| Traversal strategy | Description |
| --- | --- |
| **End-to-end** | For the start node, Collibra Data Intelligence Cloud traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.<br><br>For each encountered node, Collibra traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.<br><br>This is the default traversal strategy. |
| **Upstream** | For the start node, only the incoming edges are traversed and shown.<br><br>For each node encountered, only the incoming edges are traversed. |
| **Downstream** | For the start node, only the outgoing edges are traversed and shown.<br><br>For each node encountered, only the outgoing edges are traversed. |

| Traversal strategy | Description |
| --- | --- |
| **Complete** | For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram.<br><br>For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node.<br><br>Warning This strategy can result in a very large diagram that can take a long time to load. |

## Adjust the flow depth in a diagram

To help you control the size of business diagrams, you can adjust the flow depth, the flow relation path length from the start flow node set to any other flow node.

Tip You can also:

- Contact Collibra support to edit system-wide maximum flow depth.
- Specify the maximum flow depth in a diagram view.

For complete information on related terminology and functionality, see Maximum flow depth.

### Steps

1. Open a diagram view.
2. In the **Flow depth** field of the diagram toolbar, enter a value between 0 and 99.
3. Click **Save**.

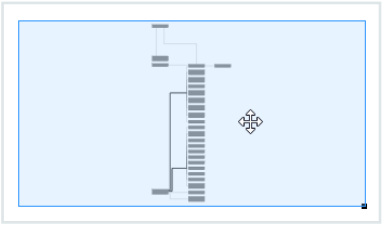
# Working with the diagram overview inset

The overview inset of the diagram editor allows you to keep an overview of the complete diagram, while the main screen is showing only a section of it.

## Steps

1. Open a diagram.
2. On the toolbar, click the ⊙ to show or hide the overview inset.

   » The overview inset is shown over the diagram. You can still see the diagram underneath.
3. Do one of the following:

| Action | Descriptions |
|---|---|
| Zoom in or out by scaling: | a. Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow.<br>b. Click and hold, then drag the pointer to zoom in or out.<br>  |
| Navigate in the diagram: | a. Move your mouse pointer over the blue square. The pointer turns into a four-way arrow.<br>  <br>b. Click and hold, then drag the pointer to move the square to what you want to see. |

# Zoom in or out in the diagram editor

When working with diagrams, you can zoom in or out in different ways.

## Steps

1. Open a diagram.
2. Do one of the following:

| Strategy | Description |
|---|---|
| Zoom in or out with buttons. | On the toolbar, click ⊕ (Zoom in) or ⊖ (Zoom out) as needed. |
| Zoom in or out by scrolling with your mouse. | Move your mouse pointer to anywhere on the diagram and use your mouse wheel to zoom. The zoom is centered at the mouse pointer. |
| Zoom in or out by scaling. | a. On the toolbar, click the ⊘ button (**Overview**).<br>An overview inset with a miniature version of the entire diagram is shown in the top right corner. The section of the diagram that is shown on the screen is visible as a blue rectangle on the overview.<br>b. Move your mouse pointer over the lower right corner of the blue rectangle, until it turns into a sleek slanted arrow.<br>  <br>c. Click and hold, then drag the pointer to zoom in or out. |
| Zoom to readable value. | On the toolbar, click 1:1. |

| Strategy | Description |
| --- | --- |
| Adapt the diagram to fit in the view. | On the toolbar, click . |

## Explore nodes in a diagram

For each node in a diagram, there might be relations that are not depicted in the diagram. This is the case if the type of relation is not in the diagram view or the relation is not traversed due to the selected traversal strategy.

You can still add these relations and their nodes to the diagram, by 'exploring' the node.

> Tip To remove the relations that you added to a node by using the explore mode, right-click the node and click **Remove explored**.

### Steps

1. Open a diagram.
2. Select a node.
3. In the context menu, point to **Explore**.
   » A submenu appears with the available relation types, and a count of how many relations exists for this type.
4. Click one of the relation types or group of relation types:

| Mode | Description |
| --- | --- |
| All | Explore all relation types of the selected node.<br><br>Clicking **Explore** in the context menu has the same result. |

| Mode | Description |
|---|---|
| Incoming | Explore all incoming relations of the selected node.<br><br>A relation is considered incoming when the selected node is the tail side of the relation type.<br><br>For example, the relation *[Business Term] has code / is code for [Code Value]* is incoming for a *Code Value*. |
| Outgoing | Explore all outgoing relations of the selected node.<br><br>A relation is considered outgoing when the selected node is the head side of the relation type.<br><br>For example, the relation *[Business Term] has code / is code for [Code Value]* is outgoing for a *Business Term*. |
| Any specific relation type | Explores the relations of the selected relation type. |

## Expand or collapse nodes

If a node has an outgoing edge with the boxing style, it becomes a boxing node. Your diagram view determines whether boxing nodes are expanded or collapsed by default. Your diagram view can also lock collapsed nodes, which means that you cannot expand the collapsed boxing node.

> Tip Though you cannot expand locked nodes, you can explore them to see their boxed nodes.

### Steps

1. Open a diagram.
2. Do one of the following:
   - Select a node.
   - Select multiple nodes by holding down the select key and clicking nodes.

     | On a macOS system | On a Windows system |
     |---|---|
     | Click the first one and then hold down `cmd` while clicking on the next ones. | Click the first one and then hold down `ctrl` while clicking on the next ones. |

   - In the legend, click the asset type or complex relation type that you want to expand or collapse. You have now selected all nodes of this type.
3. Do one of the following:
   - In the node, click + or −.
   - In the context menu of a node, click **Expand/Collapse selected**.

## Trace all paths between nodes in the diagram

You can trace all paths between any number of nodes on the diagram, which means you can show the relations between the nodes.

You can trace a path between nodes in the following ways:

- The highlight mode: Keep the whole diagram and highlight the nodes and edges on the path.
- The crop mode: Remove any node or edge that is not on the path.

### Steps

1. Open a diagram.
2. Select one, two or more nodes in the diagram:

| On a macOS system | On a Windows system |
|---|---|
| Click the first one and then hold down `cmd` while clicking on the next ones. | Click the first one and then hold down `ctrl` while clicking on the next ones. |

3. Do one of the following:
   - To keep the whole diagram and highlight the path, right-click one of the selected nodes and click **Trace path → Highlight**.
   - To remove anything that is not part of the path between the two selected nodes, right-click one of the nodes and click **Trace path → Crop**.

   » If you selected a single node, all relations are traced.
   » If you selected multiple nodes, the path between the selected nodes is traced.
   » If there is no path between the nodes, a message is displayed.

## Move a node in the diagram

If you want a node to be in a different location in the diagram, you can easily move it around.

### Steps

1. Open a diagram.
2. Click a node and hold down your mouse button. To select multiple nodes, do the same but select multiple nodes.

| On a macOS system | On a Windows system |
|---|---|
| Click the first one and then hold down `cmd` while clicking on the next ones. | Click the first one and then hold down `ctrl` while clicking on the next ones. |

3. Move the node to where you want it and release the mouse button.

> Note You cannot save the these changes, but you can create a picture or export the diagram with these changes.

# Diagram views

In this section, you can find more information about what you can do with diagram views.

## Create a diagram view

You can create your own diagram views:

- From scratch.
- From an existing view.

### Create a diagram view from scratch

1. Open an asset page.
2. In the tab pane, click **Diagram**.
   » The diagram appears in the default diagram view.
3. Click + to add a new view.
4. Edit the diagram view.

### Create a diagram view from an existing view

1. Open an asset page.
2. In the tab pane, click **Diagram**.
   » The diagram appears in the default diagram view.
3. If required, select another diagram view.
4. Click .
   » The **Save view as** dialog box appears.

5. Enter the required information.

| Field | Description |
|---|---|
| Name* | Type a name for the diagram view. |
| Description | Type a description for the diagram view. |
| Sharing options | This section determines who has access to this diagram view. |
| Public | Select to share this diagram view with all users. |
| Private | Select to share this diagram view with no one. |
| Share with specific roles, groups & users | Select to choose with whom to share the diagram view. |
| Roles | Select or type the roles whose users you want to give access. |
| Groups | Select or type the groups whose users you want to give access. |
| Users | Select or type the users to whom you want to give access. |
| Promote | |
| Default | Select to use this diagram view as the default view when you open the diagram editor. |
| Pin | Select to pin the diagram view.<br>Pinned diagram views appear in the view selection drop-down list. |

Fields marked with a * are mandatory.

6. Edit the diagram view.

# Open a diagram view

You can open a diagram view to view the diagram of an asset.

## Steps

1. Open an asset page.
2. In the tab pane, click **Diagram**.
   » The diagram appears in the default diagram view.
3. If necessary, select a different diagram view.

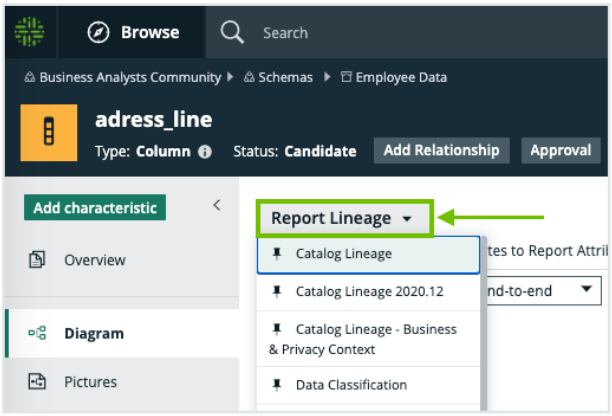
> Tip If a diagram exceeds the size or time limit set by your administrator, an error notification is shown. In this case, you can try to edit the diagram view to reduce the number of nodes and edges or ask your administrator to increase the diagram limits.

> Note
> - If the diagram depth is limited by a specified maximum flow depth value, a notification informs you that the diagram is incomplete.
> - It's possible that an asset type or characteristic that is referenced in a diagram view was deleted from your Collibra environment by another user. In this case, an error message appears and the invalid asset type or characteristic is amended with the word "Invalid", so that you can easily identify it and edit the diagram view as necessary.

# Select a diagram view

To select to a different diagram view, follow these steps:

1. Open a diagram view.
2. Do one of the following:

| | |
|---|---|
| Select a pinned view: | Click the current view name and select a view from the list of pinned views.<br><br>Show me where to click.<br>  |
| Select an unpinned view: | a. Click the current view name and click **Show all...** at the bottom.<br>b. Click on a view in the list of views that apply to an asset of this type. |

> Note It's possible that an asset type or characteristic that is referenced in a diagram view was deleted from your Collibra environment by another user. In this case, an error message appears and the invalid asset type or characteristic is amended with the word "Invalid", so that you can easily identify it and edit the diagram view as necessary.

# Edit the name and description of a diagram view

You can edit the name and the description of a diagram view.

## Steps

1. Open a diagram view.
2. Click ✎.
   » The **Edit name and description** dialog box appears.

3. Enter the required information.

| Field | Description |
| --- | --- |
| Name | Type a name for the diagram view.<br>The default name is the name of the diagram view and a date stamp. |
| Description | Type a description for the diagram view. |

4. Click **Save**.

# Edit a diagram view

You can edit a diagram view.

## Steps

1. Open a diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Edit the general properties as required.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Layout</td><td>Select the layout of your diagram view.
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<tr><td>Flow / Context</td><td>Nodes and edges are shown in a flow and a context region.<br><br>In the flow region, nodes are shown mostly from left to right.<br><br>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.<br><br>If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right.<br><br>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</td></tr>
<tr><td>Hierarchy left - right</td><td>Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout.</td></tr>
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<table>
<tr><th>Diagram layout</th><th>Description</th></tr>
<tr><td>Hierarchy top - down</td><td>Nodes and edges are shown in a flow, from top to bottom.</td></tr>
<tr><td>Hierarchy bottom - up</td><td>Nodes and edges are shown in a flow, from bottom to top.</td></tr>
<tr><td>Circular</td><td>Nodes and edges are arranged in a circular fashion.<br><br>Boxing nodes are not supported in this layout, therefore:<br><br>◦ The diagrampicture is completely redrawn.<br>◦ The explored nodes are removed from the diagrampicture.<br>◦ The nodes expand or collapse to their initial state.<br>◦ Returning to a layout that supports boxing nodes completely redraws the diagrampicture.</td></tr>
<tr><td>Radial</td><td>Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.<br><br>Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.</td></tr>
<tr><td>Smart Organic</td><td>Nodes and edges are distributed in a well-balanced manner, with few edge crossings.</td></tr>
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<tr><td>Traversal strategy</td><td>Indicates which nodes and edges have to be traversed and displayed.
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<tr><th>Traversal strategy</th><th>Description</th></tr>
<tr><td>End-to-end</td><td>For the start node, Collibra Data Intelligence Cloud traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.<br><br>For each encountered node, Collibra traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.<br><br>This is the default traversal strategy.</td></tr>
<tr><td>Upstream</td><td>For the start node, only the incoming edges are traversed and shown.<br><br>For each node encountered, only the incoming edges are traversed.</td></tr>
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<tr><th>Traversal strategy</th><th>Description</th></tr>
<tr><td>Downstream</td><td>For the start node, only the outgoing edges are traversed and shown.<br><br>For each node encountered, only the outgoing edges are traversed.</td></tr>
<tr><td>Complete</td><td>For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram.<br><br>For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node.<br><br>Warning  This strategy can result in a very large diagram that can take a long time to load.</td></tr>
</table>
</td></tr>
<tr><td>Overview</td><td>Select to show the overview inset in the initial diagram.</td></tr>
<tr><td>Labels</td><td>Select to show the edge and node labels in the initial diagram.</td></tr>
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<tr><td>Preview</td><td>Select to show the preview in the initial diagram.</td></tr>
</table>

| Field | Description |
|---|---|
| Max node label length | Type the maximum number of characters for node labels. If a label is longer than this value, it is truncated.<br>Type *0* if you always want to show the entire label.<br>The default setting is *50*. |
| Max edge label length | Type the maximum number of characters for edge labels. If a label is longer than this value, it is truncated.<br>Type *0* if you always want to show the entire label.<br>The default setting is *30*. |

4. Select a node.
   » The **Node properties** form appears.
5. Edit the node properties as required.

| Field | Description |
|---|---|
| General | This section allows you to edit the general properties of the selected node.<br>Tip Click it to collapse and expand this section. |

| Field | Description |
| --- | --- |
| Name | Type a name for the selected node.<br><br>Tip By default, this is the name of the asset type or complex relation type. For readability, it is recommended to use the name of the asset type or complex relation type.<br><br>You can refer to this node by using its ID in the **from** and **to** fields of the edge properties form.<br><br>This ID must be unique in the current diagram view. |
| Type | Choose an asset type.<br><br>By default, this is the asset type of the selected node. |
| Display name | Choose the characteristic to use as the display name of the node in the diagram.<br><br>If you leave this field empty, the node shows the name of the asset or the name of the complex relation. You can also choose a characteristic, for example, attribute or relation.<br><br>The drop-down displays all the characteristics that apply.<br><br>Tip You can filter the list by starting to type. |
| Overlays | Choose fields that you want to show on the node. For example, you can show characteristics, the status or the parent domain.<br><br>The drop-down displays all the fields that you can show.<br><br>Tip You can filter the list by starting to type. |

| Field | Description |
| --- | --- |
| Context | Select to place the node in the context region of the diagram.<br><br>If not selected, the node is placed in the flow region.<br><br>Note This influences the traversal strategy: an edge from a flow node to a context node is always included in the diagram. This edge has to be outgoing from the flow node and incoming to the context node. This means that, when you switch a node from flow to context, you have to flip any edge that is outgoing from this context node and incoming to a flow node. For more information about the traversal strategy, see Which nodes and edges are included in a diagram?. |
| Boxing nodes options | The options to determine how you want to show boxed nodes by default.<br><br>Tip The start node is always visible in the diagram, even when it is boxed inside of a collapsed or locked node. |
| Expanded | Select to show boxing nodes and their boxed nodes. |
| Collapsed | Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, you can expand these boxing nodes. |

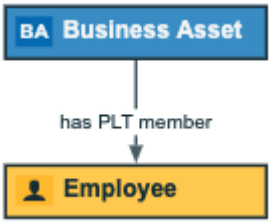
| Field | Description |
| --- | --- |
| Collapsed (hide boxed nodes) | Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, these nodes are locked, so you cannot expand them.<br><br>Tip<br>◦ Diagrams with locked nodes are also called summary diagrams.<br>◦ The boxed nodes of a locked node are not loaded when you open the diagram. As a consequence, opening the diagram may be a lot faster if some of the boxing nodes are locked.<br>◦ You can still explore locked nodes to see the boxed nodes. |
| Edges | This section allows you to add, edit and delete the edges.<br><br>Tip Click it to collapse and expand this section. |
| Outgoing | |
| <outgoing edges> | The outgoing edges that currently exist. |
| Add | Click to add an outgoing edge. |
| Incoming | |
| <incoming edges> | The incoming edges that currently exist. |
| Add | Click to add an incoming edge. |

| Field | Description |
|---|---|
| Filters | This section allows you to work with filters.<br>Tip Click it to collapse and expand this section. |
| Filtering by business qualifier | Enable users to filter diagrams by a chosen Business Qualifier asset.<br>This feature is only available if it is enabled in Collibra Console. |
| <existing filters> | The filter criteria that currently exist. |
| Add filter criteria | Click to create a filter. |

6. Select an edge.
   » The **Edge properties** form appears.
7. Edit the edge properties as required.

| Field | Description |
|---|---|
| Relation type | Select a relation type to define the relation type of the currently selected edge.<br>The drop-down list shows all available directed relation types. |
| Role direction | Indicates the direction in which instances of this relation type are traversed.<br>◦ Selected: The edge is traversed from head to tail. The edge label is the role of the relation type.<br>◦ Cleared: The edge is traversed from tail to head. The edge label is the co-role of the relation type. |

| Field | Description |
| --- | --- |
| from | Select the node from which the edge starts.<br><br>In the drop-down list of nodes, the nodes that match the current type of edge are shown first (under **Matching types**). Nodes that do not match the current type are shown after the matching types (under **All types**). It is also indicated if the node is already in the diagram (**on diagram**).<br><br>A matching node is (a parent of) the head asset type of the current relation type (when **Role direction** is selected) or (a parent of) the tail asset type of the relation type (when **Role direction** is cleared).<br><br>Selecting a node that is already in the diagram view adds this edge to that node.<br><br>Selecting a node that is not yet in the diagram view adds this node to the view. |
| to | Select the node in which the edge ends.<br><br>You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge.<br><br>A matching node is (a parent of) the tail asset type of the current relation type (when **Role direction** is selected) or (a parent of) the head asset type of the relation type (when **Role direction** is cleared).<br><br>Selecting a node that is already in the diagram view adds this edge to that node.<br><br>Selecting a node that is not yet in the diagram view adds this node to the view. |

| Field | Description |
| --- | --- |
| Style | Select the style of the edge.<br>◦ **Arrow**: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting.<br>**Example**<br>Business Asset is the selected node.<br>  <br><br>◦ **Boxed**: The node on the outgoing side is enclosed by the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxed by Employee.<br>  <br><br>◦ **Boxing**: The node on the outgoing side encloses the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxing Employee.<br>  <br> |

| Field | Description |
| --- | --- |
| Label | Type a label for the edge.<br><br>If you do not specify a label, either the role or co-role name of the relation type from the operating model is used in both the diagram view and the diagram.<br><br>If the **Role direction** check box is selected, the label is the role of the relation. If it is cleared, it uses the co-role. |

8. Click **Save**.

## The General properties form

The **General properties** form is used to define the overall look and feel of your diagram.

This pane appears when you edit a diagram view and you have not selected a node or edge.

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<tr><td>Max node label length</td><td>Type the maximum number of characters for node labels. If a label is longer than this value, it is truncated.<br><br>Type 0 if you always want to show the entire label.<br><br>The default setting is 50.</td></tr>
</table>

| Field | Description |
|---|---|
| Max edge label length | Type the maximum number of characters for edge labels. If a label is longer than this value, it is truncated.<br>Type *0* if you always want to show the entire label.<br>The default setting is *30*. |

## The Node properties form

The **Node properties** form is used to define a node in the diagram view and the edges that are connected to it.

This pane appears when you edit a diagram view and you have selected a node.

| Field | Description |
|---|---|
| General | This section allows you to edit the general properties of the selected node.<br>> Tip Click it to collapse and expand this section. |
| Name | Type a name for the selected node.<br>> Tip By default, this is the name of the asset type or complex relation type. For readability, it is recommended to use the name of the asset type or complex relation type.<br>You can refer to this node by using its ID in the **from** and **to** fields of the edge properties form.<br>This ID must be unique in the current diagram view. |
| Type | Choose an asset type.<br>By default, this is the asset type of the selected node. |

| Field | Description |
| --- | --- |
| Display name | Choose the characteristic to use as the display name of the node in the diagram.<br><br>If you leave this field empty, the node shows the name of the asset or the name of the complex relation. You can also choose a characteristic, for example, attribute or relation.<br><br>The drop-down displays all the characteristics that apply.<br><br>Tip You can filter the list by starting to type. |
| Overlays | Choose fields that you want to show on the node. For example, you can show characteristics, the status or the parent domain.<br><br>The drop-down displays all the fields that you can show.<br><br>Tip You can filter the list by starting to type. |
| Context | Select to place the node in the context region of the diagram.<br><br>If not selected, the node is placed in the flow region.<br><br>Note This influences the traversal strategy: an edge from a flow node to a context node is always included in the diagram. This edge has to be outgoing from the flow node and incoming to the context node. This means that, when you switch a node from flow to context, you have to flip any edge that is outgoing from this context node and incoming to a flow node. For more information about the traversal strategy, see Which nodes and edges are included in a diagram?. |

| Field | Description |
| --- | --- |
| Boxing nodes options | The options to determine how you want to show boxed nodes by default.<br><br>Tip The start node is always visible in the diagram, even when it is boxed inside of a collapsed or locked node. |
| Expanded | Select to show boxing nodes and their boxed nodes. |
| Collapsed | Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, you can expand these boxing nodes. |
| Collapsed (hide boxed nodes) | Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, these nodes are locked, so you cannot expand them.<br><br>Tip<br>• Diagrams with locked nodes are also called summary diagrams.<br>• The boxed nodes of a locked node are not loaded when you open the diagram. As a consequence, opening the diagram may be a lot faster if some of the boxing nodes are locked.<br>• You can still explore locked nodes to see the boxed nodes. |
| Edges | This section allows you to add, edit and delete the edges.<br><br>Tip Click it to collapse and expand this section. |
| Outgoing | |
| <outgoing edges> | The outgoing edges that currently exist. |

| Field | Description |
|---|---|
| Add | Click to add an outgoing edge. |
| Incoming | |
| <incoming edges> | The incoming edges that currently exist. |
| Add | Click to add an incoming edge. |
| Filters | This section allows you to work with filters.<br><br>Tip Click it to collapse and expand this section. |
| Filtering by business qualifier | Enable users to filter diagrams by a chosen Business Qualifier asset.<br><br>This feature is only available if it is enabled in Collibra Console. |
| <existing filters> | The filter criteria that currently exist. |
| Add filter criteria | Click to create a filter. |

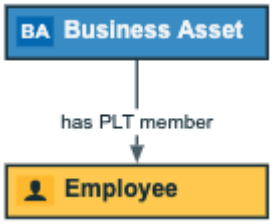
## The Edge properties form

The **Edge properties** form is used to define edges in the diagram view.

This pane appears when you edit a diagram view and select an edge.

| Field | Description |
| --- | --- |
| Relation type | Select a relation type to define the relation type of the currently selected edge.<br><br>The drop-down list shows all available directed relation types. |
| Role direction | Indicates the direction in which instances of this relation type are traversed.<br><br>• Selected: The edge is traversed from head to tail. The edge label is the role of the relation type.<br>• Cleared: The edge is traversed from tail to head. The edge label is the co-role of the relation type. |
| from | Select the node from which the edge starts.<br><br>In the drop-down list of nodes, the nodes that match the current type of edge are shown first (under **Matching types**). Nodes that do not match the current type are shown after the matching types (under **All types**). It is also indicated if the node is already in the diagram (**on diagram**).<br><br>A matching node is (a parent of) the head asset type of the current relation type (when **Role direction** is selected) or (a parent of) the tail asset type of the relation type (when **Role direction** is cleared).<br><br>Selecting a node that is already in the diagram view adds this edge to that node.<br><br>Selecting a node that is not yet in the diagram view adds this node to the view. |

| Field | Description |
| --- | --- |
| to | Select the node in which the edge ends.<br><br>You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge.<br><br>A matching node is (a parent of) the tail asset type of the current relation type (when **Role direction** is selected) or (a parent of) the head asset type of the relation type (when **Role direction** is cleared).<br><br>Selecting a node that is already in the diagram view adds this edge to that node.<br><br>Selecting a node that is not yet in the diagram view adds this node to the view. |

| Field | Description |
| --- | --- |
| Style | Select the style of the edge.<br>• **Arrow**: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting.<br>**Example**<br>Business Asset is the selected node.<br>  <br><br>• **Boxed**: The node on the outgoing side is enclosed by the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxed by Employee.<br>  <br><br>• **Boxing**: The node on the outgoing side encloses the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxing Employee.<br>  <br> |

| Field | Description |
| --- | --- |
| Label | Type a label for the edge.<br><br>If you do not specify a label, either the role or co-role name of the relation type from the operating model is used in both the diagram view and the diagram.<br><br>If the **Role direction** check box is selected, the label is the role of the relation. If it is cleared, it uses the co-role. |

## Edges

In a diagram, an edge is a directed relation between two nodes. The word 'directed' indicates that the direction in which the relation is used is relevant for the diagram.

An edge is normally depicted by an arrow between two nodes. The arrow points to the 'to' node. It can also be represented by means of boxing and boxed nodes, in which one node contains the other.

### Actions

- Add an edge to a node.
- Edit an edge.
- Remove an edge of a node.

## Add an edge in a diagram view

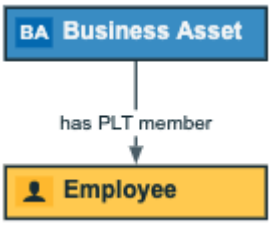
You can add an edge to a node in a diagram view.

### Steps

1. Open a diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Select a node in the diagram.
   » The **Node properties** form appears.

4. In the **Node properties** form, go to the **Edges** section.
5. Do one of the following:
   - Under **Outgoing**, click **Add**.
     This adds an edge starting from the selected node.
   - Under **Incoming**, click **Add**.
     This adds an edge ending in the selected node.
6. Define the edge characteristics:

| Edge characteristic | Description |
|---|---|
| Relation Type | Choose a relation type from the list of applicable types.<br>Start typing to reduce the list. |
| Role direction | Choose in which direction to traverse a relation.<br>For example, [Business asset] groups/is grouped by [Business Asset], if you select the **Role direction** option, you traverse in the role direction, meaning from parent to child. If you don't select this option, you traverse in the co-role direction, meaning from child to parent. |
| to | Choose the type of node (asset or complex relation) from the list of types. The dropdown first shows node types that match the relation type, but also allows you to choose a node whose type does not match the relation type. You can select a new node, or a node that already exists on the diagram. |

| Edge characteristic | Description |
| --- | --- |
| Style | Select the style of the edge.<br>◦ **Arrow**: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting.<br>**Example**<br>Business Asset is the selected node.<br>  <br><br>◦ **Boxed**: The node on the outgoing side is enclosed by the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxed by Employee.<br>  <br><br>◦ **Boxing**: The node on the outgoing side encloses the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxing Employee.<br>  <br> |

7. Click **Add**.

8. Optionally, edit the edge.

   > Tip This allows you to edit the label of the edge.

9. Above the diagram, to the right, click **Save**.

## Edit an edge in a diagram view

You can edit an edge of a node in a diagram view.

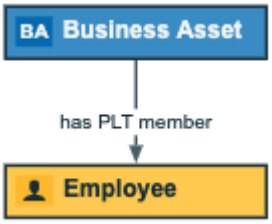
### Steps

1. Open a diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Do one of the following:
   - Select an edge in the diagram.
   - Select a node in the diagram and click ✎ next to an incoming or outgoing edge in the edge section.

   » The **Edge properties** form appears.
4. Enter the required information.

| Field | Description |
|---|---|
| Relation type | Select a relation type to define the relation type of the currently selected edge.<br><br>The drop-down list shows all available directed relation types. |
| Role direction | Indicates the direction in which instances of this relation type are traversed.<br><br>◦ Selected: The edge is traversed from head to tail. The edge label is the role of the relation type.<br>◦ Cleared: The edge is traversed from tail to head. The edge label is the co-role of the relation type. |

| Field | Description |
| --- | --- |
| from | Select the node from which the edge starts.<br><br>In the drop-down list of nodes, the nodes that match the current type of edge are shown first (under **Matching types**). Nodes that do not match the current type are shown after the matching types (under **All types**). It is also indicated if the node is already in the diagram (**on diagram**).<br><br>A matching node is (a parent of) the head asset type of the current relation type (when **Role direction** is selected) or (a parent of) the tail asset type of the relation type (when **Role direction** is cleared).<br><br>Selecting a node that is already in the diagram view adds this edge to that node.<br><br>Selecting a node that is not yet in the diagram view adds this node to the view. |
| to | Select the node in which the edge ends.<br><br>You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge.<br><br>A matching node is (a parent of) the tail asset type of the current relation type (when **Role direction** is selected) or (a parent of) the head asset type of the relation type (when **Role direction** is cleared).<br><br>Selecting a node that is already in the diagram view adds this edge to that node.<br><br>Selecting a node that is not yet in the diagram view adds this node to the view. |

| Field | Description |
| --- | --- |
| Style | Select the style of the edge.<br>◦ **Arrow**: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting.<br>**Example**<br>Business Asset is the selected node.<br>  <br><br>◦ **Boxed**: The node on the outgoing side is enclosed by the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxed by Employee.<br>  <br><br>◦ **Boxing**: The node on the outgoing side encloses the node on the incoming side.<br>**Example**<br>Business Asset is the selected node. It is boxing Employee.<br>  <br> |

| Field | Description |
| --- | --- |
| Label | Type a label for the edge.<br><br>If you do not specify a label, either the role or co-role name of the relation type from the operating model is used in both the diagram view and the diagram.<br><br>If the **Role direction** check box is selected, the label is the role of the relation. If it is cleared, it uses the co-role. |

5. Above the diagram, to the right, click **Save**.

## Remove an edge in a diagram view

You can remove an edge of a node in a diagram view.

### Steps

1. Open a diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Select a node in the diagram.
   » The **Node properties** form appears.
4. Do one of the following:
   - Click 🗑 next to an incoming or outgoing edge in the edge section.
   - Select an edge in the diagram and click 🗑 in the upper right corner.
5. Above the diagram, to the right, click **Save**.

## Maximum flow depth

Big diagrams can have very long paths, or chains of edges. They can take a long time to build, and are canceled if they exceed specified time and size limits for fetching data.

To help you control the size of diagrams, you can specify the maximum flow depth, meaning the flow relation path length from the start flow node set to any other flow node.

This aims to improve readability and performance, and reduce the potential for diagrams that are too big to build.

## Terminology and details

| Terminology | Description |
|---|---|
| Flow node | A diagram node that matches a diagram view node that is not marked as context.<br><br>This means that the "context" checkbox is not selected and, therefore, the node is situated in the flow region of the diagram.<br><br>When the start node is a flow node, the start flow node set is only the start asset. |
| Context node | A diagram node that matches a diagram view node that is marked as context.<br><br>This means that the "context" checkbox is selected and, therefore, the node is situated in the context region of the diagram.<br><br>When the start node is a context node, the start flow node set is all assets and complex relations that are reachable from the start node by traversing only "flow-context" and "context-context" edges. |
| Start flow node set | The merge of all start node sets of each diagram view node that it matches.<br><br>When the start node matches multiple diagram view nodes, the start flow node set is the merge of all start node sets of each view node that it matches. |
| Flow depth | The flow relation path length from the start flow node set to any other flow node. |
| Flow edge | An edge for which both nodes are flow nodes. |

> Note Maximum flow depth is ignored when traversing edges that are not flow edges. "Flow-context" edges and "context-context" edges are ignored in order to maximize context, which reduces diagram size and improves readability.

## Specifying the maximum flow depth

You do not have to enable this feature. You can, however, edit the system-wide maximum flow depth in Collibra Console. This establishes a maximum flow depth for all diagrams. The default value is 50.

You can also specify the maximum flow depth at the diagram view level. If you specify a value in a diagram view, that value supersedes the system-wide value in Collibra Console.

## Adjusting flow depth in a diagram

We refer to a result diagram whose depth is limited by a specified maximum flow depth value as an "incomplete diagram". When an incomplete diagram is opened, a notification informs you that the diagram is incomplete. You can manually adjust the flow depth in the diagram, to view nodes that are hidden at greater depths.

> Note When you open a diagram, the value shown in the diagram toolbar is the value that was set for the selected diagram view? If no value is set at the diagram view level, the value shown is the value that is set in Collibra Console.

## Limitations

It bears mentioning that limiting flow depth does not prevent all diagrams from becoming too big to build. It can be that a single node has a large number of related assets, for example a Schema asset that contains 10,000 Table assets. In this case, the flow depth is only "1", but the diagram will "fan out" and might become too big to build.

## Specify maximum flow depth

To help you control the size of business diagrams, you can specify the maximum flow depth in a diagram view.

There are two ways to do so:

- Via the diagram editor
- Via the JSON text editor

> Tip You can also adjust the flow depth in a result diagram.

> Note The value that you specify in the diagram view supersedes the value in Collibra Console. The default value in the Collibra Console configuration setting is 50.

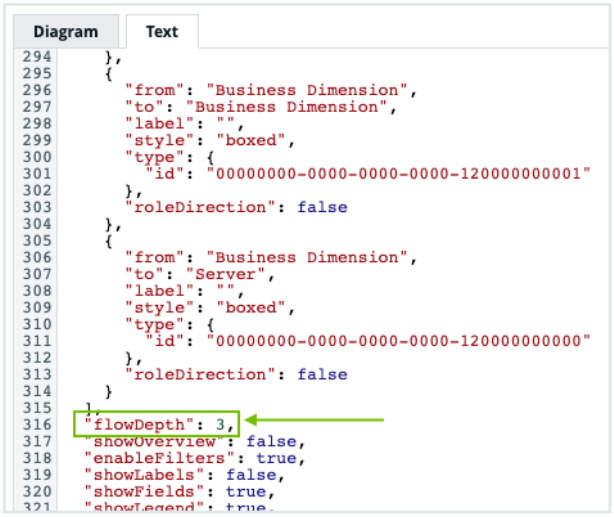
# Via the diagram editor

1. Open a diagram view.
2. In the View bar menu, click ⚙.
   » The **General properties** form appears.
3. In the **Flow depth** field, enter a value between 0 and 99.
4. Click **Save**.

# Via the JSON text editor

1. Open a diagram view.
2. In the View bar menu, click ⚙.
   » The **General properties** form appears.
3. Click the **Text** tab, to switch to the diagram view text editor.

4. Scroll down and add `"flowDepth": x,` where "x" is the maximum flow depth.




5. Click **Save**.

> Tip For more information on working with the diagram view text editor see:
>
> - JSON syntax: Nodes section
> - Tips for creating correct diagram views with the JSON text editor

## Detailed description of JSON syntax for diagram views

A diagram view can be described by a file in a specific JavaScript Object Notation (JSON) format.

To design diagram views in JSON text format, it is important that you know the information in this section.

The examples of JSON code in the following sections are key-value pairs that you can use to create a diagram view.

### JSON syntax: Diagram section

These settings determine general display settings for the diagram.

| JSON syntax | Description |
| --- | --- |
| `"visitStrategy": "directed", "directedIncoming", "directedOutgoing","completeGraph"` | • Indicates which nodes and edges have to be traversed and displayed.<br>• This setting is optional.<br>• You can choose one of the following values:<br>  • `"directed"`: For the start node, Collibra traverses the relations in all directions and adds all the nodes that it finds. For the encountered nodes, Collibra traverses relations only in the same direction as how they are encountered: if a node was encountered by traversing an outgoing relation, Collibra looks for outgoing relations, and vice versa. This behavior is similar to traversing a hierarchy.<br>This is the default setting.<br><br>For a refinement to this strategy, see also the setting for `layoutRegion`.<br><br>  • `"completeGraph"`: All nodes and edges related to the current asset are displayed, irrespective of the direction in which they were encountered.<br>• `"directedIncoming"`:For the start node, Collibra only traverses the incoming relations and adds all the nodes that it encounters. For the encountered nodes, Col- |

| JSON syntax | Description |
| --- | --- |
| | libra traverses relations only in the same direction as how they are encountered: incoming relations only.<br>• `"directedOutgoing"`: For the start node, Collibra only traverses the outgoing relations and adds all the nodes that it encounters. For the encountered nodes, Collibra traverses relations only in the same direction as how they are encountered: outgoing relations only.<br><br>Be careful with using `completeGraph`, this setting can lead to very large diagrams. |

| JSON syntax | Description |
| --- | --- |
| `"resultNodeUnicityStrategy": "multipleNodesPerAssetId", "singleNodePerAssetId"` | • Indicates the number of times a node is displayed if it matches multiple nodes in the diagram view.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  • `"multipleNodesPerAssetId"`: If an asset is encountered more than once for different nodes in the diagram view, it is represented by multiple nodes in the diagram, one per matching view node. This is the default setting.<br>  • `"singleNodePerAssetId"`: If an asset is encountered more than once for different nodes in the diagram view, it is represented by a single node in the diagram.<br><br>Note If one asset is encountered multiple times for the same node in the diagram view, it is always displayed only once in the diagram. In that situation, there is a loop for that node. |

| JSON syntax | Description |
| --- | --- |
| `"layout": "HierarchyLeftRight", "HierarchyTopBottom", "HierarchyBottomTop", "Circular", "SmartOrganic", "Radial", "Flow/Context"` | • Indicates the layout style of the diagram.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  • `"HierarchyLeftRight"`: Nodes and edges are displayed in a flow mostly from left to right. This is the default setting.<br>  • `"HierarchyTopBottom"`: Nodes and edges are displayed in a flow mostly from top to bottom.<br>• `"HierarchyBottomTop"`: Nodes and edges are displayed in a flow mostly from bottom to top.<br>• `"Circular"`: Nodes and edges are arranged in a radial tree, where all nodes with the same number of edges to a given node are drawn in a circle.<br>  • `"SmartOrganic"`: Nodes and edges are distributed in a well-balanced manner, there are minimal edge crossings.<br>  • `"Radial"`: Nodes and edges are displayed with no overlaps, few edge crossings and few bends.<br>  • `"Flow/Context"`: Layout style for diagrams with a flow and a context region. See also `layoutRegion` in the nodes section. Nodes and edges in the flow |

| JSON syntax | Description |
| --- | --- |
| | region are displayed mostly from left to right. The nodes and edges in the context region are displayed above the flow region. An edge that begins or ends with a context node, is shown with less emphasis (thinner and in light gray) than an edge between two flow nodes. If you specify this layout, keep in mind that for an edge between a flow node and a context node, the from node has to be in the flow region and the to node has to be in the context region. |
| `"showOverview": false, true` | • Indicates if the overview is displayed.<br><br>• This setting is optional.<br>• You can pick one of the following values:<br>  • `false`: The overview is not displayed. This is the default setting.<br>  • `true`: The overview is displayed. |
| `"showLabels": false, true` | • Indicates if the edge and node labels are displayed.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  • `false`: The overlays are not displayed. This is the default setting.<br>  • `true`: The overlays are displayed. |

| JSON syntax | Description |
| --- | --- |
| `"showLegend": false, true` | • Indicates if the diagram legend is displayed. The legend shows all asset types and complex relation types that occur in the diagram.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  • `false`: The legend is not displayed.<br>  • `true`: The legend is displayed. This is the default setting. |
| `"showPreview": false, true` | • Indicate if the preview pane is displayed by default. The preview pane shows information about the selected node or edge.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  ◦ `false`: The legend is not displayed.<br>  ◦ `true`: The legend is displayed. This is the default setting. |
| `"showFields": false, true` | • Indicates if the overlays are displayed.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  • `false`: The labels are not displayed.<br>  • `true`: The labels are displayed. This is the default setting. |

| JSON syntax | Description |
| --- | --- |
| `"maxNodeLabelLength": 0, <positive integer number>` | • Indicates the maximum length of the node labels (whether they should be truncated when they are too long).<br>• This setting is optional.<br>• You can provide 0 or a positive integer number as the value:<br>  • 0: Node labels are not truncated, they are displayed in full length.<br>  • The default setting is 50. |
| `"maxEdgeLabelLength": 0, <positive integer number>` | • Indicates the maximum length of the edge labels. Edge labels are truncated when they are longer.<br>• This setting is optional.<br>• You can provide 0 or a positive integer number as the value:<br>  • 0: Edge labels are not truncated, they are displayed in full length.<br>  • The default value is 30. |
| `"edgeBundling": false, true` | • Indicates whether edges of the same type are bundled to reduce clutter.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  ◦ `false`: Edges are not bundled.<br>  ◦ `true`: Edges are bundled. This is the default setting. |

| JSON syntax | Description |
| --- | --- |
| `"webworkersEnabled": false, true` | • Indicates whether the layout-related calculations can be moved to a separate DGC service thread. This is useful for larger diagrams, so that your browser does not freeze while rendering the diagram.<br>• This setting is optional.<br>• You can pick one of the following values:<br>◦ `false`: Layout-related calculations are not moved to a separate DGC thread of your processor.<br>◦ `true`: For large diagrams, layout-related calculations are moved to a separate DGC thread of your processor. This is the default setting. |

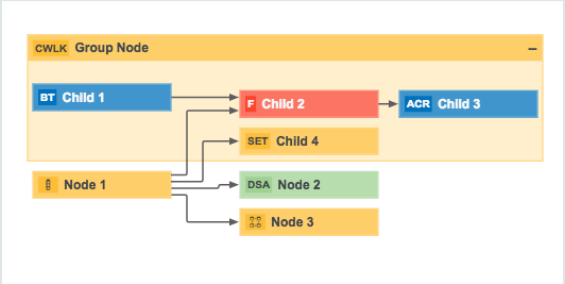
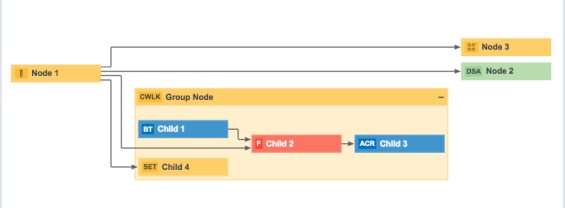
## JSON syntax: Layout options

These options determine the layout of hierarchical diagrams.

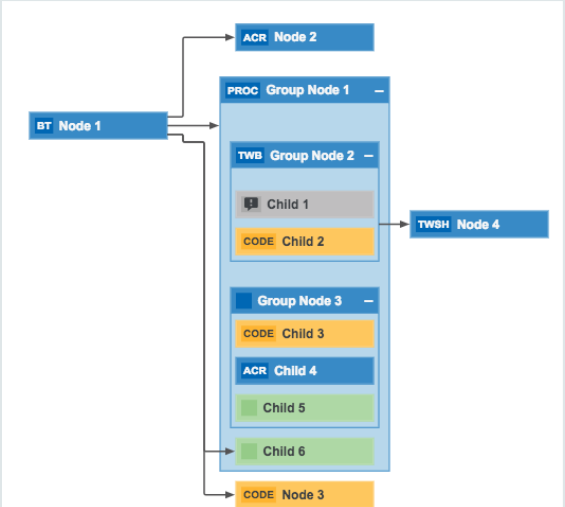
- **Flow / Context**
- **Hierarchy left - right**
- **Hierarchy top - down**
- **Hierarchy bottom - up**

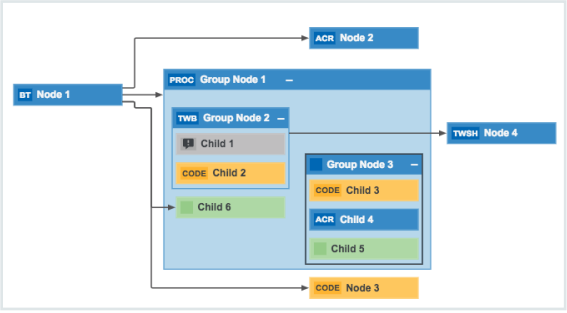
Example

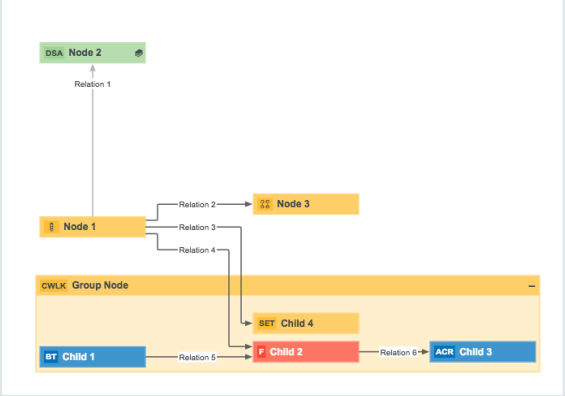
```
"layoutOptions": {
   "compactGroups": false,
   "componentArrangementPolicy": "topmost",
   "edgeBends": true,
   "edgeBundling": true,
   "edgeToEdgeDistance": 5,
   "minimumLayerDistance": "auto",
   "nodeToEdgeDistance": 5,
   "orthogonalRouting": true,
       "preciseNodeHeightCalculation": true,
       "recursiveGroupLayering": true,
   "separateLayers": true,
   "webWorkers": true,
   "nodePlacer": {
       "barycenterMode": "auto",
       "breakLongSegments": "auto",
       "groupCompactionStrategy": "none",
       "nodeCompaction": "auto",
       "straightenEdges": "auto"
   }
}
```

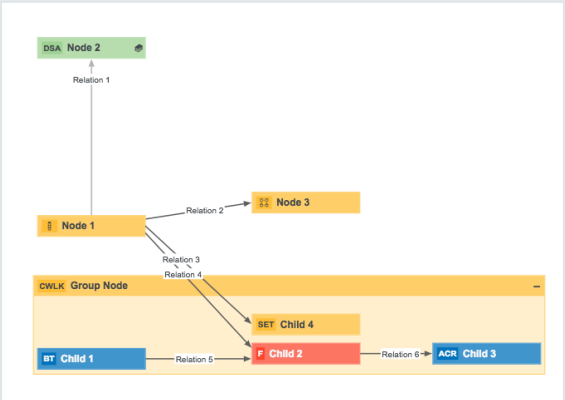
| JSON syntax with all default values | Description |
| --- | --- |
| `"compactGroups": true // false` | Group compaction reduces the number of node layers without reversing edge directions.<br><br>The resulting layering tries to keep the layer span of a boxing node at a minimum, while minimizing the overall vertical space.<br><br>You can choose one of the following values:<br><br>• `true`: The diagram view uses as few node layers as possible. The layers of a diagram are also used inside a boxing node.<br>Example<br>  <br><br>• `false`: The diagram view does not try to reduce the number of node layers. This results in separate layers inside a boxing node.<br>Example<br>  <br> |

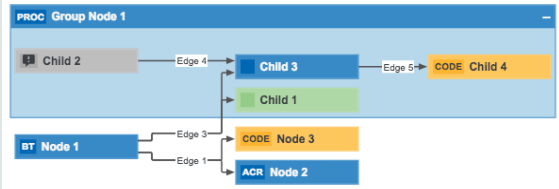
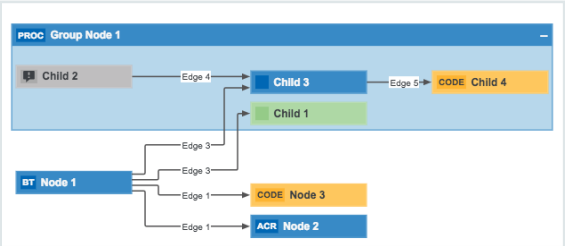
| JSON syntax with all default values | Description |
| --- | --- |
| | Note<br>• This option is only applicable when `recursiveGroupLayering` is set to `true`.<br>• This option is optional.<br>• The default value is `false`.<br>• This option does not affect the loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"componentArrangementPolicy": "topmost" // "compact"` | Choose how to arrange boxed nodes that are not connected by the arrow edge with other nodes.<br><br>This is only applicable to boxed and boxing edges.<br><br>You can choose one of the following values:<br><br>• `"topmost"`: Vertically align the boxed nodes with their topmost boxed node inside the boxing node.<br>• Example<br>  <br><br>• `"compact"`: Put the boxed nodes in different layers to reduce the size of the boxing node. This reduces the overall diagram size.<br>If the diagram layout is **Hierarchy left - right** or **Flow / Context**, the height of the diagram will be minimized.<br>If the diagram layout is **Hierarchy bottom - up** or **Hierarchy top - down**, the |

| JSON syntax with all default values | Description |
| --- | --- |
| | width will be minimized.<br>• Example<br>  <br><br>Note<br>• This option is optional.<br>• The default value is `topmost`.<br>• This option does not affect the loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"edgeBends": true // false` | Choose whether edges can be curved and can contain bends.<br><br>**Warning** When this option is false, the `edgeBundling` and `orthogonalRouting` options are automatically ignored.<br><br>You can choose one of the following values:<br><br>• `true`: Enables edge bends.<br>Example<br>  <br><br>• `false`: Disables edge bends, `edgeBundling` and `orthogonalRouting`.<br>Edges without bends go in a straight line from source node to target node, and may cross other nodes. They don't reserve space for edge labels.<br>Example |

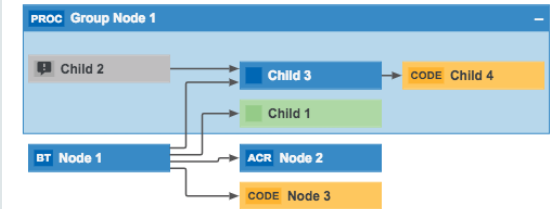
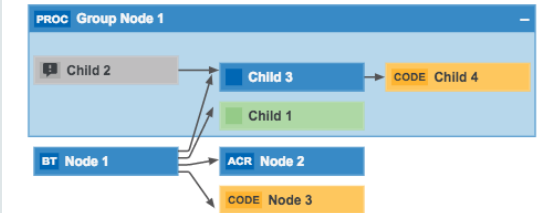
| JSON syntax with all default values | Description |
| --- | --- |
| |  <br>Note<br>• This option is optional.<br>• The default value is `true`.<br>• Choosing `true` may lead to an increased loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"edgeBundling": true // false` | Choose whether arrow edges can be bundled at the source or target node when they represent the same incoming or outgoing relation.<br><br>> Note Only one edge label is displayed for a bundled edge.<br><br>You can choose one of the following values:<br><br>• `true`: Enable edge bundling.<br>Example<br>  <br><br>• `false`: Disable edge bundling.<br>Example<br>  <br><br><br>> Note<br>> • This option is optional.<br>> • The default value is `true`.<br>> • Choosing `true` may lead to an increased loading time of the diagram. |

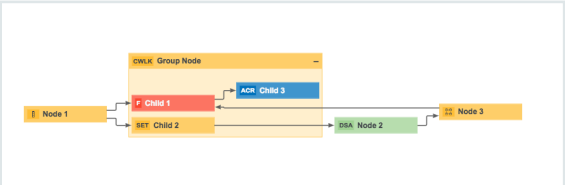
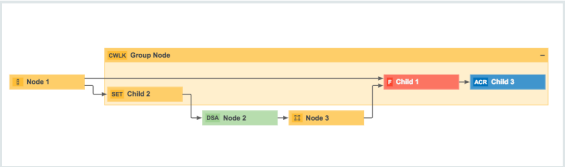
| JSON syntax with all default values | Description |
| --- | --- |
| `"edgeToEdgeDistance": 5 // "auto"` | Set the minimum distance (in pixels) between two adjacent edges in one layer.<br><br>This affects the horizontal distance if the diagram layout is:<br><br>• **Hierarchy left - right**<br>• **Flow / Context**, but only for nodes in the flow<br><br>This affects the vertical distance if the diagram layout is:<br><br>• **Hierarchy top - down**<br>• **Hierarchy bottom - up**<br>• **Flow / Context**, but only for nodes in the context<br><br>You can choose one of the following values:<br><br>• [Any positive integer value]: Use this amount of pixels.<br>• `"auto"`: Let a layouting algorithm automatically set the value.<br><br>Note<br>• This option is optional.<br>• The default value is `5`.<br>• This option does not affect the loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"minimumLayerDistance": 5 // "auto"` | Set the minimum distance (in pixels) between two adjacent layers.<br><br>This affects the horizontal distance if the diagram layout is:<br><br>• **Hierarchy left - right**<br>• **Flow / Context**, but only for nodes in the flow<br><br>This affects the vertical distance if the diagram layout is:<br><br>• **Hierarchy top - down**<br>• **Hierarchy bottom - up**<br>• **Flow / Context**, but only for nodes in the context<br><br>You can choose one of the following values:<br><br>• [Any positive integer value]: Use this amount of pixels.<br>• `"auto"`: Let a layouting algorithm automatically set the value.<br><br>Note<br>• This option is optional.<br>• The default value is `auto`.<br>• This option does not affect the loading time of the diagram. |

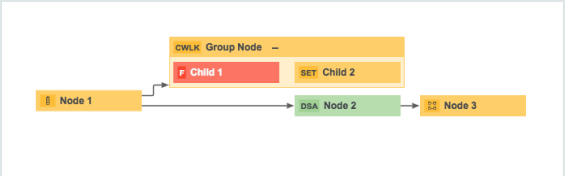
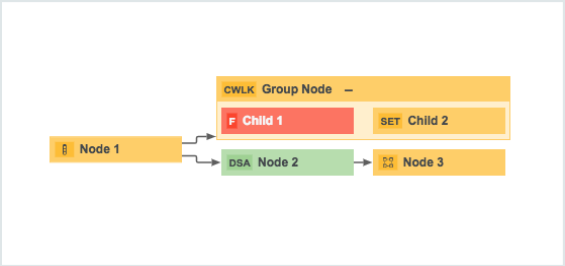
| JSON syntax with all default values | Description |
| --- | --- |
| `"nodeToEdgeDistance": 5 // "auto"` | Set the minimum distance (in pixels) between an edge and an adjacent node in the same layer.<br><br>This affects the horizontal distance if the diagram layout is:<br><br>• **Hierarchy left - right**<br>• **Flow / Context**, but only for nodes in the flow<br><br>This affects the vertical distance if the diagram layout is:<br><br>• **Hierarchy top - down**<br>• **Hierarchy bottom - up**<br>• **Flow / Context**, but only for nodes in the context<br><br>You can choose one of the following values:<br><br>• [Any positive integer value]: Use this amount of pixels.<br>• `"auto"`: Let a layouting algorithm automatically set the value.<br><br>Note<br>• This option is optional.<br>• The default value is `5`.<br>• This option does not affect the loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"orthogonalRouting": true // false` | Choose whether or not edges can be routed orthogonally.<br><br>You can choose one of the following values:<br><br>• `true`: All edge segments are horizontal or vertical.<br>Example<br>  <br><br>• `false`: Edge segments can be diagonal.<br>Example<br>  <br><br>Note<br>• This option is optional.<br>• The default value is `true`.<br>• This option does not affect the loading time of the diagram. |

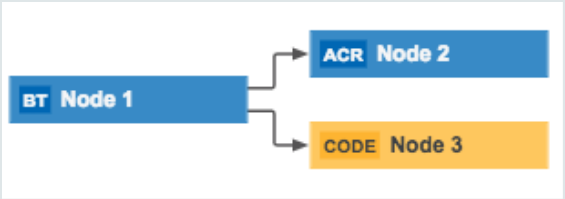
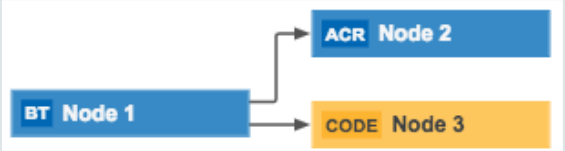
| JSON syntax with all default values | Description |
| --- | --- |
| `"preciseNodeHeightCalculation": true // false` | Determines the precision with which node heights are rendered to visually accommodate diagram text.<br>• `true`: Each node is correctly sized to fit its label text. For extremely large diagrams, this can result in significantly longer loading times.<br>• `false`: Loading times are vastly improved, but label text might not always fit in the nodes. When label text doesn't fit, the text is truncated by an ellipsis. For example: "ABC_Finance_Freq...".<br>Note<br>• This option is optional.<br>• The default value is `true`.<br>• Choosing `true` may lead to an increased loading time of the diagram. |

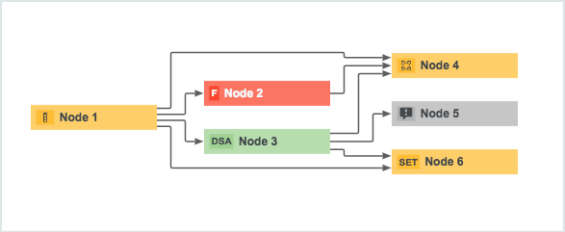
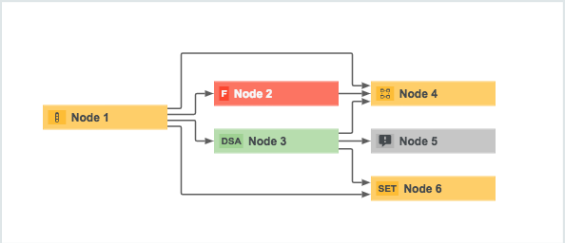
| JSON syntax with all default values | Description |
| --- | --- |
| `"recursiveGroupLayering": true // false` | Choose whether boxing edges are respected during layering.<br><br>This option is ignored when the diagram does not contain boxing nodes.<br><br>> Warning Enabling this option may change the diagram flow. Some arrow edges may go in the opposite direction. Otherwise occupying only adjacent layers by boxing nodes wouldn't be possible in some cases.<br><br>You can choose one of the following values:<br><br>• `true`: Boxing nodes are layered recursively:<br>Boxed nodes in the same boxing node always occupy adjacent layers.<br>Example<br>  <br>• `false`: Group information is ignored during the layering.<br>Example<br>  |

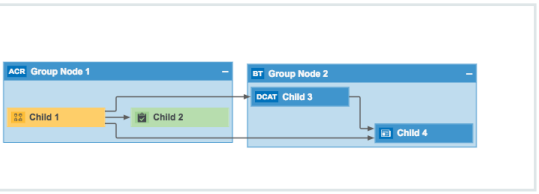
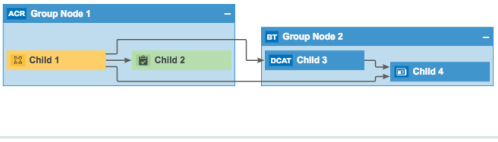
| JSON syntax with all default values | Description |
| --- | --- |
| | Note<br>• This option is optional.<br>• The default value is `true`.<br>• Choosing `true` may lead to an increased loading time of the diagram. |

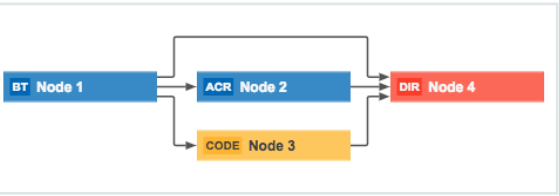
| JSON syntax with all default values | Description |
| --- | --- |
| `"separateLayers": true // false` | Strictly separate nodes of different layers. In other words, nodes are placed below each other. This prevents big nodes from extending into an adjacent layer.<br><br>You can choose one of the following values:<br><br>• `true`: Layers are separated.<br>Example<br>  <br><br>• `false`: Layers are not separated.<br>Example<br>  <br><br><br>Note<br>• This option is optional.<br>• The default value is `true`.<br>• This option does not affect the loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"webWorkers": true // false` | Choose whether big diagrams should be built in the background thread.<br><br>You can choose one of the following values:<br><br>• `true`: Enables multi-thread support for diagram building.<br><br>> Note This makes layout processing faster and less likely to freeze the browser.<br><br>• `false`: All diagrams are built in the main thread.<br><br>> Note<br>> • This option is optional.<br>> • The default value is `true`.<br>> • Choosing `false` may lead to an increased loading time of the diagram. |
| `"nodeplacer"` | Use additional options for placing the nodes. |

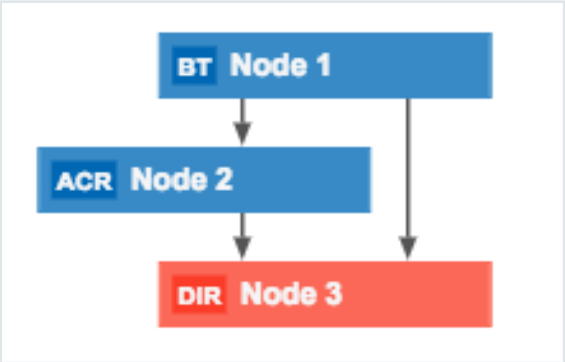
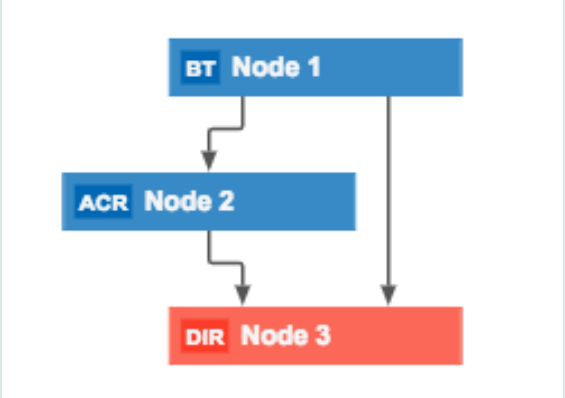
| JSON syntax with all default values | Description |
| --- | --- |
| `"barycenterMode": true // false // "auto"` | Choose whether the diagram should be as symmetric as possible. This may result in more edge bends.<br><br>You can choose one of the following values:<br><br>• `true`: The diagram is more symmetric but may have more edge bends. Example<br>  <br><br>• `false`: The diagram is less symmetric but may have fewer edge bends. Example<br>  <br><br>• `"auto"`: The layouting algorithm decides whether this option is set to `true` or `false`, depending on the diagram data.<br><br>Note<br>• This option is optional.<br>• The default value is `auto`.<br>• Choosing `true` may lead to an increased loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"breakLongSegments": true // false // "auto"` | Choose whether the diagram should break long arrow edges in favor of a more compact layout.<br><br>You can choose one of the following values:<br><br>• `true`: Long edges are broken, for a more compact diagram.<br>Example<br>  <br><br>• `false`: Long edges are not broken.<br>Example<br>  <br><br>• `"auto"`: The layouting algorithm decides whether this option is set to `true` or `false`, depending on the diagram data.<br><br>Note<br>• This option is optional.<br>• The default value is `auto`.<br>• Choosing `true` may lead to an increased loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"groupCompactionStrategy": "none" // "maximum"` | Choose the strategy for controlling the horizontal compactness of boxing nodes.<br><br>You can choose one of the following values:<br><br>• `"none"`: Do not use horizontal group compaction. The contents of a boxing node will occupy nearly the same horizontal positions as when not grouped at all.<br>Example<br>  <br><br>• `"maximum"`: Make boxing nodes as narrow as possible.<br>Example<br>  <br><br><br>Note<br>• This option is optional.<br>• The default value is `none`.<br>• Choosing `none` may lead to an increased loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"nodeCompaction": true // false // "auto"` | Choose whether to reduce the height of the diagram as much as possible. This places the nodes of a layer in a stacked style (horizontally interleaving), which reduces the width of the layer.<br><br>You can choose one of the following values:<br><br>• `true`: Nodes are placed in a compact style.<br><br>Note This may result in an increased width.<br><br>Example<br>  <br><br><br>• `false`: Nodes are not placed in a compact style.<br>Example<br>  <br><br><br>• `"auto"`: The layouting algorithm decides whether this option is set to `true` or `false`, depending on the diagram data. |

| JSON syntax with all default values | Description |
| --- | --- |
| | Note<br>• This option is optional.<br>• The default value is `auto`.<br>• This option does not affect the loading time of the diagram. |

| JSON syntax with all default values | Description |
| --- | --- |
| `"straightenEdges": true // false // "auto"` | Apply a post-processing step to reduce edge bends.<br><br>You can choose one of the following values:<br><br>• `true`: The post-processing step is applied to reduce edge bends.<br>Example<br>  <br><br><br>Warning This may violate some minimum distances specified by the user and the edge distribution may no longer be uniform.<br><br>• `false`: Post-processing step is not applied.<br>Example<br>  <br> |

| JSON syntax with all default values | Description |
| --- | --- |
| | • `"auto"`: The layouting algorithm decides whether this option is set to `true` or `false`, depending on the diagram data.<br><br>Note<br>• This option is optional.<br>• The default value is `auto`.<br>• Choosing `true` may lead to an increased loading time of the diagram. |

## JSON syntax: Nodes section

These settings determine the display settings for nodes. You must add a node for each asset type and complex relation type that you want to include in the diagram.

> Note The JSON representation of a diagram is always automatically generated. The JSON syntax allows you to update the diagram layout. Keep in mind that it is much easier to add and edit overlays through the graphical diagram view editor. See Edit a diagram view and The Node properties form.

| JSON syntax | Description |
| --- | --- |
| `"id": "Business Asset"` | • Determines the name of the node.<br>• This setting is mandatory.<br>• You can type any string here, but it must be unique in this view. For readability, we recommend using the name of the asset type or complex relation type as the ID.<br>• You can refer to this node by using its ID in the `"from"` and `"to"` key-value pairs of the edges section. |

| JSON syntax | Description |
| --- | --- |
| `"type": {"id": "00000000-0000-0000-0000-000000011001"}` | • Determines the resource ID of the asset type or the complex relation type.<br>• This setting is mandatory.<br>• You can have multiple nodes with the same `Type` in one diagram view.<br>• The value must be a valid resource ID of an asset type or complex relation type. See Find a resource ID of an asset type and Find the resource ID of a complex relation. |
| `"layoutRegion": "flow", "context"` | • Determine if the node is treated as a flow node or a context node. This influences the traversal strategy. An edge from a flow node to a context node is always included in the diagram. An edge between two flow nodes FN1 and FN2 is only included in the diagram if the edge from FN1 to FN2 is traversed in the same direction as the edge that brought FN1 into the diagram.<br>• This setting is optional.<br>• You can choose one of the following values:<br>  • `"flow"`: The node is part of the flow. This is the default setting.<br>  • `"context"`: The node is part of the context. When you select the **Flow/Context** layout for a diagram, the edges between flow nodes are rendered horizontally, mostly from left to right (the from node is to the left of the to node). The edges from flow to context nodes are rendered vertically, from bottom to top. |

| JSON syntax | Description |
| --- | --- |
| `"label": "Term"` | • Determines the name that is displayed on the node in the diagram design view. For a node that represents a complex relation type, the label is used in the diagram as well.<br>• This setting is optional.<br>• You can provide any string as the value. If you do not specify a label, the name of the asset type or the complex relation type is used. |
| `"collapsed": false, true` | • Indicates if the selected node is collapsed in the initial diagram.<br>• This setting is optional.<br>• You can choose one of the following values:<br>◦ `false`: The selected node is a boxing node and the boxed nodes are displayed.<br>◦ `true`: The selected node is a boxing node and the boxed nodes are hidden. |
| `"name":` | • Defines the name that has to be displayed on the node. By default, this is the asset's name, but you can specify any characteristic. Use the same syntax as for `"fields"`. |

| JSON syntax | Description |
| --- | --- |
| `"fields":` | • Defines which characteristics are shown in the node's overlay. The order of the fields determines the order of the characteristics in the overlay.<br>• This setting is optional.<br>• You can pick one or more of the following values:<br>◦ "name": The asset's name, as defined in the "name": setting.<br>◦ "status": The asset's status value.<br>◦ "domain": The domain in which the asset is located.<br>◦ "community": The lowest-level community in which the asset is located.<br>◦ "assetType": The asset's type.<br>> Note When filtering a diagram by asset type, keep in mind that all subtypes are included, meaning they pass the filter along with the specified asset type.<br>◦ "tags": Any tags that were created for the asset.<br>◦ “responsibility_<ID>": The overlay is a resource role type with the ID that you type here. The diagram shows the avatars of users and user groups that have this role for this asset.<br>◦ "createdOn": The date when the asset was created.<br>◦ "createdBy": The name of the user who created the asset.<br>◦ "lastModifiedOn": The date and time when the asset was last modified.<br>◦ "lastModifiedBy": The name of the user who last modified the asset. |

| JSON syntax | Description |
| --- | --- |
| | ◦ "stringAttribute_<ID>": The overlay is a string attribute type with the ID that you type here. Example: "stringAttribute_00000000-0000-0000-0000-000000000001"<br>◦ "dateAttribute_<ID>": The overlay is a date attribute with the ID that you type here.<br>◦ "numericAttribute_<ID>": The overlay is a date attribute with the ID that you type here.<br>◦ "booleanAttribute_<ID>": The overlay is a boolean attribute with the ID that you type here.<br>◦ "singleValueListAttribute_<ID>": The overlay is a single-selection attribute with the ID that you type here.<br>◦ "multiValueListattribute_<ID>": The overlay is a multi-selection attribute with the ID that you type here.<br>◦ "dataQualityRule_<ID>": The overlay is the percentage score of a data quality metric group with the ID that you type here. The score overlay shows the percentage, the color (red/amber/green) and trend (up/down/flat).<br>◦ "sourceRelation_<ID>": The overlay is a relation type where the node is a tail asset and has the ID that you type here.<br>◦ "targetRelation_<ID>": The overlay is a relation type where the node is a head asset and has the ID that you type here. |

## JSON syntax: Edges section

The edges settings determine which directed relations should be traversed, and how they should be depicted on the diagram. Each edge represents a relation type between two

nodes (asset types or complex relation types) in the view.

You have to ensure that the diagram view is a connected graph: each node in the diagram view is reachable from any other node.

| JSON syntax | Description |
|---|---|
| `"from": "Business Asset"` | • Indicates which node is the head asset.<br>• This setting is mandatory.<br>• You must fill in a node ID ("id") from the nodes section. |
| `"to": "Table Column1"` | • Indicates which node is the tail asset.<br>• This setting is mandatory.<br>• You must fill in a node ID ("id") from the nodes section. |
| `"type": "00000000-0000-0000-0000-000000007038"` | • Indicates the ID of the relation type.<br>• This setting is mandatory.<br>• You have to fill in the resource ID of the relevant relation type. You can copy and paste these resource IDs from the **Settings** UI:<br>  • Attribute type.<br>  • Relation type.<br>  • Complex relation type. |
| `"roleDirection": true, false` | • Determines the direction of the edge; is it the role or co-role.<br>• This setting is mandatory.<br>• You can pick one of the following values:<br>  • `true`: The edge is traversed from head to tail.<br>  • `false`: The edge is traversed from tail to head. |

| JSON syntax | Description |
| --- | --- |
| `"style": "arrow", "boxed", "boxing"` | • Determines how edges are displayed.<br>• This setting is optional.<br>• You can pick one of the following values:<br>  • `"arrow"`: The edge is represented by an arrow. The arrow starts at the 'from' node and ends at the 'to' node. This is the default setting.<br>  • `"boxing"`: The edge is represented as a 'from' asset that boxes one or more 'to' assets. In other words, a head asset contains one or more tail assets.<br>  • `"boxed"`: The edge is represented as a 'from' asset that is boxed by a 'to' asset. In other words, a tail asset contains one or more head assets. |
| `"label": "Groups"` | • Determines the name that is displayed on edges in the diagram.<br>• This setting is optional.<br>• If you do not specify a label, the role or co-role of the relation type from the operating model is used, in both the diagram view and the diagram. If `"roleDirection"` is *true*, Collibra uses the role, if it is *false*, it uses the co-role. |

## Tips for creating correct diagram views with the diagram view text editor

Although you can create and edit diagram views via the text editor, we recommend that you use the graphical view editor when possible. However, if you want to configure advanced filter expressions for a diagram, you have to complete the configuration via the diagram view text editor.

Each change that you make via the graphical view editor is reflected in the text editor and vice versa.

# Tips

- Collibra Data Intelligence Cloud checks the full syntax of your JavaScript Object Notation (JSON) as you type. If the JSON code is incorrect, Collibra detects this immediately and the **Save** button remains inactive.




  For example:
  - If you omit the required comma between two key-value pairs, Collibra shows an error message, and highlights the offending line.
  - If you make a typo in a value, Collibra shows an error and displays the allowed values.
- JSON is a case-sensitive language. This means that you must use the exact key-value pairs as they are described in this guide.
- The code must contain a **nodes** section and an **edges** section. The order of the sections is irrelevant. Layout to improve readability (spaces, tabs, empty lines), is irrelevant.
- Collibra checks if each resource ID (conceptTypeId, binaryFactTypeId, attributetypeID) that you specified, exists in the operating model. If a resource ID does not exist, it is removed from the diagram view and a warning and an error are displayed. Collibra does not save your view unless you correct the error.




- Collibra checks if the diagram view is a connected graph.
  A diagram view is a connected graph when every node can be reached from any other node by traversing the edges. If the diagram is not connected, a warning is displayed. Collibra does not save your view unless you correct the error.
- You can create key-value pairs with a key name that is not listed in this guide. These key-value pairs are allowed in the code but are ignored. As such, typos in the key names do not trigger Collibra to show a warning or error. You can use this to your advantage, for example, to add comments to the JSON view.

## Pin a diagram view

You can pin a diagram view in the dropdown of the view selection field:

- While creating it.
- From the diagram editor.
- From the diagram view list.

## Pin a view from the diagram editor

1. Open a diagram view.
2. Click .
   » The **Share view** dialog box appears.
3. Select the **Pin** check box.
4. Click **Save**.

## Pin a view from the diagram view list.

1. Open a diagram view.
2. Click the current view name and click **Show all...** at the bottom.
   » The available views appear.
3. Click  in front of the views you want to pin.

# Unpin a diagram view

You can unpin a diagram view to remove it from the dropdown of the view selection field:

- In the diagram editor.
- In the diagram view list.

## Unpin a view in the diagram editor

1. Open a diagram view.
2. Click .
   » The **Share view** dialog box appears.
3. Clear the **Pin** check box.
4. Click **Save**.

## Unpin a view in the diagram view list.

1. Open a diagram view.
2. Click the current view name and click **Show all...** at the bottom.
   » The available views appear.
3. Click  in front of the views you want to pin.

# Set a diagram view as default

Setting a diagram view as default for an asset means that you indicate that this diagram view is the one to be used initially, when the users with whom you shared this diagram view display a diagram for an instance of this asset type and all its child asset types.

## Steps

1. Open a diagram view.
2. Click .
   » The **Share view** dialog box appears.
3. Select the **Default** check box.
4. Click **Save**.

# Share a diagram view

You can share a diagram view with other users or make it private.

Users with whom the diagram view is shared can only edit the diagram view if they also have the **Manage and share anyone's Views, Dashboards, Search filters** permission.

> Note By default, diagram views are public.

## Steps

1. Open a diagram view.
2. Click .
   » The **Share view** dialog box appears.

3. Enter the required information.

| Field | Description |
|---|---|
| Sharing options | This section determines who has access to this diagram view. |
| Public | Select to share this diagram view with all users. |
| Private | Select to share this diagram view with no one. |
| Share with specific roles, groups & users | Select to choose with whom to share the diagram view. |
| Roles | Select or type the roles whose users you want to give access. |
| Groups | Select or type the groups whose users you want to give access. |
| Users | Select or type the users to whom you want to give access. |
| Promote | |
| Default | Select to use this diagram view as the default view when you open the diagram editor. |
| Pin | Select to pin the diagram view.<br>Pinned diagram views appear in the view selection drop-down list. |

4. Click **Save**.

# Work with filters in a diagram view

When you create a diagram view, you can configure filters to only keep the nodes that you are interested in or to limit the number of nodes that are shown in a diagram.

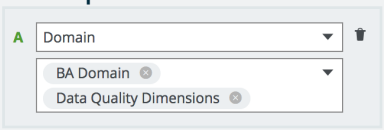
> Note Users can enable or disable all filters in the diagram toolbar.

## Steps

1. Open a diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Select a node in the diagram.
   » The **Node properties** form appears.

4. In the **Node properties** form, go to the **Filters** section.
5. Do one of the following:

<table>
<tr><th>Action</th><th>Description</th></tr>
<tr><td>Filtering by business qualifier</td><td>
<table>
<tr><th>Collibra version</th><th>Action</th></tr>
<tr><td>2021.01</td><td>Select the Filtering by business qualifier checkbox to filter a diagram to contain only the assets or complex relations that are qualified by the chosen business qualifier.</td></tr>
<tr><td>2021.02 or newer</td><td>In the Filtering by business qualifier drop-down list, select one of the following settings:<ul><li>Mandatory: The diagram only contains assets or complex relations that match this view node and are qualified by the chosen business qualifier.</li><li>Optional: The diagram includes:<ul><li>Assets or complex relations that match this view node and are qualified by the chosen business qualifier.</li><li>Assets or complex relations that match this view node and are not qualified by any business qualifier.</li></ul></li></ul></td></tr>
</table>
Note<ul><li>This feature is only available if it is enabled in Collibra Console.</li><li>You can apply filtering by business qualifier to view nodes that represent asset types or complex relation types.</li></ul>
</td></tr>
</table>

| Action | Description |
| --- | --- |
| Add a simple filter | Select a characteristic and enter one or more values. Click **Add filter criteria** to add more filter criteria.<br><br>Tip<br>◦ You can add multiple values for a characteristic. If you select multiple values, the filter clause uses the **IN** operator. In other words, any of the values is accepted. Example:<br>  <br><br>reads *Domain IN (BA Domain, Data Quality Dimensions)*<br>◦ You cannot use wildcards in the value of a filter clause.<br>◦ If you use multiple filter clauses, they are always combined with the logical **AND** operator. In other words, all filter clauses have to be met. |
| Configure advanced filter expressions | See Configure an advanced filter expression in a diagram view. |
| Edit a filter | Edit the filter criteria to match your needs. |
| Delete a filter | Click 🗑 to delete a filter criterion. |

6. Above the diagram, to the right, click **Save**.

## Configure an advanced filter expression in a diagram view

To configure advanced filter expressions for diagrams, you have to complete the configuration via the diagram view JSON text editor.

## Steps

1. Add a simple filter, as described in Work with filters in a diagram view.
2. Click the **Text** tab, to switch to the diagram view text editor.
3. Find the node on which you created the simple filter and change the **IN** operator to one of the following operators:
   **Operators for attributes kinds "text" and "plain text"**
   - IN
   - NOT_IN
   - CONTAINS
   - NOT_CONTAINS
   - STARTS_WITH
   - NOT_STARTS_WITH
   - ENDS_WITH
   - NOT_ENDS_WITH

     > Note The operators EXISTS and NOT_EXISTS do not work in advanced filter expressions for diagrams.

   **Operators for attribute kinds "date" and "number"**
   - IN
   - NOT_IN
   - LESS
   - LESS_OR_EQUALS
   - GREATER
   - GREATER_OR_EQUALS
4. Above the diagram, to the right, click **Save**.

## Examples and additional information

**Example of a node with a filter on the Report Attribute asset type**
Filtering by asset type is particularly useful for diagrams. When filtering a diagram by asset type, keep in mind that all subtypes are included, meaning they pass the filter along with the specified asset type.

```
{
 "layoutRegion": "flow",
 "id": "Report Attribute",
 "type": {
  "id": "00000000-0000-0000-0000-000000031027"
 },
 "filters": [
  {
   "operator": "IN",
   "values": [
    "00000000-0000-0000-0000-000000031027"
   ],
   "field": "assetType"
  }
 ]
},
```

**Example of a node with a filter on a data attribute**

You have to provide the value in Unix Epoch datetime, in milliseconds. This example is for a custom date attribute to be greater than 2020-okt-1.

```
{
 "operator": "GREATER",
 "values": [
  "1601483854000"
 ],
 "field": "dateAttribute_7ff7f6af-33d3-4fdf-8ac5-bf918606315f"
}
```

For more information on configuring advanced filter expressions in the diagram view text editor, see:

- JSON syntax: Nodes section
- Tips for creating correct diagram views with the JSON text editor

## Filtering by business qualifier

Filtering by business qualifier allows you to filter a diagram to contain only assets or complex relations that are qualified by a chosen business qualifier. The difference from traditional filtering is that the filter value is not fixed in the diagram view; instead, the user can choose the business qualifier to filter by in the result diagram, without having to

change the view. This is a form of dynamic filtering. We refer to such a diagram as a business qualifier diagram.

Business qualifier diagrams are smaller and load faster than "unqualified" diagrams, and their focused qualifier makes them easier to understand.

The following is true of every asset in a business qualifier diagram:

- Every asset matches a node in the business qualifier view.
- Every asset can be reached from the start asset by selecting the view and applying the normal traversal strategy. In other words, the asset would be included in an ordinary diagram.
- Every asset has a business qualifier path to the selected business qualifier.

For descriptions of these terms, see Terminology.

## Enabling business qualifier diagrams

To view Business Qualifier diagrams, the feature has to be enabled in Collibra Console.

If enabled in Collibra Console, the **Filtering by business qualifier** option is shown in the **Filters** section of the Node properties form, when editing a diagram view. The filter icon appears on the nodes for which the option is selected, like on any other node for which a filter is applied.

> Note To make the feature available to users, a **Filtering by business qualifier** option (either Optional or Mandatory) has to be selected for at least one view node.

## Key asset type and relation types

The various business qualifiers that can "qualify" assets and complex relations in a business qualifier diagram are represented by Business Qualifier assets.

When filtering by business qualifier, the start node can be a Business Qualifier asset, a Column asset or a complex relation.

## Business Qualifier assets

Business Qualifier assets relate to other assets by the following packaged relation type:

| Head | Role | Co-role | Tail |
|---|---|---|---|
| Business Qualifier | qualifies | is qualified by | Asset |

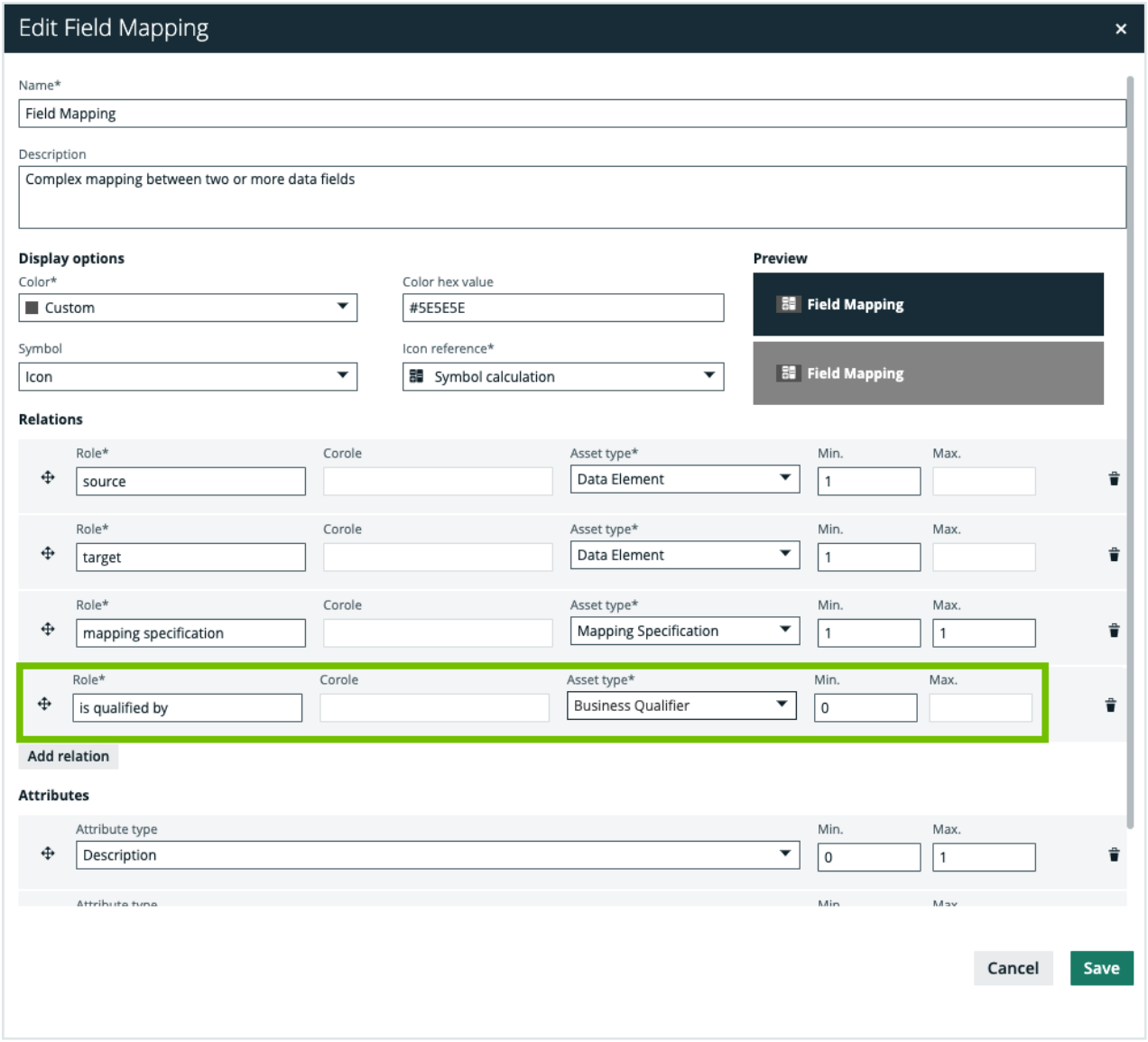
## Column assets

Column assets relate to Business Attribute assets that are related to Business Qualifier assets. The packaged relation types are the following:

| Head | Role | Co-role | Tail |
|---|---|---|---|
| Business Qualifier | qualifies | is qualified by | Data Attribute |
| Data Attribute | groups | is grouped by | Column |

## Complex relations

When configuring business qualifier filtering for complex relations, you need to edit the relevant complex relation type and add a relation leg pertaining to the Business Qualifier asset.




## Terminology

| Term | Description |
|---|---|
| Business qualifier view | A diagram view with at least one node for which a **Filtering by business qualifier** option is selected. |

| Term | Description |
| --- | --- |
| Business qualifier diagram | A diagram for which all of the following conditions are met:<br>• The selected diagram view is a business qualifier view.<br>• Filters are enabled in the diagram toolbar.<br>• Either the start node is a Business Qualifier asset, or both of the following are true:<br>◦ The start node matches a view node that has a **Filtering by business qualifier** option (either Optional or Mandatory) selected.<br>◦ The start node has at least one Business Qualifier path. |
| Business qualifier path | An asset has a business qualifier path if either of the following is true:<br>• The asset has at least one relation asset qualified by a Business Qualifier asset.<br>• The asset is a Column, and both:<br>◦ The Column asset is grouped by a Data Attribute asset.<br>◦ That Data Attribute asset is qualified by a Business Qualifier asset. |

## Configure business qualifier filtering for a complex relation

You can configure business qualifier filtering for a complex relation.

### Prerequisites

- To edit a complex relation type, you need a global role that has the System administration global permission.
- The Diagrams Business Qualifier Filter is enabled in Collibra Console.

### Steps

> Tip See the following example for detailed instruction on how to carry out each step in this procedure.

1. Edit the relevant complex relation type, for example Field Mapping. Specifically, you need to add a relation leg pertaining to the Business Qualifier asset.
2. If not already done, create the Business Qualifier asset that you will use to filter a diagram.
3. Specify the Business Qualifier asset in the complex relation type.
4. Add a relation between the relevant assets.

   > Tip We are referring here to assets that are the head or tail of the complex relation type legs, for example Column assets and the Business Qualifier asset.

5. In the relevant diagram view, enable the **Filtering by Business Qualifier** option for both the Column asset node and the Field Mapping complex relation node.

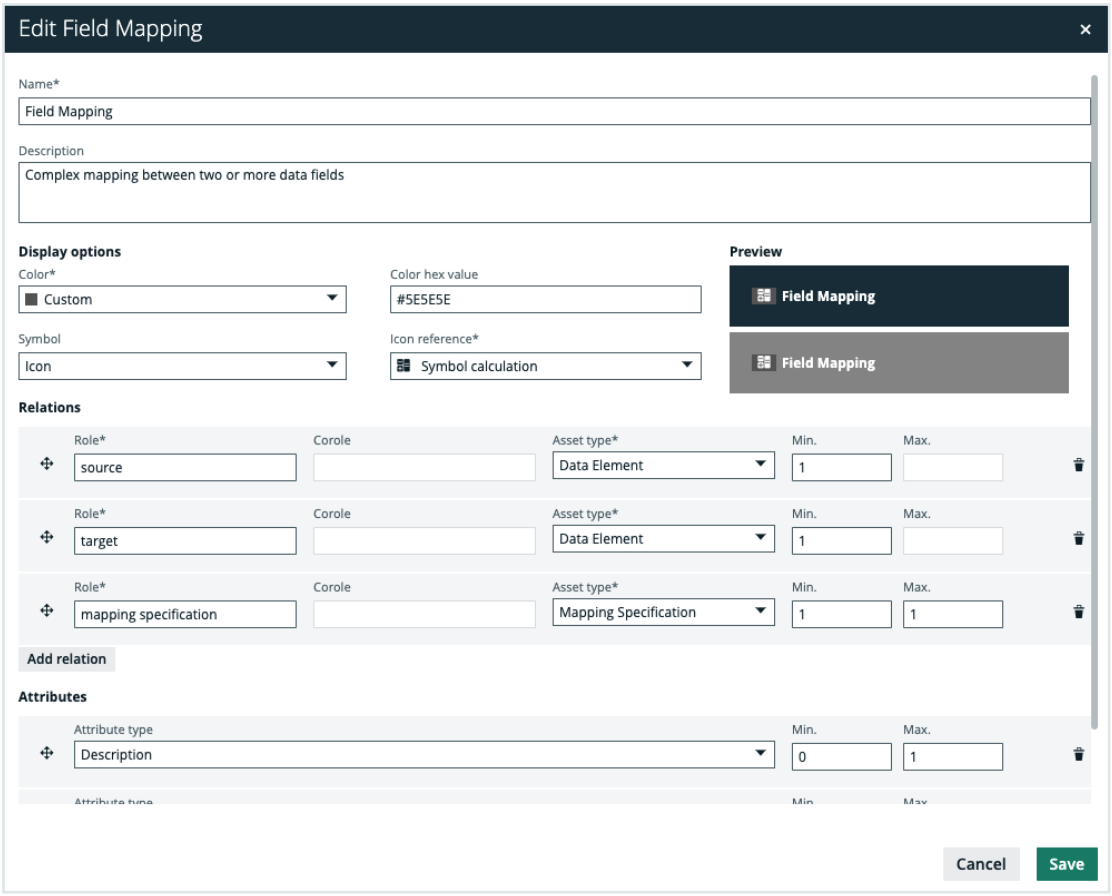
### Show me an example

In this example, we are working with the commonly used Field Mapping complex relation type that comes packaged with Collibra Data Intelligence Cloud. As the Field Mapping complex relation type is often used to track the flow of metadata from source column to target column, we also refer in this example to the Data Element asset type, which is a parent of the Column asset type. Lastly, the Field Mapping complex relation type is, by default, included the global role of the Data Element asset type.

1. Start by editing the Field Mapping complex relation type. Specifically, you need to add a relation leg pertaining to a Business Qualifier asset.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. In the **Operating model** section, click **Complex relations**.

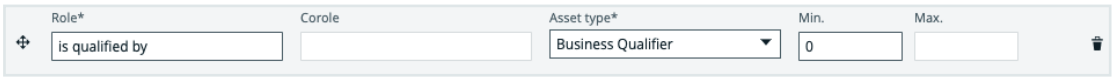
c. In the table, find the Field Mapping row and click ✎ at the end of the row.

» The **Edit Field Mapping** dialog box appears.




d. At the bottom of the **Relations** section, click **Add relation**.

e. Enter the required information.




- **Role**: We recommend the value *is qualified by*, but you can enter any text value that suits your needs.
- **Asset type**: Business Qualifier.

Leave the default values for the other fields as they are.

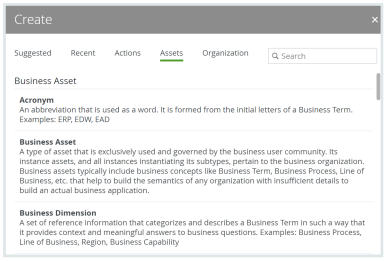
f. Click **Save**.

2. Let's assume that no appropriate Business Qualifier asset exists. Therefore, you need to create one.

a. In the main menu, click the **Create** (+) button.

» The **Create** dialog box appears.

b. Click the **Assets** tab.

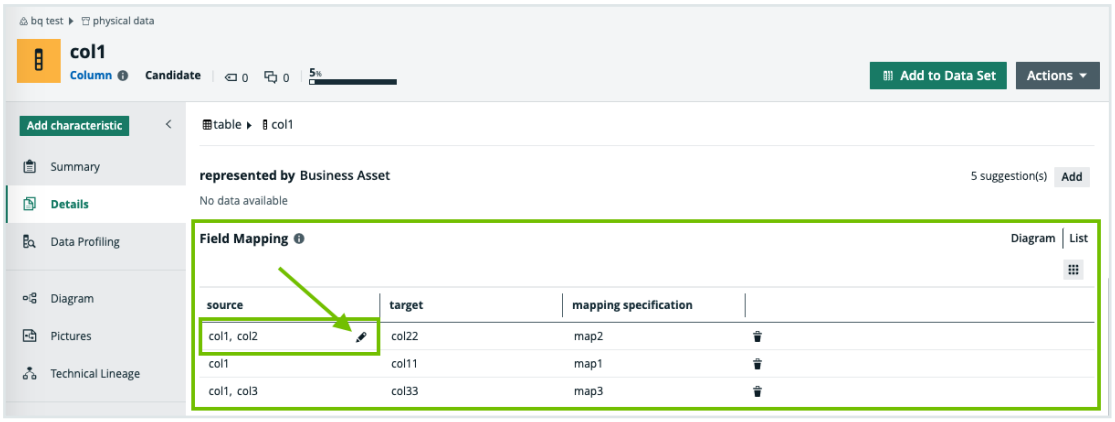



c. In the list of asset types, click Business Qualifier.
   » The **Create Asset** dialog box appears.
d. Enter the required information.

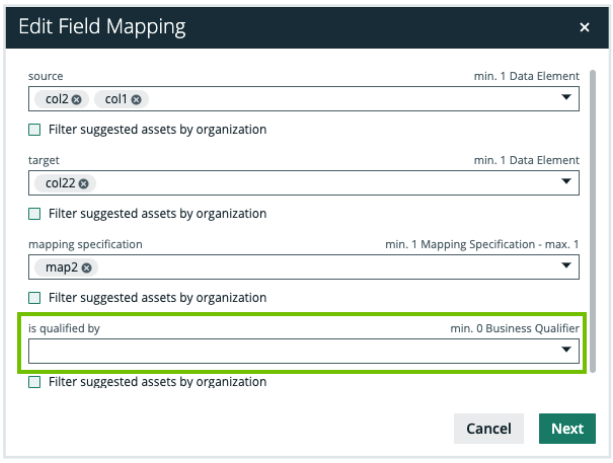
| Field | Description |
|---|---|
| Type | The asset type of the asset that you are creating. In this case, *Business Qualifier*. |
| Domain | The domain to which the new assets will belong. You can only create a asset type in any domain of a domain type that is assigned to a selected asset type. |
| Name | The name of the new Business Qualifier asset. For our example, let's use: *BQ1*. |

e. Click **Create**.
   » A message at the top-right of your screen confirms that one or more assets are created.

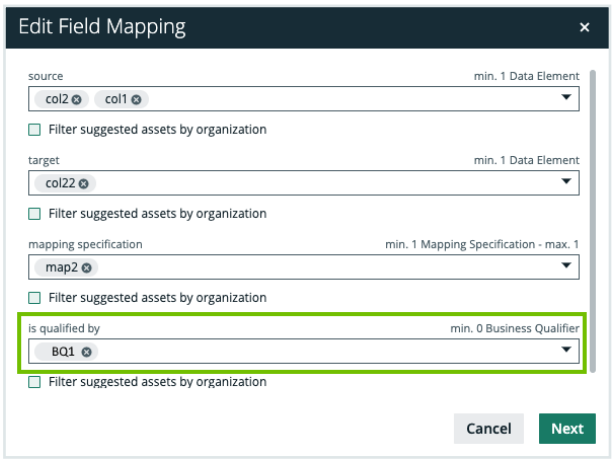
3. Specify the Business Qualifier asset in the complex relation type.
   a. Open one of the relevant leg assets. Let's choose one of the Column assets.
   b. In the tab pane, click **Details**.
   c. In the **Field Mapping** section, hover your pointer over any of the assets, and then click ✎.




» The **Edit Field Mapping** dialog box appears. Notice that the "is qualified by" relation leg is empty.




d. In the **is qualified by** field, add the Business Qualifier asset. In this example, BQ1.




e. Click **Next**.

f. If necessary, add a description of the Field Mapping complex relation.

g. Click **Finish**.

4. Now add a relation between a Column asset and the Business Qualifier asset.
   a. Open one of the relevant Column assets.
   b. In the tab pane, click **Add Characteristic**.
      » The **Add a characteristic** dialog box appears.
   c. Click **Relations**.
   d. Search for and click **is qualified by Business Qualifier**.
      » The **Add is qualified by Business Qualifier** dialog box appears.
   e. Enter the required information.

| Option | Description |
|---|---|
| Assets | The name of the Business Qualifier asset. In this example, BQ1. |
| Start date | Optionally enter the date on which the relation between the assets becomes applicable. |
| End date | Optionally enter the date on which the relation between the assets is no longer applicable. Leave this field empty to create a permanent relation. |

   f. Click **Save**.
5. In the relevant diagram view, enable the **Filtering by Business Qualifier** option for both the Column asset node and the Field Mapping complex relation node.
   a. Open a relevant Column asset page.
   b. In the tab pane, click **Diagram**.
      » The diagram appears in the default diagram view.
   c. If necessary, select a different diagram view.
   d. Click ⚙.
      » The General properties form appears.
   e. Select a node in the diagram.
      » The Node properties form appears.

> Tip You need to carry out steps e-h for both the Column asset node and the Field Mapping complex relation node.

f. In the **Node properties** form, go to the **Filters** section.
g. Enable business qualifier filtering:

| Your Collibra version | Action |
|---|---|
| 2021.01 | Click the **Filtering by business qualifier** checkbox. |
| 2021.02 or newer | In the **Filtering by business qualifier** drop-down list, select **Mandatory**, so that the diagram will only contain assets matching this view node that are qualified by the chosen business qualifier. |

h. Above the diagram, to the right, click **Save**.
i. In the diagram toolbar, click the **Business qualifier** drop-down menu and select **BQ1**.

## Delete a diagram view

You can delete a diagram view.

### Steps

1. Open an asset page.
2. In the tab pane, click **Diagrams**.
3. Select the diagram view that you want to delete.
4. In the view bar, click 🗑.
5. Click **Delete view**.

# Pictures

A picture is a copy of a diagram that is stored separately from the original. You can edit the pictures in the same way you edit diagrams, but there are fewer options available.

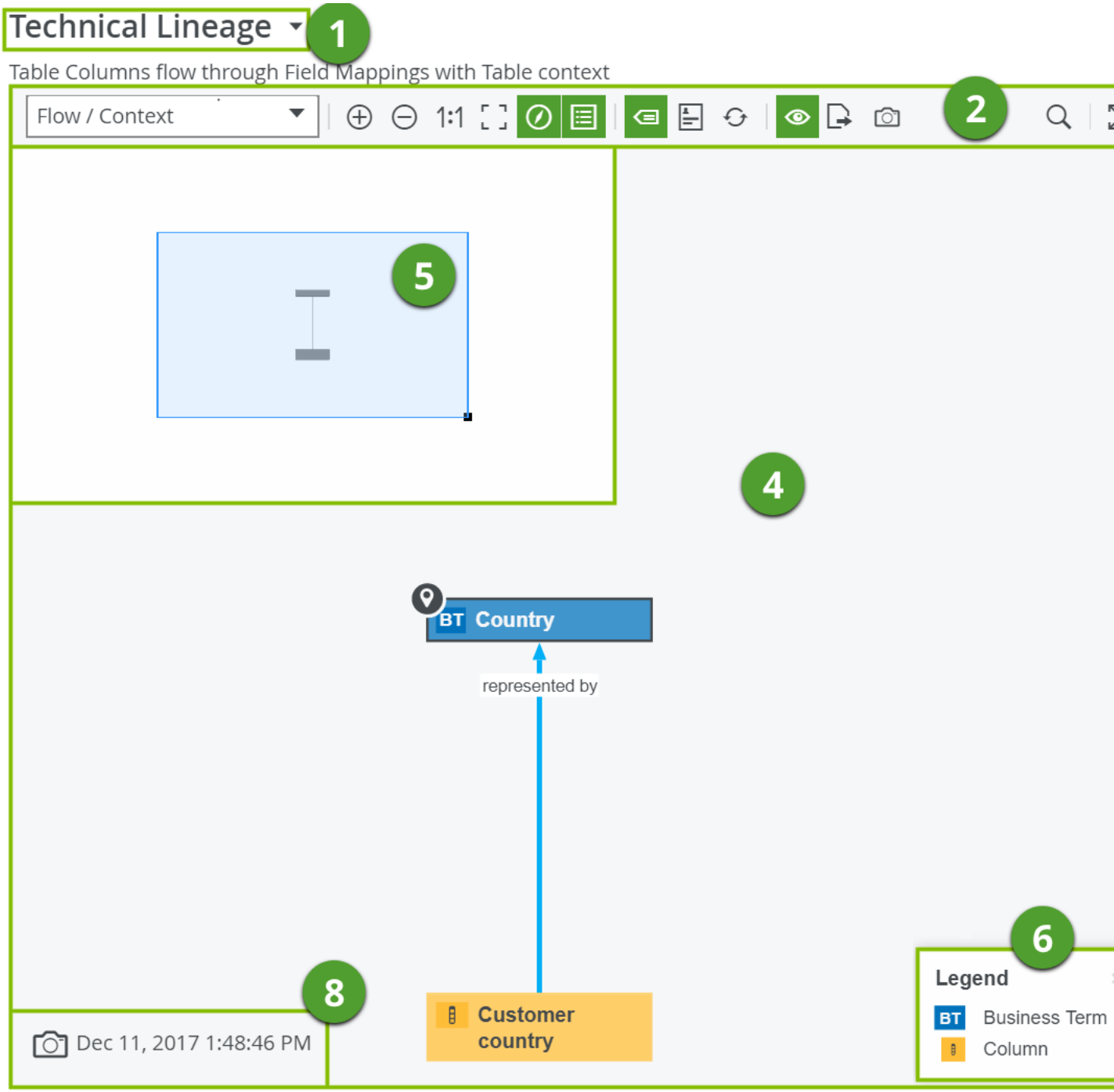
Pictures are an easy way to save a diagram after you configured it. You can then reuse it later.

## Available actions

- Create a picture.
- Open a picture.
- Edit a picture.
    a. Select a layout.
    b. Zoom in or out.
    c. Expand or collapse nodes.
    d. Trace a path between nodes.
    e. Move nodes, enable or disable labels, the legend, and so on.
- Export a picture.
- Delete a picture.

## Picture editor

The picture editor allows you to view and edit pictures. You can access the picture editor by opening a picture.




| No | Name | Description |
|---|---|---|
| 1 | Picture name | The name of the picture. |
| 2 | Picture toolbar | The toolbar to work in the picture. |

| No | Name | Description |
|---|---|---|
| 3 | View bar menu | The buttons to edit the picture's name, share it or delete it. |
| 4 | Picture | This is the actual depiction of the traceability of the current asset, according to the picture you opened. |
| 5 | Overview ( ) | Zoom and navigate a picture that is too large to fit the screen.<br>You can move it to anywhere in the diagram. |
| 6 | Legend | The legend explains the color codes and symbols of the items in the picture. You can move it to anywhere in the picture.<br>For each asset type and complex relation type that is visible on the picture, the legend shows the color and symbol, followed by the name of the type.<br>If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend.<br>Tip Click a row in the legend to select all occurrences of that type in the picture. You can use this to expand or collapse all nodes of the same type. |
| 7 | Preview panel | The preview panel with information about the selected node. |
| 8 | Time stamp | The date and time on which the picture was created. |

## Picture toolbar

The toolbar of the picture editor helps you to edit settings that apply to the entire picture.



| Button | Name | Description |
|---|---|---|
|   | Layout | Select a layout. The layout determines the location of nodes and edges, but does not change which nodes and edges are shown. |
|  | Zoom in | Zoom in on the picture. |
|  | Zoom out | Zoom out from the picture. |
|   | Zoom to readable value | Zoom the picture to a size that is readable. |
|  | Shrink to fit | Zoom the picture to a size that fits the screen. |
|  | Overview | Show or hide the overview inset that enables you to zoom and navigate. |
|  | Labels | Show or hide the labels of the edges and complex relations. |
|  | Overlays | Show or hide overlays for all nodes in the picture.<br>If the view does not have any defined overlays, the button is grayed out. |
|  | Export | Export the picture as a PDF or SVG file to your default downloads folder. |
|  | Redraw | Discard all the changes that you made to the picture and restore it to the initial state. |

| Button | Name | Description |
|---|---|---|
| | Legend | Show or hide the legend panel containing the explanation of the nodes.<br><br>The legend explains the color codes and symbols of the items in the picture. You can move it to anywhere in the picture.<br><br>For each asset type and complex relation type that is visible on the picture, the legend shows the color and symbol, followed by the name of the type.<br><br>If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend.<br><br>Tip Click a row in the legend to select all occurrences of that type in the picture. You can use this to expand or collapse all nodes of the same type. |
| | Preview | Show or hide the preview panel on the right side of the screen. It contains information about the characteristics of the currently selected node (asset or complex relation). |
| | Picture | Create a picture based on the picture. |
| | Find | Find a node in the picture. |
| | Fullscreen | Show the current picture in full-screen mode. The button changes to , to exit full-screen mode. |

## Create a picture

You can create a picture based on a diagram.

## Steps

1. Open a diagram or a picture.
2. Make the necessary changes.
   a. Select a layout.
   b. Zoom in or out.
   c. Expand or collapse nodes.
   d. Trace a path between nodes.
   e. Move nodes, enable or disable labels, the legend, and so on.
3. On the toolbar, click .
   » The **Save diagram as picture** dialog box appears.
4. Enter the required information.

| Field | Description |
|---|---|
| Name* | Type a name for the picture.<br>The default name is the name of the diagram view and a date stamp. |
| Description | Type a description for the picture. |
| Sharing options | This section determines who has access to this picture. |
| Public | Select to share this picture with all users. |
| Private | Select to share this picture with no one. |
| Share with specific roles, groups & users | Select to choose with whom to share the picture. |
| Roles | Select or type the roles whose users you want to give access. |

| Field | Description |
|---|---|
| Groups | Select or type the groups whose users you want to give access. |
| Users | Select or type the users to whom you want to give access. |
| Promote | |
| Pin | Select to pin the picture.<br>Pinned pictures appear in the view selection drop-down list. |

Fields marked with a * are mandatory.

5. Click **Save**.
   » The resulting picture appears in the **Pictures** section of the tab pane.

## Pin a picture

You can pin a picture in the drop-down of the view selection field

- while creating it.
- from the picture editor.

### Pin a view from the picture editor

1. Open a picture.
2. Click .
   » The **Share picture** dialog box appears.
3. Select the **Pin** check box.
4. Click **Save**.

## Unpin a picture

You can unpin a picture to remove it from the drop-down of the view selection field

## Unpin a picture in the picture editor

1. Open a diagram view.
2. Click .
   » The **Share view** dialog box appears.
3. Clear the **Pin** check box.
4. Click **Save**.

# Share a picture

You can share a picture with other users or keep it private.

## Steps

1. Open a picture.
2. Click .
   » The **Share picture** dialog box appears.

3. Enter the required information.

| Field | Description |
|---|---|
| Sharing options | This section determines who has access to this picture. |
| Public | Select to share this picture with all users. |
| Private | Select to share this picture with no one. |
| Share with specific roles, groups & users | Select to choose with whom to share the picture. |
| Roles | Select or type the roles whose users you want to give access. |
| Groups | Select or type the groups whose users you want to give access. |
| Users | Select or type the users to whom you want to give access. |
| Promote | |
| Pin | Select to pin the picture.<br>Pinned pictures appear in the view selection drop-down list. |

4. Click **Save**.

## Open a picture

You can open a picture of a diagram of an asset to visualize its relations in the picture editor.

## Steps

1. Open an asset page.
2. In the tab pane, click **Pictures**.
   » The picture list appears.
3. Click a picture in the list.
   » The picture is opened in the picture editor.

## What's next?

You can now edit or export the picture.

# Find node in a picture

You can search a picture for a specific node.

## Steps

1. Open a picture.
2. On the toolbar, click .
   » The search box appears.
   
   
3. Start typing in the search box.
   » The counter next to the search box indicates how many matches are found.
   » The first match is selected in the picture.

   > Tip You can use the arrows to navigate between the matches.

# Edit the name and description of a picture

You can edit the name and the description of a picture.

## Steps

1. Open a picture.
2. Click ✎.
   » The **Edit name and description** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Name | Type a name for the picture.<br>The default name is the name of the original diagram view and a date stamp. |
| Description | Type a description for the picture. |

4. Click **Save**.

# Edit a picture

You can edit a picture to represent the nodes as clearly as possible.

## Steps

1. Open a picture.
2. Make the necessary changes to the picture.
   a. Select a layout.
   b. Zoom in or out.
   c. Expand or collapse nodes.
   d. Trace a path between nodes.
   e. Move nodes, enable or disable labels, the legend, and so on.

## Select a picture layout

You can select a picture layout to change the way nodes are shown in a picture.

## Steps

1. Open a picture.
2. On the toolbar, click the layout box and select a layout.

| Diagram layout | Description |
|---|---|
| **Flow / Context** | Nodes and edges are shown in a flow and a context region.<br><br>In the flow region, nodes are shown mostly from left to right.<br><br>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the **Context** checkbox in the node properties form.<br><br>If there are no nodes in the context region, this layout produces the same result as **Hierarchy left -> right**.<br><br>> Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region. |
| **Hierarchy left - right** | Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout. |
| **Hierarchy top - down** | Nodes and edges are shown in a flow, from top to bottom. |
| **Hierarchy bottom - up** | Nodes and edges are shown in a flow, from bottom to top. |

| Diagram lay-out | Description |
|---|---|
| **Circular** | Nodes and edges are arranged in a circular fashion.<br><br>Boxing nodes are not supported in this layout, therefore:<br><br>◦ The picture is completely redrawn.<br>◦ The explored nodes are removed from the picture.<br>◦ The nodes expand or collapse to their initial state.<br>◦ Returning to a layout that supports boxing nodes completely redraws the picture. |
| **Radial** | Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.<br><br>Boxing nodes are not supported in this layout. This has the same consequences as described for the **Circular** layout. |
| **Smart Organic** | Nodes and edges are distributed in a well-balanced manner, with few edge crossings. |

## Picture layouts

Picture layouts determine the location of nodes and edges of a picture, but do not change which nodes and edges are displayed.

You can select a picture layout in the toolbar of the picture editor.

| Diagram layout | Description |
|---|---|
| **Flow / Context** | Nodes and edges are shown in a flow and a context region.<br><br>In the flow region, nodes are shown mostly from left to right.<br><br>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the **Context** checkbox in the node properties form.<br><br>If there are no nodes in the context region, this layout produces the same result as **Hierarchy left -> right**.<br><br>> Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region. |
| **Hierarchy left - right** | Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout. |
| **Hierarchy top - down** | Nodes and edges are shown in a flow, from top to bottom. |
| **Hierarchy bottom - up** | Nodes and edges are shown in a flow, from bottom to top. |
| **Circular** | Nodes and edges are arranged in a circular fashion.<br><br>Boxing nodes are not supported in this layout, therefore:<br><br>• The picture is completely redrawn.<br>• The explored nodes are removed from the picture.<br>• The nodes expand or collapse to their initial state.<br>• Returning to a layout that supports boxing nodes completely redraws the picture. |

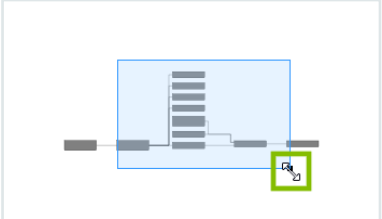
| Diagram layout | Description |
|---|---|
| **Radial** | Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.<br><br>Boxing nodes are not supported in this layout. This has the same consequences as described for the **Circular** layout. |
| **Smart Organic** | Nodes and edges are distributed in a well-balanced manner, with few edge crossings. |

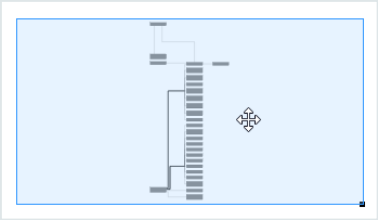
## Working with the picture overview inset

The overview inset of the picture editor allows you to keep an overview of the complete picture, while the main screen is showing only a section of it.

### Steps

1. Open a picture.
2. On the toolbar, click the ⊘ to show or hide the overview inset.
   » The overview inset is shown over the picture. You can still see the picture underneath.
3. Do one of the following:

| Action | Descriptions |
|---|---|
| Zoom in or out by scaling: | a. Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow.<br>b. Click and hold, then drag the pointer to zoom in or out.<br>  |

| Action | Descriptions |
| --- | --- |
| Navigate in the picture: | a. Move your mouse pointer over the blue square. The pointer turns into a four-way arrow.<br>  <br>b. Click and hold, then drag the pointer to move the square to what you want to see. |

## Zoom in or out in the picture editor

When working with pictures, you can zoom in or out in different ways.

### Steps

1. Open a picture.
2. Do one of the following:

| Strategy | Description |
| --- | --- |
| Zoom in or out with buttons. | On the toolbar, click ⊕ (Zoom in) or ⊖ (Zoom out) as needed. |
| Zoom in or out by scrolling with your mouse. | Move your mouse pointer to anywhere on the picture and use your mouse wheel to zoom. The zoom is centered at the mouse pointer. |

| Strategy | Description |
| --- | --- |
| Zoom in or out by scaling. | a. On the toolbar, click the button (**Overview**).<br>An overview inset with a miniature version of the entire picture is shown in the top right corner. The section of the picture that is shown on the screen is visible as a blue rectangle on the overview.<br>b. Move your mouse pointer over the lower right corner of the blue rectangle, until it turns into a sleek slanted arrow.<br>  <br>c. Click and hold, then drag the pointer to zoom in or out. |
| Zoom to readable value. | On the toolbar, click 1:1. |
| Adapt the diagram to fit in the view. | On the toolbar, click . |

## Trace all paths between nodes in a picture

You can trace all paths between any number of nodes on the picture, which means you can show the relations between the nodes.

You can trace a path between nodes in the following ways:

- The highlight mode: Keep the whole picture and highlight the nodes and edges on the path.
- The crop mode: Remove any node or edge that is not on the path.

### Steps

1. Open a picture.
2. Select one, two or more nodes in the picture:

| On a macOS system | On a Windows system |
|---|---|
| Click the first one and then hold down `cmd` while clicking on the next ones. | Click the first one and then hold down `ctrl` while clicking on the next ones. |

3. Do one of the following:
   - To keep the whole picture and highlight the path, right-click one of the selected nodes and click **Trace path → Highlight**.
   - To remove anything that is not part of the path between the two selected nodes, right-click one of the nodes and click **Trace path → Crop**.

   » If you selected a single node, all relations are traced.
   » If you selected multiple nodes, the path between the selected nodes is traced.
   » If there is no path between the nodes, a message is displayed.

## Move a node in the picture

If you want a node to be in a different location in the picture, you can easily move it around.

### Steps

1. Open a picture.
2. Click a node and hold down your mouse button. To select multiple nodes, do the same but select multiple nodes.

| On a macOS system | On a Windows system |
|---|---|
| Click the first one and then hold down `cmd` while clicking on the next ones. | Click the first one and then hold down `ctrl` while clicking on the next ones. |

3. Move the node to where you want it and release the mouse button.

> Note You cannot save the these changes, but you can create a picture or export the picture with these changes.

## Expand or collapse picture nodes

If a node has an outgoing edge with the boxing style, it becomes a boxing node. Your diagram view determines whether boxing nodes are expanded or collapsed by default. Your diagram view can also lock collapsed nodes, which means that you cannot expand the collapsed boxing node.

### Steps

1. Open a picture.
2. Do one of the following:
   - Select a node.
   - Select multiple nodes by holding down the select key and clicking nodes.

     | On a macOS system | On a Windows system |
     | --- | --- |
     | Click the first one and then hold down `cmd` while clicking on the next ones. | Click the first one and then hold down `ctrl` while clicking on the next ones. |

   - In the legend, click the asset type or complex relation type that you want to expand or collapse. You have now selected all nodes of this type.
3. Do one of the following:
   - In the node, click + or −.
   - In the context menu of a node, click **Expand/Collapse selected**.

# Export a picture

You can export a picture to a PDF or SVG file.

### Steps

1. Open a picture.
2. Make the necessary changes to the picture.
   a. Select a layout.
   b. Zoom in or out.
   c. Expand or collapse nodes.

   d. Trace a path between nodes.
   e. Move nodes, enable or disable labels, the legend, and so on.
3. On the toolbar, click and select **PDF** or **SVG**.
   » The resulting file is automatically downloaded to your default downloads folder.
   » The default file name is **diagram.pdf** or **diagram.svg**.

## Delete a picture

You can delete a picture

- from the picture list.
- from the picture editor.

### Delete a picture from the picture list.

1. Open an asset page.
2. In the tab pane, click **Pictures**.
   » The picture list appears.
3. At the end of a line, click .
   » The **Delete picture** dialog box appears.
4. Click **Delete picture**.

### Delete a picture from the picture editor

1. Open a picture.
2. In the upper right corner, click .
   » The **Delete picture** dialog box appears.
3. Click **Delete picture**.

# Diagram FAQ

## Which nodes and edges are included in a diagram?

Collibra Data Intelligence Cloud only adds relevant relations and nodes to the diagram by using a specific traversal strategy. The traversal strategy is the logic that describes which

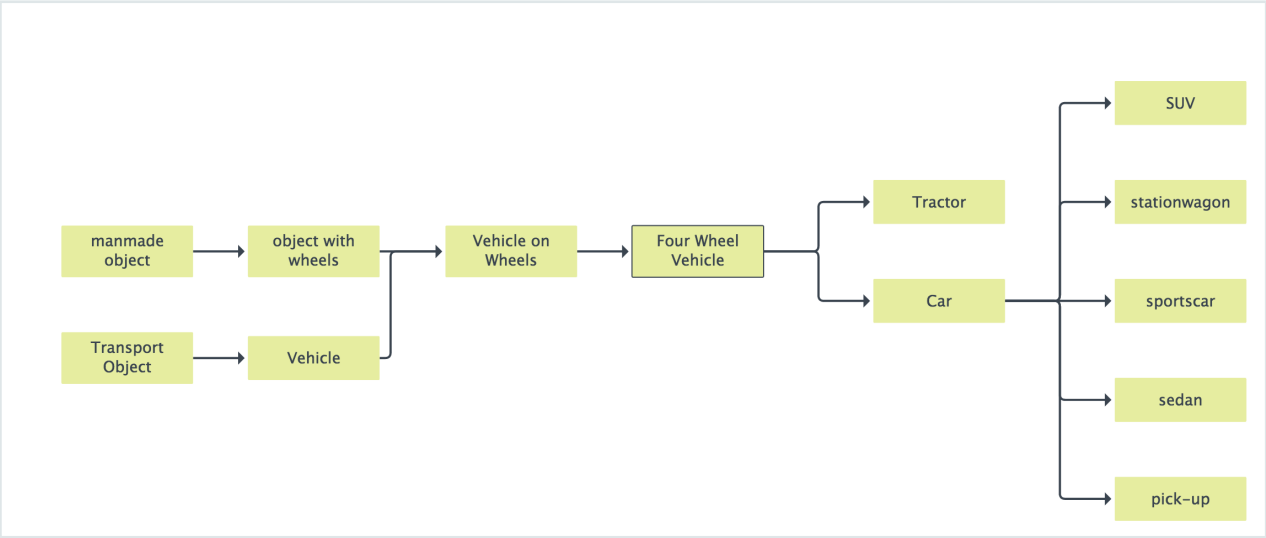
relations and assets have to be included in the diagram. To understand the traversal strategy, it is important that you know the difference between incoming and outgoing edges and between flow and context nodes.

From a start node, Collibra adds all the relations (both incoming and outgoing) and the relation's node whose relation type is mentioned in the view.

When traversing further downstream from a node that is downstream from the start node, Collibra adds all the relations and nodes that are downstream, but not the ones that are upstream.

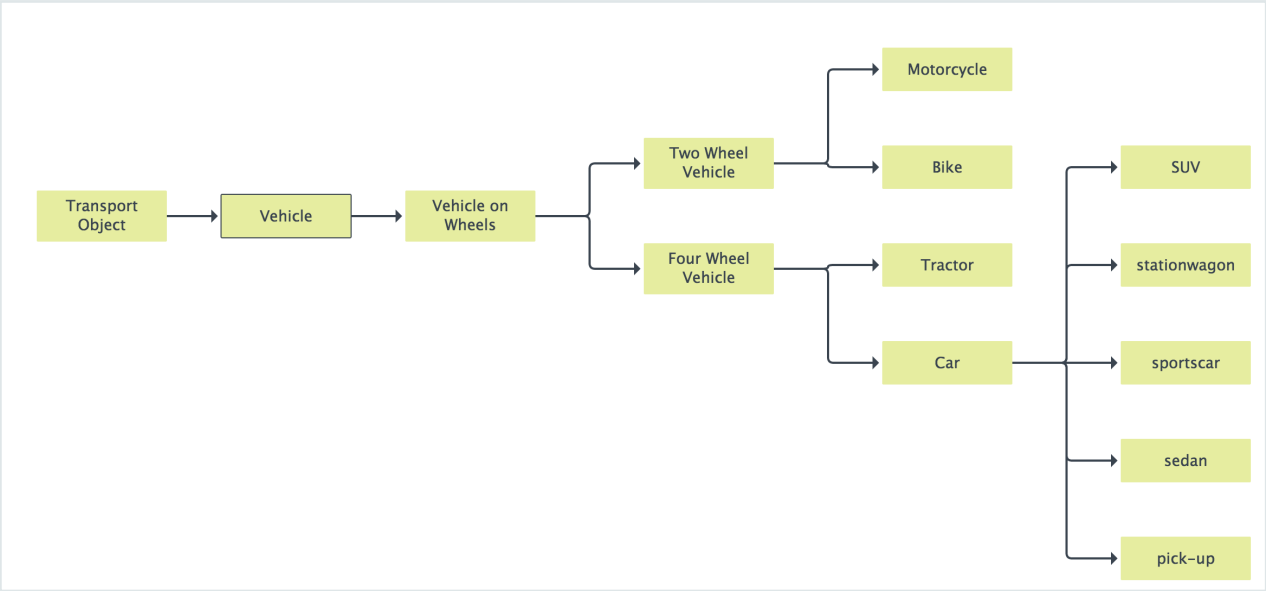
When traversing further upstream, Collibra adds all relations and nodes that are upstream of that node, but not the ones that are downstream.

For the following example diagram, the view contains the **Groups** relation type and **Four Wheel Vehicle** is the start node.




Any downstream relation of an upstream node (**Vehicle**, **Vehicle on Wheels**, ...) is irrelevant for the diagram and thus not shown. The same traversal strategy is applied to any node that is on the upstream side of a node that is downstream of the start node.

If you jump to **Vehicle**, you see that the diagram has changed for the **Vehicle on Wheels** node. This node no longer has the upstream relation to object with wheels, but the relation to **Two Wheel Vehicle** is added.

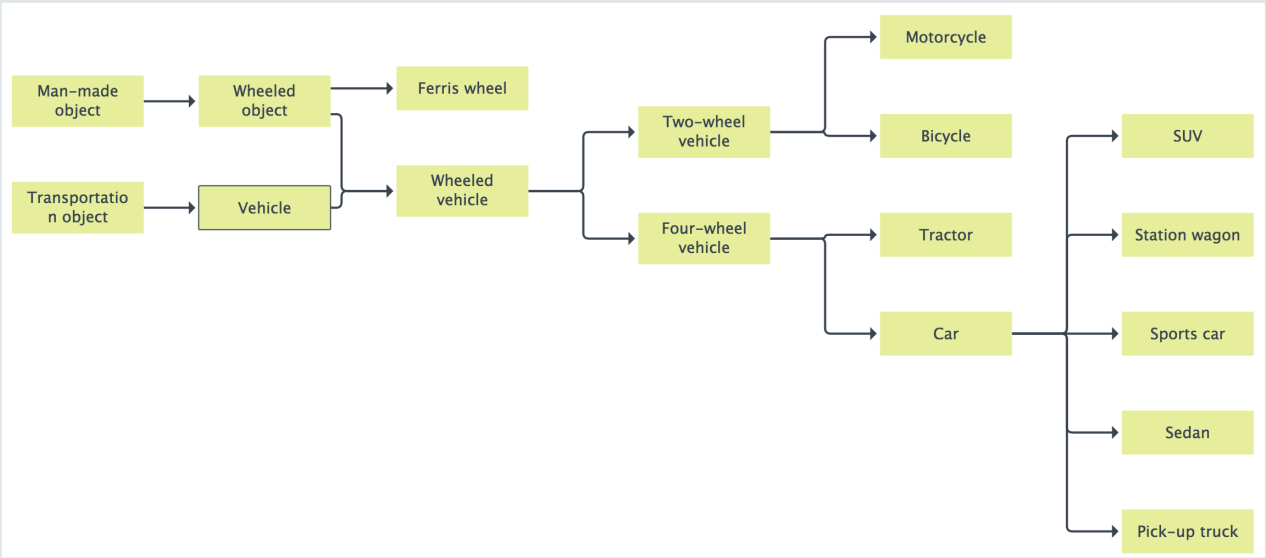



## Can I set a different traversal strategy for my diagram view?

All examples in this chapter, unless mentioned otherwise, use the default traversal strategy. We call this the 'directed' traversal strategy. It can be paraphrased as 'keep on walking and don't look back'.

You can also switch the traversal strategy to complete graph, by always looking in all directions. Depending on your data, this could obviously lead to a much bigger diagram, with many more nodes and edges.

Going back to the example given in the FAQ Which nodes and edges are included in a diagram?, and applying that strategy results in the following diagram:




Note the new upstream branch of **Wheeled vehicle**, which is downstream from the start node. An upstream node in that branch, **Wheeled object**, has a downstream branch: **Ferris wheel**.

You can switch the traversal strategy in the JSON form of the diagram view by adding the following key-value pair to the top-level diagram section

`"visitStrategy": "completeGraph".`

For more information, see Diagram views.

## When editing a diagram view, I can assign each node to either the 'Flow' or 'Context' layout region. What does that do?

The default traversal strategy ('directed') gives the required results when you depict a set of assets that are related through some kind of (data) flow or dependency. For nodes in the flow section, and the edges between them, you can paraphrase the ‘directed’ traversal strategy as "keep on walking and don't look back". But when the relation represents a link to **context** rather than **flow**, the edge between two nodes should always be traversed, even if the related node is upstream of a downstream node, or vice versa. You can also regard an edge between a flow node and a context node as bidirectional: it should always be traversed.

This notion becomes clearer when you look at the following example.

When the flow depicts transformations of table columns, the tables that contain the columns, and the business terms that are related to them, provide context to the columns. The context nodes are always relevant, regardless of whether the column was encountered while going upstream or downstream. The context nodes are always added to the diagram.

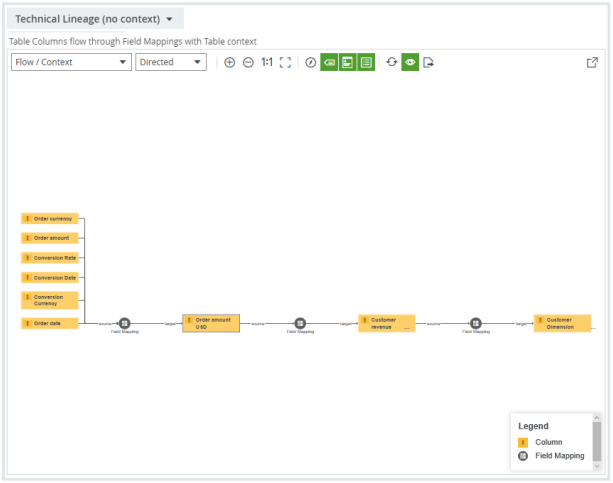
For this traversal strategy, you can assign a node in the diagram view to be a **context** node.

Consider the following example diagram view:




This view contains flow only.

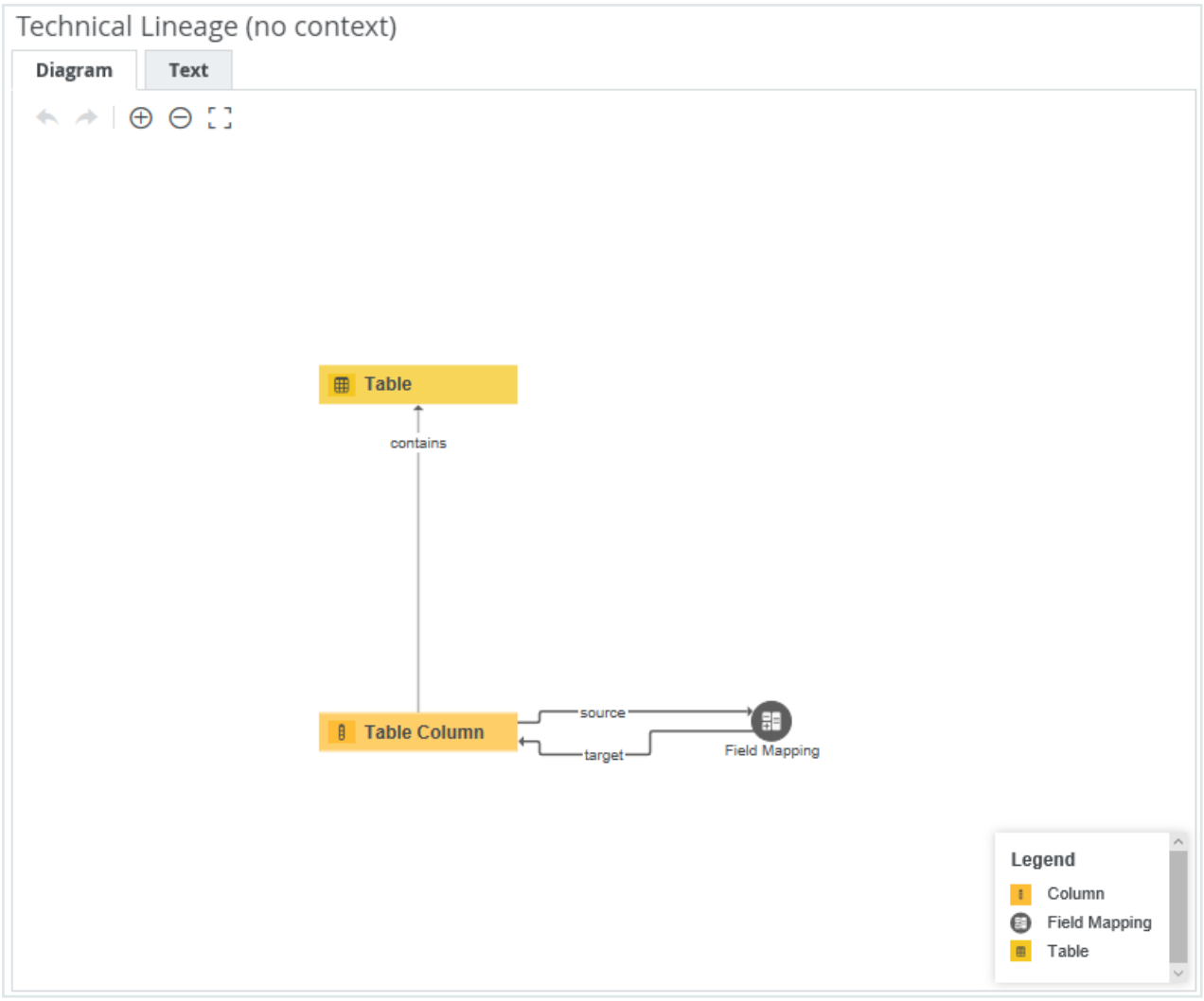
An example diagram for this view is below:



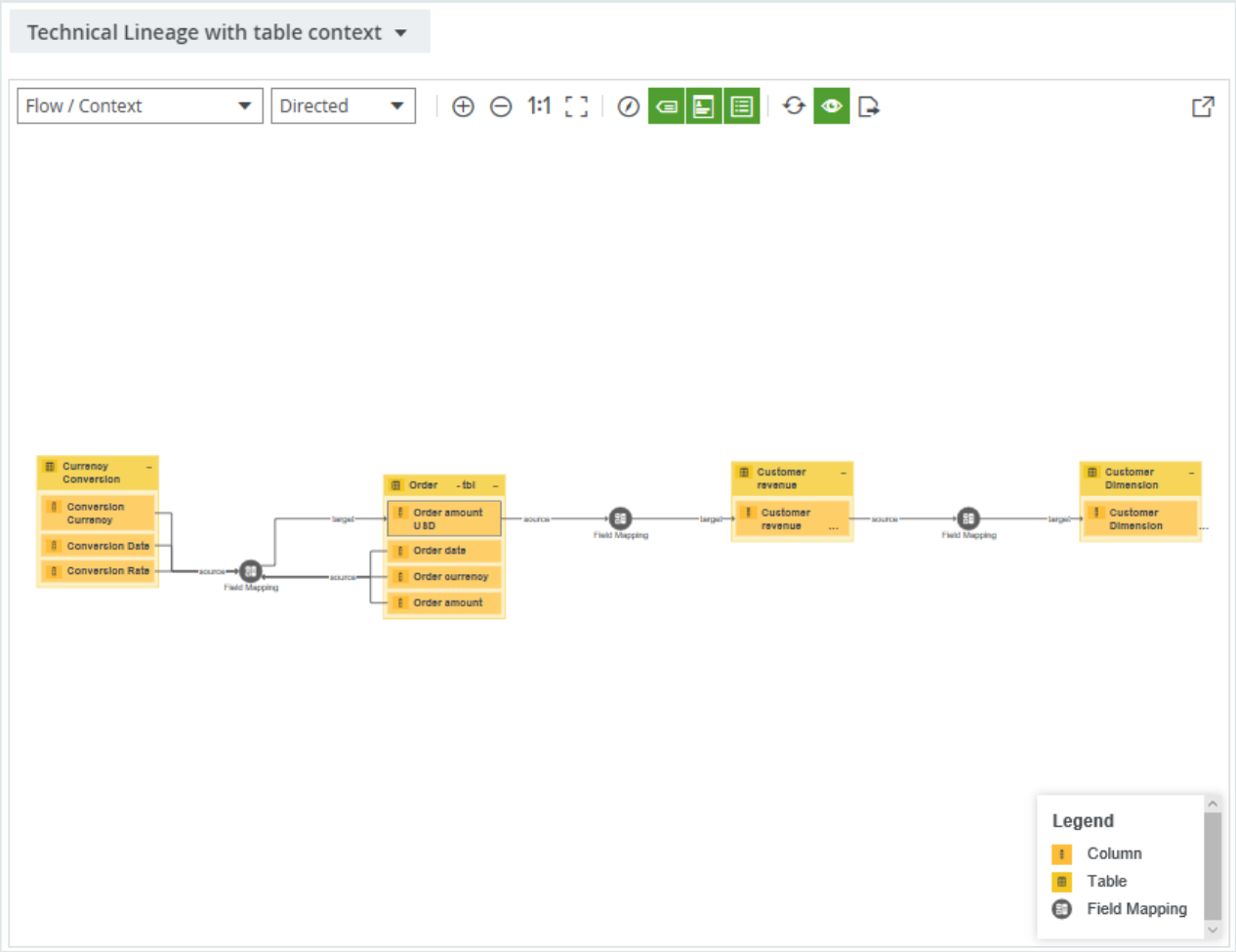

We started from the **Order amount USD** asset.

Now assume that you also want to see to which tables these columns belong.

You could add a relation from column to table to the view (in other words, a downstream edge), but this relation would only be considered on the downstream side, and if we add the column/table relation in the reverse direction, it would only be considered on the upstream side. To solve this problem, we designate the Table as a **context** node, so that the relation from **Column to Table** is always traversed, both for **Columns** that are upstream as well as downstream.




Resulting in the diagram below:




Both upstream and downstream **Columns** show the **Table** that contains them. The edge from **Column to Table** was always traversed.

## What is special about the flow/context layout?

The **Flow/Context** layout is special because it has a specific behavior.

If you set the diagram layout to **Flow/Context**, the nodes that are in the **Flow** layout region, also known as flow nodes, are depicted as a left-to-right hierarchy in the lower half of the diagram. The context nodes are all in the top half of the diagram.

> Note Flagging your nodes as flow or context nodes is always relevant, even when the diagram layout is not Flow/Context. For more information about how this is relevant, see When editing a diagram view, I can assign each node to either the 'Flow' or 'Context' layout region. What does that do? .

## Can I change the node colors and symbols that are used for an asset type or complex relation type?

You can view and edit the color and symbol of each asset type and complex relation type in ⚙ **Settings**. However, you need a role that can access the ⚙ **Settings** and the permission to make changes to the operating model.

All assets and complex relations of the same type have the same color and symbol across all diagrams.

# Data modeling

In this section, we describe the structure of the Collibra Data Intelligence Cloud data model, how data is related and how you can organize your data.

# Collibra building blocks

To be able to create a decent data governance model, it is important that you understand the basic building blocks of Collibra Data Intelligence Cloud and how they relate to each other.

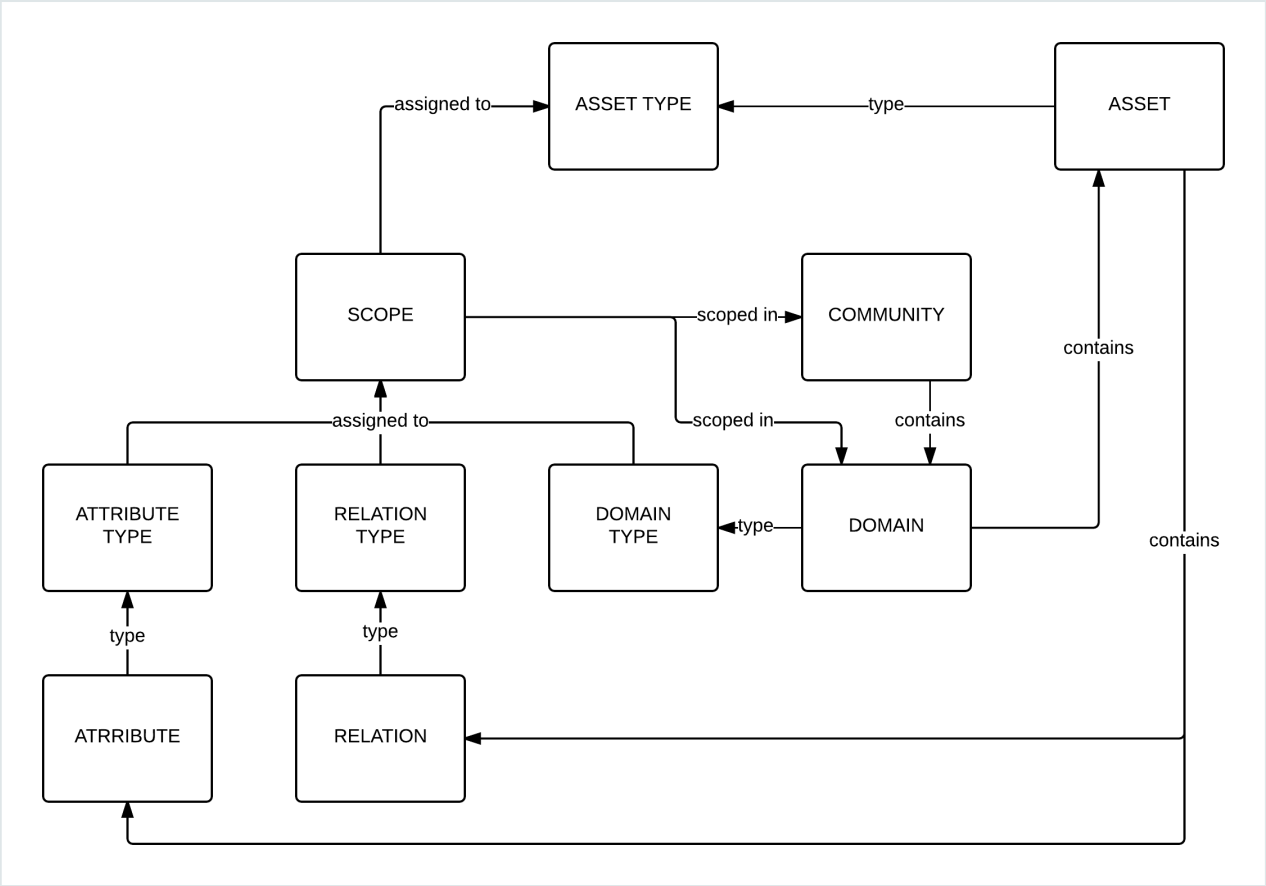
The following table lists the concepts and explains how Collibra captures information.

| Concept | Icon | Description |
|---|---|---|
| Community | | A community is a grouping of subcommunities and domains. It often corresponds to functional divisions in a company and works best if it is aligned with the company's governance organization. |
| Domain type | None | A domain type defines the semantics of a domain, as a kind of template. It defines which assets types users can create in the domain. |
| Domain | | A domain is a logical grouping of assets and belongs to exactly one community. It has a domain type that specifies which asset types can be created in the domain.<br>A domain has a unique name within its community.<br>A domain is the instance of exactly one domain type. |
| Scope | None | A scope is a selection of communities and domains that you can assign to one or more asset types.<br>In a scope, you can define amongst others a domain type, attribute types and relation types. |

| Concept | Icon | Description |
| --- | --- | --- |
| Asset type | None | An asset type defines the semantics of an asset, as a kind of template. It defines which attribute types and relation types the asset can have.<br><br>Scopes are assigned to asset types. |
| Asset |  | An asset is the fundamental building block or resource for which you want to capture information.<br><br>An asset belongs to exactly one domain and has a unique name within that domain.<br><br>An asset is the instance of exactly one asset type. |
| Attribute type | None | An attribute type defines the class of information that an attribute contains. It is assigned to an asset type through a scope. |
| Attribute | None | An attribute is a specific piece of information that captures information about an asset. One asset can contain many attributes. |
| Relation type | None | A relation type specifies the type of relation between two asset types.<br><br>A relation type is bidirectional, going from a head asset type to a tail asset type and the other way around. |
| Relation | None | A relation is a link between exactly two assets. It captures how two assets are related to each other. One asset can have many relations.<br><br>A relation is the instance of exactly one relation type. |

| Concept | Icon | Description |
|---|---|---|
| Complex Relation Type | None | A complex relation type specifies the characteristics of a complex relation instance. A complex relation is a type of relation that helps you to create many-to-many relations, as well as capture attributes (description, priority, ...) on top of the many-to-many relation. They can be regarded as 'objectified associations'. A complex relation type is specified by its name, description, a collection of relation types and a collection of attribute types. |

The following diagram explains how the concepts from the table are related to each other.



# Communities

A community is a grouping of other communities and domains. It often corresponds to functional divisions in a company and works best if it is aligned with the company's governance organization.

Each community can contain any number of subcommunities.

You can recognize a community by the following icon: .

> Note
> Collibra uses some packaged communities. You can edit them, but you cannot delete them. If required, you can hide them by restricting their view permissions.

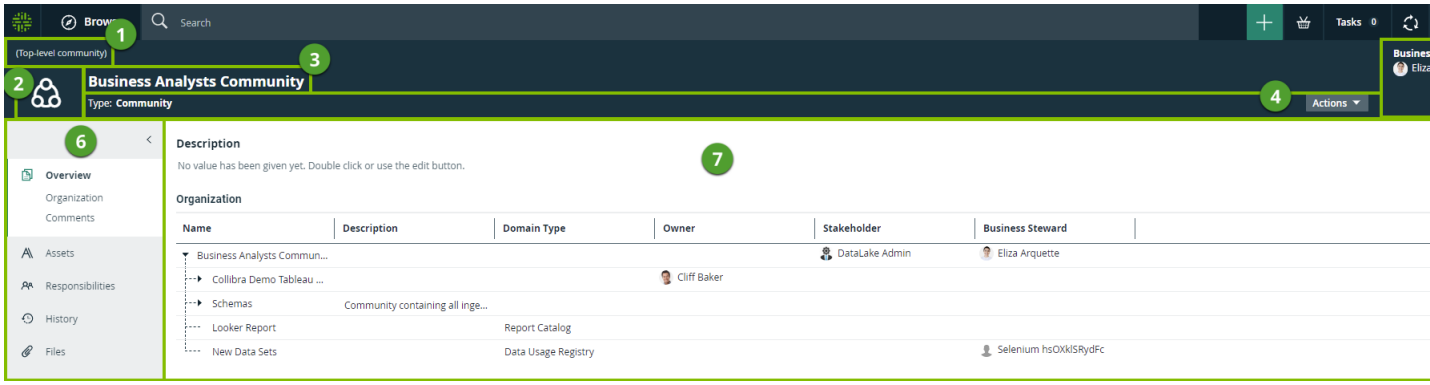
| Community name | ID | URL |
|---|---|---|
| Business Analysts Community | 00000000-0000-0000-0001-000100000001 | <your environment>/community/00000000-0000-0000-0001-000100000001 |
| Data Governance Council | bc40c085-352c-4a8c-8ee7-494fe821308e | <your environment>/community/bc40c085-352c-4a8c-8ee7-494fe821308e |
| Schemas | 00000000-0000-0000-0001-000100000002 | <your environment>/community/00000000-0000-0000-0001-000100000002 |

## Actions

- Create a community
- Add domains to a community by creating a new domain or moving an existing domain.
- Create a responsibility to assign a resource role to a user or group for a community.
- Edit the name of a community.
- Move a community to another parent community.
- Delete a community.

# Community page overview

The community page provides a complete overview of all information related to a community.




| Number | Section | Description |
|---|---|---|
| 1 | Breadcrumbs | The breadcrumbs of the current community. |
| 2 | Community representation | The icon or abbreviation of the community. |
| 3 | Community name | The name of the community. |

| Number | Section | Description |
|---|---|---|
|  | Resource toolbar | Additional actions, such as editing the community and starting a workflow. |
|  | Stewards | The stewards of the community.<br><br>You can see up to three stewards on the community page. If there are more, click **See all <number>** to see them on the **Responsibilities** page. |
|  | Tab pane | A collapsible pane that allows you to navigate to other pages of the community and add characteristics. |
|  | Editor | The currently selected page, in this case the **Overview** page, which contains all the attributes that have been defined for the community.<br><br>The **Organization** section contains a simple asset view with all the assets in the domains of the community.<br><br>Tip If you want to copy and paste text from other sources into a text field, we recommend that you click <>, and then paste the text into the **Show source code** field. This will remove any unwanted formatting or tagging of the text. For detailed information, see the knowledge base article on Collibra Support Portal. |

# Create a community

You can create a new community at the top level of your organization, or under another community.

## Steps

1. In the main menu, click the **Create** (+) button.
   » The **Create** dialog box appears.
2. Click the **Organization** tab.
3. In the **Community** section, click **Community**.
   » The **Create Community** dialog box appears.
4. Enter the required information.

| Field | Description |
|---|---|
| Community | The community under which the new communities will be located.<br><br>If you leave this field empty, the communities will be located at the top level of your organization. |
| Name | The names of the new communities.<br><br>Tip<br>You can create multiple communities in one go.<br>To do this, press `Enter` after typing a value and then type the next. Community names have to be globally unique. If you type a name that already exists, it will appear in strike-through style. |

5. Click **Create**.

# Edit the name of a community

You can edit the name of a community:

- From the community page.
- From an organization table.

## Edit the name of a community from the community page

1. Open a community page.
2. In the resource toolbar, click **Actions** → **Edit**.
   » The **Edit <community name>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the community.<br><br>Community names have to be globally unique. |

4. Click **Save**.

## Edit the name of a community from an organization table

1. Open an asset page that contains an organization table, for example a community page.
2. In the **Name** column, do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
3. Edit the name.
4. Click ✔.

# Move a community

You can move a community to another parent community.

> Note If a community is moved to a community in another scope, the assignment of its assets may change. If moving a community causes a conflict of scopes, the moved domain is removed from its original scope.

### Steps

1. Open a community page.
2. In the resource toolbar, click **Actions** → **Move**.
   » The **Move <community name>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Community | Enter the name of the new parent community.<br><br>Community names have to be unique in their parent community. If you try to move this community to a parent community that already contains a community with the same name, an error message will appear after clicking **Save**. |

4. Click **Save**.

## Delete a community

You can delete a community.

> Warning When you delete a community, you will also delete its contained views, domains and assets.

### Steps

1. Open a community page.
2. In the resource toolbar, click **Actions** → **Delete**.
   » The **Delete Confirmation** dialog box appears.
3. Click **Delete <community name>**.

# Domains

A domain is a logical grouping of assets. It always has a domain type and belongs to exactly one community.

You can recognize a domain by the following icon: .

Note
Collibra uses some packaged domains. You can edit them, but you cannot delete them. If required, you can hide them by restricting their view permissions.

| Domain name | Domain type | ID | URL |
|---|---|---|---|
| New Data Sets | Data Usage Registry | 00000000-0000-0000-0001-000200000001 | <your environment>/domain/00000000-0000-0000-0001-000200000001 |
| Data Quality Dimensions | Business Asset Domain | 00000000-0000-0000-0000-000000006019 | <your environment>/domain/00000000-0000-0000-0000-000000006019 |
| Issue Classification | Issue Classification | 00000000-0000-0000-0000-000000006011 | <your environment>/domain/00000000-0000-0000-0000-000000006011 |
| New Applications | Technology Asset Domain | 00000000-0000-0000-0000-000000006018 | <your environment>/domain/00000000-0000-0000-0000-000000006018 |
| New Business Terms | Glossary | 00000000-0000-0000-0000-000000006013 | <your environment>/domain/00000000-0000-0000-0000-000000006013 |
| New Data Assets | Data Asset Domain | 00000000-0000-0000-0000-000000006015 | <your environment>/domain/00000000-0000-0000-0000-000000006015 |

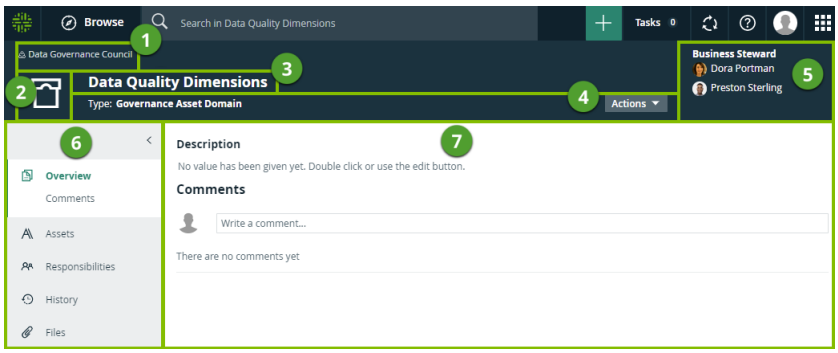
| Domain name | Domain type | ID | URL |
|---|---|---|---|
| New Policies & Business Rules | Governance Asset Domain | 00000000-0000-0000-0000-000000006016 | <your environment>/domain/00000000-0000-0000-0000-000000006016 |
| New Processes | Business Asset Domain | 00000000-0000-0000-0000-000000006017 | domain/00000000-0000-0000-0000-000000006017 |
| New Reference Data | Codelist | 00000000-0000-0000-0000-000000006014 | <your environment>/domain/00000000-0000-0000-0000-000000006014 |

## Actions

- Create a domain.
- Edit a domain.
- Move a domain.
- Create a responsibility to assign a resource role to a user or group for a community.
- Delete a domain.

## Domain page overview

The domain page provides a complete overview of all information related to a domain.



| Number | Section | Description |
| --- | --- | --- |
|  | Breadcrumbs | The breadcrumbs of the current domain. |
|  | Domain type representation | The icon or abbreviation of the domain type. |
|  | Domain name | The name of the domain. |
|  | Resource menu | Additional actions, such as editing the domain and starting a workflow. |
|  | Stewards | The stewards of the domain.<br><br>You can see up to three stewards on the domain page. If there are more, click **See all <number>** to see them on the **Responsibilities** page. |

| Number | Section | Description |
|---|---|---|
|  | Tab pane | A collapsible pane that allows you to navigate to other pages of the domain and add characteristics.<br>• **Overview**: Contains the description of and comments about a domain.<br>• **Assets**: Displays the assets in the domain.<br>• **Responsibilities**: Displays the view permissions and the responsibilities for a domain.<br>• **History**: Displays which user has done what with this domain.<br>• **Files**: Contains attachments. |
|  | Editor | The currently selected page, in this case the **Overview** page, which contains all the attributes that have been defined for the domain.<br>Tip If you want to copy and paste text from other sources into a text field, we recommend that you click <>, and then paste the text into the **Show source code** field. This will remove any unwanted formatting or tagging of the text. For detailed information, see the knowledge base article on Collibra Support Portal. |

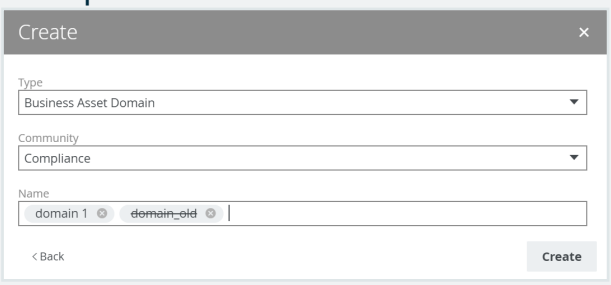
## Create a domain

You can create a new domain in a community.

### Steps

1. In the main menu, click the **Create** (+) button.
   » The **Create** dialog box appears.

2. Click the **Organization** tab.
3. Click a domain type from the list. To create a Process Register domain, use the **Process Register** domain type.
   If you selected the wrong domain type here, you can still change it in the **Type** field in the next screen.
   » The **Create Domain** dialog box appears.
4. Enter the required information.

| Field | Description |
|---|---|
| Type | The domain type of the domain you are creating.<br><br>This field contains the domain type that you clicked in the previous step. You can change it if needed. |
| Community | The community under which the domain will be located. |
| Name | The name of the new domain.<br><br>Tip<br>You can create multiple domains in one go.<br>To do this, press `Enter` after typing a value and then type the next. Domain names have to be unique in their parent community. If you type a name that already exists, it will appear in strike-through style.<br><br>Example<br>  |

5. Click **Create**.

## Edit a domain

You can edit the name and domain type of a domain:

- From the domain page.
- From an organization table.

## Edit a domain from the domain page

1. Open a domain page.
2. In the resource toolbar, click **Actions** → **Edit**.
   » The **Edit <domain name>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the domain.<br><br>Domain names have to be unique in their community. |
| Type | The domain type. |

4. Click **Save**.

## Edit a domain from an organization table.

1. Open an asset page that contains an organization table, for example, a community page.
2. In the **Name** or **Domain Type** column, do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
3. Edit the name or domain type.
4. Click ✔.

# Move a domain

You can move a domain to another community.

> Note If a domain is moved to a community in another scope, the assignment of its assets may change. If moving a domain causes a conflict of scopes, the moved domain is removed from its original scope.

### Steps

1. Open a domain page.
2. In the resource toolbar, click **Actions** → **Move**.
   » The **Move <domain name>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Community | Enter the name of the new parent community.<br><br>Domain names have to be unique in the community. If you try to move this domain to a community that already contains a domain with the same name, an error message will appear after clicking **Save**. |

4. Click **Save**.

## Delete a domain

You can delete a domain.

> Warning When you delete a domain, you will also delete its contained views and assets.

### Steps

1. Open a domain page.
2. In the resource toolbar, click **Actions** → **Delete**.
   » The **Delete Confirmation** dialog box appears.
3. Click **Delete <domain name>**.

# Asset types

An asset type defines the semantics of an asset, as a kind of template. Via its assignment, it defines which attribute types, relation types and statuses the asset can have. It also determines which articulation rules, data quality rules and validation rules are applied, and the domain types in which it can be created.

Some asset types can only be created in a specific Collibra application and in a specific domain type. For example, you can only create assets of the Validation Rule type in a domain of the Validation Rule Domain type. You can see the required domain type in the assignment of the asset type.

# Overview of packaged asset types

An asset type defines the semantics of an asset, as a kind of template. Via its assignment, it defines which attribute types, relation types and statuses the asset can have. It also determines which articulation rules, data quality rules and validation rules are applied, and the domain types in which it can be created.

> Note If you want to create an asset of a specific type, you need access to one or more domains of the required type. For example, you can only create KPI assets in a Report Catalog domain. As an admin, you can see and edit the required domain types in the assignment.

Listed below are the five main asset types and their default icons. All other asset types are descend from these:

- Business Asset
- Data Asset
- Governance Asset
- Issue
- Technology Asset

The table below contains all packaged asset types and their description.

> Tip For an interactive overview of all packaged asset types, including the relevant domain types and applications, see the online version of this guide.

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Business Asset | Business Asset | A type of asset that is exclusively used and governed by the business user community. Its instance assets, and all instances instantiating its subtypes, pertain to the business organization. Business assets typically include business concepts like Business Term, Business Process, Line of Business, etc. that help to build the semantics of any organization with insufficient details to build an actual business application. | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Business Dimension | Business Asset ▸ Business Dimension | A set of reference information that categorizes and describes business terms in a way that provides context and meaningful answers to business questions.<br><br>Examples: business process, line of business, region | Data Stewardship Manager |
| BI Folder | Business Asset ▸ Business Dimension ▸ BI Folder | A collection of BI content | Data Stewardship Manager |
| Looker Folder | Business Asset ▸ Business Dimension ▸ BI Folder ▸ Looker Folder | A container that stores Looker Looks, Dashboards and other folders. | Data Stewardship Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| MicroStrategy Folder | Business Asset ▸ Business Dimension ▸ BI Folder ▸ MicroStrategy Folder | A collection of MicroStrategy reports and data models. | Data Stewardship Manager |
| MicroStrategy Project | Business Asset ▸ Business Dimension ▸ BI Folder ▸ MicroStrategy Project | A collection of MicroStrategy visualizations, report attributes and tables. | Data Stewardship Manager |
| Power BI Capacity | Business Asset ▸ Business Dimension ▸ BI Folder ▸ Power BI Capacity | A resource that hosts Power BI Workspaces. | Data Stewardship Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Power BI Folder | Business Asset ▸ Business Dimension ▸ BI Folder ▸ Power BI Folder | A collection of Power BI Report Server Dashboards, Reports and Data Models. | Data Stewardship |
| Power BI Workspace | Business Asset ▸ Business Dimension ▸ BI Folder ▸ Power BI Workspace | A collection of Power BI Dashboards, Reports and Data Models. | Data Stewardship Manager |
| SSRS Folder | Business Asset ▸ Business Dimension ▸ BI Folder ▸ SSRS Folder | A collection of SQL Server Reporting Services and Power BI Report Server Reports and Data Sets. | Data Stewardship Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Tableau Project | Business Asset ▸ Business Dimension ▸ BI Folder ▸ Tableau Project | Collection of Tableau workbooks and data sources. | Data Stewardship Manager |
| Tableau Site | Business Asset ▸ Business Dimension ▸ BI Folder ▸ Tableau Site | Collection of content (workbooks, data sources, users, ...) that's walled off from any other content on that instance of Tableau Server. | Data Stewardship Manager |
| Business Process | Business Asset ▸ Business Dimension ▸ Business Process | A set of activities and tasks that, once completed, produces value to the business.<br>Examples: campaign management, talent recruitment | Data Stewardship Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Data Category | Business Asset ▸ Business Dimension ▸ Data Category | A container for all the business definitions that encompass associated terminology and definitions that an organization is trying to govern.<br><br>Examples: master data, reference data, transactional data | Data Stewardship Manager |
| Data Concept | Business Asset ▸ Business Dimension ▸ Data Concept | A data concept is a high level theoretical representation of the most common data properties of a data domain. A data concept is the business counterpart of a data attribute in a logical data dictionary, just as a data attribute is the logical counterpart of a field or column in the physical data dictionary. (Example: an address is a data concept of the data domain customer or organisation). | Data Stewardship Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Data Domain | Business Asset ▸ Business Dimension ▸ Data Domain | Also known as Data Category or Subject area, this is a container of all the business data domains and data concepts that encompass associated terminology and definitions that an organization is trying to govern. Examples: Master Data (Customer, Product), Reference Data. Business Data Domains group Data Concepts (Year, Date, Address, Name, etc.) | Data Stewardship Manager |
| Line of Business | Business Asset ▸ Business Dimension ▸ Line of Business | A logical element or segment of an organization that serves a particular business need. Line of business is also known as business unit or business area.<br><br>Examples: retail, e-commerce, investment management | Data Stewardship Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Business Qualifier | Business Asset ▸ Business Qualifier | Business Qualifiers qualify certain assets. This can be used as filters in Business Qualifier Diagrams. | Business Semantics Glossary |
| Business Term | Business Asset ▸ Business Term | A word or phrase that describes a concept that is used in a particular branch of business.<br>Examples: customer, person purchase count, loan amount | Business Semantics Glossary |
| Acronym | Business Asset ▸ Business Term ▸ Acronym | An abbreviation of a business term that forms a word or a name. It is formed by stringing the initial components of a business term together. It is often pronounced as a word.<br>Examples: ERP, EDW, EAD | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Measure | Business Asset ▸ Measure | An asset type that is used for calculations, such as sum, count, average, minimum or maximum.<br><br>Examples: net sales, top customers, on-hand inventory | Business Semantics Glossary |
| KPI | Business Asset ▸ Measure ▸ KPI | Key Performance Indicator, an indicator to periodically measure the success of or the progress towards a strategic goal of a particular activity or of an organization.<br><br>Examples: employee turnover, customer attrition, claims denial rate | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Report | Business Asset ▸ Report | A document containing information that is organized in a narrative, graphic, or tabular form. The document is prepared on an ad hoc, periodic, recurring, regular or as-required basis.<br><br>Reports can refer to specific periods, events, occurrences or subjects. | Business Semantics Glossary |
| BI Report | Business Asset ▸ Report ▸ BI Report | A visual representation of data or a collection of visualizations. | Business Semantics Glossary |
| Looker Dashboard | Business Asset ▸ Report ▸ BI Report ▸ Looker Dashboard | A collection of Looker tiles with metrics from one or more Looker Looks. | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Looker Look | Business Asset ▸ Report ▸ BI Report ▸ Looker Look | A detailed view of a Looker Data Set, with visualizations of findings and insights. | Business Semantics Glossary |
| Looker Query | Business Asset ▸ Report ▸ BI Report ▸ Looker Query | A query that creates a simple report in a Looker Tile or Looker Look. | Business Semantics Glossary |
| Looker Tile | Business Asset ▸ Report ▸ BI Report ▸ Looker Tile | An element that represents data on the Looker Dashboard. | Business Semantics Glossary |
| MicroStrategy Dossier | Business Asset ▸ Report ▸ BI Report ▸ MicroStrategy Dossier | A collection of MicroStrategy chapters and pages. | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| MicroStrategy Report | Business Asset ▸ Report ▸ BI Report ▸ MicroStrategy Report | A detailed view of a MicroStrategy data model, with visualizations of findings and insights. | Business Semantics Glossary |
| Power BI Dashboard | Business Asset ▸ Report ▸ BI Report ▸ Power BI Dashboard | A collection of Power BI tiles with metrics from one or more Reports and Data Models. | Business Semantics Glossary |
| Power BI Report | Business Asset ▸ Report ▸ BI Report ▸ Power BI Report | A detailed view of a Power BI Data Model, with visualizations of findings and insights. | Business Semantics Glossary |
| Power BI Tile | Business Asset ▸ Report ▸ BI Report ▸ Power BI Tile | An element representing data on the Power BI Dashboard. | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| SSRS KPI | Business Asset ▸ Report ▸ BI Report ▸ SSRS KPI | A key performance indicator of SQL Server Reporting Services. | Business Semantics Glossary |
| SSRS Report | Business Asset ▸ Report ▸ BI Report ▸ SSRS Report | A detailed view of an SQL Server Reporting Services Data Set, with visualizations of findings and insights. | Business Semantics Glossary |
| Tableau Dashboard | Business Asset ▸ Report ▸ BI Report ▸ Tableau View ▸ Tableau Dashboard | A collection of several worksheets and supporting information, shown on a single screen, so that you can simultaneously compare and monitor a variety of data. | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Tableau Worksheet | Business Asset ▸ Report ▸ BI Report ▸ Tableau View ▸ Tableau Worksheet | A worksheet is a single sheet on which you can build views of your data. | Business Semantics Glossary |
| Tableau Workbook | Business Asset ▸ Report ▸ BI Report ▸ Tableau Workbook | Collection of sheets. A sheet can be a worksheet, a dashboard or a story. | Business Semantics Glossary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Data Asset | Data Asset | A type of asset that represents details of organizational data in two layers. One layer is independent of any particular technology for non-technical stakeholder communication. The other one is taking the implementation system for technical stakeholder communication into account. Examples: Data Element, Table | • Catalog<br>• Data Dictionary |
| Code Set | Data Asset ▸ Code Set | An enumerated list of valid code values for a specific topic, where the code set is the whole and the code values are parts of that whole. It is a data asset that defines the set of permissible values to be used by other data assets.<br><br>Examples: Product Code Set, Person Gender Code, ISO 3166 Country Code | Reference Data Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Code Value | Data Asset ▸ Code Value | A valid form of representation for an asset, shortened or covert.<br>Examples:<br>• In the Person Gender Code, “male”, “female”, “not known” and "not specified" are represented by the valid code values "1", "2", "0" and "9".<br>• “US” is part of the "ISO 3166 code set" and refers to The United States of America. | Reference Data Manager |
| Crosswalk | Data Asset ▸ Crosswalk | Mapping between two or more code sets. | • Catalog<br>• Data Dictionary |
| Data Element | Data Asset ▸ Data Element | A construct that documents aspects of something abstract, especially one that is essential for business.<br>Examples: person birth date, person address | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Column | Data Asset ▸ Data Element ▸ Column | An atomic unit of data that can be stored in a database table.<br>Examples: FST_NM, EMPID | • Catalog<br>• Data Dictionary |
| Data Attribute | Data Asset ▸ Data Element ▸ Data Attribute | A specification that defines a property of a data entity.<br>Examples: CustomerBirthDate, EmployeeFirstName | • Catalog<br>• Data Dictionary |
| BI Data Attribute | Data Asset ▸ Data Element ▸ Data Attribute ▸ BI Data Attribute | An atomic unit of data that represents a BI report. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Looker Data Set Column | Data Asset ▸ Data Element ▸ Data Attribute ▸ BI Data Attribute ▸ Looker Data Set Column | An atomic unit of data that is used in a Looker Look or Looker Tile. It represents a column in a Looker Data Set. | • Catalog<br>• Data Dictionary |
| MicroStrategy Column | Data Asset ▸ Data Element ▸ Data Attribute ▸ BI Data Attribute ▸ MicroStrategy Column | A column in a MicroStrategy data model. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Power BI Column | Data Asset ▸ Data Element ▸ Data Attribute ▸ BI Data Attribute ▸ Power BI Column | A column in a Power BI Data Model. | • Catalog<br>• Data Dictionary |
| SSRS Column | Data Asset ▸ Data Element ▸ Data Attribute ▸ BI Data Attribute ▸ SSRS Column | A column in an SQL Server Reporting Services Report Data Set. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Tableau Data Attribute | Data Asset ▸ Data Element ▸ Data Attribute ▸ BI Data Attribute ▸ Tableau Data Attribute | A specification that defines a property of a Tableau data entity.<br>Examples: CustomerBirthDate, EmployeeFirstName. | • Catalog<br>• Data Dictionary |
| Field | Data Asset ▸ Data Element ▸ Field | An atomic unit of data that can be stored in a file.<br>Examples: FirstName, EmpID | • Catalog<br>• Data Dictionary |
| Report Attribute | Data Asset ▸ Data Element ▸ Report Attribute | An atomic unit of data that represents a report. | • Catalog<br>• Data Dictionary |
| BI Report Attribute | Data Asset ▸ Data Element ▸ Report Attribute ▸ BI Report Attribute | An atomic unit of data that represents a BI report. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Looker Report Attribute | Data Asset ▸ Data Element ▸ Report Attribute ▸ BI Report Attribute ▸ Looker Report Attribute | An atomic unit of data that is used in a Looker Look or Looker Tile. It represents the actual use a Looker Data Set Column. | • Catalog<br>• Data Dictionary |
| MicroStrategy Report Attribute | Data Asset ▸ Data Element ▸ Report Attribute ▸ BI Report Attribute ▸ MicroStrategy Report Attribute | A detailed view of a MicroStrategy visualization, with findings and insights. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| SSRS Parameter | Data Asset ▸ Data Element ▸ Report Attribute ▸ BI Report Attribute ▸ SSRS Parameter | A column that is part of an SQL Server Reporting Services Data Set and that is used in a KPI. | • Catalog<br>• Data Dictionary |
| Tableau Report Attribute | Data Asset ▸ Data Element ▸ Report Attribute ▸ BI Report Attribute ▸ Tableau Report Attribute | An atomic unit of data that represents a Tableau report.<br>Examples: ExpenseAmount, RiskAmount | • Catalog<br>• Data Dictionary |
| Data Set | Data Asset ▸ Data Set | A collection of related sets of data assets that are data elements or composed of data elements.<br>Example: Customer Contact information | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| BI Data Set | Data Asset ▸ Data Set ▸ BI Data Set | A collection of data that is used for BI report creation | • Catalog<br>• Data Dictionary |
| Looker Data Set | Data Asset ▸ Data Set ▸ BI Data Set ▸ Looker Data Set | A collection of data that is used to define Looker Dimensions and Measures. | • Catalog<br>• Data Dictionary |
| SSRS Data Model | Data Asset ▸ Data Set ▸ BI Data Set ▸ SSRS Data Model | A collection of data that is used to create an SQL Server Reporting Services Report. | • Catalog<br>• Data Dictionary |
| Data structure | Data Asset ▸ Data structure | A logical grouping (through whole-part relation) of data elements.<br>Example: cfPerson is a data structure that contains the cfBirthDate, cfPersonFullName data elements. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Data Entity | Data Asset ▸ Data Structure ▸ Data Entity | A unit of data that can be classified and can have a stated relationship to other units of data.<br>Examples: Customer, Employee | • Catalog<br>• Data Dictionary |
| BI Data Entity | Data Asset ▸ Data Structure ▸ Data Entity ▸ BI Data Entity | A unit of data in a BI data source that can be classified and can have a stated relationship to other units of data. | • Catalog<br>• Data Dictionary |
| Power BI Table | Data Asset ▸ Data Structure ▸ Data Entity ▸ BI Data Entity ▸ Power BI Table | A table in a Power BI Data Model. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| SSRS Table | Data Asset ▸ Data Element ▸ Data Attribute ▸ BI Data Attribute ▸ Power BI Table▸ SSRS Table | A table in an SQL Server Reporting Services Report Data Set. | • Catalog<br>• Data Dictionary |
| Tableau Data Entity | Data Asset ▸ Data Structure ▸ Data Entity ▸ BI Data Entity ▸ Tableau Data Entity | An abstraction from the physical implementation of database tables, used for Tableau report creation. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Data Model | Data Asset ▸ Data Structure ▸ Data Model | Organizes data elements and standardizes how the data elements relate to one another. The data model often facilitates the communication between business and technology.<br><br>Examples: customer subject area model, event subject area model | • Catalog<br>• Data Dictionary |
| BI Data Model | Data Asset ▸ Data Structure ▸ Data Model ▸ BI Data Model | A diagram that organizes data elements and standardizes how the data elements relate to one another. The Data Model is often used as a communication aid between business and technology.<br><br>Examples: Customer Subject area model, Event Subject area model | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| MicroStrategy Data Model | Data Asset ▸ Data Structure ▸ Data Model ▸ BI Data Model ▸ MicroStrategy Data Model | A collection of data that is used to create MicroStrategy reports. | • Catalog<br>• Data Dictionary |
| Power BI Data Flow | Data Asset ▸ Data Structure ▸ Data Model ▸ BI Data Model ▸ Power BI Data Flow | A collection of tables that are created and managed in workspaces in the Power BI service. | • Catalog<br>• Data Dictionary |
| Power BI Data Model | Data Asset ▸ Data Structure ▸ Data Model ▸ BI Data Model ▸ Power BI Data Model | A collection of data that is used to create a Power BI report. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Tableau Data Model | Data Asset ▸ Data Structure ▸ Data Model ▸ BI Data Model ▸ Tableau Data Model | An abstraction from the physical implementation of database, schema, file, etc., used for Tableau report creation. | • Catalog<br>• Data Dictionary |
| Schema | Data Asset ▸ Data Structure ▸ Schema | An asset that contains the location of specific data. It provides all the details that are required for setting up a connection to a database or server. | • Catalog<br>• Data Dictionary |
| Table | Data Asset ▸ Data Structure ▸ Table | An implementation of data entities in columns and rows, in a given database system. It is the basic structure of a relational database.<br>Examples: Account_tbl, CUST_ADDR | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Database View | Data Asset ▸ Data Structure ▸ Table ▸ Database View | A Database View is a virtual table based on the result-set of an SQL statement. | • Catalog<br>• Data Dictionary |
| Data Usage | Data Asset ▸ Data Usage | An asset that clearly documents how the data can be used between data produces and consumers for specific purpose<br>Example: Sales growth information that is available to share for read-only requirements | • Catalog<br>• Data Dictionary |
| Foreign Key | Data Asset ▸ Foreign Key | Asset type used to model the Primary key - Foreign key relations in relational databases. | • Catalog<br>• Data Dictionary |
| Mapping Specification | Data Asset ▸ Mapping Specification | Mapping between two or more data structures. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Governance Asset | Governance Asset | A type of asset that is used to monitor and advocates to maximize performance or utilization of other Business and Data assets while minimizing the risk factors in alignment with Organisational/Business goals. | Policy Manager |
| Assessment Review | Governance Asset ▸ Assessment Review | An asset of this type is created when an assessment is conducted on an asset and submitted for review. | Policy Manager |
| Data Quality Dimension | Governance Asset ▸ Data Quality Dimension | Represents criteria that are relevant for assessing quality and categorizes different aspects of how data quality is measured.<br>Examples: accuracy, completeness, consistency | Data Helpdesk |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Data Sharing Agreement | Governance Asset ▸ Data Sharing Agreement | An agreement between data producers and consumers with terms and conditions including provisions concerning access and dissemination to 'pool' a set of data for specific purposes.<br><br>Examples: Sales growth information that is available only to the Risk team for generating internal reports. | Policy Manager |
| Issue Category | Governance Asset ▸ Issue Category | Allows you to categorize Issue type assets to help with organization and reporting.<br><br>Example: You want to differentiate between types of issues, such as a Duplication issue or a Completeness issue. | Data Helpdesk |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Policy | Governance Asset ▸ Policy | A statement of intent that is set by a council and is implemented by a set of standards.<br>Example: Personal information must be adequately protected. | Policy Manager |
| Standard | Governance Asset ▸ Policy ▸ Standard | Consists of specific low-level mandatory controls that help enforce and support the policy.<br>Example: All personal information is encrypted with a specific encryption type. | Policy Manager |
| Rule | Governance Asset ▸ Rule | Defines or constrains some aspect of specific business data categories. It is intended to control or influence the behavior of the business.<br>Example: Every customer must have a unique identifier. | Policy Manager |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Business Rule | Governance Asset ▸ Rule ▸ Business Rule | Defines or constrains some aspect of specific business data. It is intended to control or influence the behavior of business data.<br>Example: Customer numbers have to be unique. | Policy Manager |
| Data Quality Metric | Governance Asset ▸ Rule ▸ Data Quality Metric | An implementation of data quality rules in a selected physical database system using a particular data quality tool.<br>Example: CRM.ACT.Tx_ID cannot be null, must be a 9-digit number and has to take the 999-99-9999 format in the CRM system, and ERP.Cust.SSN has to take the 999999999 format in the ERP system. | Data Helpdesk |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Data Quality Rule | Governance Asset ▸ Rule ▸ Data Quality Rule | A specification that defines which actions are required to measure the quality level of a data element for its intended use.<br>Example: SSN must be a unique 9-digit identification number for 100% of US personal accounts for tax processing. | Data Helpdesk |
| Validation Rule | Governance Asset ▸ Rule ▸ Validation Rule | A rule that describes a criterion to which content in DGC has to comply. | Reference Data Manager |
| Issue | Issue | The parent asset type of all issues. | Data Helpdesk |
| Data Issue | Issue ▸ Data Issue | A problem related to issue management, also referred to as "issue". | Data Helpdesk |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Technology Asset | Technology Asset | A piece of information technology (hardware, software, database, software platform) that helps an organization to run a business application.<br><br>Examples: Database, File | • Catalog<br>• Data Dictionary |
| Database | Technology Asset ▸ Database | A collection of data that is systematically organized or structured, to make it is easy to create, update and query the information.<br><br>Examples: Ora_DGC_V45, SalesDB2020 | • Catalog<br>• Data Dictionary |
| File Container | Technology Asset ▸ File Container | An asset type that represents Cloud File Container. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Directory | Technology Asset ▸ File Container ▸ Directory | A collection of data that is treated by a computer as a unit, for the purposes of input and output.<br><br>Examples: businessGlossary.xls, dataDictionary05220.csv, datacatalogv25.txt | • Catalog<br>• Data Dictionary |
| GCS Bucket | Technology Asset ▸ File Container ▸ GCS Bucket | An asset type that represents an Google Cloud Storage bucket which is a logical unit of storage containing Google Cloud Storage objects. | • Catalog<br>• Data Dictionary |
| S3 Bucket | Technology Asset ▸ File Container ▸ S3 Bucket | An asset type that represents an Amazon S3 Bucket, which is a logical unit of storage containing Amazon S3 Objects. | • Catalog<br>• Data Dictionary |
| File Group | Technology Asset ▸ File Group | A collection of physical files which together represent a single logical file. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Server | Technology Asset ▸ Server | A computer program or device that supports other computer programs and their users | • Catalog<br>• Data Dictionary |
| BI Server | Technology Asset ▸ Server ▸ BI Server | A visual analytics platform for creating and storing visualizations. | • Catalog<br>• Data Dictionary |
| Looker Tenant | Technology Asset ▸ Server ▸ BI Server ▸ Looker Tenant | A platform to create Looker Dashboards and rich visualizations. | • Catalog<br>• Data Dictionary |
| MicroStrategy Server | Technology Asset ▸ Server ▸ BI Server ▸ MicroStrategy Server | A visual analytics platform for creating and storing MicroStrategy reports and data models. | • Catalog<br>• Data Dictionary |
| Power BI Server | Technology Asset ▸ Server ▸ BI Server ▸ Power BI Server | A visual analytics platform for creating and storing Power BI Reports and Data Models. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| SSRS Server | Technology Asset ▸ Server ▸ BI Server ▸ SSRS Server | A visual analytics platform for creating and storing SQL Server Reporting Services and Power BI Report Server Reports and Data Sets. | • Catalog<br>• Data Dictionary |
| Tableau Server | Technology Asset ▸ Server ▸ BI Server ▸ Tableau Server | A visual analytics platform for creating interactive dashboards and rich visualisations | • Catalog<br>• Data Dictionary |
| System | Technology Asset ▸ System | Executable software that you can buy commercially off the shelf (COTS), or build internally, to automate one or more business functions that help run a business smoothly and efficiently.<br>Examples: CRM, ERP, EDW | • Catalog<br>• Data Dictionary |
| BI Data Source | Technology Asset ▸ System ▸ BI Data Source | The link between a BI System and an external system. | • Catalog<br>• Data Dictionary |

| Asset type | Asset type | Description | Required global permission |
|---|---|---|---|
| Tableau Data Source | Technology Asset ▸ System ▸ BI Data Source ▸ Tableau Data Source | The link between Tableau and an external system. A Tableau data source contains the information to connect to external data, table names, the table relationships, and any customizations that you make. | • Catalog<br>• Data Dictionary |
| File Storage | Technology Asset ▸ System ▸ File Storage | An asset type that represents a Cloud File Storage bucket. | • Catalog<br>• Data Dictionary |
| GCS File System | Technology Asset ▸ System ▸ File Storage ▸ GCS File System | An asset type that represents Google Cloud Storage file system. | • Catalog<br>• Data Dictionary |
| S3 File System | Technology Asset ▸ System ▸ File Storage ▸ S3 File System | Amazon S3 (Simple Storage Service) file system abstraction. | • Catalog<br>• Data Dictionary |

# Create an asset type

You can create an asset type. For example, you can do this if the packaged asset types do not suffice.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. Above the table, to the right, click **Add**.
   » The **Asset Type Creation** dialog box appears.
4. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the asset type.<br>You can add more than one type by pressing `Enter`.<br>Note The name of the asset type must be globally unique. |
| Parent Asset Type | The parent asset type from which the new asset type inherits all properties. |

5. Click **Save**.

Warning If you create an asset type and hierarchically nest the new asset type under, for example, a Catalog asset type, you may encounter asset page rendering issues. This is due to a difference in the required characteristics of the asset type

you created and the Catalog asset type. Likewise, if you remove a required characteristic from an asset type, you may encounter page rendering issues for asset pages of that asset type.

## What's next?

If necessary, edit the asset type, for example by doing one of the following:

- Enable or disable ratings and reviews.
- Enable or disable non-unique naming.
- Edit the representation in Collibra Data Intelligence Cloud.

# Edit an asset type

You can edit an asset type. For example you can do this if you want to give it another name.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the upper-right corner, click **Edit**.

» The **Edit <asset type>** dialog box appears.

3. Enter the required information.

| Field | Description |
|---|---|
| Name | Enter the name of the asset type.<br><br>Note The name of the asset type must be unique. |
| Allow identical asset names per domain | Select to enable identical asset names per domain.<br><br>Clear to disable identical asset names per domain. |
| Enable ratings | Select to allow users to rate assets.<br><br>Ratings enable users to subjectively rate the quality of an asset, using a five-star rating system, and write a free-text review of the asset, in support of the rating provided. |
| Display options | These fields allow you to edit how assets of this type are represented on the asset page and in diagrams. |
| Colors | The default colors that you can use for the complex relation nodes of this type. |
| Color hex value | The hexadecimal value of the color that you want for assets of this type.<br><br>For a list of colors and their hexadecimal values, see ColorHexa. |

| Field | Description |
| --- | --- |
| Symbol | A graphical representation for assets of this type.<br>You can choose one of the following values:<br>◦ **None**: No graphical representation is used for assets of this type.<br>◦ **Code**: Assets of this type are represented with a code in front of them. You can specify the code that you want in the **Code** field.<br>◦ **Icon**: Assets of this type are represented with an icon in front of them. You can select the icon that you want in the **Icon reference** field. |
| Code | The code that is displayed in front of assets of this type. This code is also displayed in the legend of diagrams. By default, this field contains the initials of the selected asset type.<br>This field is only displayed if you have selected **Code** in the **Symbol** field. |
| Icon reference | The icon that is displayed in front of assets of this type. This icon is also displayed in the legend of diagrams.<br>This field is only displayed if you have selected **Icon** in the **Symbol** field. |
| Preview | Displays two previews of your asset type configuration.<br>◦ The left preview is the title bar on an asset page.<br>◦ The right preview is a diagram node. |

4. Click **Save**.

# Edit an asset type's representation

You can change the color and icon by which an asset is represented in Collibra Data Intelligence Cloud. This can be handy to quickly spot a specific asset type in a diagram.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the upper-right corner, click **Edit**.
   » The **Edit <asset type>** dialog box appears.

3. Enter the required information.

| Field | Description |
|---|---|
| Display options | These fields allow you to edit how assets of this type are represented on the asset page and in diagrams. |
| Colors | The default colors that you can use for the complex relation nodes of this type. |
| Color hex value | The hexadecimal value of the color that you want for assets of this type.<br>For a list of colors and their hexadecimal values, see ColorHexa. |
| Symbol | A graphical representation for assets of this type.<br>You can choose one of the following values:<br>◦ **None**: No graphical representation is used for assets of this type.<br>◦ **Code**: Assets of this type are represented with a code in front of them. You can specify the code that you want in the **Code** field.<br>◦ **Icon**: Assets of this type are represented with an icon in front of them. You can select the icon that you want in the **Icon reference** field. |
| Code | The code that is displayed in front of assets of this type. This code is also displayed in the legend of diagrams. By default, this field contains the initials of the selected asset type.<br>This field is only displayed if you have selected **Code** in the **Symbol** field. |

| Field | Description |
| --- | --- |
| Icon reference | The icon that is displayed in front of assets of this type. This icon is also displayed in the legend of diagrams.<br><br>This field is only displayed if you have selected **Icon** in the **Symbol** field. |
| Preview | Displays two previews of your asset type configuration.<br><br>◦ The left preview is the title bar on an asset page.<br>◦ The right preview is a diagram node. |

4. Click **Save**.

# Enable or disable ratings

You can enable and disable ratings via the asset type pages, in ⚙ **Settings**.

Enabling ratings for a particular asset type is not inherited by children asset types. The feature has to be manually enabled for each child asset type.

By default, ratings are enabled for asset types **Data Set** and **Report** and their children asset types. Ratings are disabled, by default, for all other packaged asset types and any asset types you create.

> Warning Ratings cannot be disabled for a specific asset type if user ratings exist for any assets of that asset type. In other words, all user ratings for all assets of a specific asset type must be manually deleted before ratings can be disabled for that asset type.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the upper-right corner, click **Edit**.
   » The **Edit <asset type>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Enable ratings | Select to allow users to rate assets.<br><br>Ratings enable users to subjectively rate the quality of an asset, using a five-star rating system, and write a free-text review of the asset, in support of the rating provided. |

4. Click **Save**.

# Enable or disable identical asset names per domain

You can enable and disable Identical asset names per domain, by asset type.

## Prerequisites

You have a new or existing asset type.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.

b. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
c. In the overview of asset types, click an asset type.

» The **Asset type** editor opens.

2. In the upper-right corner, click **Edit**.
   » The **Edit <asset type>** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Allow identical asset names per domain | Select to enable identical asset names per domain.<br>Clear to disable identical asset names per domain. |

4. Click **Save**.

# Move an asset type

You can move an asset type to another parent asset type. As a consequence, the asset type may inherit the assignment of the new asset type, which may impact, amongst others, the possible characteristics.

## Prerequisites

You have a global role that has the System administration global permission.

## Move an asset type from the asset type table

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the row of the asset type that you want to move, click .
   » The **Select Parent Asset Type** dialog box appears.

4. Enter the required information.

| Field | Description |
| --- | --- |
| Parent | Choose the parent asset type. |

5. Click **Save**.

## Move an asset type from the asset type page

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. Above the table, to the right, click **Move**.
   » The **Select Parent Asset Type** dialog box appears.
3. Enter the required information.

| Field | Description |
| --- | --- |
| Parent | Choose the parent asset type. |

4. Click **Save**.

# Delete an asset type

You can delete an asset type. For example, you can do this if you no longer need an asset type that you created earlier.

## Prerequisites

- You have a global role that has the System administration global permission.
- It is not a packaged asset type.
- There are no assets of that asset type. If assets of that asset type exist, either edit their asset type or delete them.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the row of the asset type that you want to delete, click .
   » The **Delete Asset Type** dialog box appears.
4. Click **Yes**.

# Assignments

An assignment is a collection of components that is assigned to an asset type and optionally to its child asset types.

In this section, we provide more information about the assignments in Collibra Data Intelligence Cloud.

# Assignments

An assignment is a collection of components, such as characteristics and statuses, assigned to an asset type and optionally to its child asset types.

Assignments determine what you can do with assets in the user interface of Collibra Data Intelligence Cloud, but they do not limit the possibilities of the API or import feature.

## Assignments and scopes

An assignment can apply globally, in which case it is called the global assignment, or to a scope, in which case it is called a scoped assignment.

The global assignment applies to all assets that are not in a scope. A scoped assignment only applies to assets that are located in a domain or community that belongs to the scope. An asset type can only have one global assignment, but many scoped assignments.

Before adding a scoped assignment, an asset type must have a global assignment. You can add the global assignment by going to the Asset Type page and clicking the **Add Global Assignment** button.

## Components

You can assign the following components to an asset type.

### Characteristics

The **Characteristics** page contains a list of all attribute types, relation types and complex relation types that can be added to an asset of this type, if the asset is in the scope of the assignment.

An assignment line consists of the following:

- One characteristic type, including its description and kind.
- A minimum cardinality.
- A maximum cardinality.

The cardinality of an assignment line determines how many characteristics of this type can be added to an asset.

| Number | Minimum | Maximum |
|---|---|---|
| not filled in | This is not possible. The minimum number of occurrences must at least be 0. | You can add as many characteristics of this characteristic type as you want. |
| 0 | The characteristic doesn't automatically appear on the asset page, but you can add it via **Add characteristics**. | If the maximum cardinality is 0, you cannot add this characteristic to the asset. |
| 1 or greater | The characteristic's type is automatically visualized on the asset page of the asset, even if the characteristic doesn't exist yet. | You can add characteristics of this type until you reach this maximum. |

## Domain types

The **Domain types** page contains the hierarchy of domain types. You can select domain types to allow assets of this type to be put in domains of this type. Assets of this asset type can then be created in the domains of the selected types.

## Statuses

The **Statuses** page contains a list of statuses with their description. When you create a new asset of the asset type for which you have an assignment, the asset gets the first status from this list.

## Articulation

The **Articulation** page shows the articulation score calculator

### Data quality rules

The **Data quality rules** page contains a list of data quality rules with their description.

### Validation rules

The **Validation rules** page contains a list of validation rules with their description.

## Inheritance

If an asset type does not have an assignment, then the asset type inherits all assignments of its parent asset type. If an asset type has one or more assignments, it does not inherit any assignments of its parent asset type.

# Create an assignment

You can create an assignment for an asset type if you want to change the behavior of assets of this type in Collibra Data Intelligence Cloud. For example, you do this if you want to make a specific attribute type available only for assets of a certain type.

## Prerequisites

- You have a global role that has the System administration global permission.
- If you want to create a scoped assignment, you have created the scope.

## Steps

1. Open an asset type.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.

   » The **Asset type** editor opens.

2. Create a global or scoped assignment:

| Assignment type | Steps |
|---|---|
| Global assignment | a. In the tab pane, click **Add global assignment**.<br>» The **Add Global Assignment** dialog box appears.<br>b. Click **Add global assignment**.<br>» The asset type no longer inherits the assignments of its parent asset types.<br>Note Each asset type can only have one global assignment. |
| Scoped assignment | a. In the tab pane, click **Add assignment**.<br>» The **Select scope for this assignment** dialog box appears.<br>b. Select a scope.<br>Note You can only add one scope at a time.<br>c. Click **Add assignment**.<br>» The settings of the global assignment are copied into the selected scope.<br>Note You can only create scoped assignments if the asset type has a global assignment. |

## What's next?

You can now edit the assignment.

# Edit an assignment

You can edit an assignment. For example, you do this if you want to add a specific attribute type to assets of a certain type.

## Prerequisites

- You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.

2. In the tab pane, click the name of the assignment.
3. Do one of the following:

<table>
<tr><th>Component</th><th>Steps</th></tr>
<tr><td>Characteristics</td><td>
Assign one or more characteristic types to the asset type.<br>
a. Above the table, to the right, click Edit.<br>
b. Above the table, to the right, click Add characteristic.<br>
» The Add a Characteristic dialog box appears.<br>
c. Click the characteristic type that you want to add.<br>
<blockquote>Tip You can use the filter to search for a specific characteristic type.</blockquote>
» The characteristic type appears at the bottom of the table.<br>
d. If required, edit the minimum or maximum number of occurrences of the characteristic.
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Min.</td><td>The minimum number of occurrences of the characteristic.<br><br>Set this option to 1 or greater to make the characteristic appear automatically on the asset page.</td></tr>
<tr><td>Max.</td><td>The maximum number of occurrences that you can assign to an asset type.<br><br>Leave this option empty if you don't want a limit to the maximum number of occurrences.</td></tr>
</table>
e. Above the table, to the right, click Save.<br>
» You can now add the characteristic to the assets of this type.
</td></tr>
</table>

| Component | Steps |
|---|---|
| Domain types | Assign one or more domain types to the asset type.<br>a. In the tab pane, click **Domain Types**.<br>» The domain type table appears.<br>b. Above the table, to the right, click **Edit**.<br>c. In the domain types overview, select the domain types to assign the selected asset type to.<br>d. Click **Save**. |
| Statuses | Assign one or more statuses to the asset type.<br>a. In the tab pane, click **Statuses**.<br>b. Above the table, to the right, click **Edit**.<br>c. Above the table, to the right, click **Add**.<br>d. In the **Add status** dialog box, click the status to add to the asset type.<br>Statuses in gray are already assigned to the asset type.<br>Repeat this step for every status that you want to assign.<br>e. Click **Save**. |
| Articulation | Assign one or more articulation rules. |
| Data quality rules | Assign one or more data quality rules.<br>a. In the tab pane, click **Data quality rules**.<br>b. Above the table, to the right, click **Edit**.<br>c. Above the table, to the right, click **Add**.<br>» The **Add data quality rule** dialog box appears.<br>d. Click a data quality rule.<br>» The data quality rule appears at the bottom of the list of data quality rules.<br>If required, change the order.<br>e. Click **Save**. |

| Component | Steps |
| --- | --- |
| Validation rules | Assign one or more validation rules to the asset type.<br>a. In the tab pane, click **Validation rules**.<br>» The **Asset type - Validation rules** editor appears.<br>b. Above the table, to the right, click **Edit**.<br>c. Above the table, to the right, click **Add**.<br>» The **Add validation rule** dialog box appears.<br>d. Click a validation rule.<br>» The validation rule appears at the bottom of the list of validation rules.<br>If required, change the order.<br>e. Click **Save**. |

# Delete an assignment

You can delete an assignment. For example, you do this if you no longer want assets to have specific attribute types.

> Note For some asset types, you cannot delete the global assignment because it is required for the proper functioning of Collibra Data Intelligence Cloud.

## Prerequisites

- You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
   b. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.

2. In the tab pane, click the name of the assignment.
3. In the tab pane, click 🗑.

> Note If you want to delete the global assignment, you first have to delete all scoped assignments.

4. Click **Yes**.

> Note If you deleted the global assignment, the asset type inherits all assignments of its parent asset type.

# Assign a characteristic type to an asset type

You can assign a characteristic type to an asset type by adding it to the asset type's assignment. As a result, you can see and add characteristics of this type to assets of this type on the asset page, if the asset is in the scope of the assignment.

> Note
> - Via the import API, the import functionality or a workflow, you can add characteristic types that are not in the assignment.
> - The asset page only shows characteristics whose type is in the asset type's assignment.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.

2. In the tab pane, click the name of the assignment.
3. Above the table, to the right, click **Edit**.
4. Above the table, to the right, click **Add characteristic**.
   » The **Add a Characteristic** dialog box appears.
5. Click the characteristic type that you want to add.

   > Tip You can use the filter to search for a specific characteristic type.

   » The characteristic type appears at the bottom of the table.
6. If required, edit the minimum or maximum number of occurrences of the characteristic.

| Option | Description |
|---|---|
| Min. | The minimum number of occurrences of the characteristic.<br><br>Set this option to *1* or greater to make the characteristic appear automatically on the asset page. |
| Max. | The maximum number of occurrences that you can assign to an asset type.<br><br>Leave this option empty if you don't want a limit to the maximum number of occurrences. |

7. Above the table, to the right, click **Save**.
   » You can now add the characteristic to the assets of this type.

# Assign a domain type to an asset type

You can assign a domain type to an asset type by adding it to the asset type's assignment. As a result, you can create assets of this type in domains of this type, if the domain is in the scope of the assignment.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the tab pane, click the name of the assignment.
3. In the tab pane, click **Domain Types**.
   » The domain type table appears.
4. Above the table, to the right, click **Edit**.
5. In the domain types overview, select the domain types to assign the selected asset type to.
6. Click **Save**.

# Assigning a status to an asset type

You can assign a status to an asset type by adding it to the asset type's assignment. As a result, you can give assets of this type this status on the asset page, if the asset is in the scope of the assignment.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.

2. In the tab pane, click the name of the assignment.
3. In the tab pane, click **Statuses**.
4. Above the table, to the right, click **Edit**.
5. Above the table, to the right, click **Add**.
6. In the **Add status** dialog box, click the status to add to the asset type.
   Statuses in gray are already assigned to the asset type.
   Repeat this step for every status that you want to assign.
7. Click **Save**.

# Assign a validation rule to an asset type

You can assign a validation rule to an asset type by adding it to the asset type's assignment. As a result, you can validate assets of this type against this validation rule, if the asset is in the scope of the assignment.

## Prerequisites

- You have a global role that has the System administration global permission.
- You have created a Validation Rule asset.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the tab pane, click the name of the assignment.
3. In the tab pane, click **Validation rules**.
   » The **Asset type - Validation rules** editor appears.
4. Above the table, to the right, click **Edit**.
5. Above the table, to the right, click **Add**.
   » The **Add validation rule** dialog box appears.
6. Click a validation rule.
   » The validation rule appears at the bottom of the list of validation rules.
   If required, change the order.
7. Click **Save**.

# Assign a data quality rule to an asset type

You can assign a data quality rule to an asset type by adding it to the asset type's assignment. As a result, the data quality dashboard is available for assets of this type if the asset is in the scope of the assignment.

## Prerequisites

- You have a global role that has the System administration global permission.
- You have created a data quality rule.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.

b. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
c. In the overview of asset types, click an asset type.

» The **Asset type** editor opens.

2. In the tab pane, click the name of the assignment.
3. In the tab pane, click **Data quality rules**.
4. Above the table, to the right, click **Edit**.
5. Above the table, to the right, click **Add**.
   » The **Add data quality rule** dialog box appears.
6. Click a data quality rule.
   » The data quality rule appears at the bottom of the list of data quality rules.
   If required, change the order.
7. Click **Save**.

## What's next?

If the asset has all relations as defined in the aggregation path, you can go to the relevant asset pages and open the Quality tab page to see the data quality results.

# Chapter 8

# Overview of characteristic types

Characteristic types is a generic term for attribute types, relation types and complex relation types.

# Attributes and attribute types

An attribute is a characteristic that describes an asset by means of an individual field. The attribute's kind defines the class of information that the attribute contains.

## Overview of packaged attribute types

An attribute is a characteristic that describes an asset by means of an individual field. The attribute's kind defines the class of information that the attribute contains.

The table below contains all packaged attribute types. You can also create new attribute types.

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| 1st Decile | The data 1st decile value. | Column | Text |
| 1st Percentile | The data 1st percentile value. | Column | Text |
| 1st Quartile | The data 1st quartile value. | Column | Text |
| 3rd Quartile | The data 3rd quartile value. | Column | Text |
| 5th Percentile | The data 5th percentile value. | Column | Text |
| 95th Percentile | The data 95th percentile value. | Column | Text |
| 99th Percentile | The 99th percentile value. | Column | Text |
| 9th Decile | The data 9th decile value. | Column | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Abbreviation | A shorthand signifier for an asset. | Report | Text |
| Analysis | The analysis of this issue. | Issue | Text |
| Application Regulation | Any regulations that apply to the application. For example, for certain applications that consumes data, there is a regulation about how to handle that. | Directory, System, Technology Asset | Text |
| Application Standards | Any standards applied to the business application. | Directory, System, Technology Asset | Text |
| Approval Date | The date on which the assessment was approved. | Assessment Review | Date |
| Assessment Link | The link to the submitted assessment. | Assessment Review | String |
| Background | Background information on the asset. | | Text |
| Calculation Rule | The rule that specifies how the KPI or metric is calculated. | KPI, Tableau Report Attribute | Text |
| Categorical Data | Data is considered categorical if it can only take a limited set of different values. | Column | True/False |
| Category | A possible value for Categorical Data. | Column | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Certified | Indicates whether or not a report asset meets the set standards. | Data Set, Looker Dashboard, Looker Data Set, Looker Look, Looker Tile, Power BI Dashboard, Power BI Data Model, Power BI Report, Power BI Tile, Tableau Data Source, Tableau View, Tableau Workbook | True/False |
| Char octet Length | For character types, the maximum number of bytes in the column. | Column | Numeric |
| Column Position | The index of the column in the table. | Column | Numeric |
| Conformity Score | The amount of rows that passed the rule. | Business Rule, Data Quality Metric | Numeric |
| Co-role | Relationship name from tail to head. | - | Text |
| Criticality Indicator | Indicate the criticality of an asset. | - | True/False |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Data Source | The data source of an asset. It specifies where the data corresponding to this asset is coming from. | Database, Tableau Data Model, Schema | Text |
| Data Source Type | The type of the registered data source. | Schema, Database | Text |
| Data Type | The logical Data type detected by Collibra profiling. | Column | Text |
| Data Type Precision | The precision of the data type. For example how many characters it can contain. | Data Attribute, Data Element, Report Attribute | Numeric |
| Date and/or Time Pattern | The pattern used to encode a time, date or both. Format must be compatible with a java DateTimeFormatter. Example: yyyy-MM-dd HH:mm:ss. | Column | Text |
| Default Value | The default value for the column. | Column | Text |
| Definition | The definition of the business asset. This is the shortest possible description that clearly defines the business asset. | Business Asset, Business Process, Business Term, Data Category, KPI, Line of Business, Measure, Report, Report Attribute | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Description | The description of the asset. This is typically a more verbose way to describe what the asset means. | Asset, Business Dimension, Business Rule, Code Set, Code Value, Column, Crosswalk, Data Asset, Data Attribute, Database, Data Element, Data Entity, Data Model, Data Quality Dimension, Data Quality Metric, Data Quality Rule, Data Set, Data Sharing Agreement, Data Structure, Data Usage, Directory, File, File Group, Governance Asset, Issue, Issue Category, Looker Dashboard, Looker Data Set, Looker Data Set Column, Looker Folder, Looker | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| | | Look, Looker Query, Looker Report Attribute, Looker Tenant, Looker Tile, Mapping Specification, Policy, Power BI Capacity, Power BI Dashboard, Power BI Data Model, Power BI Table, Power BI Column, Power BI Report, Power BI Server, Power BI Tile, Power BI Workspace, Report, Report Attribute, Role Type, Rule, S3 Bucket, S3 File System, Schema, Standard, System, Table, Tableau Data Source, Tableau Project, Tableau Report Attribute, Tableau Server, Tableau Site, Tableau View, | |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| | | | |
| Description From Source System | The description from the source system of the asset. | Table, Column | String |
| Descriptive Example | An example of the asset. | Asset, Business Asset, Business Process, Business Rule, Business Term, Code Set, Code Value, Data Asset, Data Attribute, Data Category, Data Element, Data Entity, Data Model, Data Quality Metric, Data Quality Rule, Data Structure, Directory, Governance Asset, Issue Category, KPI, Line of Business, Measure, Policy, Report, Role Type, Rule, Standard, System, Technology Asset | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Document creation date | Date the document was created. | Looker Dashboard, Looker Folder, Looker Look, Tableau Data Source, Tableau View, Tableau Workbook | Date |
| Document last accessed date | Date the document was last accessed. | Looker Dashboard, Looker Look | Date |
| Document last viewed data | Date the document was last viewed. | Looker Dashboard, Looker Look | Date |
| Document modification date | Date the document was last edited. | Looker Look, Tableau Data Source, Tableau View, Tableau Workbook | Date |
| Document size | Size of the document in megabytes. | File, File Group, Tableau Workbook | Numeric |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Effective End Date | Date as of which an asset is scheduled to end. | Business Rule, Code Set, Code Value, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Rule | Date |
| Effective Start Date | Date on which asset takes effect. | Business Rule, Code Set, Code Value, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Rule | Date |
| Empty Values Count | The number of empty values for that column | Column | Numeric |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Empty values definition override | Overrides the default list of values to consider as empty or missing values during data profiling. It must be a comma separated list of text values with each value enclosed in double quotes. | Column, Schema, Table | Text |
| Entity Load Date | The load date of the entities from the external system. | Data Quality Metric | Text |
| Exception Scenario | The exception scenario. | Business Rule, Data Quality Metric, Data Quality Rule, Data Sharing Agreement, Governance Asset, Issue Category, Policy, Rule, Standard | Text |
| External System Label | The label from external system. | File, GCS Bucket, File Container | String |
| Favorites count | The number of Looker Looks and Looker Dashboards that are marked as favorite. | Looker Dashboard, Looker Look | Number |
| File Location | The location of the original source file. | File, Schema | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| File Type | The type of a File, which may constrain its format, its content or both. | File, File Group | Text |
| Foreign Key Delete Rule | What happens to the foreign key when primary is deleted. | Foreign Key | Text |
| Foreign Key Evaluation Defer-rability | Can the evaluation of the foreign key constraints be deferred until commit. | Foreign Key | Text |
| Foreign Key Update Rule | What happens to foreign key when primary is updated. | Foreign Key | Text |
| Frequency | Rate at which an asset changes over a particular period of time. | Report, Report Attribute | Text |
| Glue Database Name | The name of the AWS Glue data-base in which this data is ref-erenced and described. | Table | String |
| Glue Table Name | The name of the AWS Glue table in which this data is ref-erenced and described. | Table | String |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Inclusion Scenario | The inclusion scenario | Business Rule, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Report, Report Attribute, Rule, Standard | Text |
| Inferred Data Type | The data type of a data asset that was automatically inferred by profiling corresponding instance data. | | Text |
| Is Auto Incremented | Indicates whether this column is auto incremented. | Column | True/False |
| Is Generated | Indicates whether this is a generated column. | Column | True/False |
| Is Mandatory | Is the asset mandatory or not. | Data Attribute | True/False |
| Is Nullable | Determines if the column can store NULL values. | Column | True/False |
| Is Primary Key | Indicates if the column is a primary key. | Column | True/False |
| Is Unique | If the asset is unique or not. | Data Attribute | True/False |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| IT Requirements | Describes the requirements from an IT perspective for the asset. | Crosswalk, Mapping Specification | Text |
| Key sequence | Key Sequence of an element in a foreign key | | Numeric |
| Last Review Date | Date on which asset was last reviewed. | Code Set, Data Usage, Report, Report Attribute, Standard | Date |
| Last Sync Date | Date on which asset was synchronized with external system. | Code Set, Code Value, Database, Data Quality Metric, File | Date |
| License | The current license. | Data Set | Text |
| Loaded Rows | The number of rows that were loaded. | Business Rule, Data Quality Metric | Numeric |
| Loaded Values | The number of values that were loaded. | | Numeric |
| Load Sample | A sample. | | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Location | The location where the actual asset is stored or can be found. | Asset, Code Set, Code Value, Data Asset, Data Attribute, Database, Data Element, Data Entity, Data Model, Data Structure, Directory, Report, Report Attribute, Role Type, S3 Bucket, System, Technology Asset | Text |
| Materiality | The materiality. | Data Usage | Text |
| Maximum Text Length | The length of the longest text value in this column | Column | Numeric |
| Maximum Value | The maximum value, using alphabetical order for text | Column | Text |
| Max Length | The maximum length of any value corresponding to the data asset. | | Numeric |
| Mean | The mean of values (numeric only), excluding missing values | Column | Numeric |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Measurement | The measurement of the asset. | Business Rule, Data Quality Rule, Governance Asset, Issue Category, Policy, Rule | Numeric |
| Median | The data median value | Column | Text |
| Minimum Text Length | The length of the shortest text value in this column | Column | Numeric |
| Minimum Value | The minimum value, using alphabetical order for text | Column | Text |
| Min Length | The minimum length of any value corresponding to the data asset. | | Numeric |
| Mode | The value with the highest frequency for a categorical feature. | Column | Text |
| Non Conformity Score | The amount of rows that failed the rule. | Business Rule, Data Quality Metric | Numeric |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Note | A note. | Asset, Business Asset, Business Process, Business Rule, Business Term, Code Set, Code Value, Data Asset, Data Attribute, Database, Data Category, Data Element, Data Entity, Data Model, Data Quality Rule, Data Structure, Directory, File, KPI, Line of Business, Measure, Policy, Report Attribute, Role Type, Standard, System, Technology Asset | Text |
| Null Count | The number of null values in the data corresponding to the data asset. | | Numeric |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Number of Attributes | The number of attributes of the data entity. | | Numeric |
| Number of distinct values | The number of different values stored in this column | Column | Numeric |
| Number of Files | The number of files in a File Group. | File Group | Numeric |
| Number Of Fractional Digits | The number of fractional digits. | Column | Numeric |
| Number of Values | The number of distinct instance values in the data corresponding to the data asset. | | Numeric |
| Original Name | Name of this object in its source environment. The 'Original Name' may differ from the asset's name in Data Governance Center. | Column, Tableau Data Source, Tableau Project, Tableau Report Attribute, Tableau Site, Tableau View, Tableau Workbook | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Owner in source | The email address of the owner of the data objects in a data source, represented in Collibra by the asset types mentioned here. | Looker Dashboard, Looker Folder, Looker Look, Power BI Data Model, Power BI Report, Power BI Workspace, Tableau Data Model, Tableau Project, Tableau Workbook | Text |
| Passing Fraction | The % of rows or entities that have passed the rule. | Business Rule, Data Quality Metric | Numeric |
| Personally Identifiable Information | An indicator to flag an asset that could potentially be used to identify a specific individual. | Column | True/False |
| Predicate | The logical formula that will be executed to implement the rule. | Data Quality Rule | Text |
| Primary Key Name | The name of the primary key composed by the column. | Column | Text |
| Priority | The priority of this issue. | Issue | Text |
| Profiled Row Count | The number of rows from the data set that were selected for profiling. | | Numeric |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Profiling Information | Provides additional information related to the status of the profiling results. | Table | Text |
| Purpose | The reason why the asset exists. | Business Rule, Data Sharing Agreement, Data Usage, File, Governance Asset, Issue Category, Policy, Rule, Standard | Text |
| Rating | The current rating. | | Numeric |
| Refresh Conflict | Provides the information about the conflict detected on the Data Asset during a Schema refresh if any. | Column, Table | Text |
| Refresh Frequency | The frequency of refresh. | | Text |
| Report Image | Image of the report view | Looker Look, Tableau View, Tableau Workbook | Text |
| Resolution | The solution of how this issue can or is resolved. | Issue | Text |
| Result | The result. | Business Rule, Data Quality Metric | True/False |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Role | Relationship name from head to tail. | | Text |
| Role in Report | The use of Report Attribute in Report (for example, measure or dimension) | Tableau Report Attribute | Text |
| Row Count | The number of rows inside the data set, possibly including duplicated or missing values | Column | Numeric |
| Rows Failed | The amount of rows that failed the rule. | Data Quality Metric | Numeric |
| Rows Passed | The amount of rows that passed the rule. | Data Quality Metric | Numeric |
| Rule | The description of the rule. | | Text |
| Schema Name | The name of the schema. | | Text |
| Scope | The scope of applications that correspond to this policy. | Crosswalk, Database, Data Usage, Directory, Mapping Specification, Policy, Report, Report Attribute, System, Technology Asset | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Security Classification | Classification of assets based on sensitivity. | Column, Data Usage, Report, Report Attribute | Text |
| Sequence Number | The sequence number of the asset. Often used to order assets in a specific way. | Data Attribute | Numeric |
| Size | The size of the column in the table. | Column | Numeric |
| Source Type | The source type of an asset. | | Text |
| Standard Deviation | The statistical standard deviation of values (numeric only) | Column | Numeric |
| Start Date | The date on which the assessment was started. | Assessment Review | Date |
| State | The current state. | | Text |
| State Changed by | The cause of the state change. | Power BI Workspace | Text |
| State Changed Date | The date the state was changed. | Data Sharing Agreement | Text |
| Submission Date | The date on which the assessment was submitted. | Assessment Review | Date |
| Synchronization Status | Provides information about the status of the Schema synchronization. | Schema | Text |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Table Type | The table type that is declared in the data source. For example: TABLE, VIEW, ... | Table | Text |
| Technical Data Type | The Data Type of a data asset as it is declared by the data source. For example: String, Integer, Varchar, Blob, Boolean, ... | Column, Data Attribute, Data Element, Report Attribute, Power BI Column, Tableau Report Attribute | Text |
| Threshold | The minimum percentage of all rows or entities that must pass the rule. | Data Quality Metric | Numeric |
| Transformation Logic | The transformation logic. | | Text |
| URL | Uniform Resource Locator, also colloquially known as web address. | Directory, File, File Group, Looker Look, S3 Bucket, Tableau Server, Tableau Site, Tableau View | Text |
| Validation Result | The results of validation. | | True/False |
| Validation Script | Contains the validation logic to evaluate the content of an asset. | Validation Rule | Script |
| Value Distribution | The distribution percentage of the values | | Numeric |

| Type | Description | Assigned to asset type | Kind |
|---|---|---|---|
| Variance | The statistical variance of values (numeric only) | Column | Numeric |
| Visible on server | Worksheet is uploaded to Tableau server. | Tableau View | True/False |
| Visits count | Number of visits on Tableau report | Looker Dashboard, Looker Look, Tableau View | Numeric |
| Weighting Factor | A factor by which some quantity is multiplied in order to make it comparable with others. | | Numeric |

## Create an attribute type

You can create an attribute type. For example, if the packaged attributes types do not meet your needs.

### Prerequisites

You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Characteristics** → **Attributes**.
3. Above the table, to the right, click **Add**.

» The **Create Attribute Type** dialog box appears.

4. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the object.<br>The name of the attribute type must be globally unique.<br>> Tip<br>You can create multiple objects in one go. To do this, press `Enter` after typing a value and then type the next. If you type a name that already exists, it will appear in strike-through style. |
| Description | The description of the object. This field is optional. |
| Kind | The kind of information that attribute of this type can contain, for example, date, number or selection. |
| Date | A date value. If you edit attributes of this type, you can pick a date using the date selector.<br>> Note The date format that is displayed in the UI, can be different depending on the language settings in your user profile. For example, dd/mm/yyyy or yyyy/mm/dd. |
| Multiple Selection | A field that allows multiple values that you can select from a predefined list. |
| with values | The values from which you can select one or more. |
| Number | A number, or a number with a fraction. |

| Field | Description |
|---|---|
| Only integers. (..., -2, -1, 0, 1, 2, ...) | Checkbox to only allow integer numbers.<br><br>Note Numeric values are stored as Floating Point values (IEEE 754 standard), which are not able to represent all numbers accurately. Due to this technical constraint, rounding issues occur for both negative and positive numbers.<br>The bigger the number, the more noticeable the rounding issue. |
| Metric | Checkbox to make this attribute type a metric. This allows you to assign this attribute type as a metric when you create a data quality rule. |
| Selection | A field that allows a single value that you can select from a predefined list. |
| with values | The values from which you can select one. |
| Text | Textual input which may contain formatting. |
| Plain Text | Checkbox to disable formatting. |
| True/False | A binary option that allows you to indicate whether something is true or false. |
| Metric | Checkbox to make this attribute type a metric. This allows you to assign this attribute type as a metric when you create a data quality rule. |

5. Click **Save**.

## What's next?

You can now assign the attribute type to an asset type.

# Edit an attribute type

You can edit the name and description of an attribute type. You can't edit the attribute type's kind.

> Tip If you want to edit an attribute type's kind, you have to delete the attribute type first and then create a new one. Keep in mind that the new attribute type will have a new ID.

## Prerequisites

You have a global role that has the System administration global permission.

If you delete an attribute value from an attribute type of the Selection or Multiple Selection kind, then you can no longer edit the values of the attributes of that type without removing those invalid values. We recommend that you remove invalid attribute values from the attributes before removing them from the attribute type.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Attributes**.
   » The table with attribute types appears.
4. In the table, double-click a name or description field.
5. Type the new name or description.
6. Click ✔.

## Delete an attribute type

You can delete custom attribute types. You cannot delete packaged attribute types.

### Prerequisites

- You have a global role that has the System administration global permission.
- The attribute type is not a packaged attribute type.

### Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Attributes**.
   » The table with attribute types appears.
4. At the end of the row of the attribute type that you want to delete, click .
   » The **Delete <attribute type>** dialog box appears.
5. Click **Yes**.

# Relations and relation types

A relation is a characteristic that describes how two assets relate to each other. The relation's type defines the relation and determines which assets can be related.

## Overview of packaged relation types

A relation is a characteristic that describes how two assets relate to each other. The relation's type defines the relation and determines which assets can be related.

The following table shows packaged relation types. You can also create new relation types.

Note
- **role** is the description of the relation type going from the head asset type to the tail asset type.
- **co-role** is the description of the relation type going from the tail asset type to the head asset type.

This is a table of all packaged relation types. For a sortable overview of all packaged relation types, see the online version of this information in the Documentation Center.

| Head | Role | Co-role | Tail |
|---|---|---|---|
| Asset | complies to | applies to | Governance Asset |
| Asset | governed by | governs | Governance Asset |
| Asset | is essential for | requires | Data Usage |
| Asset | related to | impacted by | Asset |
| Asset | specializes | generalizes | Asset |
| Asset | uses | used in | Asset |
| Business Asset | groups | grouped by | Business Asset |
| Business Asset | has acronym | is acronym for | Acronym |
| Business Asset | represents | represented by | Data Asset |
| Business Dimension | classifies | is classified by | Asset |
| Business Dimension | groups | is grouped into | Report |
| Business Dimension | source | is source of | System |
| Business Process | consumes | is consumed by | Business Asset |
| Business Process | produces | is produced by | Business Asset |

| Head | Role | Co-role | Tail |
|---|---|---|---|
| Business Term | allowed value | allowed value of | Business Term |
| Business Term | has code | is code for | Code Value |
| Business Term | synonym | synonym of | Business Term |
| Code Set | source of | source | Crosswalk |
| Code Set | target of | target | Crosswalk |
| Code Value | groups | grouped by | Code Value |
| Code Value | is part of | contains | Code Set |
| Column | is part of | contains | Table |
| Data Asset | groups | is grouped by | Data Asset |
| Data Asset | implemented in | implements | Technology Asset |
| Data Asset | is essential for | is constrained by | Data Usage |
| Data Element | allowed value | allowed value for | Code Value |
| Data Element | allowed value set | applies to | Code Set |
| Data Element | is part of | contains | Data Structure |
| Data Entity | contains | is part of | Data Attribute |
| Data Entity | is part of | contains | Data Model |
| Data Quality Rule | allowed value | allowed value for | Code Value |
| Data Quality Rule | allowed value set | allowed value set for | Code Set |

| Head | Role | Co-role | Tail |
|---|---|---|---|
| Data Quality Rule | classified by | classifies | Data Quality Dimension |
| Data Quality Rule | executed by | executes | Data Quality Metric |
| Data Quality Rule | governs | is governed by | Data Element |
| Data Set | contains | is part of | Data Element |
| Data Set | related to | impacted by | Business Asset |
| Data Sharing Agreement | is requested by | requests | Business Dimension |
| Data Structure | source of | source | Mapping Specification |
| Data Structure | target of | target | Mapping Specification |
| Data Usage | is required by | requires | Data Sharing Agreement |
| Directory | contains | contained in | File |
| Directory | contains | is part of | Directory |
| Directory | contains | is part of | File Group |
| File | contains | is part of | Table |
| File Group | contains | is part of | Table |
| Governance Asset | groups | is grouped by | Governance Asset |
| Governance Asset | resolves | resolved by | Issue |
| Governance Asset | violated by | violates | Issue |

| Head | Role | Co-role | Tail |
|---|---|---|---|
| Issue | categorized by | categorizes | Issue Category |
| Issue | has duplicate | is duplicate for | Issue |
| Issue | impacts | impacted by | Asset |
| Line of Business | associates | is associated with | Business Asset |
| Policy | is enforced by | enforces | Rule |
| Report | groups | is grouped into | Report |
| Report | related to | is impacted by | Business Asset |
| Report | uses | used in | Report |
| Report Attribute | contained in | contains | Report |
| Report Attribute | is source for | is target of | Report Attribute |
| Role Type | is responsible for | is responsibility of | Asset |
| Rule | is implemented by | implements | Business Rule |
| S3 Bucket | contains | is part of | Directory |
| S3 File System | contains | is part of | S3 Bucket |
| Schema | contains | is part of | Table |
| Server | hosts | is hosted in | Business Dimension |
| Standard | is included in | includes | Policy |
| System | implements | is implemented in | Data Set |

| Head | Role | Co-role | Tail |
|---|---|---|---|
| Table | is input for | has input | Transformation Rule |
| Table | is part of | contains | Database |
| Tableau Site | assembles | is assembled in | Tableau Project |
| Technology Asset | groups | is grouped by | Technology Asset |
| Technology Asset | has | belongs to | Schema |
| Technology Asset | source system for | source system | Business Term |
| Technology Asset | source system for | source system | Data Asset |
| Technology Asset | system of record for | system of record | Business Term |
| Technology Asset | system of record for | system of record | Data Asset |
| Technology Asset | system of use for | system of use | Business Term |
| Technology Asset | system of use for | system of use | Data Asset |
| Transformation Rule | is input for | has input | Transformation Rule |
| Transformation Rule | produces | is produced by | Table |

## Create a relation type

You can create a new relation type if, for example, the packaged relation types do not meet your needs.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Relations**.
4. Above the table, to the right, click **Add**.
   » The **Create relation type** dialog box appears.
5. Enter the required information.

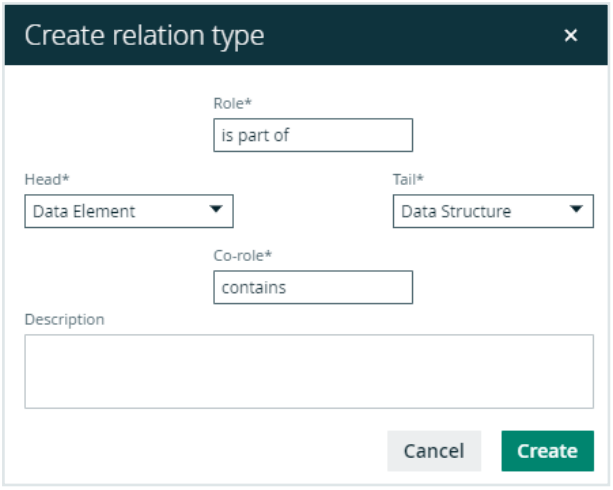
| Element | Description |
|---|---|
| Head | Asset type of assets that can be the head of the relation. |
| Tail | Asset type of assets that can be the tail of the relation. |
| Role | The description of the relation type going from the head asset to the tail asset. |
| Co-role | The description of the relation type going from the tail asset to the head asset. |

> Note The combination of the relation type's head, tail, role, and co-role has to be globally unique.

6. Click **Create**.

## Example

The following example creates a part-whole relation type between two assets: *Data Element is part of / contains Data Structure*.




## What's next?

You can now assign the relation type to an asset type and after that add a relation to an asset.

# Edit relation types

You can edit a relation type by changing the role or co-role of a relation type or its description.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Relations**.
4. In the row of the relation type that you want to edit, click ✎ at the end of the **Role** or **Co-role** column.

5. Enter the required information and click ✔.
   » The relation type is edited.

> Note The combination of the relation type's head, tail, role, and co-role has to be globally unique.

## Delete a relation type

You can delete a relation type that you created yourself. However, you can't delete packaged complex relation types.

### Prerequisites

- You have a global role that has the System administration global permission.
- The relation type is not a packaged relation type.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Relations**.
4. In the row of the relation type that you want to delete, click 🗑.
   » The **Delete <relation type>** dialog box is shown.
5. If a dialog box appears, click **Yes**.
   » The relation type is deleted.

# Complex relations and complex relation types

A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The complex relation's type defines the relations and attributes the complex relation can have.

# Overview of packaged complex relation types

A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The complex relation's type defines the relations and attributes the complex relation can have.

The table below contains all packaged complex relation types. You can also create new complex relation types.

| Name | Description | Relation types | Attribute types | Assigned asset types |
|---|---|---|---|---|
| Code Mapping | Complex mapping between two or more code values | Source - Code Value (1:-)<br>Target - Code Value (1:-)<br>Crosswalk - Crosswalk (1:1) | • Description (0:1)<br>• Transformation Logic (0:1) | • Code Value<br>• Crosswalk |
| Data Usage | Data Usage | Uses - Data Asset (1:-)<br>Used in - Business Asset (1:-)<br>Governed by - Rule (1:-) | • Description (0:1)<br>• Materiality (0:1) | |

| Name | Description | Relation types | Attribute types | Assigned asset types |
|---|---|---|---|---|
| Fact Type | | Head - Asset (1: 1)<br>Tail - Asset (1: 1) | • Role (1:-)<br>• Co-role (1:-) | |
| Field Mapping | Complex mapping between two or more data fields | Source - Data Element (1:-)<br>Target - Data Element (1:-)<br>Mapping specification - Mapping Specification (1: 1) | • Description (0:1)<br>• Transformation Logic (0:1) | • Column<br>• Data Attribute<br>• Data Element<br>• Field<br>• Mapping Specification<br>• Report Attribute |
| Foreign Key Mapping | Complex mapping between two columns representing a primary key and a foreign key | Constrains - Column (1: 1)<br>References - Column (1: 1)<br>Is part of - Foreign Key (1: 1) | • Key sequence (1:1) | • Column<br>• Foreign Key |

## Create a complex relation type

You can create a complex relation type. For example, if the packaged complex relation types do not meet your needs.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Complex Relations**.
4. Above the table, to the right, click **Add**.
   » The **Create complex relation type** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the complex relation type.<br><br>> Note The name of the complex relation type must be globally unique. |
| Description | The description of the complex relation type. |
| Display options | These fields allow you to edit how complex relations of this type are represented in diagrams. |
| Color | The default colors that you can use for the complex relation nodes of this type. |
| Color hex value | The hexadecimal value of the color that you want for complex relations of this type.<br><br>For a list of colors and their hexadecimal values, see ColorHexa. |

| Field | Description |
| --- | --- |
| Symbol | A graphical representation for complex relations of this type.<br><br>You can choose one of the following values:<br><br>◦ **None**: No graphical representation is used for complex relations of this type.<br>◦ **Code**: Complex relations of this type are represented with a code in front of them. You can specify the code that you want in the **Code** field.<br>◦ **Icon**: Complex relations of this type are represented with an icon in front of them. You can select the icon that you want in the **Icon reference** field. |
| Code | The code that is displayed in front of complex relations of this type. This code is also displayed in the legend of diagrams.<br><br>This field is only displayed if you have selected **Code** in the **Symbol** field. |
| Icon reference | The icon that is displayed in front of complex relations of this type. This icon is also displayed in the legend of diagrams.<br><br>This field is only displayed if you have selected **Icon** in the **Symbol** field. |
| Preview | Two previews of the representation of complex relations of this type:<br><br>◦ The left preview is the title bar on a complex relation page.<br>◦ The right preview is a diagram node. |
| Relations | The relation types of the complex relation type.<br><br>At least one relation type is required. |

| Field | Description |
| --- | --- |
| Role | The description of the relation type going from the head asset to the tail asset. |
| Co-role | The description of the relation type going from the tail asset to the head asset. |
| Asset type | The asset type of the head of the relation. The complex relation type can only be used by assets of this asset type or its children if the complex relation type is in the asset type's assignment.<br>The complex relation is always the tail of the complex relation type. |
| Min. | The minimum amount of relations of this type.<br>You must have at least one relation with a minimum cardinality of 1 or greater. |
| Max. | The maximum amount of relations of this type. |
| Attributes | The attribute types of the complex relation type. |
| Attribute Type | The attribute type used by this complex relation type. |
| Min. | The minimum amount of attributes of this type. |
| Max. | The maximum amount of attributes of this type. |

6. Click **Save**.

## What's next?

You can now assign the complex relation type to an asset type and after that add a complex relation to an asset.

# Edit a complex relation type

You can edit the name, description and display options of a complex relation type. You can't edit existing relations and attributes in the complex relation, but you can add relations and attributes to the complex relation type.

> Tip If you want to edit the relations or attributes of a complex relation type, you have to delete the complex relation type first and then create a new one. Keep in mind that the new complex relation type will have a new ID.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Complex Relations**.
4. In the row of the complex relation type that you want to edit, click ✎.
   » The **Edit complex relation** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the complex relation type.<br>> Note The name of the complex relation type must be globally unique. |
| Description | The description of the complex relation type. |

| Field | Description |
|---|---|
| Display options | These fields allow you to edit how complex relations of this type are represented in diagrams. |
| Color | The default colors that you can use for the complex relation nodes of this type. |
| Color hex value | The hexadecimal value of the color that you want for complex relations of this type.<br><br>For a list of colors and their hexadecimal values, see ColorHexa. |
| Symbol | A graphical representation for complex relations of this type.<br><br>You can choose one of the following values:<br><br>◦ **None**: No graphical representation is used for complex relations of this type.<br>◦ **Code**: Complex relations of this type are represented with a code in front of them. You can specify the code that you want in the **Code** field.<br>◦ **Icon**: Complex relations of this type are represented with an icon in front of them. You can select the icon that you want in the **Icon reference** field. |
| Code | The code that is displayed in front of complex relations of this type. This code is also displayed in the legend of diagrams.<br><br>This field is only displayed if you have selected **Code** in the **Symbol** field. |
| Icon reference | The icon that is displayed in front of complex relations of this type. This icon is also displayed in the legend of diagrams.<br><br>This field is only displayed if you have selected **Icon** in the **Symbol** field. |

| Field | Description |
| --- | --- |
| Preview | Two previews of the representation of complex relations of this type:<br>◦ The left preview is the title bar on a complex relation page.<br>◦ The right preview is a diagram node. |
| Relations | The relation types of the complex relation type.<br>At least one relation type is required. |
| Role | The description of the relation type going from the head asset to the tail asset. |
| Co-role | The description of the relation type going from the tail asset to the head asset. |
| Asset type | The asset type of the head of the relation. The complex relation type can only be used by assets of this asset type or its children if the complex relation type is in the asset type's assignment.<br>The complex relation is always the tail of the complex relation type. |
| Min. | The minimum amount of relations of this type.<br>You must have at least one relation with a minimum cardinality of 1 or greater. |
| Max. | The maximum amount of relations of this type. |
| Attributes | The attribute types of the complex relation type. |
| Attribute Type | The attribute type used by this complex relation type. |

| Field | Description |
| --- | --- |
| Min. | The minimum amount of attributes of this type. |
| Max. | The maximum amount of attributes of this type. |

6. Click **Save**.

## Delete a complex relation type

You can delete custom complex relation types. However, you can't delete packaged complex relation types.

### Prerequisites

- You have a global role that has the System administration global permission.
- The complex relation type is not a packaged complex relation type.

### Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Characteristics** → **Complex Relations**.
4. In the row of the complex relation type that you want to delete, click .
   » The **Delete <complex relation type>** dialog appears.
5. Click **Yes**.
   » The complex relation type is deleted.

# Domain types

A domain type is a property of a domain that determines which assets can be included in the domain, based the asset's type.

Some asset types can only be created in a specific Collibra application and in a specific domain type. For example, you can only create assets of the Validation Rule type in a domain of the Validation Rule Domain type. You can see the required domain type in the assignment of the asset type.

# Overview of packaged domain types

A domain type is a property of a domain that determines which assets can be included in the domain, based the asset's type.

The table below contains all packaged domain types and their description. You can find out about domain types that are not packaged on their dedicated pages, such as Process Register, which is part of Data Privacy.

> Tip For an interactive overview of all packaged domain types, including the relevant asset types and applications, see the online version of this documentation.

| Type | Type | Description |
|---|---|---|
| BI Catalog | BI Catalog | A collection of Tableau assets with the list of related attributes. |
| Business Asset Domain | Business Asset Domain | |
| Business Dimensions | Business Asset Domain ▸ Business Dimensions | A set of business dimensions that categorize and describe business terms. |
| Report Catalog | Business Asset Domain ▸ Report Catalog | A collection of reports and their definitions with the list of related report characteristics. |
| Codelist | Codelist | Any kind of data that is used solely to categorize other data found in a database, or solely for relating data in a database to information beyond the boundaries of the enterprise. |

| Type | Type | Description |
| --- | --- | --- |
| Hierarchies | Codelist ▸ Hierarchies | A Code list with a hierarchical structure in its Code Values |
| Data Asset Domain | Data Asset Domain | |
| Data Usage Registry | Data Asset Domain ▸ Data Usage Registry | A collection of data usage agreements and related data structures. |
| Logical Data Dictionary | Data Asset Domain ▸ Logical Data Dictionary | Represents details of organizational data, independent of any particular technology, and uses vocabulary of a business area to communicate with non-technical stakeholders. |
| Mapping Domain | Data Asset Domain ▸ Mapping Domain | Groups data assets of the crosswalk type (to map between code sets) and mapping specification (used to map between data structures). |
| Physical Data Dictionary | Data Asset Domain ▸ Physical Data Dictionary | A collection of physical objects, such as tables, columns, file fields, views and APIs, to describe how data is stored, arranged and related to each other in a data storage technology/location. |
| Glossary | Glossary | A prioritized list of business terms and acronyms, and their meanings. |
| Governance Asset Domain | Governance Asset Domain | |

| Type | Type | Description |
| --- | --- | --- |
| Assessment Review Register | Data Governance Domain ▸ Assessment Review Register | Domain type for Assessment Review assets, which are created when an assessment is conducted on an asset and submitted for review. |
| Policy Domain | Data Governance Domain ▸ Policy Domain | A set of polices and standards related to an organization. |
| Rulebook | Data Governance Domain ▸ Rulebook | A set of rules that are used as a basis for making decisions and governing programs or policies. |
| Issue Classification | Issue Classification | |
| Storage Catalog | Storage Catalog | A domain type that contains assets of the asset type S3 File System or GCS File System. |
| Technology Asset Domain | Technology Asset Domain | An inventory of all technology assets and their business benefits. |
| Validation Rule Domain | Validation Rule Domain | A domain type for domains containing validation rules. |

# Create a domain type

You can create new domain types.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Domain Types**.
   » The domain type table appears.
4. Above the table, to the right, click **Add**.
   » The **Domain Type Creation** dialog box appears.
5. Enter the required information.

| Option | Description |
|---|---|
| Name | Type a name for the domain type.<br>You can enter more than one value at a time. To do this, press *Enter* after typing a value and then type the next. |
| Parent Type | Select the parent domain type. |

6. Click **Create**.

# Edit a domain type

You can edit the name and the description of a domain type in the domain type table.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Domain Types**.
   » The domain type table appears.
4. In the **Name** or **Description** column, do one of the following:
   - Double-click a cell.
   - Hover your mouse over a cell and click .

   » The cell editor appears.
5. Edit the name or description.
6. Click .

# Move a domain type

You can move a domain type to another parent domain type in the domain type table.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Domain Types**.
   » The domain type table appears.
4. At the end of a row, click .
   » The **Select Parent Domain Type** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Parent type | Select the new parent type of the domain type. |

6. Click **Save**.

# Delete a domain type

You can delete a domain type in the domain type table.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Domain Types**.
   » The domain type table appears.
4. At the end of a row, click .
   » The **Delete <domain type>** dialog box appears.
5. Click **Yes**.

# Asset statuses

The status indicates the condition of an asset or workflow.

# Overview of packaged statuses

Use statuses to reflect the life cycle of resources. The following statuses can be used out of the box in your workflows.

| Status | Description | Use |
|---|---|---|
| Accepted | The stewards approved an asset definition.<br><br>The technical stewards are granting the requested access.<br><br>The reviewer is appointing an assignee to resolve an issue. | An asset is **accepted** at the end of the Approval and Simple Approval workflows.<br><br>A data usage asset is **accepted** when the approvers, who are the owners of the resources that are part of an access request, have approved the request in the Request Assets Access workflow.<br><br>An issue is **accepted** after the stewards approved its proposed solution. At this stage of the Issue Management workflow, the reviewer either appoints an assignee or marks the issue as resolved. |
| Access Granted | The requester has been granted access to the requested resources. | The requester is assigned a Data Analyst Level 2 role for the newly granted resources, as the final step in the Request Assets Access workflow. |

| Status | Description | Use |
|---|---|---|
| Approval Pending | The approvers are voting for the approval of a data usage request. | A data usage asset has this status during the voting sub-process of the Request Assets Access workflow. |
| Approved | | Currently not in use. |
| Candidate | The initial status of an asset. | Newly created assets receive this status. |
| Deployed | The initial status of a workflow. | Refers to workflow definitions. |
| Disabled | The workflow is currently not in use. | Refers to workflow definitions. |
| Enabled | The workflow is currently active. | Refers to workflow definitions. |
| Implemented | | Currently not in use. |
| In Progress | The assignee is solving the issue. | The status is used in the Issue Management workflow. |
| Invalid | The reviewer rejected an issue.<br>The initial status of a data usage asset. | Reviewers can reject invalid issues during the Issue Management workflow.<br>Newly created data usage requests receive this status in the Request Assets Access workflow. |
| Monitored | | Currently not in use. |
| New | The initial status of an issue. | Newly created issues receive this status. |

| Status | Description | Use |
|---|---|---|
| Obsolete | | Currently not in use. |
| Pending | The requester is providing more information about an issue. | The status is used in the Issue Management workflow. |
| Rejected | The approvers rejected the data usage request. | The status is used in the Request Assets Access workflow. |
| Resolution Pending | The reviewer is validating the asignee's solution to an issue. | |
| Resolved | The issue is resolved. | The status is used in the Issue Management workflow. |
| Reviewed | | Currently not in use. |
| Submitted for Approval | The stakeholders are verifying the proposed solution to an issue. | The status is used in the Issue Management workflow. |
| Under Review | The stakeholders are reviewing an asset.<br><br>The reviewer is analyzing an issue and proposing a solution. | An asset is **under review** from the moment the subject matter experts have approved its definition until it is **accepted** in the Approval workflow. There is no intermediary status in the Simple Approval workflow.<br><br>After being submitted or after being rejected by the stakeholders, an issue is **under review** while a reviewer analyzes it, in the Issue Management workflow. |

# Create a status

Collibra Data Intelligence Cloud comes out of the box with a large number of statuses for all the resources, for example assets and workflow tasks.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Statuses**.
4. Above the table, to the right, click **Add**.
5. Type the name for the status.
   You can create multiple statuses at once by pressing `Enter` and type another name.
   Statuses that already exist appear in strike-through format.
6. Click **Create**.

# Edit a status

You can edit the name and the description of a status.

> Tip If you enter a description, it appears as a tooltip next the status on asset pages. You can use this to give more details about the status to other users.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Statuses**.
4. Do one of the following in the **Name** or **Description** column:
   - Double-click a cell.
   - Hover your mouse over a cell and click ✎.

   » The cell editor appears.
5. Enter the new name or description.
6. Click ✔.

# Delete a status

You can delete a status if is no longer used in any kind of workflow.

> Note *Enabled*, *Disabled* and *Deployed* are system resources. They are specific to describe workflows and cannot be deleted.

## Prerequisites

- You have a global role that has the System administration global permission.
- The status that you want to delete is not used by any asset.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Operating Model**.
   » The operating model settings appear on the **Asset types** tab page.
3. In the tab pane, click **Statuses**.
4. On the right of the status you want to delete, click 🗑.
   » The **Delete** dialog box appears.

5. Click **Yes**.
   » The status is deleted.

# Articulation score

The articulation score of an asset is a percentage that indicates how complete the asset is according to the articulation score rules. It is typically used to give you a quick estimation of the status of the asset and whether the most important characteristics are present.

The score is shown in the title bar of the asset page, a column in a table or as a field on a tile.

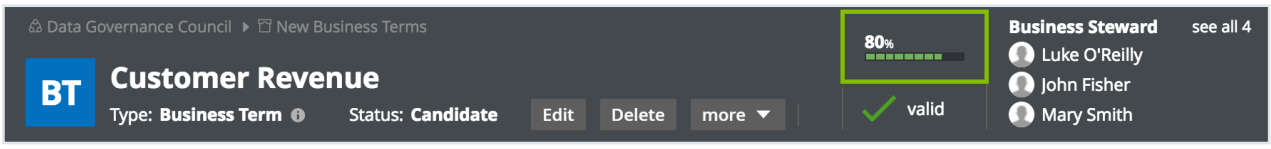
In this section you will learn more about how the articulation score is calculated and how you can manage the articulation score rules.

# Articulation scores

The articulation score of an asset is a percentage that indicates how complete the asset is according to the articulation score rules. It is typically used to give you a quick estimation of the status of the asset and whether the most important characteristics are present.

You can configure an articulation score calculator that contains your own rules. Whenever an asset is edited, either manually or via a workflow, the articulation score is reset to 0 and the articulation score rules are executed in their specific order.

The score is shown in the title bar of the asset page, a column in a table or as a field on a tile.




> Note
> - You may have to refresh the page after you edited the asset to see the new score.
> - If you edited the articulation rules or their assignment, the articulation score of the assets to which it is assigned does not recalculate. You still need to edit each asset to trigger recalculation of the articulation score.

## Articulation score rules

An articulation rule consists of a number of fields that determine when a rule applies and what the result is.

- The Condition field and the subsequent Status or Characteristic field determine when a rule applies. These fields allow your rule to look for a specific status or a specific characteristic. Having multiple instances of the same characteristic, for example, two notes, does not apply the rule more than once.
- The Score and Value fields determine what the effect of the articulation rule is. You can either increase the score, or set the score to a specific value.

> Note
> - 'Increasing the score' means that the value will be added to the percentage that was received from the other rules. It does not increase the score of the asset before it was edited.
> - If a rule sets the score to a specific value, all previous rules effectively become useless.

## Example

Suppose this is the articulation score calculator:

| | | | | |
|---|---|---|---|---|
| 1 | Condition<br>Characteristic added | Characteristic<br>Definition | Score<br>Increase score by | Value<br>33 |
| 2 | Condition<br>Status set to | Status<br>Candidate | Score<br>Sets score to | Value<br>0 |
| 3 | Condition<br>Status set to | Status<br>In progress | Score<br>Sets score to | Value<br>10 |
| 4 | Condition<br>Status set to | Status<br>Under review | Score<br>Sets score to | Value<br>50 |
| 5 | Condition<br>Status set to | Status<br>Reviewed | Score<br>Sets score to | Value<br>80 |
| 6 | Condition<br>Status set to | Status<br>Accepted | Score<br>Sets score to | Value<br>100 |
| 7 | Condition<br>Characteristic added | Characteristic<br>Note | Score<br>Increase score by | Value<br>22 |

A business term has the following attributes:

- Status: In progress
- A definition
- A note
- Articulation score: 32%
    a. Articulation score rule 1 matches and adds 33%.
        » Current score: 33%
    b. Articulation score rule 2 does not match.
    c. Articulation score rule 3 matches and sets the score to 10%.
        » Current score: 10%
    d. Articulation score rule 4 does not match.
    e. Articulation score rule 5 does not match.
    f. Articulation score rule 6 does not match.
    g. Articulation score rule 7 matches and adds 22%
        » Final articulation score: 32%

A second note is added, the definition is deleted and the status of the business term is changed to Reviewed. It now has the following attributes:

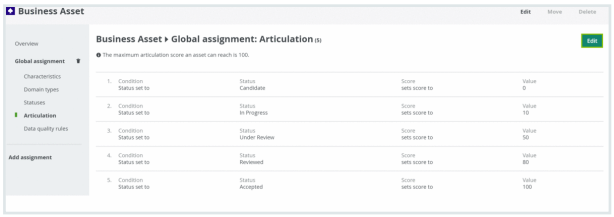
- Status: Reviewed
- Two notes
- Articulation score: 100%
    a. Articulation score rule 1 does not match.
    b. Articulation score rule 2 does not match.
    c. Articulation score rule 3 does not match.
    d. Articulation score rule 4 does not match.
    e. Articulation score rule 5 matches and adds 80%.
        » Current score: 80%
    f. Articulation score rule 6 does not match.
    g. Articulation score rule 7 matches and adds 22%
        » Final articulation score: 100%

# Create an articulation score rule

You can create a new articulation score rule. For example, you can do this if you want to give users a quick indication about the completeness of an asset.

# Steps

1. Open the scope of an asset type.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. Click the name of an asset type.
2. In the tab pane, click <name of the scope>, then click **Articulation**.
   The default scope is **Global assignment**.
3. Above the table, to the right, click **Edit**.




4. Above the table, to the right, click **Add rule**.
   » A new row for an articulation rule appears at the bottom of the list.

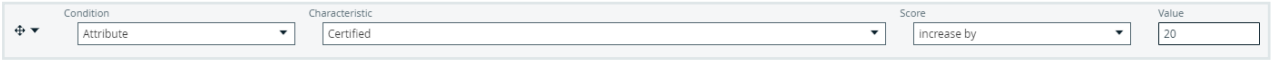
5. Enter the required information.

| Field | Description |
|---|---|
| Condition | The condition of the articulation rule that determines when the rule applies.<br>◦ **Status set to**: The score depends on a specific status of an asset.<br>◦ **Characteristic added**: The score depends on a specific characteristic of an asset. |
| Status | The specific status that an asset must have for the rule to apply.<br>This field only appears if the **Condition** is **Status set to**. |
| Characteristic | The specific characteristic that an asset must have for the rule to apply.<br>This field only appears if the **Condition** is **Characteristic added**. |
| Score | The impact on the score if an asset meets the condition and status or characteristic.<br>◦ **increase score by**: Adds a value to the articulation score<br>◦ **sets score to**: Sets the articulation score to a specific value. As a consequence, the previous score and the previous rules are discarded. |
| Value | The value that is used by the rule. |

6. Click **Save**.

# Example

To specify that adding an attribute adds 20 % to the calculation score, configure the following:



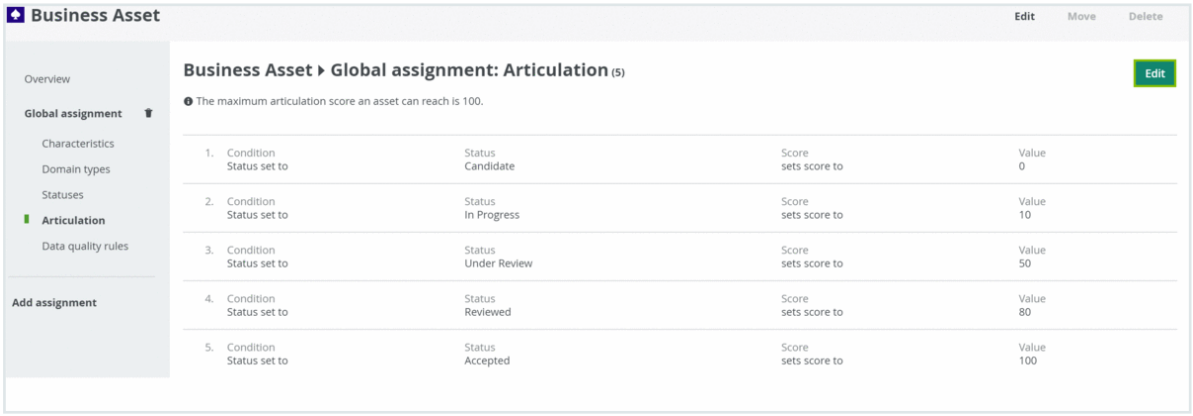
Result: The articulation calculator is added to the articulation table and is assigned to the given asset types.

# Edit an articulation score rule

You can delete an articulation score rule. For example, you can do this if you want to increase the importance of a certain attribute type on the articulation score.

## Steps

1. Open the scope of an asset type.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. Click the name of an asset type.
2. In the tab pane, click <name of the scope>, then click **Articulation**.
3. Above the table, to the right, click **Edit**.



4. Enter the required information.

| Field | Description |
|---|---|
| Condition | The condition of the articulation rule that determines when the rule applies.<br>◦ **Status set to**: The score depends on a specific status of an asset.<br>◦ **Characteristic added**: The score depends on a specific characteristic of an asset. |
| Status | The specific status that an asset must have for the rule to apply.<br>This field only appears if the **Condition** is **Status set to**. |
| Characteristic | The specific characteristic that an asset must have for the rule to apply.<br>This field only appears if the **Condition** is **Characteristic added**. |
| Score | The impact on the score if an asset meets the condition and status or characteristic.<br>◦ **increase score by**: Adds a value to the articulation score<br>◦ **sets score to**: Sets the articulation score to a specific value. As a consequence, the previous score and the previous rules are discarded. |
| Value | The value that is used by the rule. |

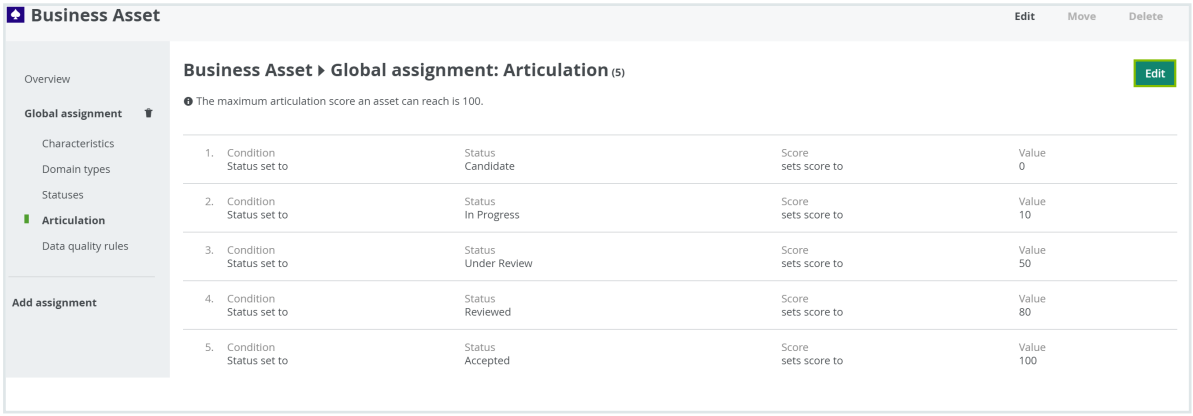
5. Click **Save**.

# Delete an articulation score rule

You can delete an articulation score rule. For example, you can do this if you no longer need an existing articulation score rule.

# Steps

1. Open the scope of an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. Click the name of an asset type.
2. In the tab pane, click <name of the scope>, then click **Articulation**.
3. Above the table, to the right, click **Edit**.




4. Click 🗑 next to the rule that you want to delete.
5. Click **Save**.

# Asset data quality

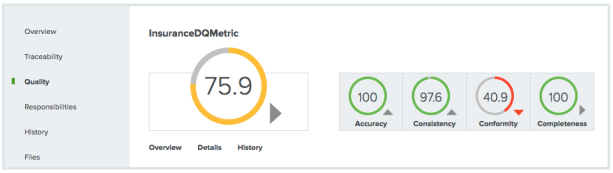
The **Quality** page of an asset makes data quality results of an asset available to the business stakeholders. The dashboard aggregates the following values:

- Collected over time on attributes.
- Aggregated from different assets along a number of predefined relations.

The assets for which these data quality dashboards are available and how the values are aggregated are defined in data quality rules, which can be edited on the **Data Quality Rule** tab on the **Settings** page. For the following examples, a data quality rule exists on business terms, aggregating values from data quality rules related to these business terms.

## Asset quality

The assets for which the quality dashboard is available have an extra option in their tab menu, namely **Quality**. The dashboard displays the aggregated passing fraction (quality score) for the asset in the form of ring charts.




Each ring chart shows the quality score in the form of:

- A quality score as a percentage.
- A color code indicating the quality of this passing fraction:
  - Red: 0-50%
  - Orange: 50-85%
  - Green: 85 - 100%
- An arrow indicating the trend of the score compared to the previous measurement.

The first ring chart shows the general score of the asset. The ring charts next to it show subscores for a specific dimension, such as **Accuracy**, **Conformity**, **Completeness** and **Consistency**. Only values that belong to that specific dimension are then taken into account. The dimensions to use are configured in the metric group. In this example, it is the relation: **Data Quality Rule** is Classified By **Data Quality Dimension**.

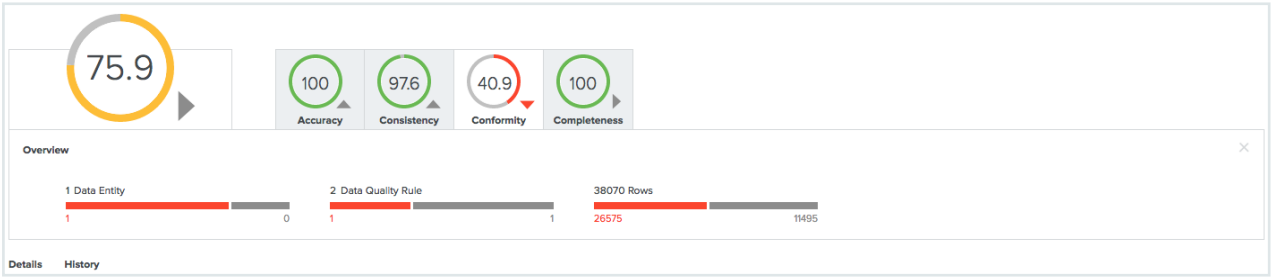
Underneath the top pane, three selection boxes are available. They display an extra overview, details and history pane, respectively.

To close a pane, click ✕ in the upper-right corner of the pane.

# Data quality overview pane

The **Overview** pane shows more information about each level in the aggregation path for the selected general score or dimension. For each level, it shows the number of involved assets of a certain type and what their results are: failing (red) or passing (gray). It also shows the total number of rows, the number of failing rows (red) and the number of passing rows (gray) that resulted in the given scores.

In the following example, the **Conformity** dimension consists of a total of 38 070 rows, 26 575 of which were failing. Two **Data Quality Rules** were involved, one of which was failing. And these **Data Quality Rules** were used by one **Data Entity**, which has an aggregated failing result.



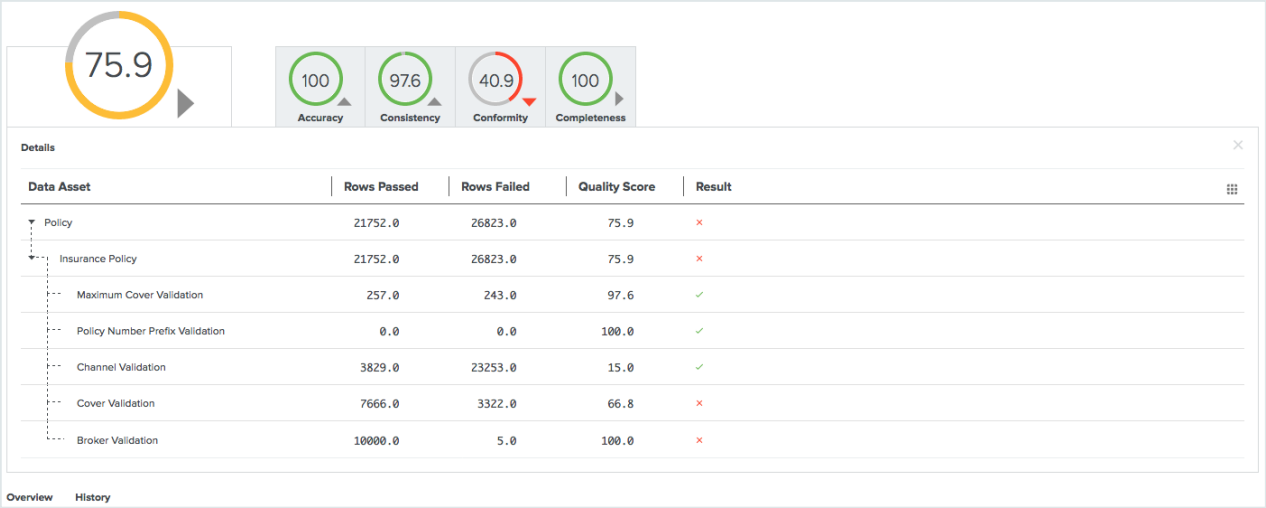

# Asset quality details pane

The **Details** pane shows more information about all the assets involved in a table format.

For each asset, a row with the following default columns is shown:

- **Data Asset**: The data asset signifier
- **Rows Passed**: The number of passing rows, aggregated as a sum of the passing rows of the underlying assets
- **Rows Failed**: The number of failing rows, aggregated as a sum of the failing rows of the underlying assets
- **Quality Score**: The score aggregated as an average of the quality scores of the underlying assets

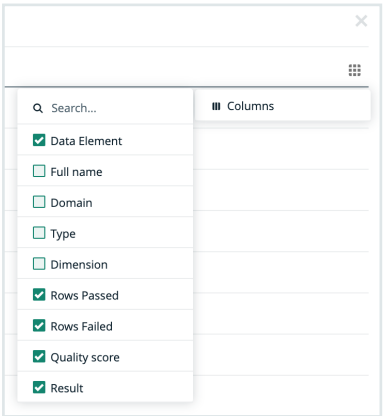
- **Result** (failing or passing): The aggregated result as a logical conjunction of the results of the underlying assets.




Some extra columns can be displayed in this table by clicking ⠿ → **Columns**.

These include:

- **Full name**: The unique full name of the asset.
- **Domain**: The domain to which the asset belongs.
- **Type**: The type of the asset.
- **Dimension**: The dimension that applies to these assets, if any. Dimensions are used to calculate the subscores, as mentioned earlier.



# Asset quality history

The **History** pane shows the evolution of the quality score over time, for up to one month in the past.

You can display the date and the score for a specific period at the top right of the pane by hovering your pointer over that period.

When you select a period by clicking on it, the top left corner of the pane shows a trend of the score compared to the period before it.




# Data quality rules

Data quality rules are rules that calculate the quality of a certain asset based on a predefined aggregation path and metrics. The results of a data quality rule are available in a data quality dashboard on the asset page of assets of the type to which you assigned the data quality rule.

## Data quality and report certification

Data quality is an important aspect of report certification. However, we understand that not all organizations are at a stage in their governance program where data quality is fully enabled.

When you are certifying a report, the last step of the Certify Report workflow involves a data quality check to ensure:

- The report contains data attributes.
- All columns have positive data quality metrics.

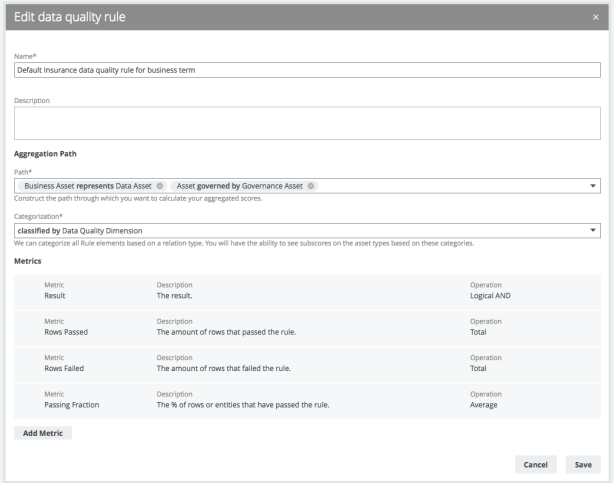
> Important  Data quality is a mandatory criterion for attaining the Gold certification level. If you don't have data quality configured, the highest certification level a report can attain is Silver.

## About data quality rules

Data quality rules are rules that calculate the quality of a certain asset based on a predefined aggregation path and metrics.

The results of a data quality rule are available in a data quality dashboard via the Quality tab on the asset page of the asset for which you calculated its data quality. Data quality rules define for which assets the data quality dashboard is created and how the data quality values are aggregated. A data quality result aggregates values that have been collected over time on attributes and that are aggregated from different assets along a number of predefined relations.

> Example
> The example shows the data quality rule **Default Insurance data quality rule for business term** and is explained in more detail in the following sections.



# Fields

### **Name** and **Description**

The data quality rule consists of a unique name and a description that is shown in the Data quality rules table in the DGC Settings and in the assignments of an asset type.

### Path

The data quality rule aggregates values that are collected through a defined aggregation path. An aggregation path consists of a chain of relations that is to be followed from the asset to which the data quality rule is assigned, to the asset containing the actual values.

In the example above, values from 'Governance Assets' are aggregated for 'Business Assets' by looking up:

- The 'Data Assets' that these business assets are represented by.
- The 'Governance Assets' that these data assets are governed by.

### Categorization

Select a relation in the categorization field to create subscores for assets at the end of the aggregation path that have this relation. The data quality dashboard on the asset's page then shows these subscores. These subscores are attributes belonging to the asset that has a relation to the asset at the end of the aggregation path.

The data quality dashboard also shows subscores limited to certain dimensions, such as 'Accuracy'. The values of an asset at the end of the aggregation path are only taken into account for these subscores if the asset 'belongs' to the given dimension. An asset 'belongs' to a dimension when it has a relation of the type defined in the Categorization to that dimension. In the given example, the 'Data Quality Rule' should have a relation Classified by to, for example, the 'Accuracy' Data Quality Dimension.

### Metrics

The metrics of a data quality rule define the values that are displayed in the data quality dashboard and which operation should be used when aggregating the value. These values are attributes that are available on the last asset of the aggregation path, in this example the 'Governance Asset'.

This section contains a couple of metrics that are fixed for each metrics group:

| Name | Operation | Description |
|---|---|---|
| Rows Passed | Total | The aggregated sum of passing rows. |
| Rows Failed | Total | The aggregated sum of failing rows. |
| Result | Logical AND | The aggregated logical and of the result: failing or passing. |
| Passing Fraction | Average | The aggregated average of the passing fraction (quality score). |

You can add extra metrics and their corresponding operation by clicking **Add Metric**.

# Create a data quality rule

You can create a new data quality rule.

## Prerequisites

- You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Data quality rules**.
3. Above the table, to the right, click **Add**.

4. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the data quality rule. |
| Description | The description of the data quality rule. |
| Path | The chain of relations to follow from the asset to which the data quality rule is assigned, to the asset containing the actual values. |
| Categorization | The relation type that determines to which subscore the metric belongs.<br><br>The values of an asset at the end of the aggregation path are only taken into account for these subscores if the asset has the relation that you enter here. |
| Metrics | The metrics of a data quality rule define the values that are displayed in the data quality dashboard and which operation should be used when aggregating the value. These values are attributes that are available on the last asset of the aggregation path.<br><br>This section contains a couple of metrics that are fixed for each metrics group:<br><br>◦ 'Rows Failed', operation 'Total': aggregated sum of failing rows<br>◦ 'Rows Passed', operation 'Total' aggregated sum of passing rows<br>◦ 'Passing Fraction', operation 'Average': aggregated average of the passing fraction (quality score)<br>◦ 'Result', operation 'Logical AND': aggregated logical and of the result: failing or passing<br>You can add extra metrics and their corresponding operation by clicking **Add Metric**. |

5. Click **Save**.

# Validation rules

Validation rules are special assets of the type **Validation Rule**. They allow you to verify whether assets meet certain criteria. They have a special attribute **Validation Script**, which contains a validation script that evaluates assets of the types to which the validation rule is assigned.

## Administrator actions

- Create a domain of the type **Validation rule domain**.
- Create a validation rule.
- Edit a validation rule.
- Delete a validation rule.
- Assign a validation rule to an asset type.
- Change the order of validation rules.
- Unassign a validation rule from an asset type.

## User actions

- Validate assets.
- View the validation result.
- Revalidate an asset.

# Create a validation rule

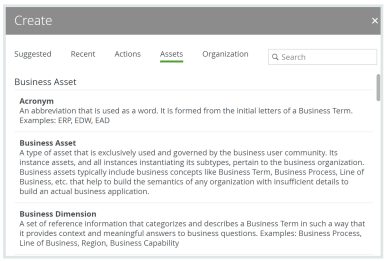
You can create validation rules to verify whether assets meet certain criteria.

## Prerequisites

- You have a domain of the type **Validation Rule Domain**.
- You have a global role that has the System administration global permission.

## Steps

1. Open any application, for example the Business Glossary.
2. In the main menu, click the **Create** (+) button.
   » The **Create** dialog box appears.
3. Click the **Assets** tab.




4. Click Validation Rule.
   » The **Create Asset** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Type | The asset type of the assets that you are creating, in this case Validation Rule. |
| Domain | The domain to which the new assets will belong. You can only create a asset type in any domain of a domain type that is assigned to a Validation Rule asset type. |

| Field | Description |
| --- | --- |
| Name | The names of the new Validation Rule assets.<br><br>Tip<br>You can create multiple assets in one go.<br>To do this, press `Enter` after typing a value and then type the next. Depending on the settings, asset names may have to be unique in their domain. If you type a name that already exists, it will appear in strike-through style. |

6. Click **Create**.
   » A message at the top-right of your screen confirms that one or more assets are created.

## What's next?

- You can now open and edit the validation rule asset, for example to add a validation script.
- Assign the validation rule to an asset type.

# Edit a validation rule

You can edit validation rules.

## Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. Open a validation rule asset.
   » The asset page appears.
2. Double-click any attribute.

3. Fill in the required information.

   > Note Learn more about the validation script attribute here: Validation scripts.

4. Click **Save**.

# Delete a validation rule

You can delete validation rules in the same way as normal assets.

You cannot delete a validation rule if it is assigned to an asset type.

## Prerequisites

- You have unassigned the validation rule from asset types.
- You have a global role that has the System administration global permission.

## Steps

1. Open the validation rule domain to which the validation rule belongs.
2. In the first row of the validation rule table, select one or more checkboxes.
3. In the action toolbar, click **Delete**.
   » The **Delete assets** dialog box appears.
4. Click **Yes**.

# Assign a validation rule to an asset type

You can assign a validation rule to an asset type by adding it to the asset type's assignment. As a result, you can validate assets of this type against this validation rule, if the asset is in the scope of the assignment.

## Prerequisites

- You have a global role that has the System administration global permission.
- You have created a Validation Rule asset.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the tab pane, click the name of the assignment.
3. In the tab pane, click **Validation rules**.
   » The **Asset type - Validation rules** editor appears.
4. Above the table, to the right, click **Edit**.
5. Above the table, to the right, click **Add**.
   » The **Add validation rule** dialog box appears.
6. Click a validation rule.
   » The validation rule appears at the bottom of the list of validation rules.
   If required, change the order.
7. Click **Save**.

# Change the order of validation rules

You can change the order of validation rules that are assigned to an asset type.

The order of the validation rules will determine the order in which they are executed and shown on the asset page.

## Prerequisites

- You have an asset type that has multiple validation rules assigned to it.
- You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.

   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the tab pane, click the name of the assignment.
3. In the tab pane, click **Validation rules**.
   » The **Asset type - Validation rules** editor appears.
4. Above the table, to the right, click **Edit**.
5. Click ✣ in front of a validation rule and hold down the mouse button.
6. Move your mouse to the desired location in the order.
7. Release the mouse button.
8. Click **Save**.

# Unassign a validation rule from an asset type

You can unassign a validation rule from an asset type via its assignment.

## Prerequisites

- A validation rule that is assigned to an asset type.
- You have a global role that has the System administration global permission.

## Steps

1. Open an asset type.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. Click **Operating Model**.
      » The operating model settings appear on the **Asset types** tab page.
   c. In the overview of asset types, click an asset type.
   » The **Asset type** editor opens.
2. In the tab pane, click **Global assignment** or the scope to which you want to add the validation rule.
3. In the tab pane, click **Validation rules**.
   » The **Asset type - Validation rules** editor appears.
4. Above the table, to the right, click **Edit**.

5. In the validation rule table, click 🗑 at the end of the line of a validation rule.
6. Click **Save**.

# Executing validation rules

You can execute validation rules in many ways:

- Validate assets
  Do this to manually validate assets.
- Revalidate an asset
  Do this after editing an invalid asset.
- Automatically.
  You can configure a workflow to start a validation on given events. For example when a asset is added or an attribute is edited.
  To configure triggers on certain events, see Getting started with workflows.

## Validation logging

Collibra Data Governance Center can write extensive log messages from the execution of validation rules. These messages are written to the **dgc.log** file.

If the execution of a validation rule fails, analyzing the log is probably the most thorough approach.

For more information on how to configure validation logging, see Logging.

> Tip When contacting support regarding a problem with validation, attach the log file to the ticket.

## Validate assets

Validating an asset executes all validation rules assigned to the asset type. If an asset does not meet all validation rules, the asset is invalid.

You can see the validation result on:

- An asset page's title bar.
- As a column, when viewing assets in table display mode.

- As a field, when viewing assets in tiles display mode.
- As an overlay in a traceability diagram.

After validation, the **dgc.log** file will also contain more extensive messages. For more information on how to configure validation logging, see Logging.

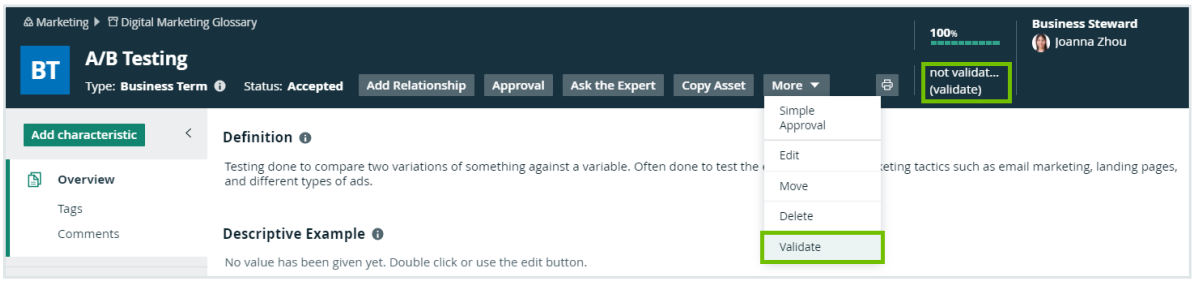
> Note By default, validation is not automatically triggered when an asset is edited, so you have to revalidate it after editing an asset. However, you can create a workflow for this. To configure validation on certain events, see Getting started with workflows.

## Prerequisites

- Either of the following:
  - You have a resource role with the Validation Execution resource permission, for example Community Manager.
  - You have a global role that has the Manage all resources global permission.

## Validate an asset from the asset page

1. Open an asset page.
2. In the resource toolbar, click **(validate)**.




## Validate one or more assets from an asset table

1. Open a set of assets in table display mode.
2. Select checkboxes in front of the assets you want to validate.
3. In the action toolbar, click **Validate**.

## Validate one or more assets from a set of tiles

1. Open a set of assets in tile display mode.
2. Select the assets you want to validate.
3. In the action toolbar, click **Validate**.

# Revalidate an asset

You can revalidate assets that were previously validated to see whether they meet the validation rules that are assigned to the asset type.

Validating an asset executes all validation rules that are assigned to the asset types. If an asset does not meet all validation rules, the asset is invalid.

You can see the validation result:

- An asset page's title bar.
- As a column, when viewing assets in table display mode.
- As a field, when viewing assets in tiles display mode.
- As an overlay in a diagram.

> Note You can create a workflow to automatically revalidate assets. To configure validation on certain events, see Getting started with workflows.

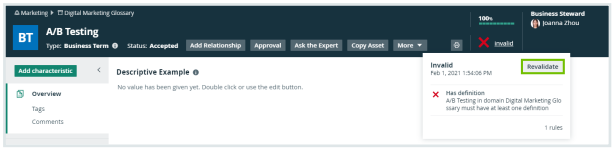
## Prerequisites

- Either of the following:
  - You have a resource role with the Validation Execution resource permission, for example Community Manager.
  - You have a global role that has the Manage all resources global permission.

## Revalidate an asset from the asset page

1. Open an asset.
2. In the upper right corner, click ✓ **valid** or ✕ **invalid**.

3. Click **Revalidate**.

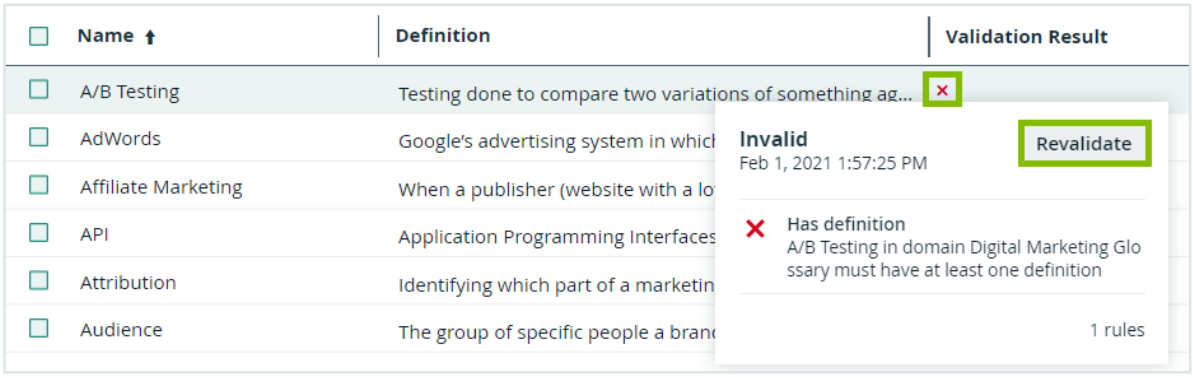



## Revalidate one or more assets from an asset view

1. Open an asset table.
2. Select checkboxes in front of one or more assets.
3. In the action toolbar, click **Validate**.

## Revalidate an asset from an asset view

1. Open an asset table.
2. If you don't see the **Validation Result** column, add it to the table.
   More info on adding columns to a table: Customizing tables.
3. Click ✓ or ✗.
   You can see the validation result of each validation rule.
4. Click **Revalidate**.

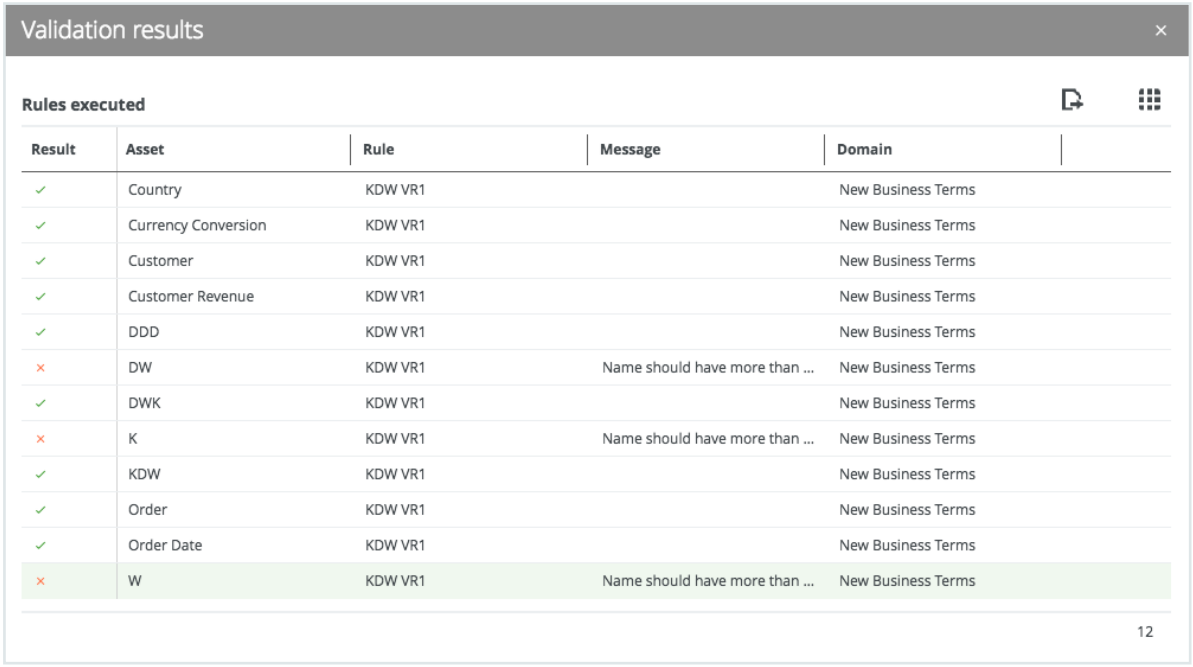



# View the validation result

After validating or revalidating assets, you can view the result and make changes where necessary.

# View the validation result from the activities list

1. Open the activities list.
   » In the table, you see the validations.
2. In the results column, click **Result**.
   » The **Validation results** dialog box appears.
   Example




3. The results column shows ✓ or ✗ to indicate whether they are respectively valid or invalid.

> Tip If you want to fix invalid assets, you can open them by clicking them.

# View the validation result on the asset page

1. Open an asset page.
2. In the upper right corner, you see ✓ **valid** or ✗ **invalid**.

# View the validation result in an asset table

1. Open an asset table.
2. If you don't see the **Validation Result** column, add it to the table.
   More info on adding columns to a table: Customizing tables.

3. Click ✓ or ✕.
   » You can see the validation result of each validation rule.

# Validation scripts

A validation script is an attribute of a validation rule asset. It contains the validation logic, which expresses a single condition to evaluate assets.

The outcome of the evaluation is binary:

- **valid**: The validated asset meets the condition.
- **invalid**: The validated asset does not meet the condition.

Depending on the result, it can also show a custom message.

Validation scripts are written using a syntax that is based on Groovy, but enhanced specifically for validation rules in Collibra Data Intelligence Cloud.

> Tip For general syntax-related questions, you can always refer to the Groovy syntax.

Within the validation script, you can use the following features:

- Aggregate functions
- Validation functions
- Multi-line boolean expressions
- Collections
- Closures

## Validation script structure

The structure of validation scripts can be basic or advanced. More information:

- Basic script structure
- Advanced validation script structure

## Basic script structure

The basic script structure only contains the pure validation logic in a `rule`. More information: Validation logic.

```
rule {

}
```

Example
The following script checks that the asset name is not empty and contains more than two characters.

```
rule {
   isNotEmpty(name, message: "Name cannot be empty") &&
   isLengthMore( name, 2, message: "Name should have more
   than 2 characters")
}
```

## Advanced validation script structure

The advanced script structure contains up to three sections, which are all contained in a `rule`.

```
rule {
   given {
   }
   when {
   }
   then {
   }
}
```

Example

```
rule {
   given {
       definitions = attributes['Definition']
   }
   when {
       isEqual(type.id,\
                   '00000000-0000-0000-0000-000000011001')
   }
   then {
       isNotEmpty(definitions, \
                   message: "The asset ${name} \
           in domain ${vocabulary.name} must have
```

```
                    at least one definition")
    }
}
```

## Given-section

You can use this optional section to define variables that you can re-use in the rest of the script. Variables can make the rest of the validation script more readable. It allows you to separate data creation from the actual constraint-checking validation logic.

Each line of the given-section contains a variable name, an equal sign and an asset property. More info: Asset model.

Example
The following given-section creates the variable *definitions* , which contains a list of the values of the **Definition** attributes.

```
given {
    definitions = attributes['Definition']
}
```

## When-section

You can use this optional section if certain conditions have to be met before the rule is executed. If you do not use this section, the validation logic is applied to all assets.

If an asset does not meet these conditions, the validation logic is not executed and the outcome of the rule is **valid**.

If the conditions are met, the validation logic is executed. The outcome of the rule will then depend on the actual validation logic in the **then**-section.

Each line of the **when**-section typically contains:

1. A validation function. More info: Validation functions.
2. An attribute from the given-section, an asset property or a constant value that you entered in the script.

Example
The following when-section only allows assets to be validated if they are of a specific asset type.

```
when {
    isEqual(type.id,'00000000-0000-0000-0000-000000011001')
}
```

## Then-section

The **then**-section contains the pure validation logic. More information: Validation logic.

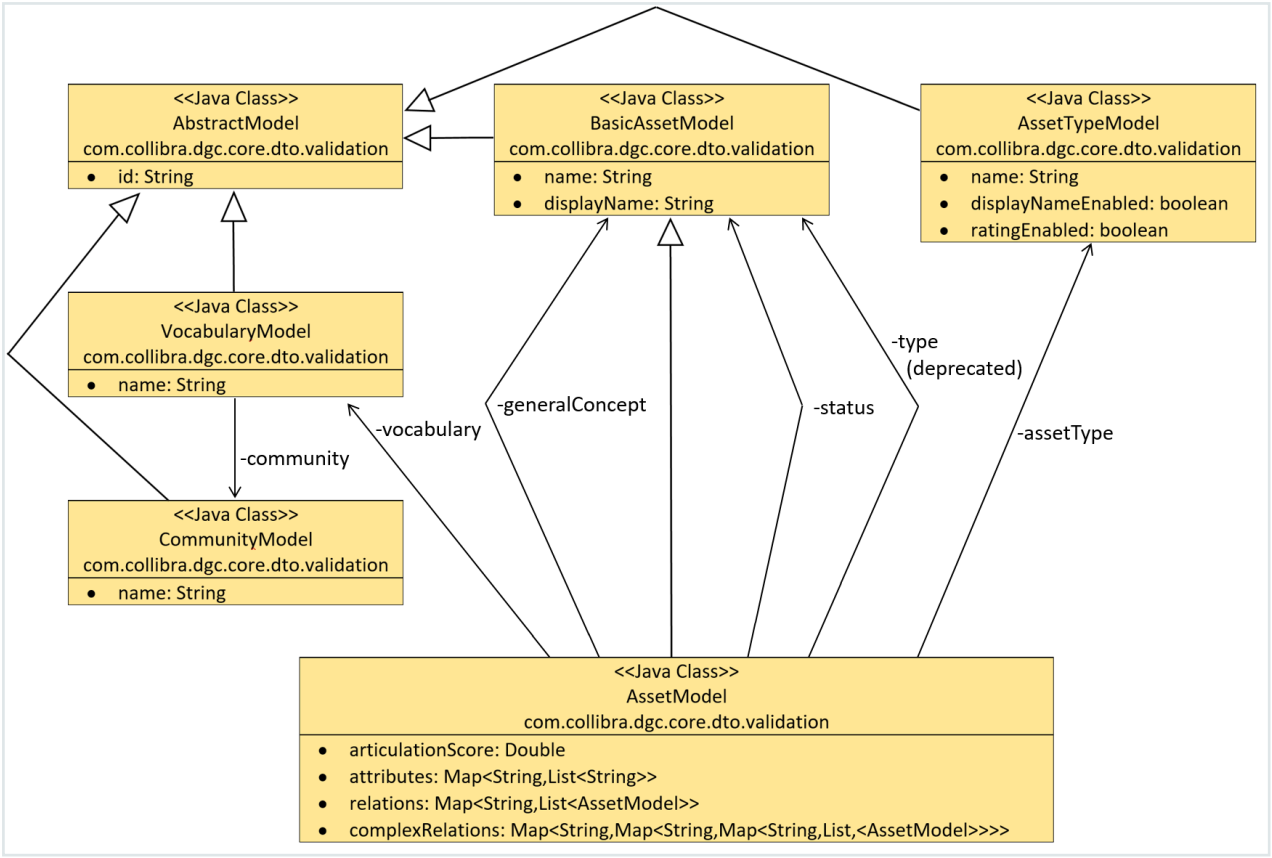
## Asset model

The asset model is the technical structure of assets. You can use the asset model to refer to specific fields of assets: its attributes and properties. This is required for optimal use of validation rules.

> Note This information does not apply to worfklows and APIs.

### Graphical representation

The asset model can be represented graphically. Further below you can find explanations on each individual field.




## General

| Field | Explanation |
|---|---|
| articulationScore | The articulation score of the asset. |
| id | The resource ID. Every resource that can be retrieved using the asset model has this property. |
| name | The full name of an asset. All resources have this property (community, vocabulary and asset). |

| Field | Explanation |
| --- | --- |
| signifier | Identical to **name** but only available for the BasicAssetModel.<br><br>> Note This field is deprecated. |
| displayName | The name of the resource. All resources have this property (community, vocabulary and asset). |
| status | The status of the asset. |
| status.id | The resource id of the status. |
| status.name | The name of the status. |
| status.signifier | Identical to **status.name**.<br><br>> Note This field is deprecated. |
| type | The asset type. |
| type.id | The resource ID of the asset type. |
| type.name | The name of the asset type. |
| type.signifier | Identical to **type.name**. |
| vocabulary | The domain of the asset. |
| vocabulary.id | The ID of the vocabulary. |
| vocabulary.name | The name of the vocabulary. |
| vocabulary.community.id | The ID of the community of the asset. |

| Field | Explanation |
| --- | --- |
| vocabulary.community.name | The name of the community of the asset. |
| generalConcept | The general concept of the asset.<br>Note This field is deprecated. |
| generalConcept.id | The ID of the general concept.<br>Note This field is deprecated. |
| generalConcept.name | The name of the general concept.<br>Note This field is deprecated. |
| generalConcept.signifier | Identical to **generalConcept.name**.<br>Note This field is deprecated. |

## Attributes

**Attributes** is a dictionary that contains all attribute values. You can retrieve the list for a given attribute type name or attribute type ID.

There are several possibilities to navigate the attributes of an asset.

| Field | Explanation |
| --- | --- |
| attributes.'Definition' | The list of all **Definition** attribute values. |
| attributes['Definition'] | Identical to **attributes.'Definition'**. |

| Field | Explanation |
| --- | --- |
| attributes['00000000-0000-0000-0000-000000000202'] | Identical to **attributes.'Definition'**, but using the resource ID of the **Definition** attribute type. |
| attributes.'00000000-0000-0000-0000-000000000202'.first() | The first attribute value within the list of all the **Definition** attributes. |
| attributes.'00000000-0000-0000-0000-000000000202'?.first() | Identical to **attributes.'00000000-0000-0000-0000-000000000202'.first()**, but null-safe.<br><br>Tip `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute. |
| attributes['Definition'][1] | The second **Definition** attribute value of the asset.<br><br>Note This uses index-based navigation of the list, and the first element has index 0. |

## Relations

Relations allow you to retrieve the list of target assets through a given relation, and each target is an asset model in itself. Navigation is done in a similar way as for attributes.

> Note (Complex) Relations are only available one level deep. This means that when your script refers to a target asset through a (complex) relation, that referred asset will contain all the aspects of the asset that are mentioned above (name, attributes, etc), but without the (complex) relations of the referred asset.

| Field | Explanation |
| --- | --- |
| relations['Related To'] | The list of target assets of all **Related To** relations. |
| relations['Related To']?.first().name | The name of the first target asset using the **Related To** relation in a null-safe way.<br><br>Tip `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute. |

## Complex relations

Complex relations are a type of relation. However, because they are less predictable, not all possible relations can be listed here.

| Field | Explanation |
| --- | --- |
| complexRelations.<complexRelationType (Name/Id)>.<firstrelationname>.<secondrelationname> | Similar to the relations, the end result will be an asset model. |

### Example

If you have a complex relation type

- with name **CRT** and id **1**,
- containing four relation types **up**, **down**, **left** and **right**,
- all sides referencing a business term.

These are the complex relations:

| Field | Explanation |
| --- | --- |
| complexRelations.CRT.up.right | The list of the complex relations from **up** to **right**. |
| complexRelations['CRT']['up']['right'] | Identical to **complexRelations.CRT.up.right**. |
| complexRelations.'CRT'?.'up'?.'right' | Identical to **complexRelations.CRT.up.right**, but does not fail in case the list of **CRT** is empty, nor if the **up** side is empty.<br><br>Tip `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute. |
| complexRelations['1'].down.up | The list of the complex relations from **down** to **up**. |

## Asset type model

| Field | Description |
| --- | --- |
| name | The full name of the asset type. |
| displayEnabled | Parameter that determines whether the Identical asset names per domain feature is enabled for the asset type. |
| ratingEnabled | Parameter that determines whether ratings are enabled for the asset type. |
| id | The resource id. |

| Field | Description |
| --- | --- |
| signifier | Identical to **name** but only available for the BasicAssetModel.<br><br>Note This field is deprecated. |

## Validation logic

The validation logic of a validation rule expresses the condition that is checked by the validation rule. In a basic validation script, it is contained directly in the rule. In an advanced validation script, it is contained in the **then**-section. More information: Validation scripts.

### Structure

Each line typically consists of:

1. A validation function. More info: Validation functions.
2. An attribute from the given-section, an asset property or a constant value.
3. A message for when assets do not meet the condition of the validation function.
4. Other syntactic elements:
    - Aggregate functions
    - Validation functions
    - Multi-line boolean expressions
    - Collections
    - Closures

### What's next?

If an asset does not meet the validation logic, the outcome of the rule is invalid.
If the asset meets the validation logic, the outcome of the rule is valid.

Example

```
then {
    isNotEmpty(attributes['Definition'],
        message: "The asset ${name} in domain ${vocabulary.name} \
```

```
                    must have at least one definition")
}
```

## Validation functions

Validation functions are the functions in a validation script that check for a condition. The result is a boolean: `true` or `false`.

To make the validation script more readable, there are many packaged validation functions. The built-in validation functions not only handle the validation, but they also provide a way to produce meaningful error messages. For more advanced functions, you need a closure, more information: Closures.

### General functions

| The function... | checks whether... |
|---|---|
| isEmpty (value) | A value is empty, null or does not contain any element. |
| isNotEmpty (value) | A value is not empty. |
| isEqual (value1, value2) | A value is the same as a second value. |
| isNotEqual (value1, value2) | A value is not the same as a second value. |
| isIn (value, Collection) | A value is part of a collection. |
| areIn (Collection values, Collection collection) | A collection is part of another collection. |
| isAny (Collection, Closure) | Any value of a collection meets the criteria of a validation closure. |
| isEvery (Collection, Closure) | All values of a collection meet the criteria of a validation closure. |

| The function... | checks whether... |
|---|---|
| isFalse (value) | A value is false, empty or null according to the Groovy truth.<br><br>Examples:<br><br>• `isFalse (something)`: returns true if `something` is false.<br>• `isFalse (something)`: returns false is `something` is true.<br>• `isFalse (false)`: returns true.<br>• `isFalse (null)`: returns true. |
| isTrue (value) | A value is true, empty or null according to the Groovy truth.<br><br>Examples:<br><br>• `isTrue (something)`: returns false if `something` is false.<br>• `isTrue (something)`: returns true is `something` is true.<br>• `isTrue (false)`: returns false.<br>• `isTrue (null)`: returns true. |
| isUnique (Collection, Closure) | All values in a collection are unique.<br><br>Examples:<br><br>• `isUnique ([1,2,3])`: will evaluate to true.<br>• `isUnique ([1,2,3,1])`: will evaluate to false.<br><br>Examples:<br><br>The closure `{it % 2}` allows only one even and one odd element in the list.<br><br>• `isUnique ([3, 4], {it % 2})`: will evaluate to true.<br>• `isUnique ([1, 3, 4], {it % 2})`: will evaluate to false, because both 1 and 3 are odd. |

| The function... | checks whether... |
| --- | --- |
| validate (value) | A value is a valid function, accepting any closure that is capable of returning true or false.<br>Tip Validate (value) is a general validation function used to check another function. |

## Error messages

If you add a `message` parameter in a validation function, a message appears if the result is `false`.

You can add the message parameter anywhere in the list of function parameters.

Example

```
isEmpty (value, message: "this value is not empty") is equivalent to
isEmpty (message: "this value is not empty", value).
```

You can also include parameters in your message by using `${<asset property>}`.
More info on asset properties: Asset model.

Example:

```
message: "The description of the ${name} asset in domain ${vocab-
ulary.name} is empty.".
```

When this message appears, `name` and `vocabulary.name` are automatically replaced by its value.

> Note Message parameters entered in the when-clause will not be taken into account.

## String functions

| The function... | checks whether the value... |
|---|---|
| isEmpty (value) | Is empty or null. |
| isNotEmpty (value) | Is not empty. |
| startsWith (value, prefix) | Starts with `prefix`. |
| contains (value, sub-string) | Contains the given substring. |
| endsWith (value, suffix) | Ends with the given suffix. |
| isLengthBetween (value, minLength, maxLength) | Has a length between the specified range.<br>Note The range is inclusive. For example `isLengthBetween ('Hello', 2, 6)` is true. |
| isLengthLess (value, maxLength) | Has a length less than the specified length. |
| isLengthMore (value, minLength) | Has a length longer than the specified length. |
| isLengthEq (value, length) | Has the specified string length. |
| isAlpha (value) | Contains only alphabetical characters.<br>Note This is done through the regular expression `[a-zA-Z]+`. |
| isAlphaSpace (value) | Contains only alphabetical characters and spaces. |
| isAlphanum (value) | Contains only alphabetical characters and digits. |

| The function... | checks whether the value... |
|---|---|
| isAlphanumSpace (value) | Contains only alphabetical characters, digits, and spaces. |
| matches (value, regular expression) | Matches the specified regular expression.<br>A regular expression has to be placed between two forward slashes (`/`).<br>Examples:<br>• `matches ("stream", /str.*/)` checks whether `stream` matches the pattern `str.*`, which will result to true.<br>• `matches ("stream", /srl.*/)`: checks whether `stream` matches the pattern `srl.*` which results to false. |

## Number functions

| The function... | checks whether a number... |
|---|---|
| isEven (number) | Is even. |
| isOdd (number) | Is odd. |
| isGreater (number1, number2) | Is greater than the second number. |
| isGreaterEq (number1, number2) | Is greater than or equal to the second number. |
| isLess (number1, number2) | Is smaller than the second number. |
| isLessEq (number1, number2) | Is smaller than or equal to the second number. |

| The function... | checks whether a number... |
|---|---|
| isPositive (number) | Is greater than zero. |
| isNonnegative (number) | Is greater than or equal to zero. |
| isNegative (number) | Is smaller than zero. |
| isBetween (number1, number2, number3) | Is greater than the second but smaller than the third number. |

## Date conversion functions

You can use the date conversion functions to convert the date or time from one format to another.

| Implementation | Purpose |
|---|---|
| `Long toTimestamp(String dateConstant) {`<br>`  LocalDateTime.of(`<br>`  LocalDate.from(DateTimeFormatter.ISO_LOCAL_DATE.parse(dateConstant)),`<br>`  LocalTime.of(0, 0, 0)`<br>`  ).atOffset(ZoneOffset.UTC).toInstant().toEpochMilli()`<br>`}` | Converts a date constant to a timestamp.<br>• `@param dateConstant`: the date in `yyyy-MM-dd` format .<br>• `@return`: the timestamp of the dateConstant. |

| Implementation | Purpose |
| --- | --- |
| `String toDateConstant(Long timestamp) { Instant.ofEpochMilli(timestamp).atOffset (ZoneOffset.UTC) .format(DateTimeFormatter.ISO_LOCAL_DATE) }` | Converts a timestamp to a date string in `yyyy-MM-dd` format.<br>• `@param timestamp`: the timestamp to convert.<br>• `@return`: the string representation of the timestamp. |
| `String toDateConstant(Long timestamp, String pattern) { Instant.ofEpochMilli(timestamp).atOffset (ZoneOffset.UTC) .format(DateTimeFormatter.ofPattern(pattern, ValidationConfig.getInstance ().getLocale())) }` | Converts a timestamp to a string using the given pattern.<br>• `@param timestamp`: the timestamp to convert.<br>• `@param pattern`: the pattern to use for conversion. For example: *yyyy-MM-dd*.<br>• `@return`: the string representation of the timestamp in the given pattern representation. |

| Implementation | Purpose |
| --- | --- |
| `String now() { Instant.now().atOffset(ZoneOffset.UTC).format(DateTimeFormatter.ISO_LOCAL_DATE) }` | Returns the current date string in `yyyy-MM-dd` format.<br>• `@return`: the current date in `yyyy-MM-dd` format. |

## Date functions

The functions for attributes with datatype **Date**, require a long value as timestamp, in the UNIX Epoch time format `1234567890000`, and a string value as calendar date, in the ISO extended format `YYYY-MM-DD`.

| The function... | checks whether a timestamp is... |
| --- | --- |
| now() | Returns the current date. |
| isPast (Timestamp) | In the past (before the system date). |
| isFuture (Timestamp) | In the future (after the system date). |
| isEqual (Timestamp, Date) | The same as the date. |
| isLess (Timestamp, Date) | Smaller than the date. |
| isLessEq (Timestamp, Date) | Smaller than or equal to the date. |
| isGreater (Timestamp, Date) | Greater than the date. |

| The function... | checks whether a timestamp is... |
|---|---|
| isGreaterEq (Timestamp, Date) | Greater than or equal to the date |
| isBetween(Timestamp, Date1, Date2) | Greater than the first but smaller than the second date. |

## Aggregate functions

Aggregate functions allow you to extract a value from a collection. More information on collections: Collections.

They are not validation functions in itself, but can help you in retrieving data you want to refer to more easily in the rest of your validation script.

| Function | Result |
|---|---|
| max (Collection) | The maximum of the given collection of values. |
| min (Collection) | The minimum of the given collection of values. |
| avg (Collection) | The average of the given collection of number values. |
| sum (Collection) | The sum of the given collection of number values. |

## Multi-line boolean expressions

The validation script of a validation rule may consist of multiple boolean expressions. To increase legibility, you can use specific constructs.

Using the constructs makes your rule a little more verbose, but more readable in most cases.

## Constructions

| Expression | Purpose |
|---|---|
| allOf | All the conditions have to be valid (= `AND`). |
| anyOf | One or more of the conditions have to be valid (= `OR`). |
| condition | Capture the result of a boolean to re-use in other constructs. |

## Examples

The examples below give the same result but are formulated in a single line, multi-line or in a hybrid construct.

Single-line expression:

```
rule {
((isNotEmpty (name) && isEqual (name, 'doesnotequal2', message:
'shouldfail')\
 || isEqual (name, 'doesnotequal')) && isNotEmpty (id)
}
```

Multi-line expression:

```
rule {
    allOf {
   anyOf {
       allOf {
       condition { isNotEmpty (name) }
       condition { isEqual (name, 'doesnotequal2', message:\
'shouldfail') }
       }
       condition { isEqual (name, 'doesnotequal') }
   }
   condition { isNotEmpty (id) }
    }
}
```

Hybrid expression:

```
rule {
    allOf {
   anyOf {
       condition { isNotEmpty (name) && isEqual (name,\
```

```
                'doesnotequal2', message: 'shouldfail') }
        condition { isEqual (name, 'doesnotequal') }
    }
    condition { isNotEmpty (id) }
     }
}
```

## Closures

A closure is a function that you can pass as an argument to another function.

It is contained by curly brackets, `{<closure>}`.

You can also define variables before the arrow `->`

> Tip For more extensive documentation about closures, please refer to the Groovy closure documentation.

## Examples

| Closure | Purpose |
|---|---|
| {a, b -> a + b} | 1. Define two variables of an undefined type.<br>2. Add them up.<br>3. Show the result. |
| {String a -> isNotEmpty (a) } | 1. Define a variable of the type `String`.<br>2. Apply the validation function `isNotEmpty` on it.<br>More info: isNotEmpty (value). |
| {isNotEmpty (it)} | 1. Apply the validation function `isNotEmpty` on any variable that has `it` as its name.<br>More info: isNotEmpty (value).<br>> Tip Naming an argument is not necessary when there is only one. |

# Collections

A collection is a list of data. Usually you create it when retrieving attributes or relations.

You can refer to a specific element in the collection in multiple ways.

> Note If a reference points to a value that doesn't exist, the rule will crash. For example, retrieving the fifth value of a list that only contains four values causes a crash.

| Reference | Result |
|---|---|
| mylist.first() | The first value in the list `mylist`. |
| mylist.last() | The last value from the list `mylist`. |
| mylist[1] | The second element from the list `mylist`. The number is the index of the value you want to retrieve from the list.<br>> Note The first element has index zero. As a consequence, `mylist.first()` is equivalent to `mylist.[0]`. |
| mylist.get(1) | The second element from the list my list. It is very similar to the example above. |
| mylist?.get(1) | The second element from the list. However, this syntax is null-safe. `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute. |

## Using the *. operator in collections

When using relations, you sometimes only need to have one value of the target assets, such as the name. You can use the `*.` operator for this.

| Script | Purpose |
| --- | --- |
| isIn ('expectedTargetName', relations['Is Related To']*.name) | Check whether `expectedTargetName` is in the list of all names of the target assets. The `*.` operator applies the `.name` on every target asset and creates a new list. |
| isEvery (relations['Is Related To']*.name, {targetName -> startsWith (targetName, 'S')}) | This will check that every target asset related to the current asset has a name that starts with `S`. |

## Validate the first element of a collection

In many situations, the first element is the only element you actually want to validate. For example, if you want to check if the first **Description** attribute is equal to a certain value, you can do this:

| Script | Purpose |
| --- | --- |
| isEqual (attributes['Description'].first(), 'myvalue') | Retrieve the first element from list of `Descriptions` and compare this to `myvalue`. |
| isEqual (attributes['Description'], ['myvalue']) | Check wether the list of `Descriptions` is equal to the given list `['myvalue']`. This is identical to the first example, but has as a side effect that if there is more than one occurrence of the `Description` attribute, the comparison will return false. As a consequence, it validates that there is exactly one `Description` attribute. |

# Validation script examples

These are examples of real validation scripts of validation rules.

- An asset must have at least one definition.

```
rule {
    isNotEmpty (attributes.'Definition'?.first(), \
        message:"The Asset ${name} in domain ${vocabulary.name}
\
   must have at least one Definition")
}
```

- An attribute must comply to a given pattern (defined using a regular expression).

```
rule {
    given {
    codes = attributes.'Code'
    }
    when {
    isNotEmpty (codes)
    }
    then {
    matches (codes.first(), /S\d\d\d\d\d000/,\
    message: "The asset ${name} in domain \
       ${vocabulary.name} Code must start with\
           an S, then 5 digits, then 000")
    }
}
```

- All assets with a `related to` relation must have at least one `uses` relation.

```
rule {
    given {
    relatedTo = relations.'Related To'
    uses  = relations.'Uses'
    }
    when {
    isNotEmpty (relatedTo)
    }
    then {
    isNotEmpty (uses, message: "Asset ${name}\
       has Related To relation, so it must \
       also have a Uses relation")
    }
}
```

- An asset must comply to the following naming rule, defined by a regular expression: starts with T, followed by 4 digits, 2 zeroes and exactly one 0, 1 or 2.

```
rule {
    matches (name, /T(\d{4})0{2}[0,1,2]/, \
        message: "Asset ${name} does not comply to naming
rule")
}
```

- An asset name must consist of one or more words in capitals.

```
rule {
    matches(name, /(\p{Upper}+|\p{Space}*)*/, \
        message: "Name ${name} should be words in capitals")
}
```

- All codes for a given asset must be in a different code list.

```
rule {
    given {
    code_domains = \
       relations.'Code'?.vocabulary?.name
    }
    then {
    isUnique (code_domains)
    }
}
```

- A code must be related to only one business term.

```
rule {
    given { terms = relations.'Business Term'
    }
    when { isNotEmpty (terms)
    }
    then { isEmpty (terms[1] )
    }
}
```

- All target assets using the `Transform` complex relation following the `from` and `to` branch, must have the same name as the current asset.

```
rule {
    isEvery (\
   complexRelations.'Transform'.from.to.name, \
      {isEqual(name, it)}, \
       message: "Not all From and To names of the \
      Transform relation are equal")
}
```

- The total score of each asset related to the current asset through an `Impacted By` relation may not exceed 100.

```
rule {
    given {
    impacted = relations.'Impacted By'.
    totalScoresForEachRelatedAsset = impacted?.collect\
       {it.attributes['Score'].sum {it.toIteger()}}
    }
```

```
    when {
    isNotEmpty (totalScoresForEachRelatedAsset)
    }
    then {
    isEvery (totalScoresForEachRelatedAsset, \
            { isLessEq (it, 100)}, \
            message: 'Not all related assets have a \
            total score smaller or equal to 100')
    }
}
```

- When the first target asset of the current asset using the `Is Grouped By` relation is inactive, then the current asset must be inactive. Whether or not the current asset is active or not, is based on the boolean attribute `Active`.

```
rule {
    given {
    reference = relations.'Is Grouped By'?.first()
    active = reference.attributes.'Active'?.first()
    }
    when {
    isNotEmpty (reference) && isFalse (active)
    }
    then {
    isFalse (active, message: "The node '${name}' in\
       '${vocabulary.name}' should also be inactive, \
       since it parent is inactive.")
    }
}
```

# Scopes

A scope in Collibra Data Intelligence Cloud is a selection of communities and domains that you can refer to in an assignment of an asset type. Each community or domain belongs to exactly one scope.

## Default scope and custom scopes

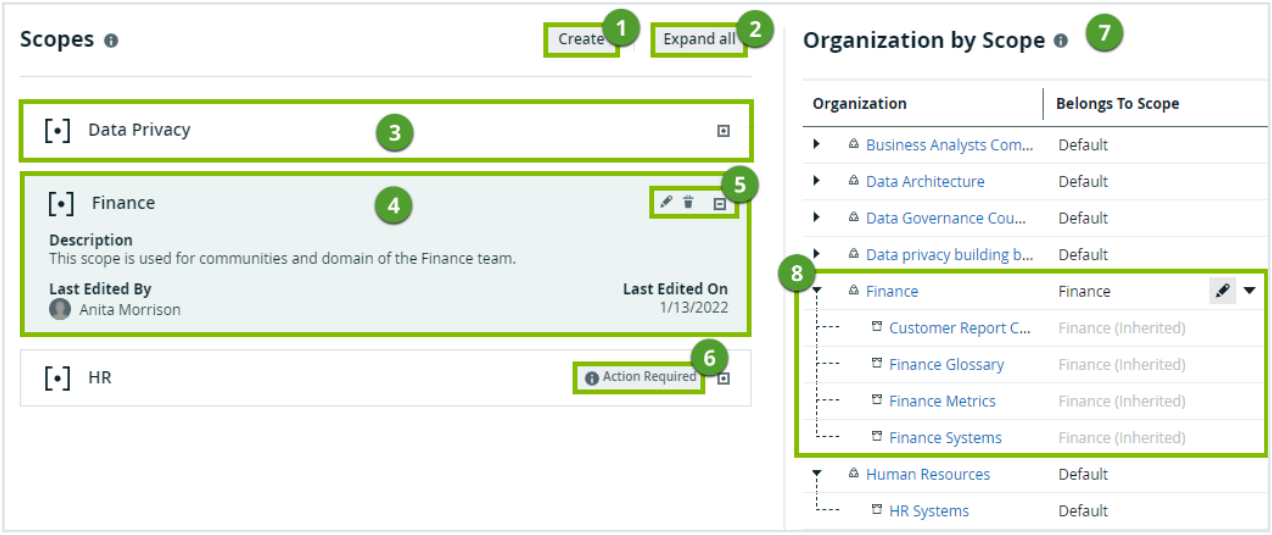
Collibra always has a default scope. Initially, all communities and domains are part of the default scope.

Depending on your requirements, you can create custom scopes and add specific communities and domains to it. If you add a community or domain to a custom scope, it is no longer part of the default scope. If you delete a custom scope, or remove communities and domains from a custom scope, the affected communities and domains revert to the default scope.

For more information about scopes after an upgrade from version 4.x to 5.x, see Collibra Support Portal.

## Scopes page overview

The Scopes page in the Collibra Settings provides an overview of the scopes in the Collibra Data Intelligence Cloud.




| Number | Section | Description |
|---|---|---|
| 1 | **Create** button | Button to create a scope. |
| 2 | **Expand all** / **Collapse all** button | Button to expand or collapse all scope tiles. |
| 3 | Collapsed scope tile | Scope tile that is collapsed to reduce its size. You can expand it by clicking the ⊡ button. |
| 4 | Expanded scope tile | Scope tile that is expanded, showing the metadata about the scope, such as the description. |
| 5 | Scope action buttons | Buttons to edit or delete the scope, and to collapse the scope tile. |
| 6 | **Action Required** warning | Warning to indicate that this scope currently does not contain any communities or domains. |
| 7 | **Organization by Scope** section | Section that contains an overview of communities and domains, and shows to which scope each community and domain belongs. |

| Number | Section | Description |
| --- | --- | --- |
| 8 | Communities and domains per scopes | A community that belongs to a custom scope. Its domains and subcommunities inherit the same scope. |

# Create a scope

You can create a scope, for example, if you want to create a specific assignment for assets in a certain community.

## Prerequisites

- You have a global role that has the System administration global permission.

## Steps

1. Open the Scopes page.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. In the **Operating model** section, click **Scopes**.
      » The Scopes page opens.
2. In the **Scopes** section, click **Create**.
   » The **Create Scope** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the scope. |
| Description | The description of the scope, for example to add extra details. |

4. Click **Save**.

## What's next?

You can now edit the scope to add domains and communities to the scope. After that, you create a scoped assignment for one or more asset types.

# Edit a scope

You can edit a scope, for example, if you want to change which assignment is used for a certain community or domain.

## Prerequisites

- You have a global role that has the System administration global permission.

## Steps

1. Open the Scopes page.
   a. On the main menu, click ⠿, then ⚙ **Settings**.
      » The Collibra settings page opens.
   b. In the **Operating model** section, click **Scopes**.
      » The Scopes page opens.
2. If required, edit the name and description of a scope:
   a. Click ✎ in the tile of the scope.
      » The **Edit Scope** dialog box appears.
   b. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the scope. |
| Description | The description of the scope, for example to add extra details. |

   c. Click **Save**.
3. If required, add communities and domains to or remove them from a scope in the **Organization by Scope** section:
   a. In the row of a community or domain, click ✎ in the **Belongs To Scope** column.
      » The cell editor appears.
   b. Type the name of the scope, or use the drop-down menu ▼.
   c. Click ✔.

## What's next?

If required, create a scoped assignment for one or more asset types.

# Delete a scope

You can delete a scope, for example, if you want an asset type to use the default assignment.

When you delete a scope, the asset types that used this scope, revert to other custom scopes or, if there are no other custom scopes, to the default assignment.

## Prerequisites

- You have a global role that has the System administration global permission.

## Steps

1. Open the Scopes page.
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. In the **Operating model** section, click **Scopes**.
      » The Scopes page opens.
2. In the scope's tile, click .
   » The **Delete <scope name>** dialog box appears.
3. Click **Delete**.

# Workflows

You can find this section on the Collibra Developer Portal.

Collibra Insights - Reporting Data Layer and Dashboard Reporting Configuration

You can find the most up-to-date technical documentation on our Documentation Center at

https://productresources.collibra.com/docs/collibra/latest/Content/Reporting/to_reporting-intro.htm

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# The Reporting Data Layer

The objective of the Reporting Data Layer is to make reporting easier for Collibra Data Intelligence Cloud customers. It captures all your reporting data from Collibra and enables you to build reports, to visualize the data.

The Reporting Data Layer can retrieve vast amounts of data, while retaining history, and without jeopardizing Collibra front-end performance. You can then use the Collibra Insights widget to show Tableau reports, or any report that can be shown as an iframe, on your Collibra dashboard. If you're not using Tableau, you can still leverage the definition of the SQL view.

For information on how the different Reporting Data Layer tables can be linked, see Reporting data layer entity relationship diagram.

For some example reports, showing how you can leverage the power of the Reporting Data Layer, see Dashboard reports.

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# Working with your reporting data

> Note This functionality is applicable only for Collibra Data Intelligence Cloud 5.7.0 and newer versions.

# Storing your reporting data

Each night, Collibra stores a copy of your reporting data–all assets, attributes, relations, and responsibilities, for all domains and communities, including your operating model customizations–in Collibra Data Intelligence Cloud. The copy includes both real and delta data values.

Each data record includes the date on which the data was copied. These timestamped data records are copied each day and stored for a rolling period of 31 days. A copy of the data is also taken on the last day of each month, and these monthly snapshots are stored in Collibra Data Intelligence Cloud indefinitely.

## Processing and availability of the previous day's reporting data

Reporting data is processed in the Coordinated Universal Time (UTC) time zone.

> Note
> - The time at which the reporting data is ready (as identified in the last column of the following table) can vary depending on the amount of data.
> - In the following table, "local time" refers to the time in the relevant region. For example, when considering the time for the eu-west-2 region, "02:00 local time" means 02:00 in London.

| Cloud provider | Region name | Location | Data dump (UTC) | Processing begins (UTC) | Reporting data is ready (UTC) |
|---|---|---|---|---|---|
| AWS | ap-south-east-2 | Sydney | 14:00 UTC<br>00:00 (midnight) local time | Between 16:00 and 19:00 UTC<br>(02:00 and 05:00 local time) | 20:00 UTC<br>06:00 local time |

| Cloud provider | Region name | Location | Data dump (UTC) | Processing begins (UTC) | Reporting data is ready (UTC) |
|---|---|---|---|---|---|
| AWS | ca-central-1 | Canada | 04:00 UTC<br>00:00 local time | Between 06:00 and 09:00 UTC<br>(02:00 and 05:00 local time) | 10:00 UTC<br>06:00 local time |
| AWS | eu-west-1 | Ireland | 00:00 UTC<br>00:00 local time | Between 02:00 and 05:00 UTC<br>(02:00 and 05:00 local time) | 06:00 UTC<br>06:00 local time |
| AWS | eu-west-2 | London | 23:00 UTC<br>00:00 local time | Between 01:00 and 04:00 UTC<br>(02:00 and 05:00 local time) | 05:00 UTC<br>06:00 local time |
| AWS | us-east-1 | Northern Virginia | 04:00 UTC<br>00:00 local time | Between 06:00 and 09:00 UTC<br>(02:00 and 05:00 local time) | 10:00 UTC<br>06:00 local time |
| AWS | us-west-1 | Northern California | 07:00 UTC<br>00:00 local time | Between 09:00 and 12:00 (noon) UTC<br>(02:00 and 05:00 local time) | 13:00 UTC<br>06:00 local time |

# Downloading your data

Due to security considerations, you cannot access the data directly on Collibra Data Intelligence Cloud. A REST API is created to enable you to download your reporting data to a local server or your computer. If you specify the snapshot date that you want in the REST API, a ZIP file of your reporting data for the specified date is downloaded to your hard disk.

# Connecting your data with your business intelligence tool

After you have downloaded your reporting data, you must establish a connection between your data and your organization's business intelligence tool. This guide describes the procedures to do so via Amazon Web Services and Google Cloud Platform.

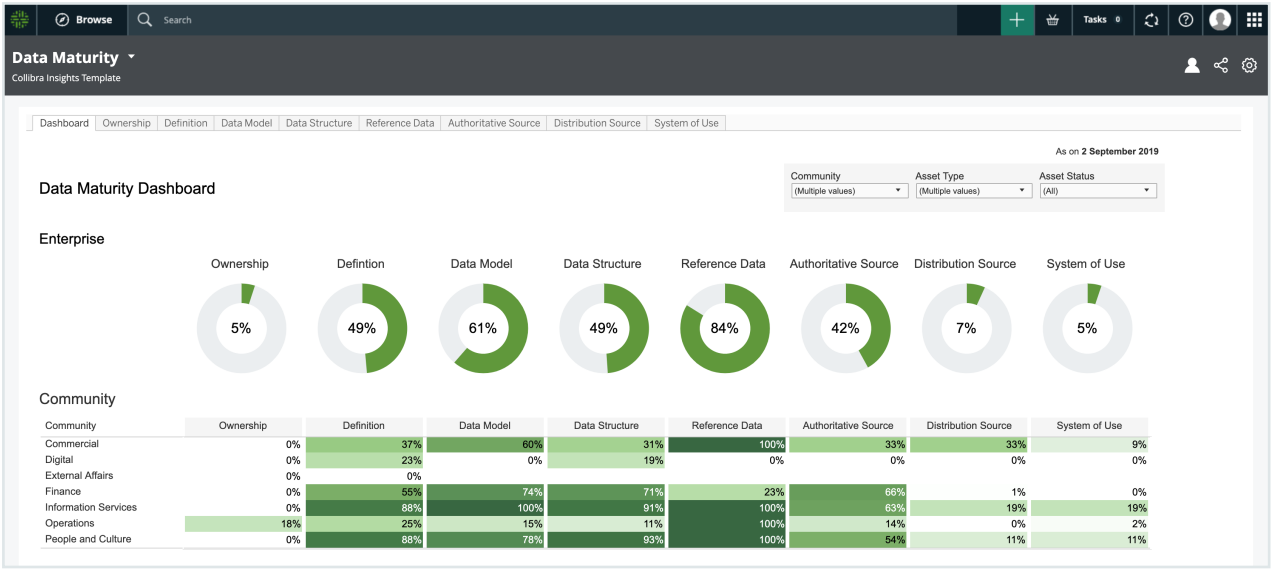
> Tip If you need assistance, contact your internal IT infrastructure team, who can advise you as to where to store the downloaded files and how to establish the connection with your organization's business intelligence tool.

# Dashboard reports

You can configure three different dashboard reports.

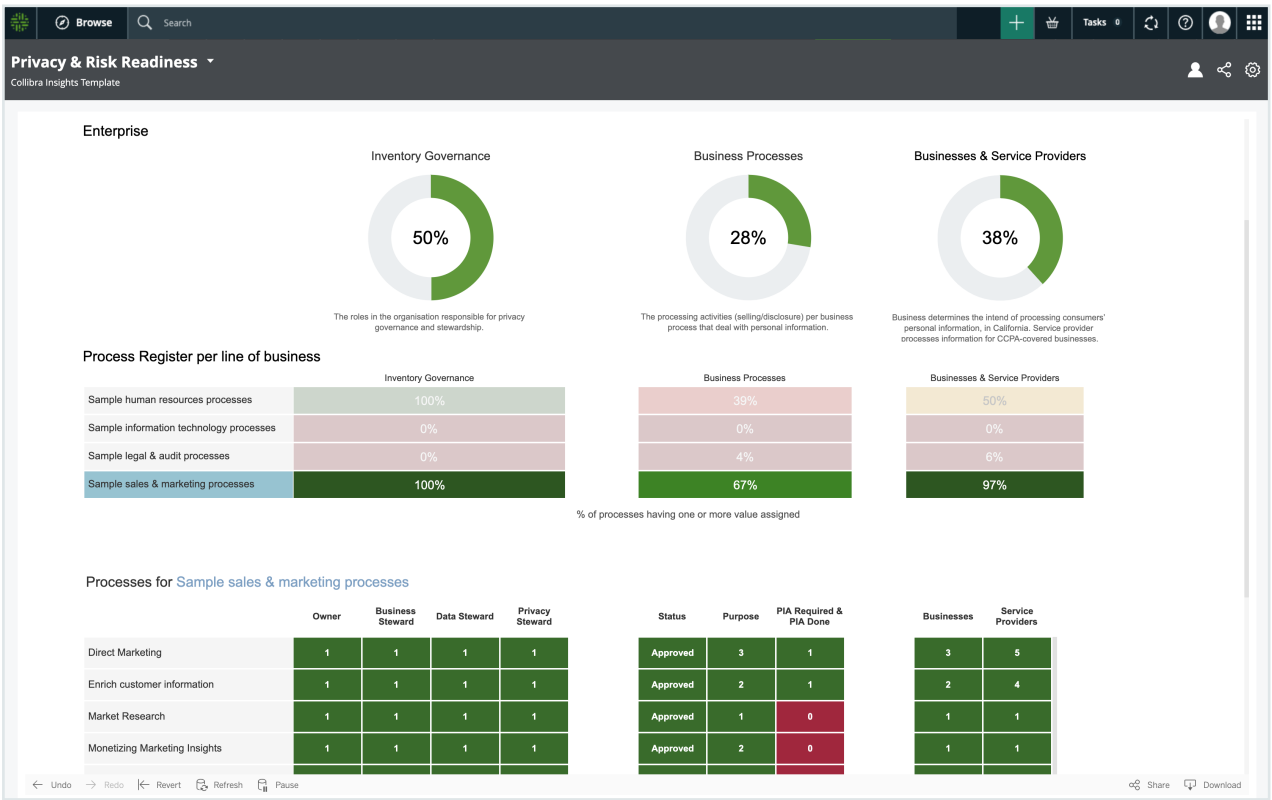
# Data Maturity

The Data Maturity report helps you track the completeness of critical assets, based on the business dimensions used in an organization.

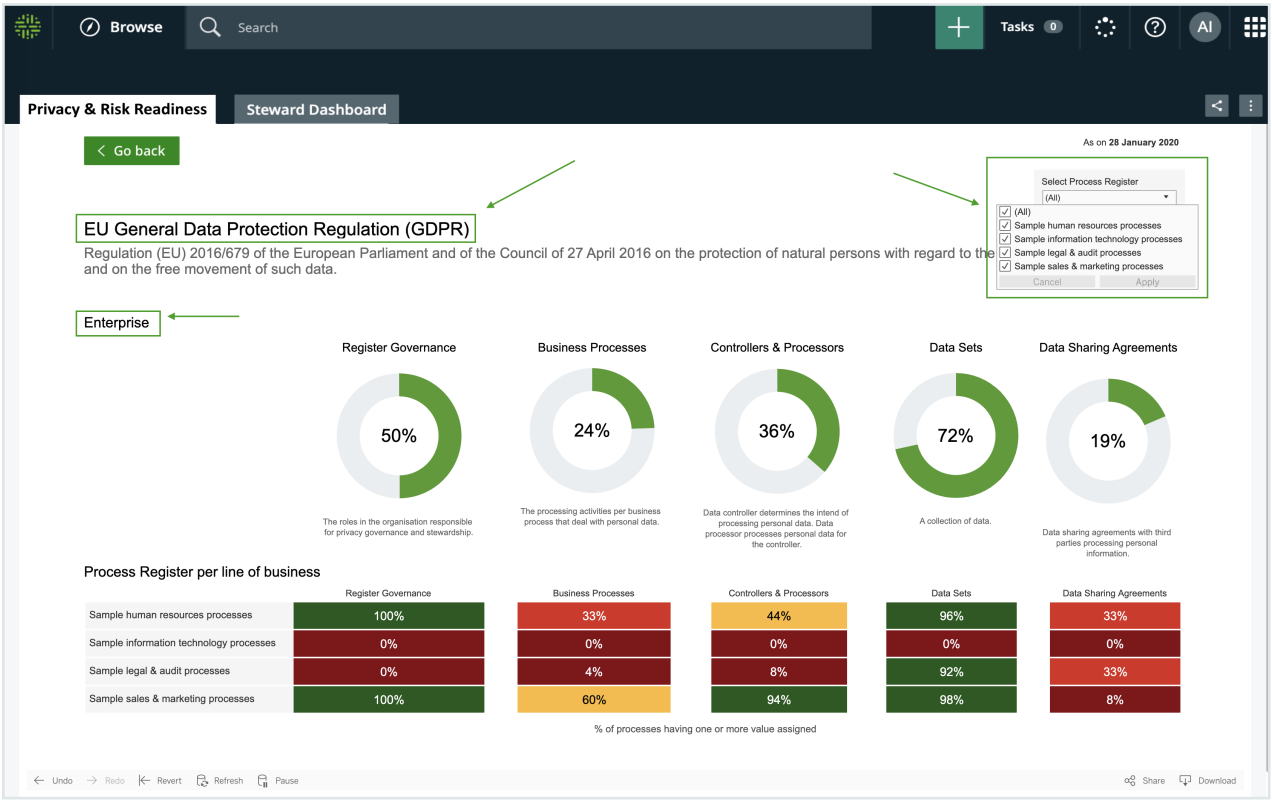



# Privacy & Risk Readiness

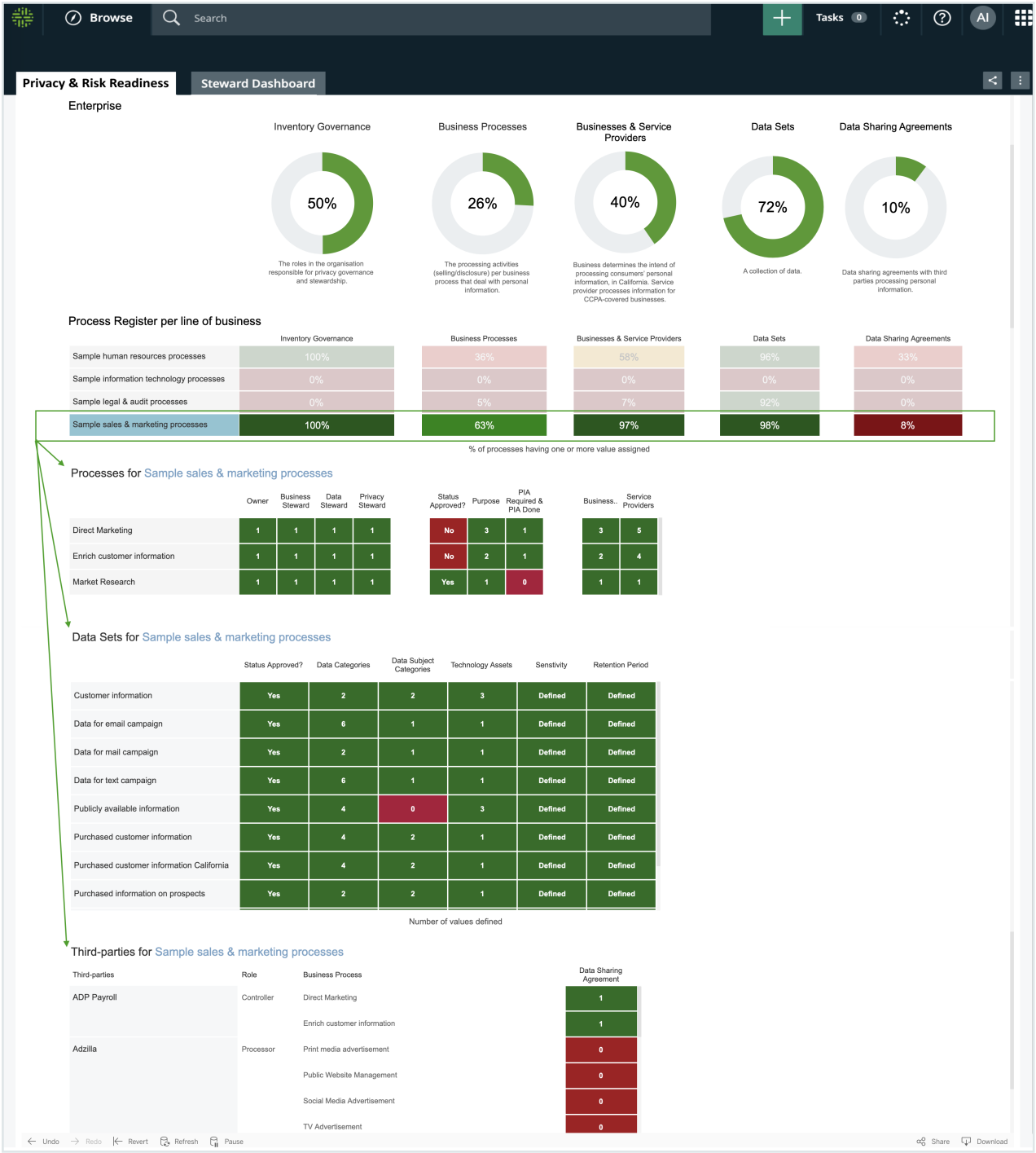
The Privacy & Risk Readiness helps you track the development of your organization's data and progress towards compliance with the relevant regulation.



You can drill down, to view the details relative to a specific regulation, for a specific community, and select the process registers you want to monitor.

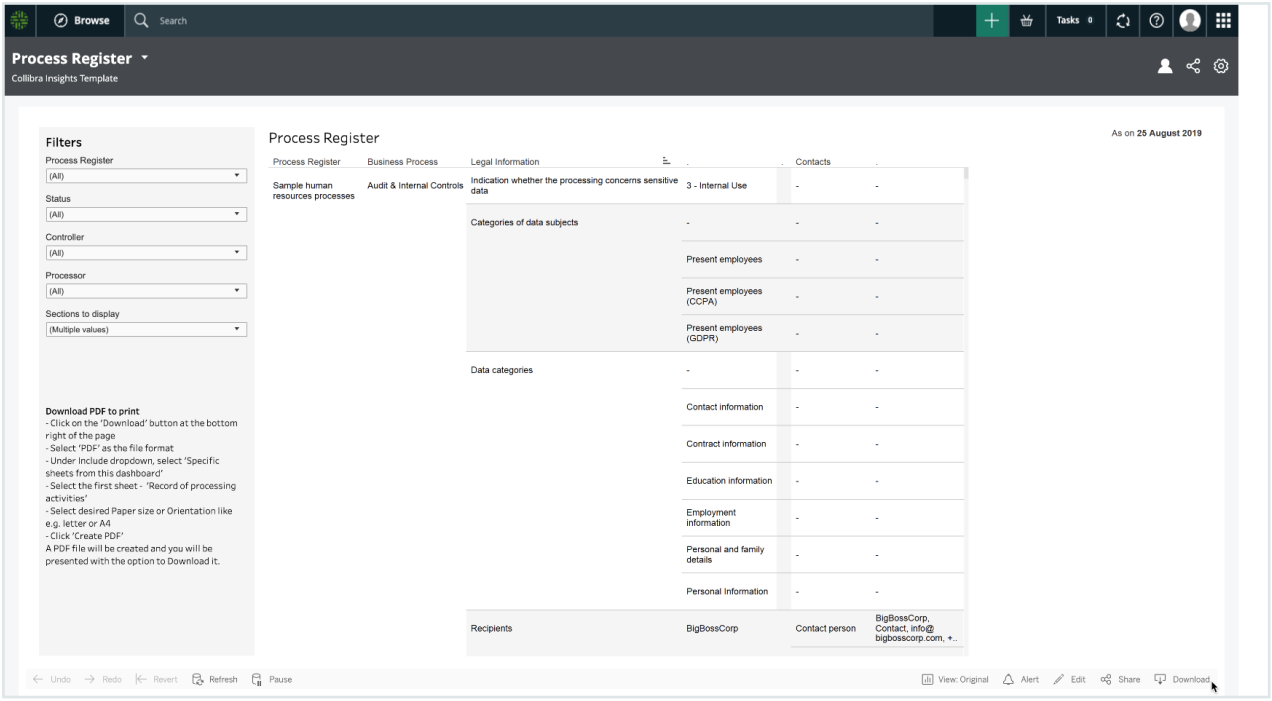



Drilling down further, you can monitor the process registers of specific lines of business, including the business processes, data sets and third-parties related to a specific process register.




# Process Register

The Process Register report shows the important information of every Business Process asset of every Process Register domain in your Collibra environment. You can download the report as a printable PDF.




# Reporting Data Layer tables

The Reporting Data Layer is comprised of eight tables. These tables reflect the data that can be accessed through the Collibra UI:

- The community hierarchy.
- All domains.
- All assets, including assets of custom asset types.
- All asset tags.
- All attributes related to these assets, such as Definition, Description and custom attributes types.
- All relations related to these assets, such as “categorizes” and “is categorized by”, including custom relation types.
- All complex relations.
- Responsibilities, such as Owner and Stakeholder, for a given resource.

> Note  Only responsibilities that are directly assigned at the asset level or domain level are included in the Reporting Data Layer. Inherited responsibilities from the community level are not.

This is the reporting data that is copied and stored in Collibra Data Intelligence Cloud, on a daily basis.

# Creating the Reporting Data Layer on AWS and generating reports

Before configuring the dashboard reports, you have to create the Reporting Data Layer on Amazon Web Services (AWS). You can then create your dashboard reports via Collibra Console or URL.

# In this chapter

# Create the Reporting Data Layer on AWS

This section provides information on how to create the Reporting Data Layer on Amazon Web Services (AWS), with S3 bucket storage and AWS Athena query service. You can, however, use alternative software. We also provide documentation on how to create the reporting data on Google Cloud Platform.

## Prerequisites

You have:

- A license for Collibra Insights.
- Collibra Data Intelligence Cloud 5.7 or newer.
- Software for working with Parquet files.

## Steps

1. Download a data snapshot from your Collibra environment
2. Upload the data to an S3 bucket
3. Download the Reporting Data Layer from Collibra Marketplace
4. Create the Reporting Data Layer model in AWS Athena

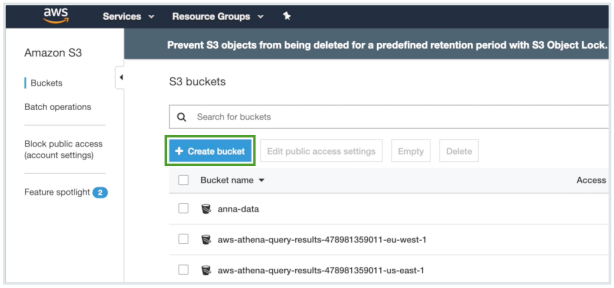
## Step 1: Download a data snapshot from your Collibra DGC environment

1. Enter the following URL in your browser: *<your-DGC-environment-URL>/rest/2.0/reporting/insights/download?snapshotDate=<snapshot_date>&format=zip*, where <snapshot date> is the date from which you want the data, formatted as YYYY-MM-DD, for example "2019-07-23".
   » A ZIP file of the data from your Collibra environment, for the specified date, is downloaded to your hard disk.
2. Extract the ZIP files on your local computer.
   » A folder with the name of the ZIP file is created.

## Step 2: Upload the data to an S3 bucket

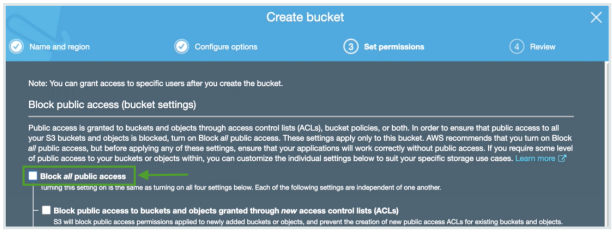
> Note This only needs to be done once for the collection Tableau workbook files. After that, you only need to carry out this step If the data layer model changes.

1. Sign in to your AWS account.
2. In the main menu, expand the **Services** page, and then select **S3**.
3. In the **Buckets** tab, click **Create bucket**.

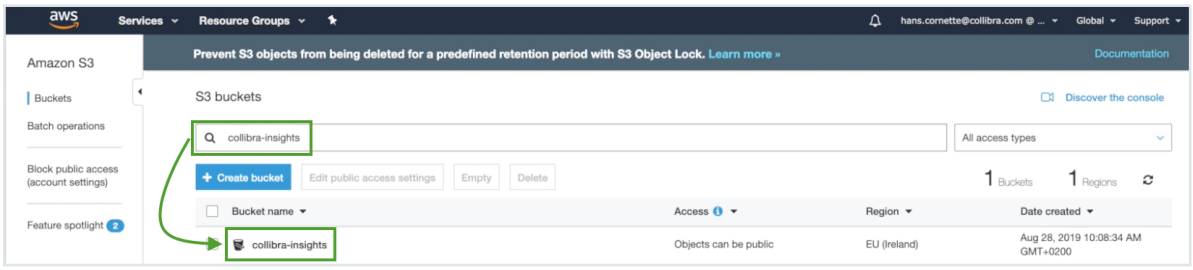



   » The **Create bucket** dialog box appears.
4. In the **Bucket name** field, enter a name for the bucket you are creating, for example "collibra-insights".
5. Click **Next**.
6. Click **Next**, to bypass the configuration options.

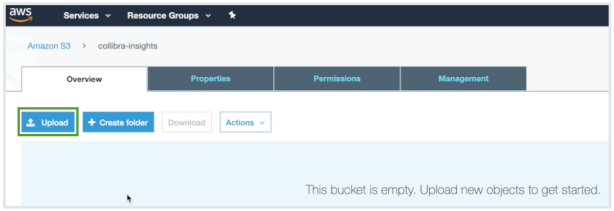
7. Clear the **Block all public access** check box, to allow access to Tableau.




8. Click **Next**.
9. Click **Create bucket**.
   » The bucket is created.
10. In the **Buckets** tab, search for your newly created bucket, and then click on it.




   » The bucket details page opens.
11. Click **Upload**, to upload the data you downloaded from your Collibra environment.

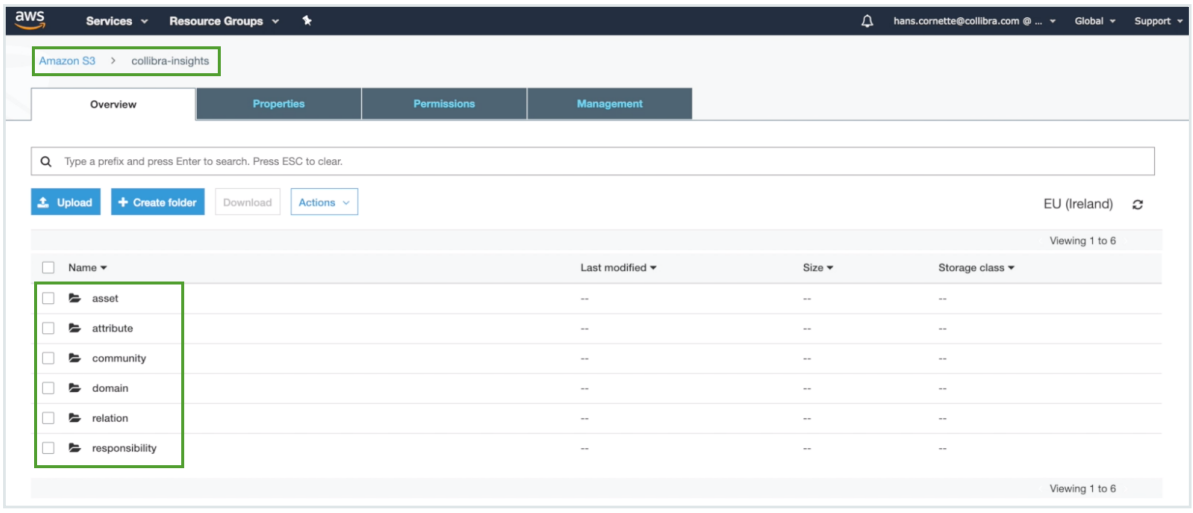



   » The **Upload** dialog box appears.
12. Click **Add files**, or drag and drop into the dialog box all of the folders in the ZIP file you downloaded from your Collibra environment.




   » The folders appear in the Upload dialog box.

13. Click **Upload**.
    » The folders are added to the newly created bucket.

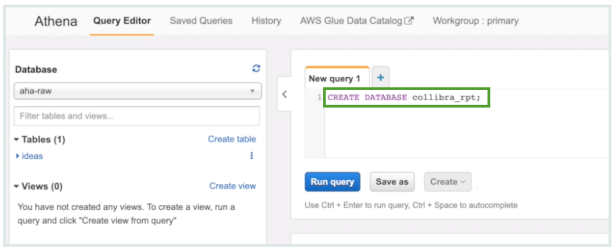



## Step 3: Download the Reporting Data Layer from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the Reporting Data Layer package.
   » A ZIP file is downloaded to your hard disk.
3. Extract the ZIP file on your local computer.
   » A folder with the name of the ZIP file is created.

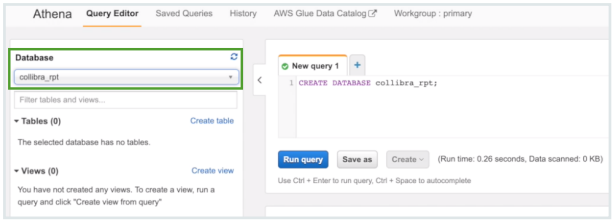
## Step 4: Create the Reporting Data Layer model in AWS Athena

1. In the AWS main menu, expand the **Services** page, and then select **Athena**.
2. In the **New query** tab, enter *CREATE DATABASE <name-of-the-database>;*.
   As shown in the following example image, we have created a database named "collibra_rpt".




3. Click **Run query**.

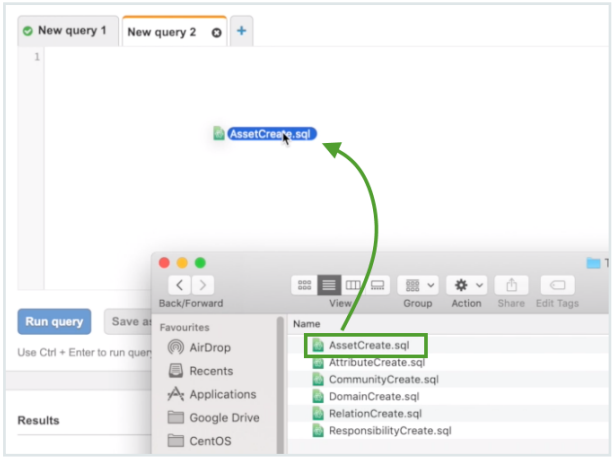
4. In the **Database** drop-down menu, select the database you created.



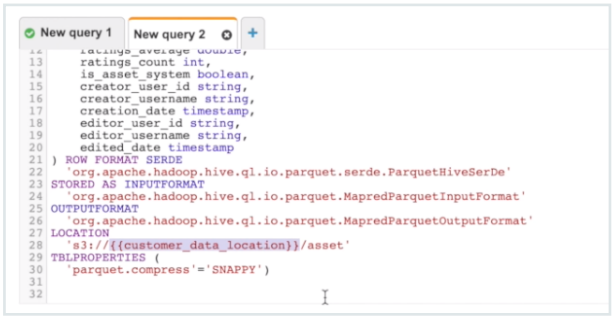

5. Click the **+** button, to add another query.



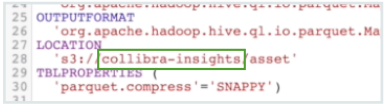

6. In the Reporting Data Layer ZIP file you downloaded from Collibra Marketplace, drag and drop the first SQL file into a new query tab.




» The code appears in the query tab.

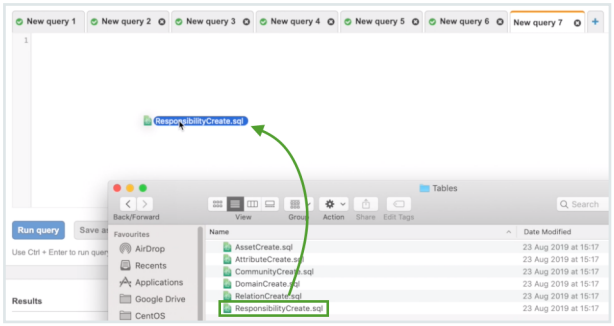



7. Edit the location to the recently created bucket.
In this example, we replaced "{{customer_data_location}}" with *collibra-insights*.

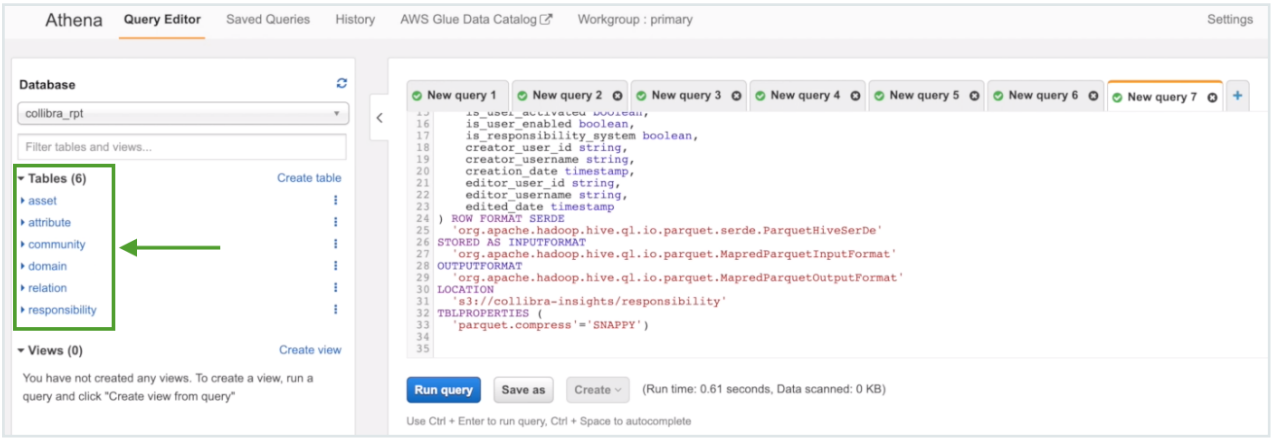



8. Click **Run query**.

9. Repeat steps 5-8 for each of the SQL files in the Reporting Data Layer ZIP file.




When you're done, all table definitions are shown and the Reporting Data Layer is fully configured.




# Generate dashboard reports via AWS

After creating the Reporting Data Layer on Amazon Web Services (AWS), you can generate dashboard reports that configure in Collibra Console.

> Tip You can also generate dashboard reports via URL.

## Prerequisites

You have:

- The Insights global role, to be able to view a report in Collibra Data Intelligence Cloud.
- Created the Reporting Data Layer on AWS.

- A license for Tableau Desktop 2018.3.
- A Tableau Server or Tableau Online account.
- The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

## Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event
4. Configure the reporting options in Collibra Settings
5. Add a dashboard in Collibra and configure the Insights widget

## Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
   - Process Register Report Template
   - Privacy and Risk Readiness Report Template
   - Data Maturity Report Template

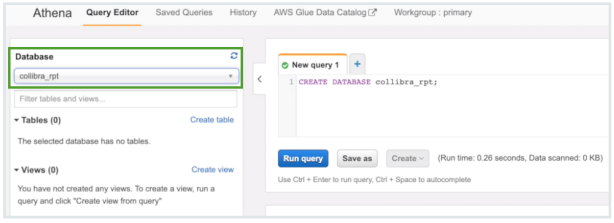
   » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

   » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

# Step 2: Install the SQL views associated with the Tableau workbook files

> Note
> - If this is the first time you are installing the SQL views, you have to carry out this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views, but are now installing a new version of a report, you have to install the new SQL view, if one was provided with the new report.

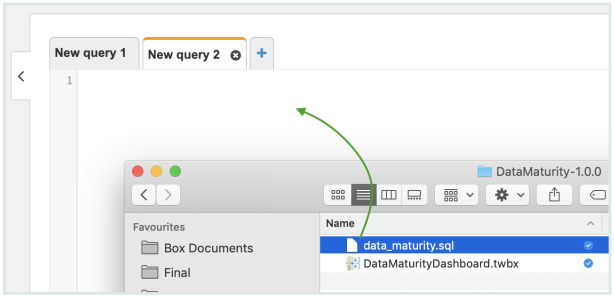
1. In the AWS main menu, expand the **Services** page, and then select **Athena**.
2. In the **Database** drop-down menu, select the relevant database.




3. Click the **+** button, to add another query.




4. In one of the report template package ZIP files you downloaded from Collibra Marketplace, drag and drop the SQL file into a new query tab.



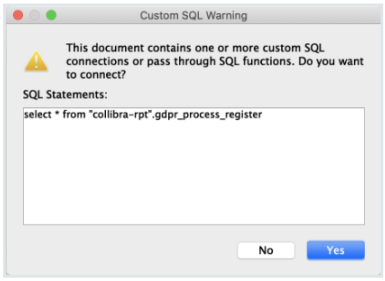
» The code appears in the query tab.



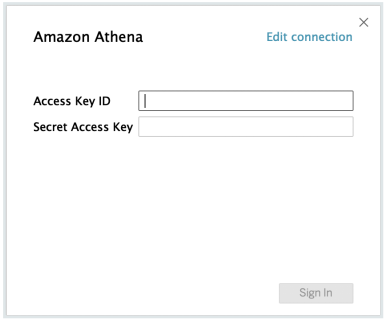

5. Click **Run query**.
6. Repeat steps 3-5 for the SQL files in the other two report template packages.

## Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

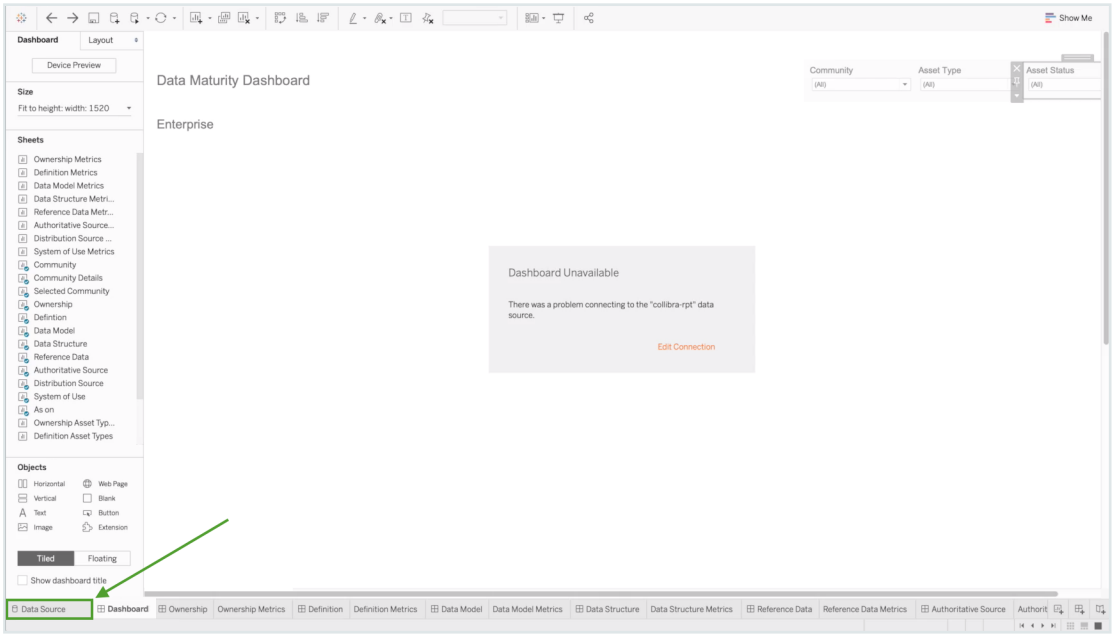
1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace, for example DataMaturity.
2. Open the Tableau Workbook file, in this example DataMaturityDashboard.twbx.
3. If the following warning appears, click **Yes**.



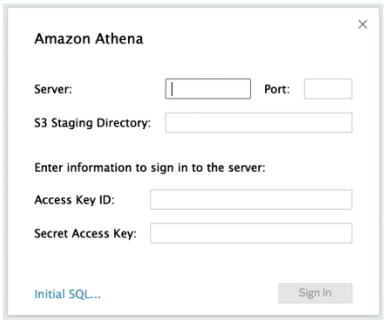
4. Do one of the following:
    - If the following dialog box appears, click **Edit connection**.




    - If, instead, the Tableau dashboard is shown, click the **Data Source** tab in the lower-left corner of the page.




5. Enter the information specific to your AWS server.



6. Click **Sign in**.

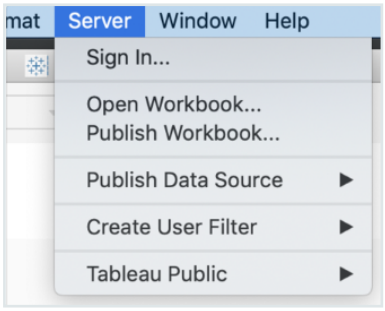
> Note If you receive an error at this point, it could be that the data source "collibra_rpt" is not configured. In this case, you should edit the connection details to point to the data source you've created.

7. In the upper-right corner of the page, select an **Extract** connection.

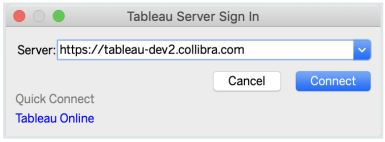



8. In the lower-left corner of the page, click the **Dashboard** tab.
9. In the **Save As** dialog box, enter a name for the database extract file.
10. Click **Save**.

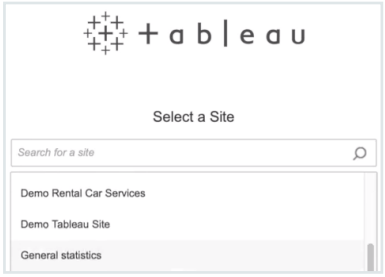
    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
11. When the dashboard is loaded, click or **File** > **Save**, to save the database extract.
12. In the main menu, click **Server** and then click **Sign In**.



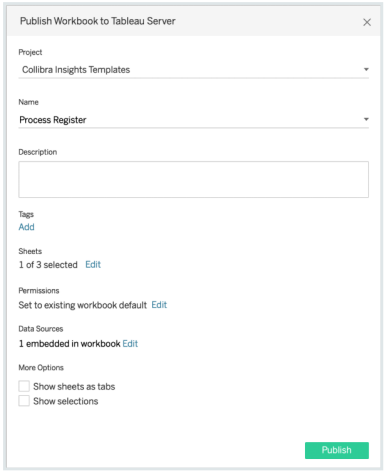

13. In the **Tableau Server Sign in** dialog box, click **Connect**.




14. Enter your Tableau sign in credentials.
15. Select the site to which you want to publish the Tableau workbook.



16. Click **Server** and then select **Publish Workbook**.
    » The following dialog box appears.

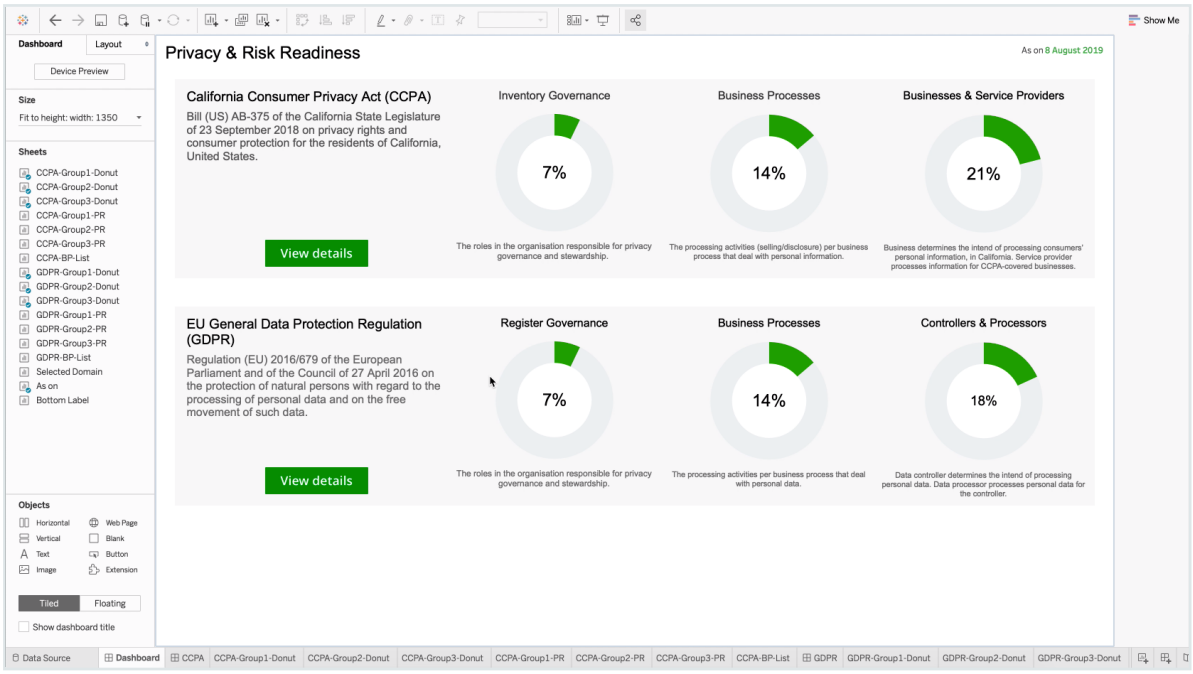



17. Enter the required information.
    The following fields are of interest for this task:

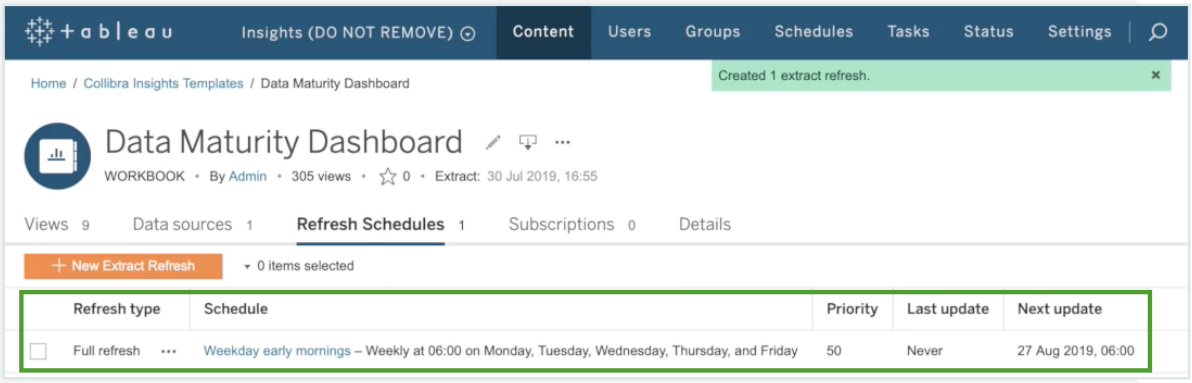
| Property | Description |
|---|---|
| Project | The project to which you want to publish. |
| Name | The name of the workbook. |
| Refresh Schedule (Full Extract) | The frequency with which the currently cached database extract is purged, and a new extract is cached.<br>Tip We recommend that you schedule a daily refresh. |
| Sheets | Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it.<br>Tip To avoid clutter, we recommend that you click **Edit** and then click **Only Dashboards**. |

| Property | Description |
| --- | --- |
| Data Sources | Determines:<br>◦ Whether the data is embedded in the workbook or published separately.<br>◦ How users authenticate with data sources.<br>Tip We strongly recommend the following settings. Click **Edit** and then:<br>◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**.<br>This enables users to view the report without having to authenticate themselves every time.<br>◦ In the **Authentication** drop-down menu, select **Allow refresh access**.<br>This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field. |
| More options | Additional publication options. The "Include external files" determines whether or not external files are included in the publication.<br>Note Only the DataMaturityDashboard.twbx file refers to external files. The **Include external files** option will not be available for the other Tableau workbook files.<br>Tip Ensure that the **Include external files** is selected, so that the images we've included with the Tableau workbook files are included in the publication. |

18. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

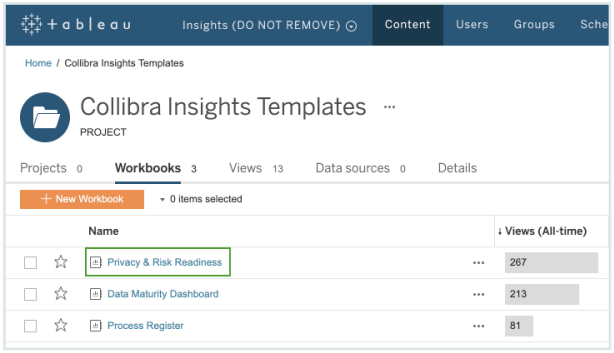



Tip In the Refresh Schedules tab, you can see the refresh schedule event you configured.

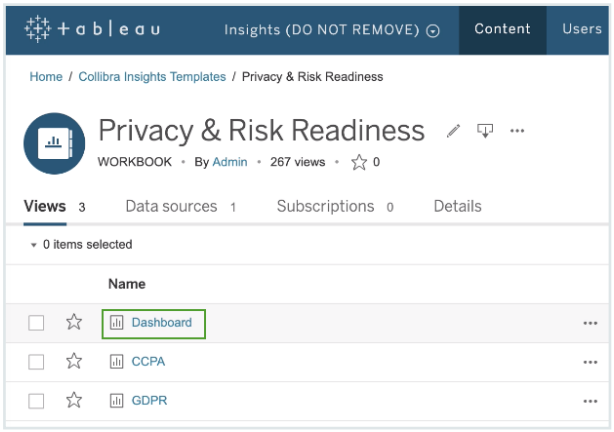



## Step 4: Configure the reporting options in Collibra Settings

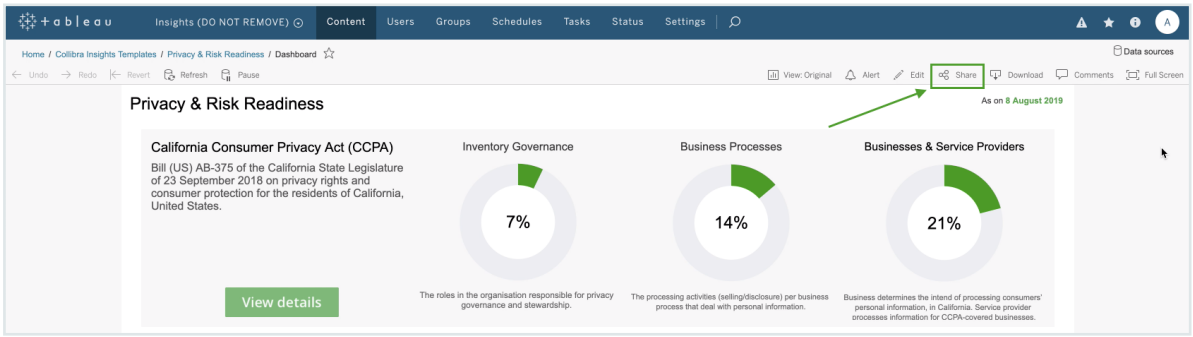
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example **Privacy & Risk Readiness**.



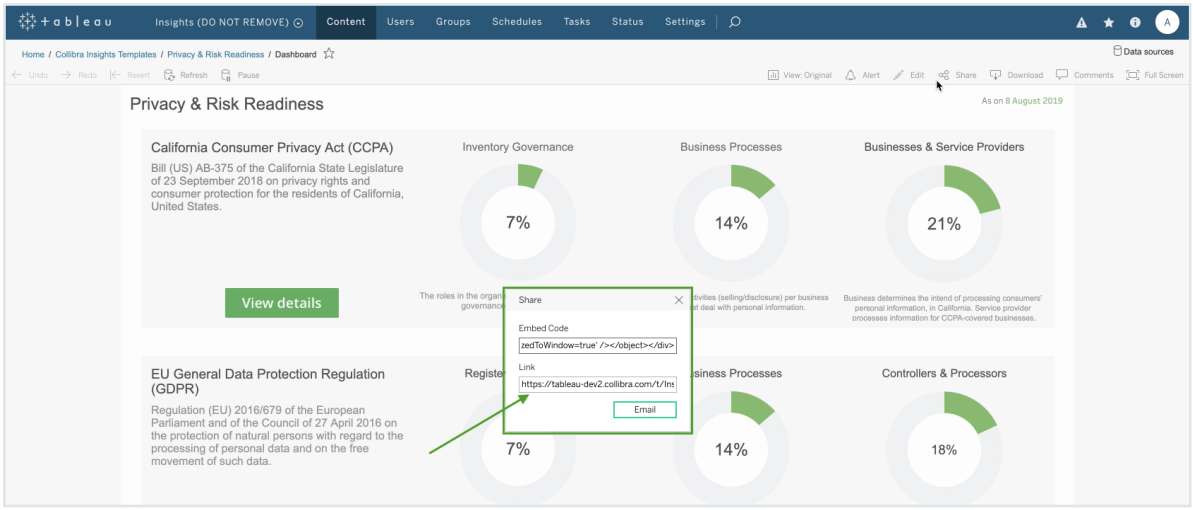

2. Click **Dashboard**.



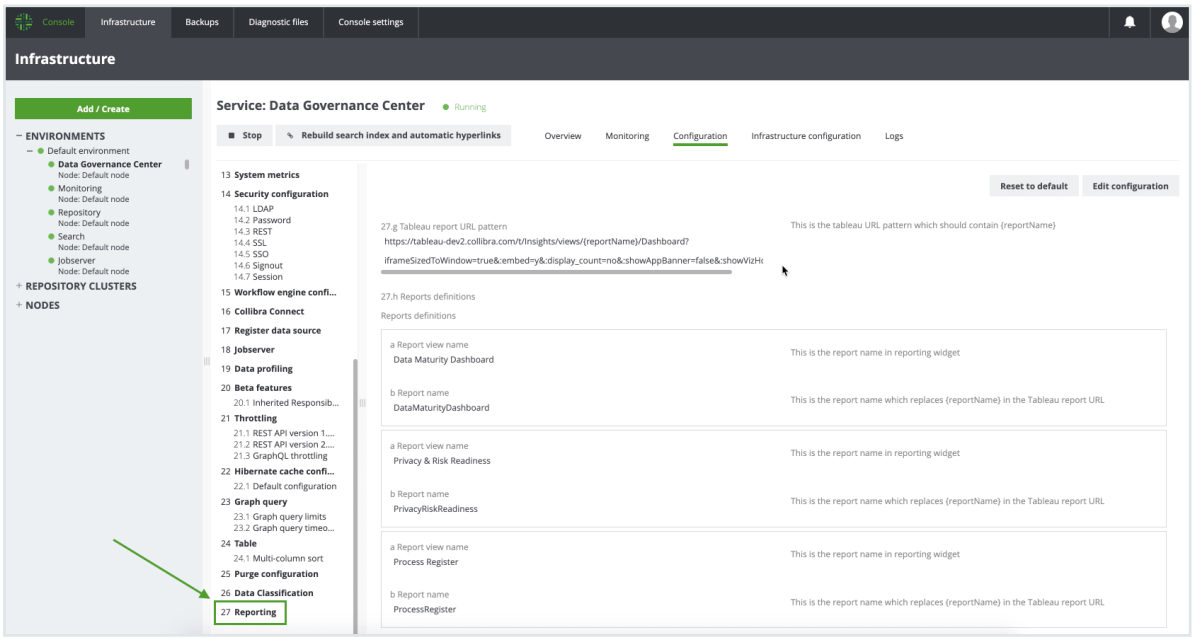

3. Click **Share**.



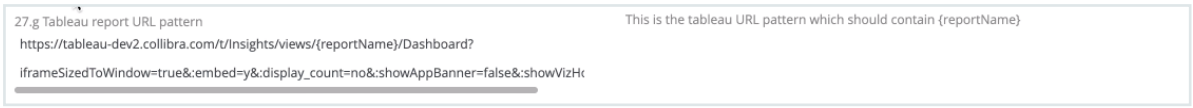
4. In the **Share** dialog box, copy the URL in the **Link** field.




5. Open Collibra Console with a user profile that has at least the **ADMIN** role.
   » Collibra Console opens with the **Infrastructure** page.
6. In the tab pane, click the Data Governance Center service of a Collibra environment.
   » The details of the DGC service are shown.
7. Click **Configuration**.
8. Click **Edit configuration**.
9. Scroll down the list of configuration options and click **Reporting**.



10. In field **Tableau report URL pattern**, paste the URL that you copied from the **Link** field in Tableau.




11. In the URL, replace the actual report name (such as *DataMaturityDashboard*) by *{reportName}*, for example: *https://tableau-dev2.<your-Collibra-Data-Intelligence-Cloud-environment-URL>/t/Insights/views/{reportName}/iframeSizedToWindow=true&...*
12. Under **Reports definitions**, click **Add**.

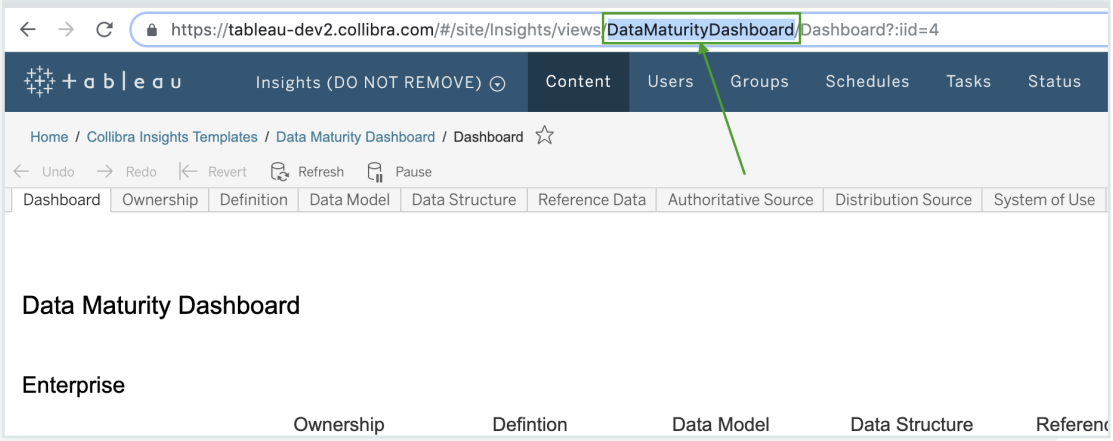
> Note  You have to carry out this step for all three reports.

    - In field **a Report view name**, enter the name of a report, as you want it to appear on the report button in the Insights widget, for example:
        - Data Maturity Dashboard
        - Privacy & Risk Readiness
        - Process Register

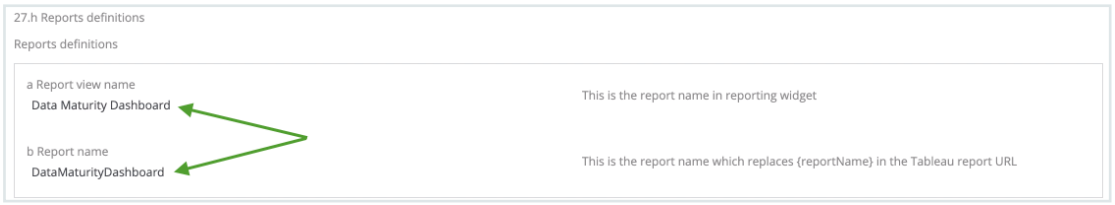



    - In field **b Report name**, enter the report name, for example:
        - DataMaturityDashboard
        - PrivacyRiskReadiness
        - ProcessRegister

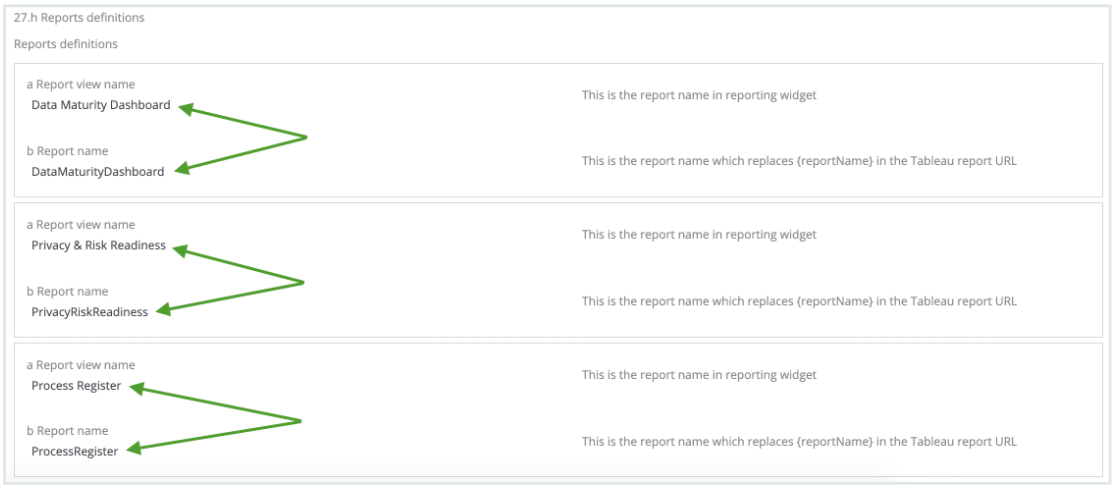
Tip Use the name as it appears in the URL of the Tableau report, for example "DataMaturityDashboard".




The settings in Console should look similar to the following example image:




- Click **Add**, and then add the report definitions for the remaining two reports.




13. Click **Save all**.

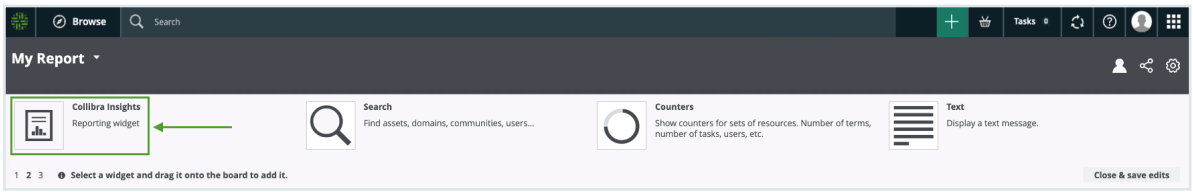
## Step 5: Add a dashboard in Collibra and configure the Insights widget

> Tip To facilitate the viewing of each report, we recommend that you add and configure a separate dashboard for each report. To do so, you have to complete this step for each report.

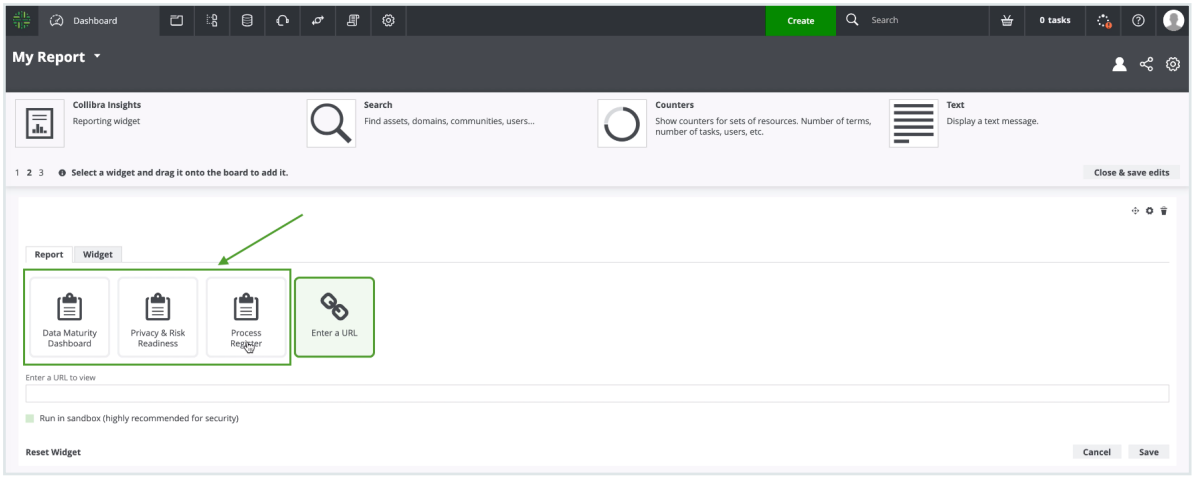
1. In the Collibra main menu, click → **Dashboards**.
2. In the view bar, click → **Add Dashboard**.
3. Enter the required information.

| Property | Description |
|---|---|
| Name | The name of your new dashboard. |
| Description | A description of the dashboard (optional). |
| Layout | The number of columns in the layout of the dashboard.<br>Tip Ensure that **1 column** is selected. |
| Always visible in the toolbar. | Option to always show the dashboard in the toolbar. |

4. Click **Save**.
5. In the view bar, click → **Edit widgets**.
6. Find the Insights widget and drag it onto the dashboard.



» The three reports that you configured in Collibra Settings are shown:




7. Select the report you want to show on the dashboard.
8. Click **Save**.
   » The report is shown on the dashboard you created.

## What's next?

Optionally, you can:

- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

# Generate a dashboard report via URL on AWS

After creating the Reporting Data Layer on Amazon Web Services, you can generate a dashboard report via a URL, from tools such as Tableau Online, Power BI, Qlik, or ThoughtSpot.

## Prerequisites

You have:

- The Insights global role, to be able to view a report in Collibra Data Intelligence Cloud.
- Created the Reporting Data Layer on AWS.
- A license for Tableau Desktop 2018.3.
- A Tableau Server or Tableau Online account.

- The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

## Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event
4. Obtain the shareable link
5. Add a dashboard in Collibra and add your report via URL

### Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
   - Process Register Report Template
   - Privacy and Risk Readiness Report Template
   - Data Maturity Report Template

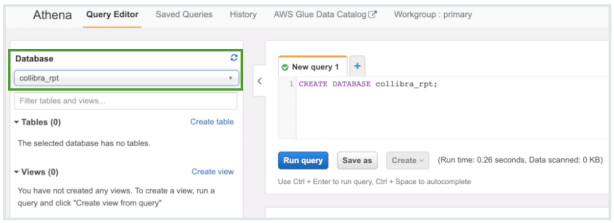
   » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

   » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

### Step 2: Install the SQL views associated with the Tableau workbook files

> Note
> - If this is the first time you are installing the SQL views, you have to carry out this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views, but are now installing a new version of a report, you have to install the new SQL view, if one was provided with the new report.

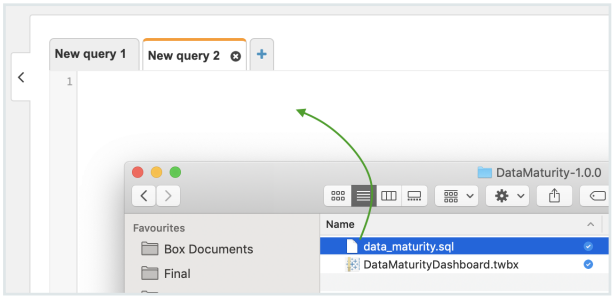
1. In the AWS main menu, expand the **Services** page, and then select **Athena**.
2. In the **Database** drop-down menu, select the relevant database.




3. Click the **+** button, to add another query.




4. In one of the report template package ZIP files you downloaded from Collibra Marketplace, drag and drop the SQL file into a new query tab.




» The code appears in the query tab.



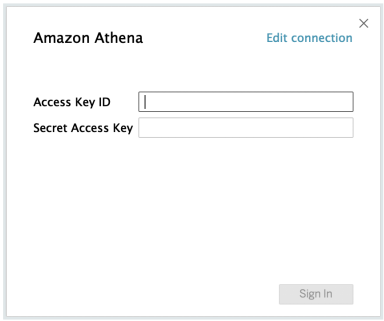

5. Click **Run query**.
6. Repeat steps 3-5 for the SQL files in the other two report template packages.

## Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

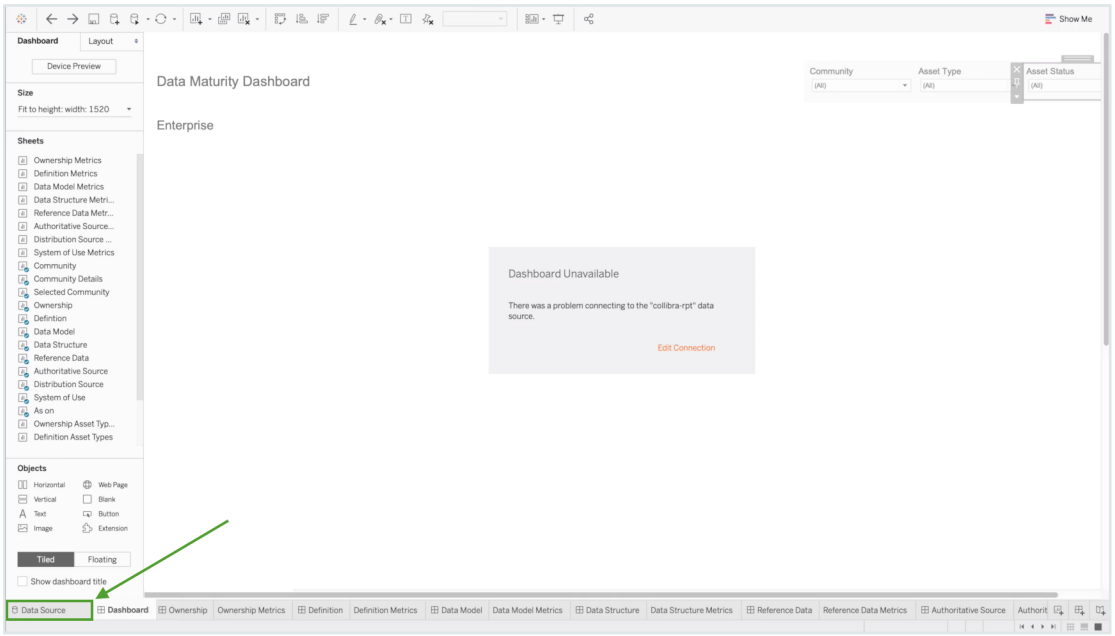
1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace, for example DataMaturity.
2. Open the Tableau Workbook file, in this example DataMaturityDashboard.twbx.
3. If the following warning appears, click **Yes**.



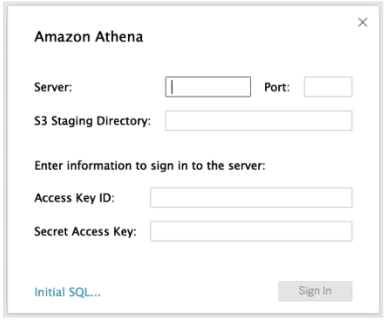

4. Do one of the following:
   - If the following dialog box appears, click **Edit connection**.



- If, instead, the Tableau dashboard is shown, click the **Data Source** tab in the lower-left corner of the page.




5. Enter the information specific to your AWS server.




6. Click **Sign in**.

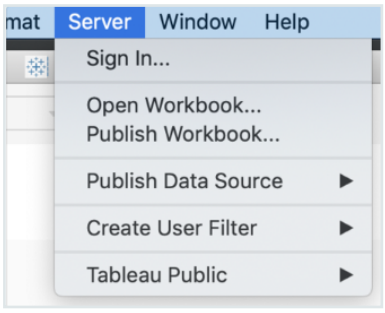
> Note If you receive an error at this point, it could be that the data source "collibra_rpt" is not configured. In this case, you should edit the connection details to point to the data source you've created.

7. In the upper-right corner of the page, select an **Extract** connection.

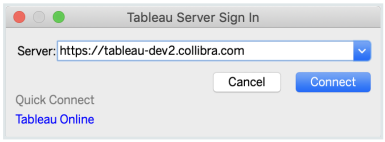



8. In the lower-left corner of the page, click the **Dashboard** tab.
9. In the **Save As** dialog box, enter a name for the database extract file.

10. Click **Save**.
    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
11. When the dashboard is loaded, click or **File** > **Save**, to save the database extract.
12. In the main menu, click **Server** and then click **Sign In**.



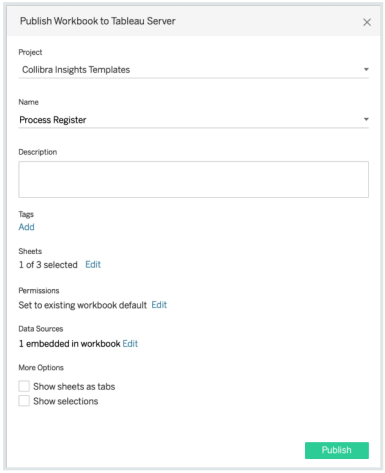

13. In the **Tableau Server Sign in** dialog box, click **Connect**.




14. Enter your Tableau sign in credentials.
15. Select the site to which you want to publish the Tableau workbook.



16. Click **Server** and then select **Publish Workbook**.
    » The following dialog box appears.

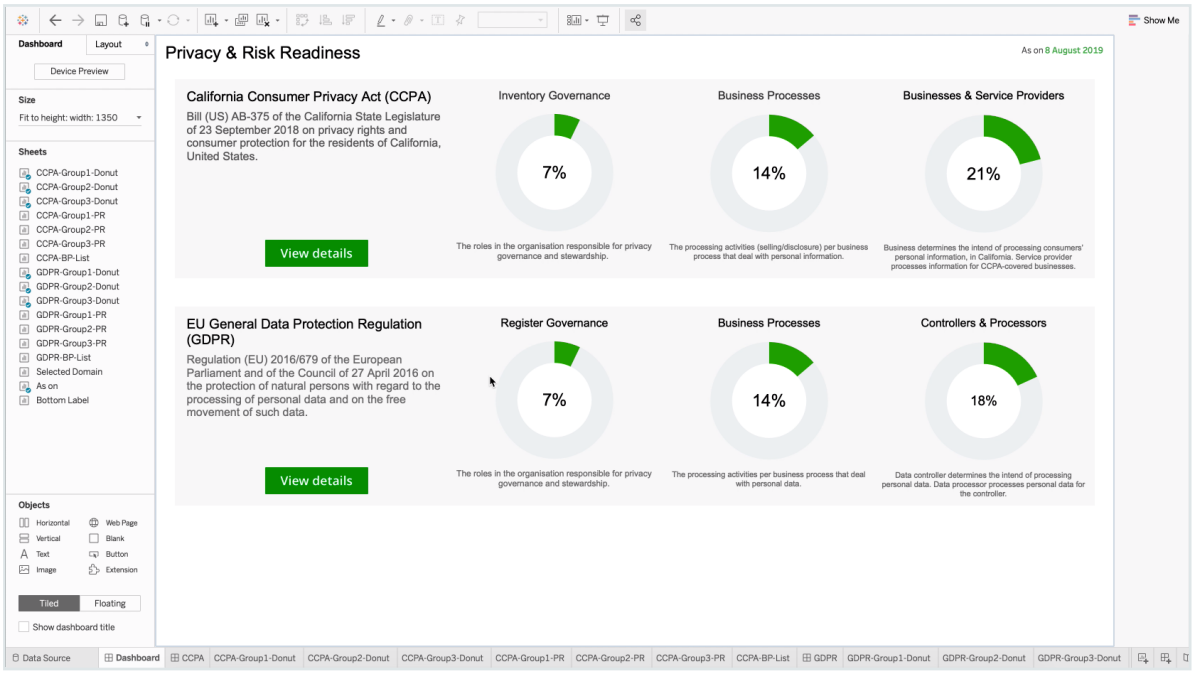



17. Enter the required information.
    The following fields are of interest for this task:

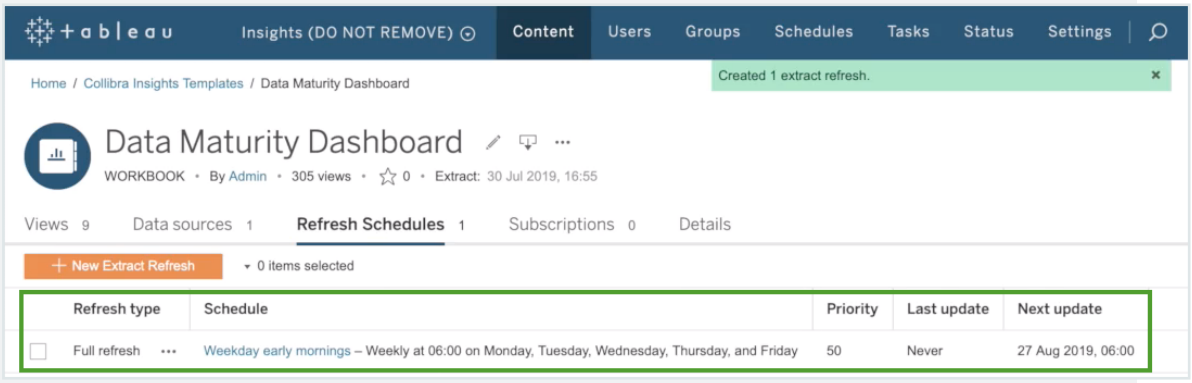
| Property | Description |
|---|---|
| Project | The project to which you want to publish. |
| Name | The name of the workbook. |
| Refresh Schedule (Full Extract) | The frequency with which the currently cached database extract is purged, and a new extract is cached.<br>Tip We recommend that you schedule a daily refresh. |
| Sheets | Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it.<br>Tip To avoid clutter, we recommend that you click **Edit** and then click **Only Dashboards**. |

| Property | Description |
| --- | --- |
| Data Sources | Determines:<br>◦ Whether the data is embedded in the workbook or published separately.<br>◦ How users authenticate with data sources.<br>Tip We strongly recommend the following settings. Click **Edit** and then:<br>◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**.<br>This enables users to view the report without having to authenticate themselves every time.<br>◦ In the **Authentication** drop-down menu, select **Allow refresh access**.<br>This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field. |
| More options | Additional publication options. The "Include external files" determines whether or not external files are included in the publication.<br>Note Only the DataMaturityDashboard.twbx file refers to external files. The **Include external files** option will not be available for the other Tableau workbook files.<br>Tip Ensure that the **Include external files** is selected, so that the images we've included with the Tableau workbook files are included in the publication. |

18. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

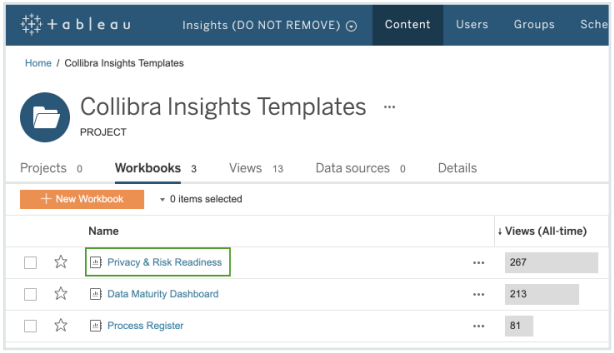



Tip In the Refresh Schedules tab, you can see the refresh schedule event you configured.

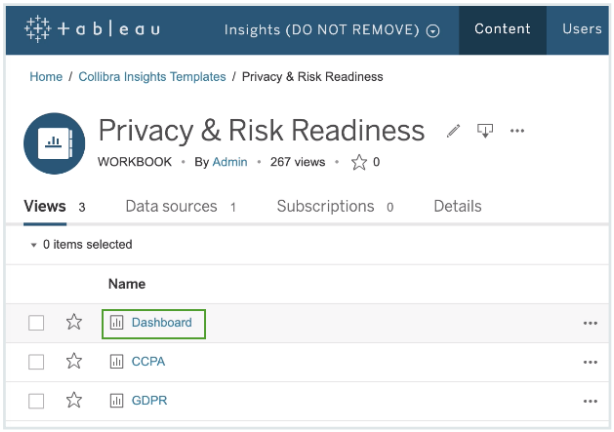



## Step 4: Obtain the shareable link

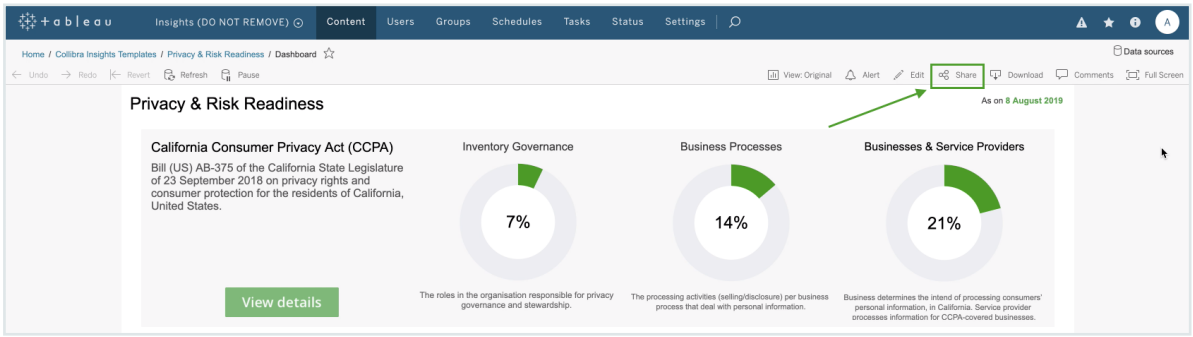
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example **Privacy & Risk Readiness**.



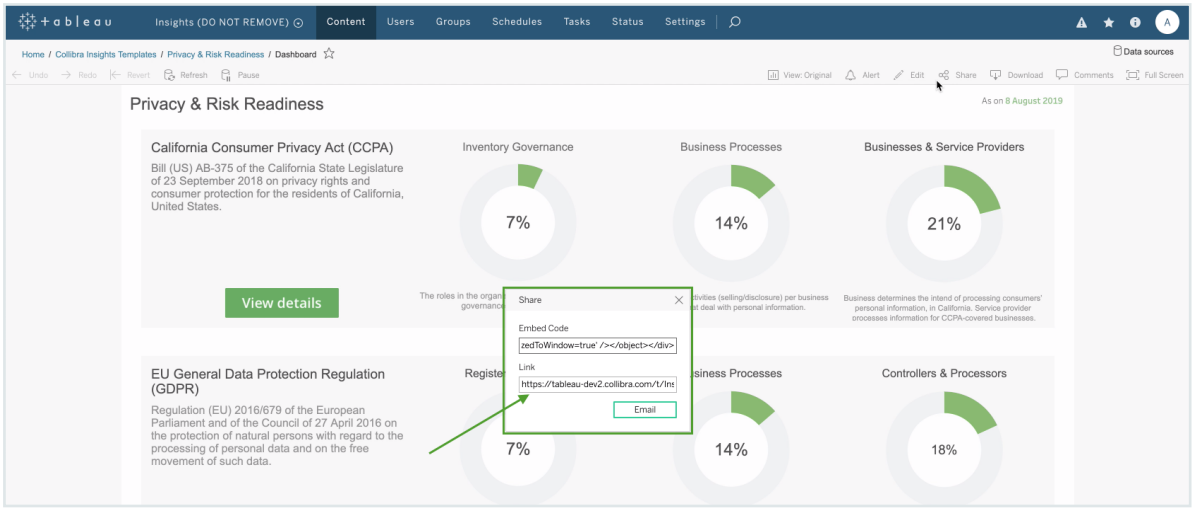

2. Click **Dashboard**.




3. Click **Share**.



4. In the **Share** dialog box, copy the URL in the **Link** field.




## Step 5: Add a dashboard in Collibra and then add your report via URL

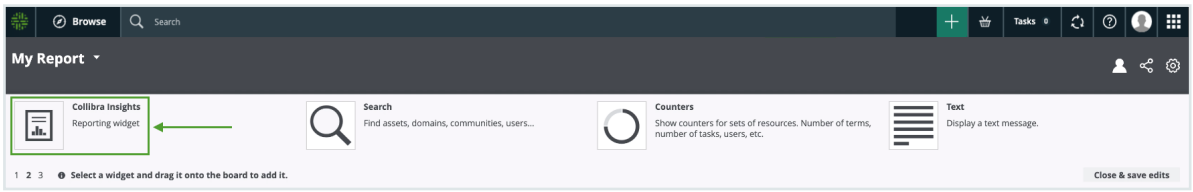
> Tip To facilitate the viewing of each report, we recommend that you add and configure a separate dashboard for each report. To do so, you have to complete this step for each report.

1. In the Collibra main menu, click → **Dashboards**.
2. In the view bar, click → **Add Dashboard**.
3. Enter the required information.

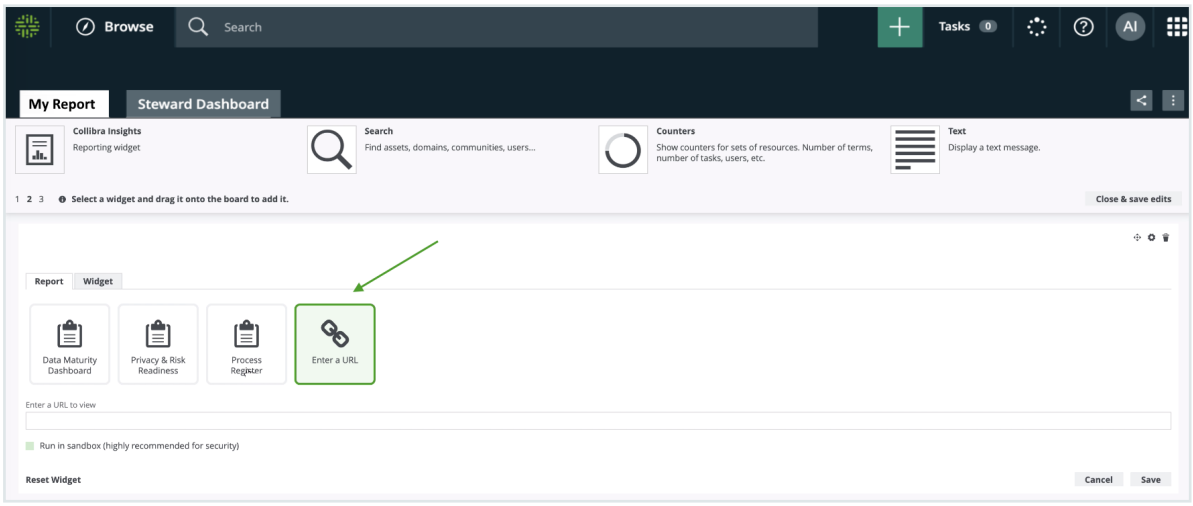
| Property | Description |
|---|---|
| Name | The name of your new dashboard. |
| Description | A description of the dashboard (optional). |
| Layout | The number of columns in the layout of the dashboard.<br>Tip Ensure that **1 column** is selected. |

| Property | Description |
| --- | --- |
| Always visible in the toolbar. | Option to always show the dashboard in the toolbar. |

4. Click **Save**.
5. In the view bar, click ⚙ → **Edit widgets**.
6. Find the Insights widget and drag it onto the dashboard.




7. Click Enter a URL, and enter the relevant URL.




8. Click **Save**.
   » The report is shown on the dashboard you created.

## What's next?

Optionally, you can:

- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

# Creating the Reporting Data Layer on GCP and generating reports

Before configuring the dashboard reports, you have to create the Reporting Data Layer on Google Cloud Platform (GCP). You can then create your dashboard reports via Collibra Console or URL.

# In this chapter

## Create the Reporting Data Layer on GCP

This section provides information on how to create the Reporting Data Layer on Google Cloud Platform (GCP), with Google Cloud Storage and Google BigQuery. You can, however, use alternative software. We also provide documentation on how to create the Reporting Data Layer on Amazon Web Services.

### Prerequisites

You have:

- A license for Collibra Insights.
- Collibra Data Intelligence Cloud 5.7 or newer.
- Software for working with Parquet files.

### Steps

1. Download a data snapshot from your Collibra environment
2. Upload the data to a Google Cloud Storage bucket
3. Create the Reporting Data Layer model in Google BigQuery

## Step 1: Download a data snapshot from your Collibra DGC environment

1. Enter the following URL in your browser: *<your-DGC-environment-URL>/rest/2.0/reporting/insights/download?snapshotDate=<snapshot_date>&format=zip*, where <snapshot date> is the date from which you want the data, formatted as YYYY-MM-DD, for example "2019-07-23".
   » A ZIP file of the data from your Collibra environment, for the specified date, is downloaded to your hard disk.
2. Extract the ZIP files on your local computer.
   » A folder with the name of the ZIP file is created.

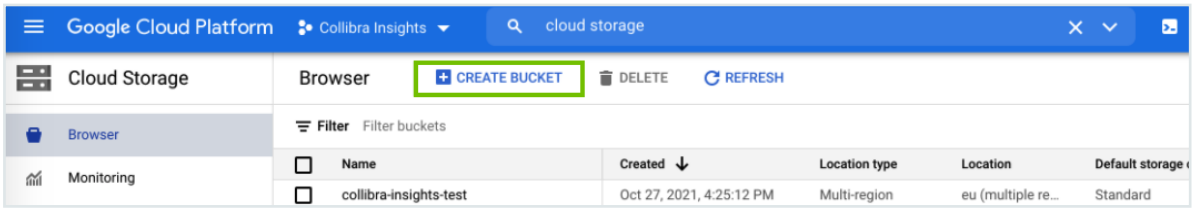
## Step 2: Upload the data to a Google Cloud Storage bucket

> Note This only needs to be done once for the collection Tableau workbook files. After that, you only need to carry out this step If the data layer model changes.

1. Sign in to your GCP account and choose your working project for Insights deployment.

   > Tip We recommend that you create a separate project for Insights deployment.

2. In the tab menu, click the **Storage** tab and then click **Cloud Storage**.
3. In the **Browser** tab, click **Create bucket**.




   » The **Create a bucket** dialog box appears.
4. In the **Name your bucket** field, enter a name for the bucket you are creating, for example "collibra-insights".
5. Click **Continue**.

6. In the **Choose where to store your data** section, enter the relevant values, for example:
   - Location type: *Multi-region*
   - Location: *Your geographic location*

   > Tip Consult your IT department for help with the correct values for your Collibra environment configuration and to ensure compliance with your company policies.

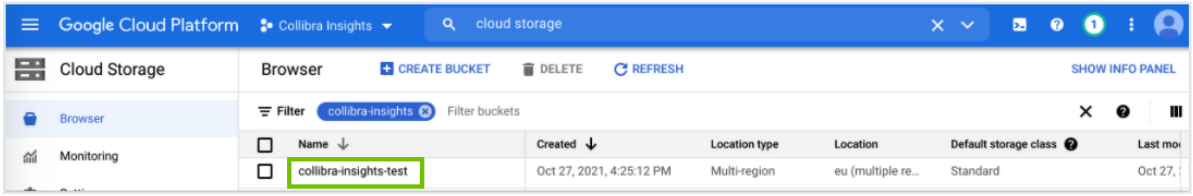
7. Click **Continue**.
8. In the **Choose a default storage class for your data** section, click **Standard**.
9. Click **Continue**.
10. in the **Choose how to control access to objects** section, enter the relevant values, for example:
    - Access control: *Uniform*

    > Tip Consult your IT department for help with the correct values for your Collibra environment configuration and to ensure compliance with your company policies.

11. Click **Continue**.
12. in the **Choose how to protect object data** section, enter the relevant values, for example:
    - Protection tool: *None*

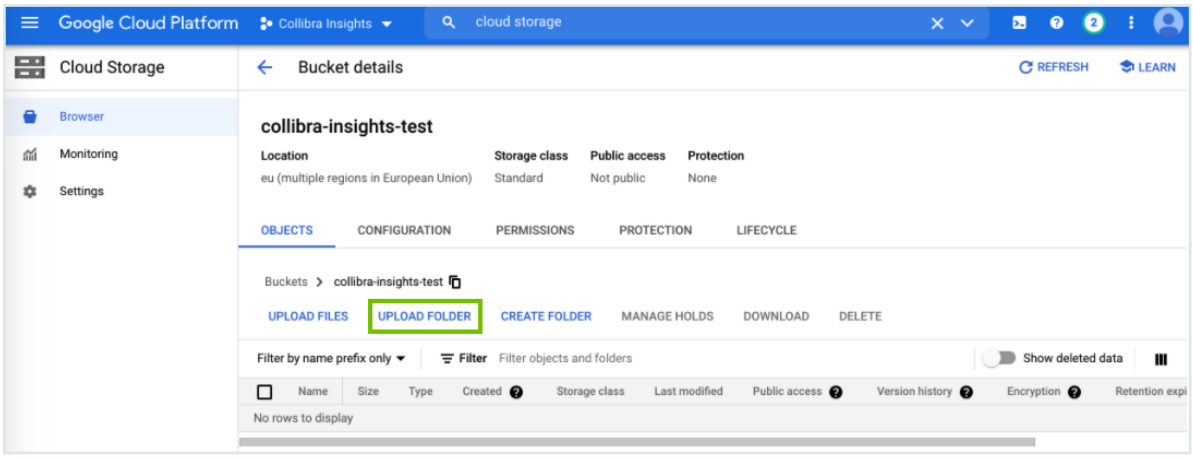
    > Tip Consult your IT department for help with the correct values for your Collibra environment configuration and to ensure compliance with your company policies.

13. Click **Create**.
    » The bucket is created.
14. In the **Browse** tab, search for your newly created bucket, and then click it.




» The bucket details page opens.

15. Click **Upload Folder**, to upload the data you downloaded from your Collibra environment.




» The **Upload** dialog box appears.

16. In the **Upload** dialog box, find the unpacked folders of the ZIP file you downloaded from your Collibra environment. As shown in the following image, there are eight folders to be uploaded.

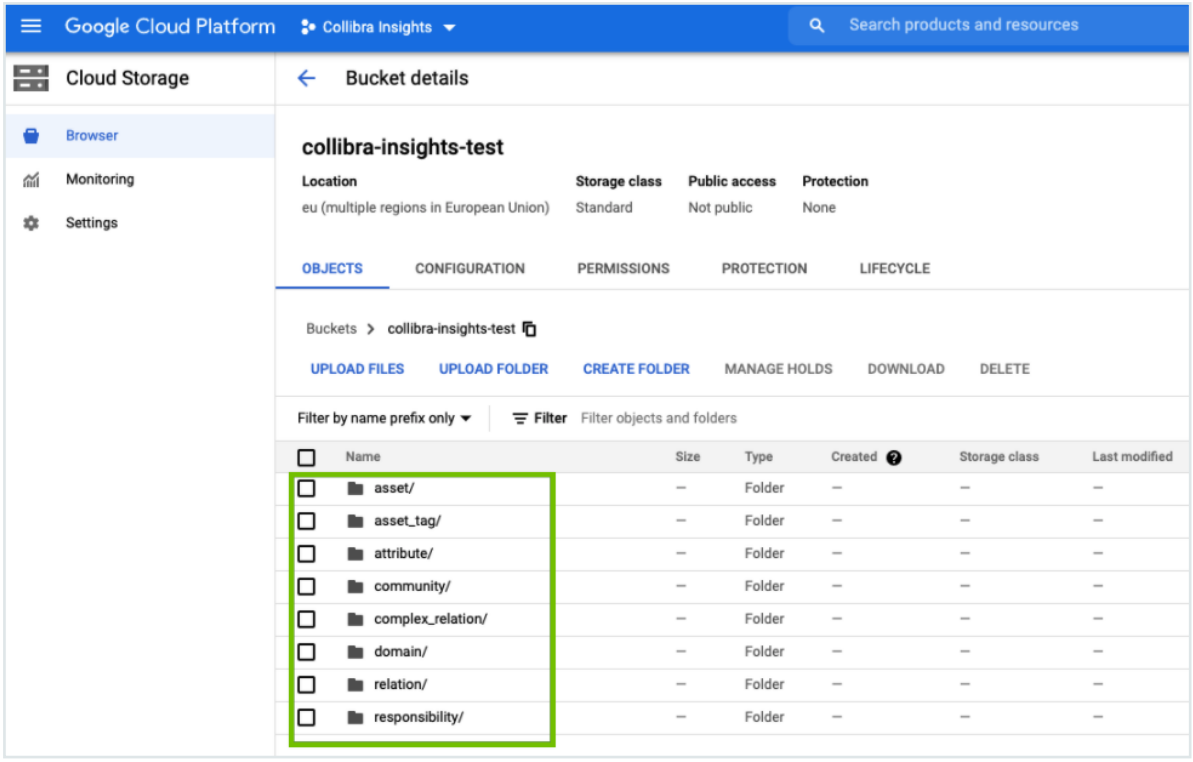



17. Select a folder, for example "complex_relation", and then click **Upload**.

> Note You can only select one folder at a time.

18. Repeat steps 15-17, until you have uploaded all eight folders.

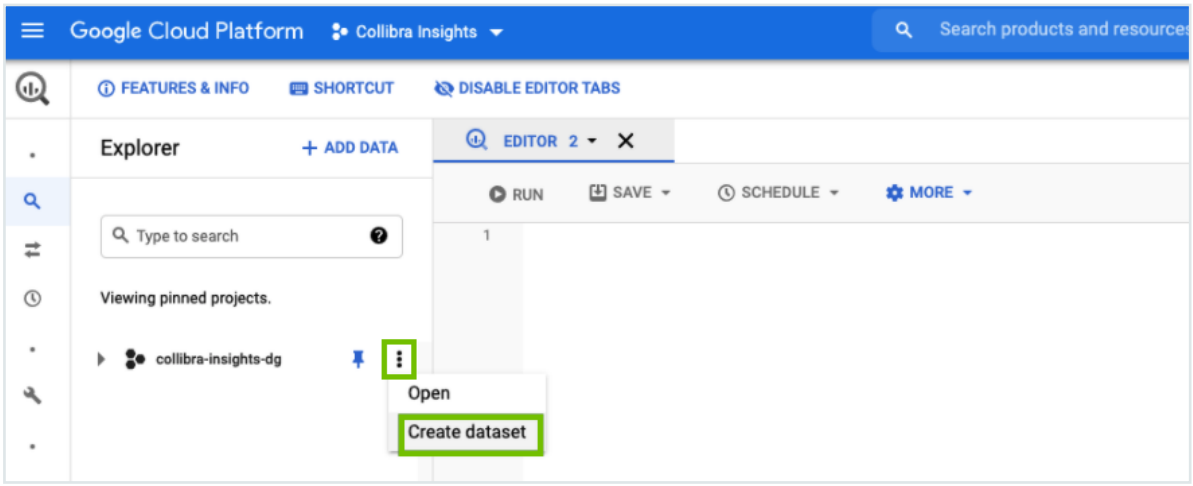
» The folders are added to the newly created bucket.



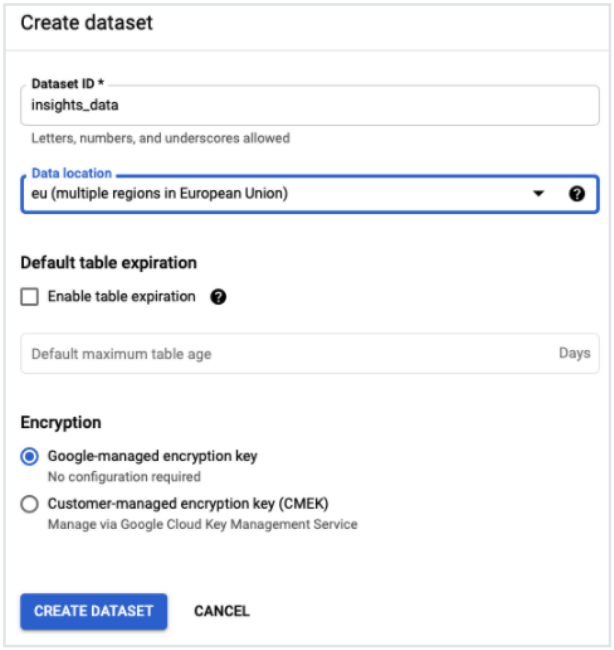

## Step 3: Create the Reporting Data Layer model in Google BigQuery

> Tip The objective of steps 6-8 in the following procedure can also be achieved by using a Cloud shell command.

1. In the left tab menu, in the **BIG DATA** section, click **BigQuery**.
2. On the **Explorer** page, find your Insights project, and then click ⋮ > **Create dataset**.



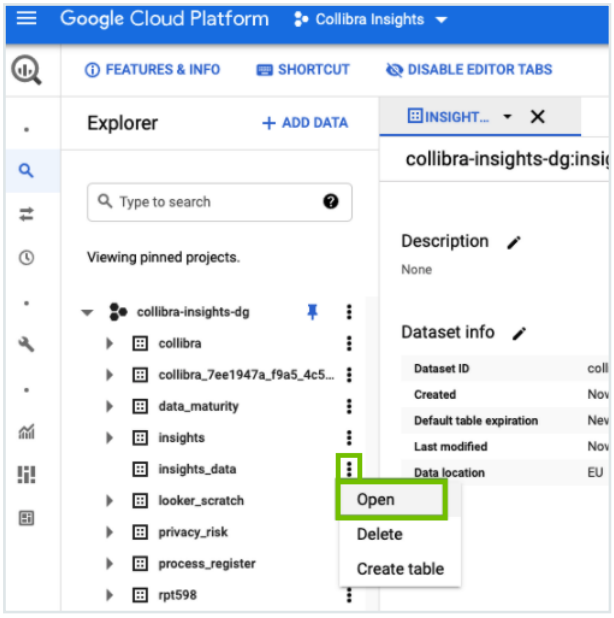
3. In the **Create dataset** side panel, enter the relevant information:




| Field | Description |
|---|---|
| Dataset ID | A unique name for your dataset. |
| Data location | The geographical region of your data.<br><br>Tip Consult your IT department for help with the correct value for your Collibra environment configuration and to ensure compliance with your company policies. |

4. Click **Create dataset**.

5. In the **Explorer** page, find your newly created dataset, and then click ⋮ > **Open**.
   » The dataset view page opens.

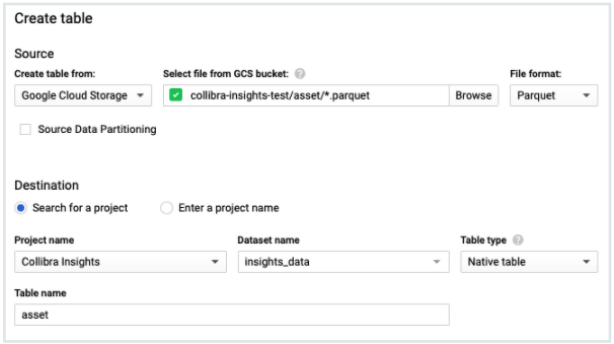



6. In the dataset view page, click **Create table**.




   » The **Create table** side panel opens.

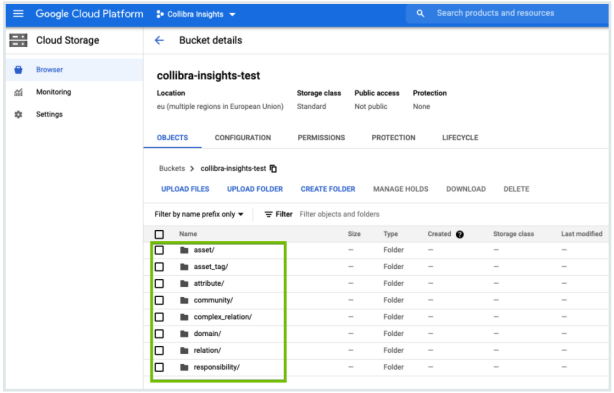
7. In the **Create table** section, enter the relevant information:



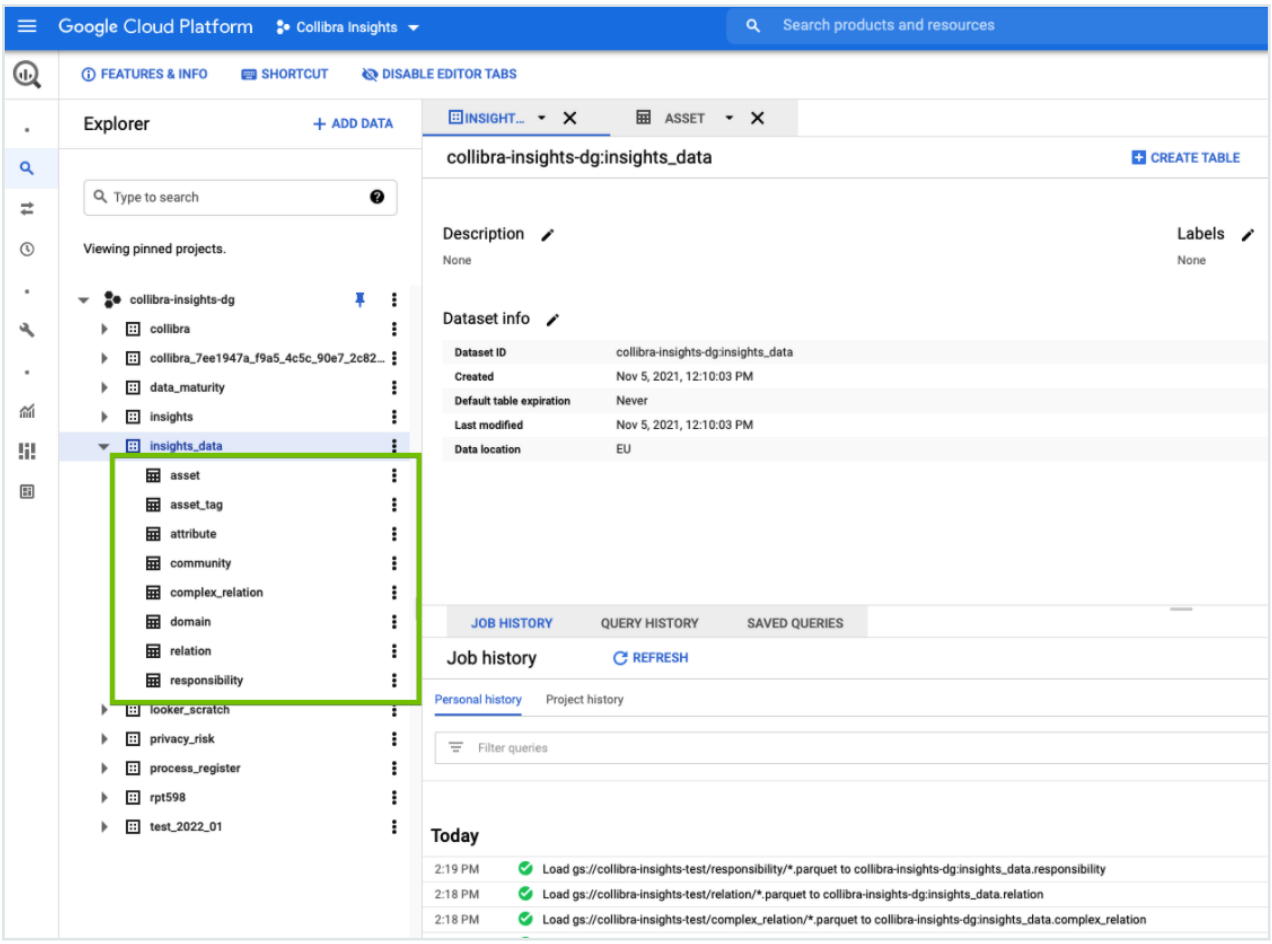
| Field | Description |
|---|---|
| Create table from | Select **Google Cloud Storage**. |
| Select file from GCS bucket | Enter *<your-data-bucket-name>/<data type>/*.parquet*<br>The bucket name is the one you created in Step 2.4 and the data type, for example "asset", is the sub-directory location.<br>> Tip Step 9 of this procedure prompts you to repeat steps 6-8, for each data type, for example, asset, attributes, relation, responsibility and so forth. |
| File format | Select **Parquet**. |
| Source Data Partitioning | This checkbox should be cleared. |
| Search for a project / Enter a project name | Select the **Search for a project** option. |
| Project name | Select the project you are using for Insights deployment. |
| Dataset name | Select the database name you entered in step 3.3. |
| Table type | Select **Native table**. |

| Field | Description |
| --- | --- |
| Table name | Enter the data type. This must match the data type enter for the sub-directory location in the **Select file from GCS bucket** field.<br><br>Tip Step 9 of this procedure prompts you to repeat steps 6-8, for each data type, for example, asset, attribute, relation, responsibility and so forth. |

8. Click **Create table**.
9. Repeat steps 6-8 for each data type in the file you downloaded in step 1.1, for example, asset, relation, responsibility and so forth.



When you're done, all table definitions are shown and the Reporting Data Layer is fully configured.




## Use a Cloud shell command

The objective of steps 6-8 in the previous procedure can also be achieved by using a Cloud shell command.

Run the following command, where <customer-dataset-name> and <customer-data-bucket> are replaced with the relevant values.

```
bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.asset \
   gs://<customer-data-bucket>/asset/*.parquet
```

```
bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.asset_tag \
   gs://<customer-data-bucket>/asset_tag/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   customer-dataset-name>.attribute \
   gs://<customer-data-bucket>/attribute/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.community \
   gs://<customer-data-bucket>/community/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.complex_relation \
   gs://<customer-data-bucket>/complex_relation/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.domain \
   gs://<customer-data-bucket>/domain/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.relation \
   gs://<customer-data-bucket>/relation/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.responsibility \
   gs://<customer-data-bucket>/responsibility/*.parquet
```

# Generate dashboard reports via GCP

After creating the Reporting Data Layer on Google Cloud Platform (GCP), you can generate dashboard reports that configure in Collibra Console.

> Tip You can also generate dashboard reports via URL.

## Prerequisites

You have:

- The Insights global role, to be able to view a report in Collibra Data Intelligence Cloud.
- Created the Reporting Data Layer on GCP.
- A license for Tableau Desktop 2018.3.
- A Tableau Server or Tableau Online account.
- The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

## Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event
4. Configure the reporting options in Collibra Settings
5. Add a dashboard in Collibra and configure the Insights widget

### Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
   - Process Register Report Template
   - Privacy and Risk Readiness Report Template
   - Data Maturity Report Template

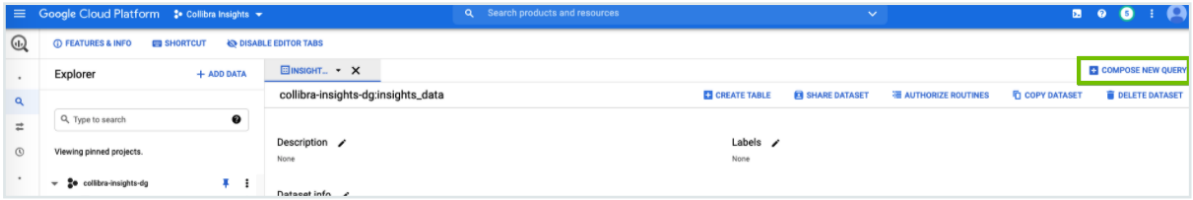
   » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

   » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

## Step 2: Install the SQL views associated with the Tableau workbook files

> Note
> - If this is the first time you are installing the SQL views, you have to carry out this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views, but are now installing a new version of a report, you have to install the new SQL view, if one was provided with the new report.

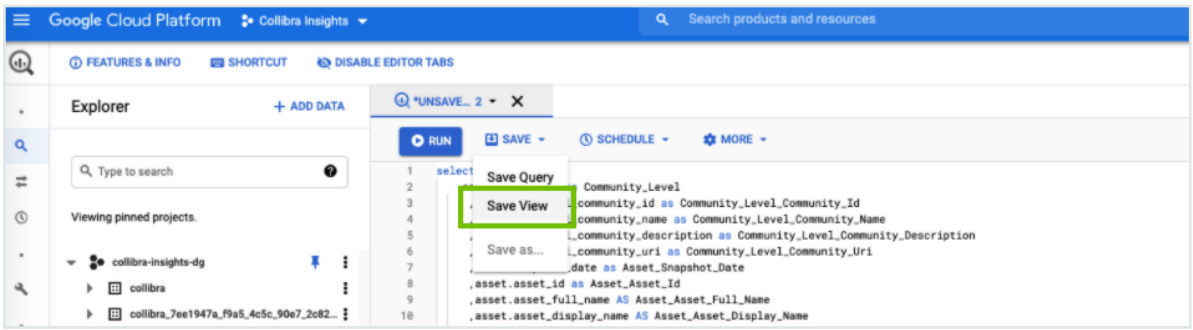
1. In the **BIG DATA** section of the GCP left-hand menu, click **BigQuery**.
2. In the **Explorer** page, click **COMPOSE NEW QUERY**.




3. From one of the report template packages you downloaded from Collibra Marketplace, drag and drop one of the SQL files into a new query tab.
   » The code appears in the query tab.
4. In the code, change any occurrences of "<customer_dataset>" to "<*the-name-of-your-Insights-dataset*>".

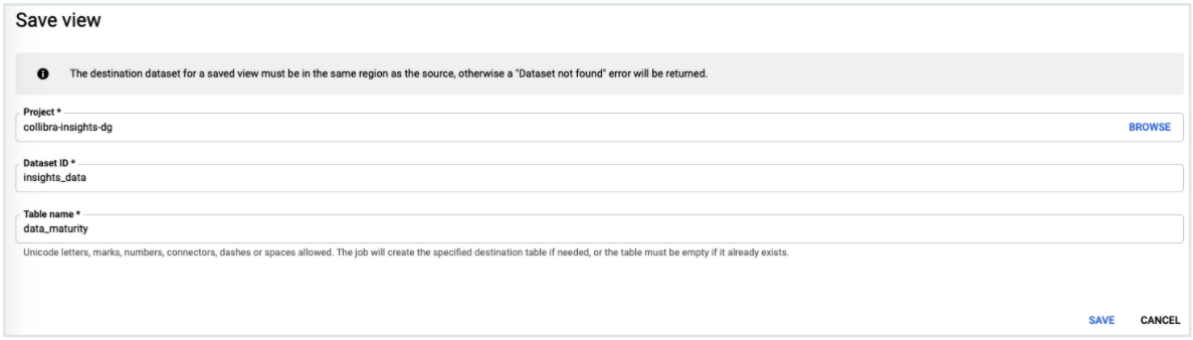
> Tip The dataset name is the value you entered in the Dataset ID field in step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure.

5. Click **Save** > **Save View**.




   » The **Save view** dialog box appears.

6. In the **Save view** dialog, enter the relevant information:



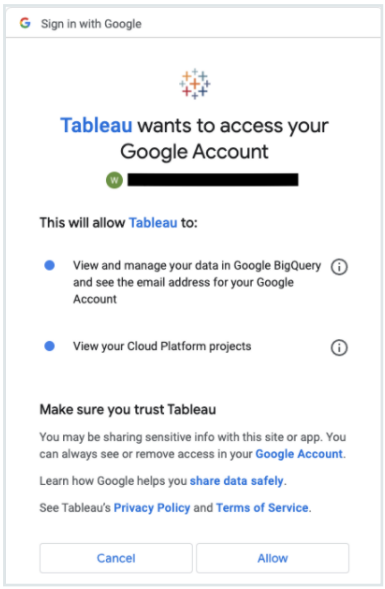

| Field | Description |
|---|---|
| Project | The project you are using for Insights deployment. |
| Dataset ID | The value you entered in the Dataset ID field in step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure. |
| Table name | The name of the report SQL file, for example "data_maturity". |

7. Repeat steps 3-5 for the SQL files in the other two report template packages.

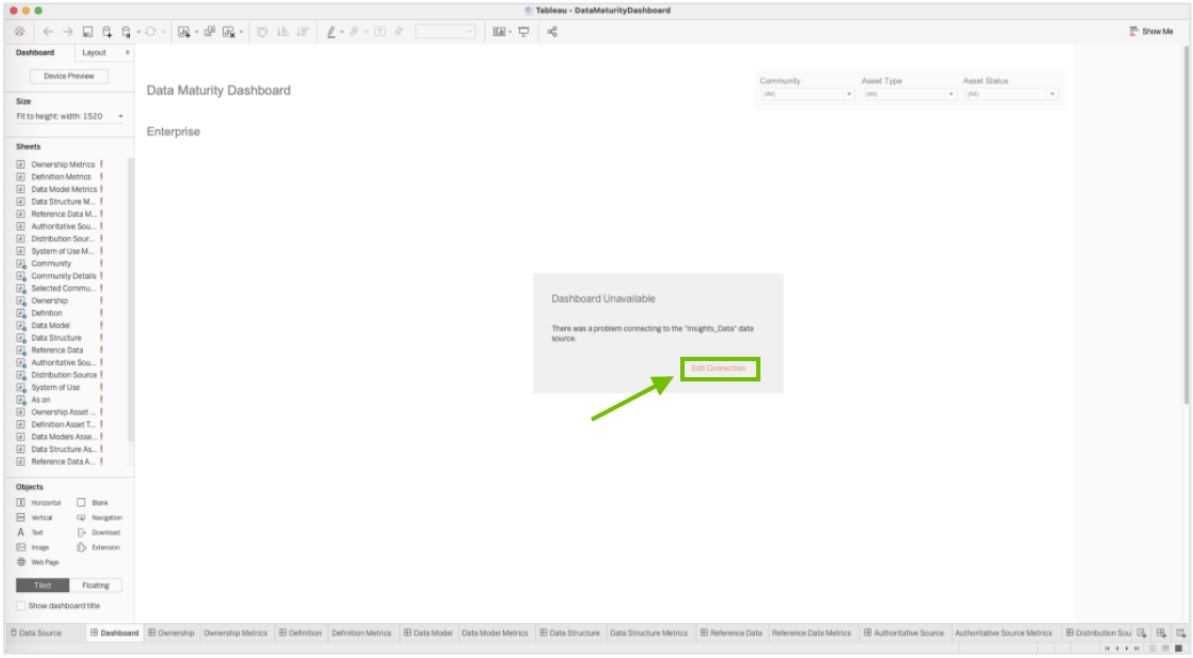
## Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace, for example DataMaturity.
2. Open the Tableau Workbook file, in this example DataMaturityDashboard.twbx.
   » The Google sign in page appears.

3. Select the relevant Google account.
   » You are prompted to allow Tableau to access your Google account.

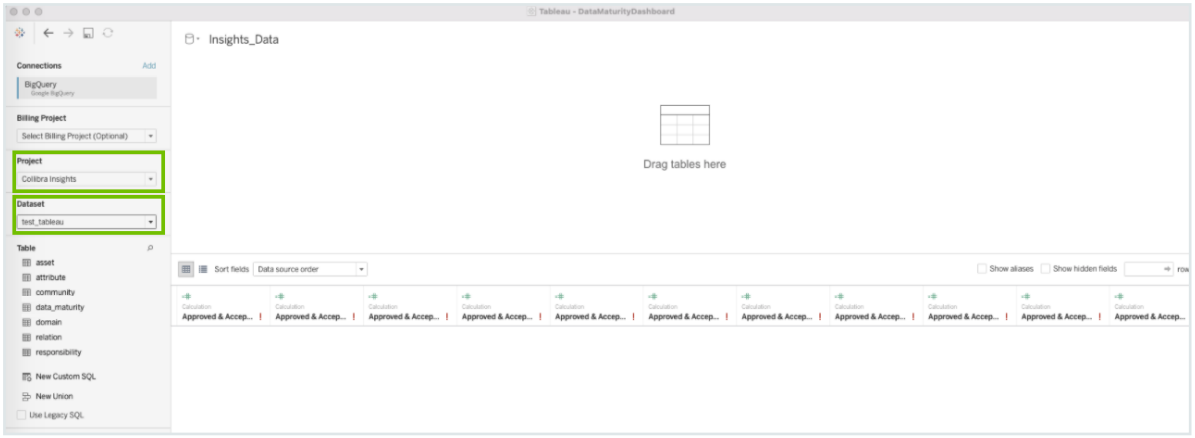



4. Ensure that both access options are selected, and then click **Allow**.
5. In the Tableau DataMaturityDashboard, click **Edit Connection** in the **Dashboard Unavailable** notification.



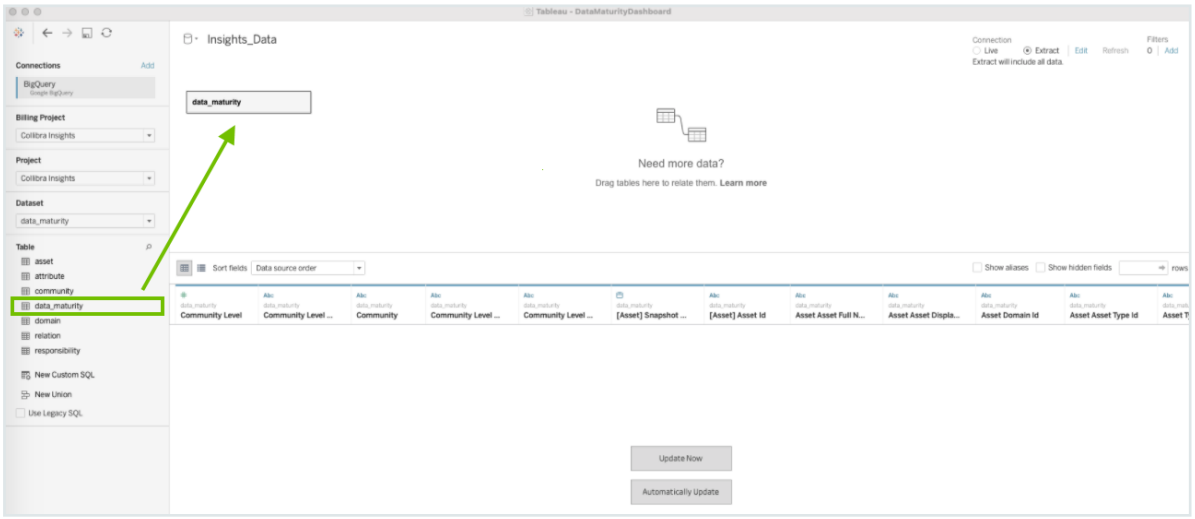

   » The **Data Source** tab opens.

6. Specify the following information:




| Field | Description |
|---|---|
| Project | The project you are using for Insights deployment. |
| Dataset | What should the user choose? |

7. In the **Table** section, double-click on the **data_maturity** view.
   » The view appears in the main frame, indicating that a link to the data is made.

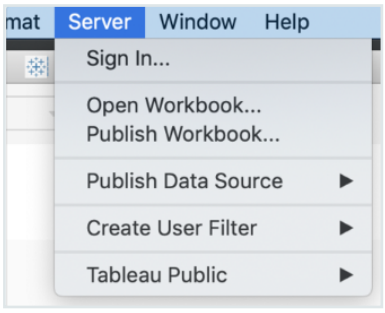



8. In the upper-right corner of the page, select an **Extract** connection.

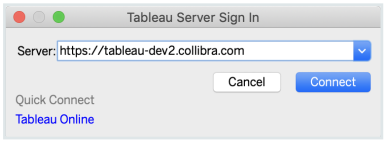



9. In the lower-left corner of the page, click the **Dashboard** tab.
10. In the **Save As** dialog box, enter a name for the database extract file.

11. Click **Save**.
    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
12. When the dashboard is loaded, click or **File** > **Save**, to save the database extract.
13. In the main menu, click **Server** and then click **Sign In**.



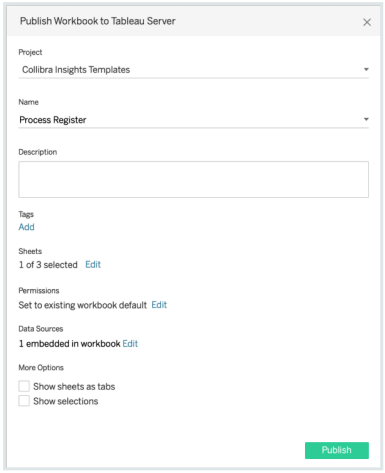

14. In the **Tableau Server Sign in** dialog box, click **Connect**.




15. Enter your Tableau sign in credentials.
16. Select the site to which you want to publish the Tableau workbook.



17. Click **Server** and then select **Publish Workbook**.
    » The following dialog box appears.

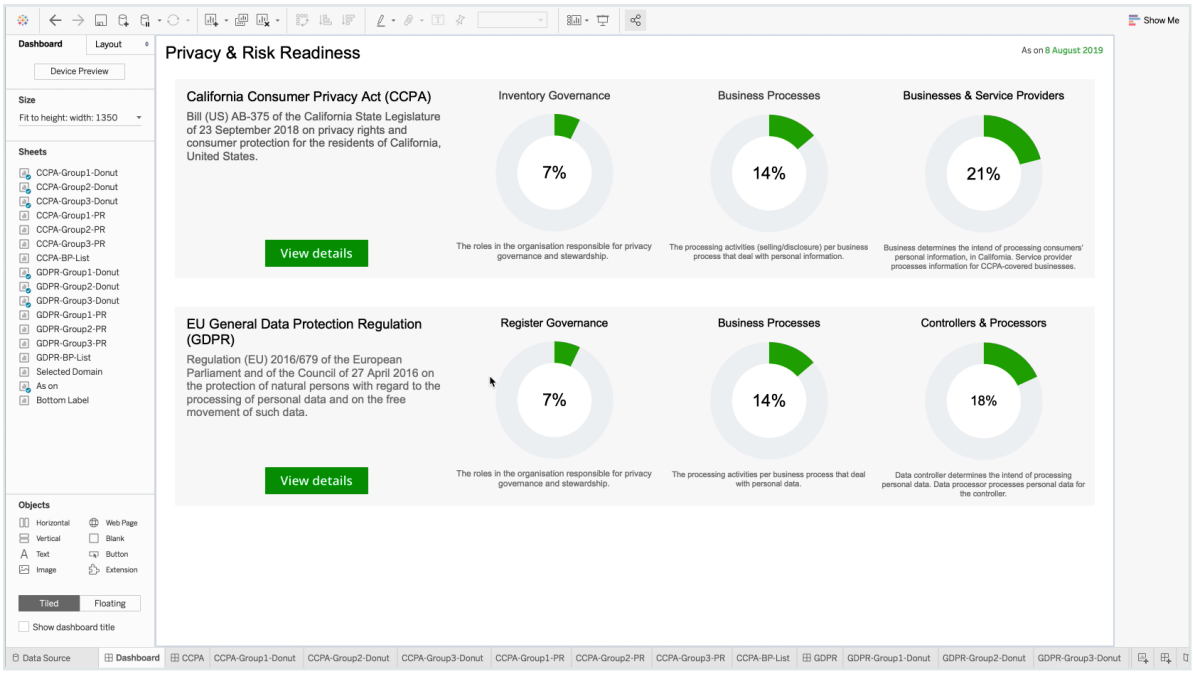



18. Enter the required information.
    The following fields are of interest for this task:

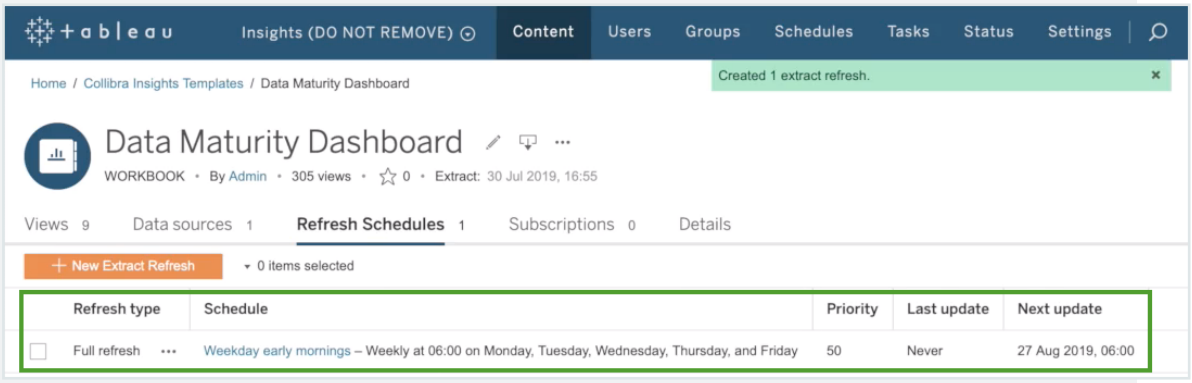
| Property | Description |
|---|---|
| Project | The project to which you want to publish. |
| Name | The name of the workbook. |
| Refresh Schedule (Full Extract) | The frequency with which the currently cached database extract is purged, and a new extract is cached.<br>Tip We recommend that you schedule a daily refresh. |
| Sheets | Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it.<br>Tip To avoid clutter, we recommend that you click **Edit** and then click **Only Dashboards**. |

| Property | Description |
| --- | --- |
| Data Sources | Determines:<br>◦ Whether the data is embedded in the workbook or published separately.<br>◦ How users authenticate with data sources.<br>Tip We strongly recommend the following settings. Click **Edit** and then:<br>◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**.<br>This enables users to view the report without having to authenticate themselves every time.<br>◦ In the **Authentication** drop-down menu, select **Allow refresh access**.<br>This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field. |
| More options | Additional publication options. The "Include external files" determines whether or not external files are included in the publication.<br>Note Only the DataMaturityDashboard.twbx file refers to external files. The **Include external files** option will not be available for the other Tableau workbook files.<br>Tip Ensure that the **Include external files** is selected, so that the images we've included with the Tableau workbook files are included in the publication. |

19. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

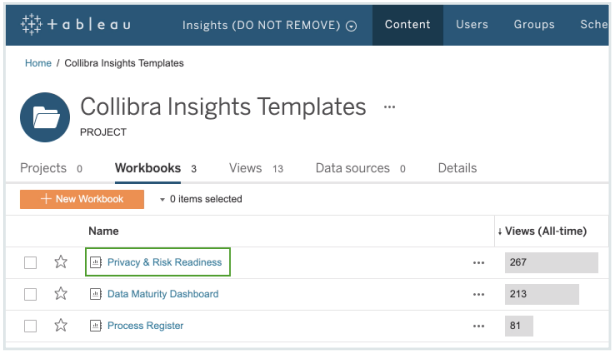



Tip In the Refresh Schedules tab, you can see the refresh schedule event you configured.

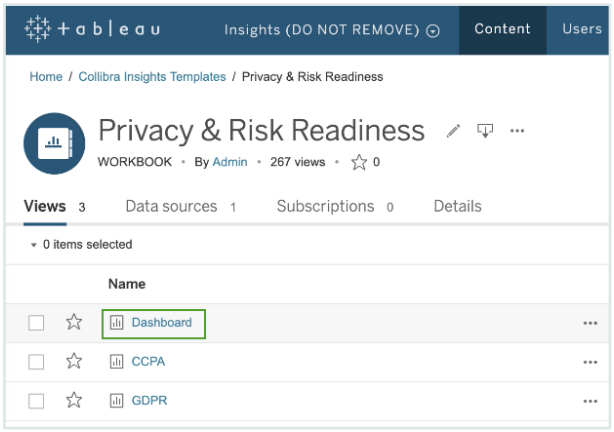



## Step 4: Configure the reporting options in Collibra Settings

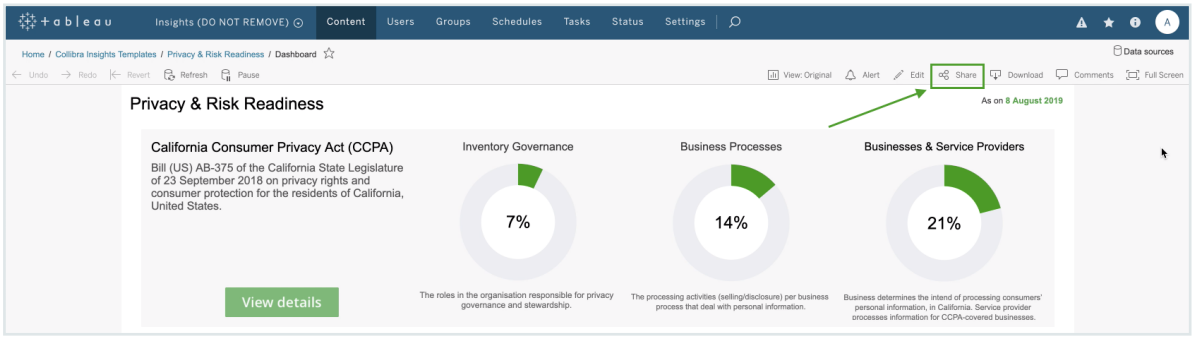
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example **Privacy & Risk Readiness**.



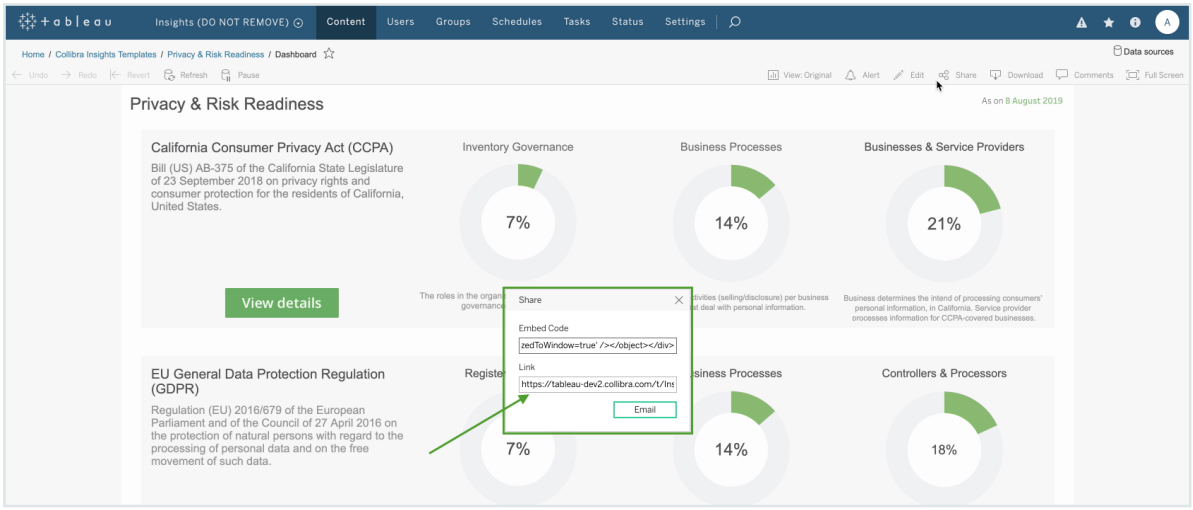

2. Click **Dashboard**.



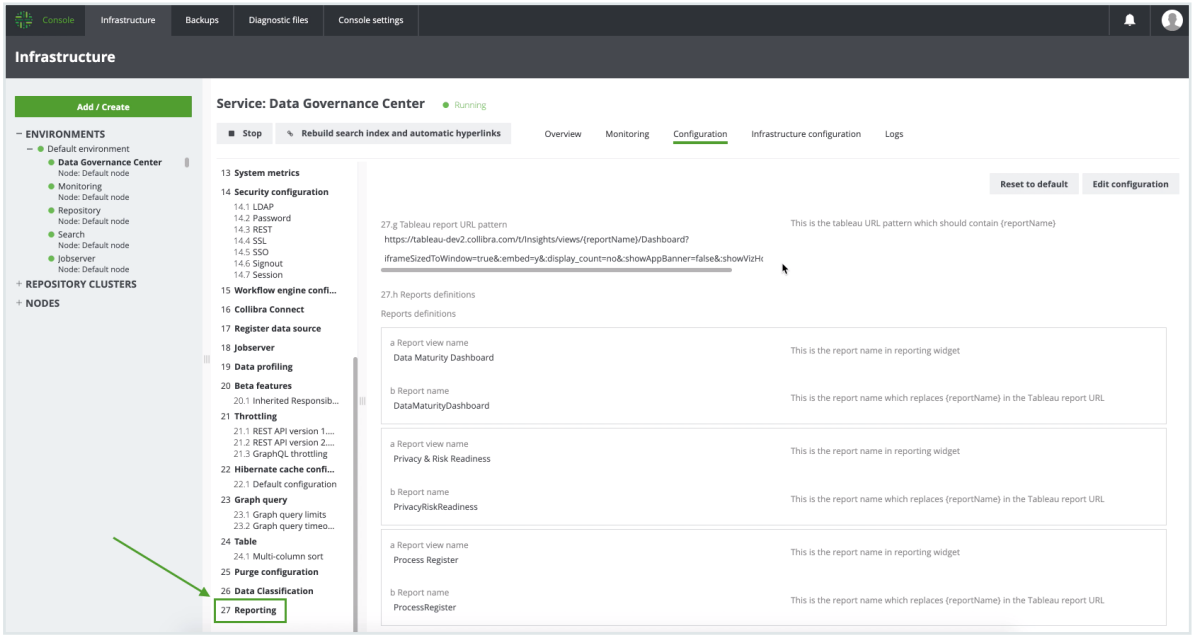

3. Click **Share**.



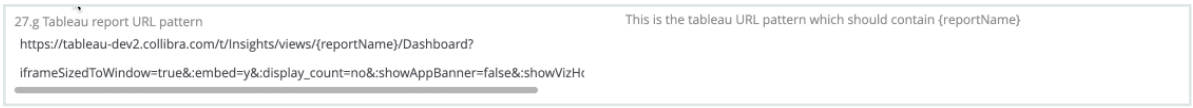
4. In the **Share** dialog box, copy the URL in the **Link** field.




5. Open Collibra Console with a user profile that has at least the **ADMIN** role.
   » Collibra Console opens with the **Infrastructure** page.
6. In the tab pane, click the Data Governance Center service of a Collibra environment.
   » The details of the DGC service are shown.
7. Click **Configuration**.
8. Click **Edit configuration**.
9. Scroll down the list of configuration options and click **Reporting**.



10. In field **Tableau report URL pattern**, paste the URL that you copied from the **Link** field in Tableau.




11. In the URL, replace the actual report name (such as *DataMaturityDashboard*) by *{reportName}*, for example: *https://tableau-dev2.<your-Collibra-Data-Intelligence-Cloud-environment-URL>/t/Insights/views/{reportName}/iframeSizedToWindow=true&...*
12. Under **Reports definitions**, click **Add**.

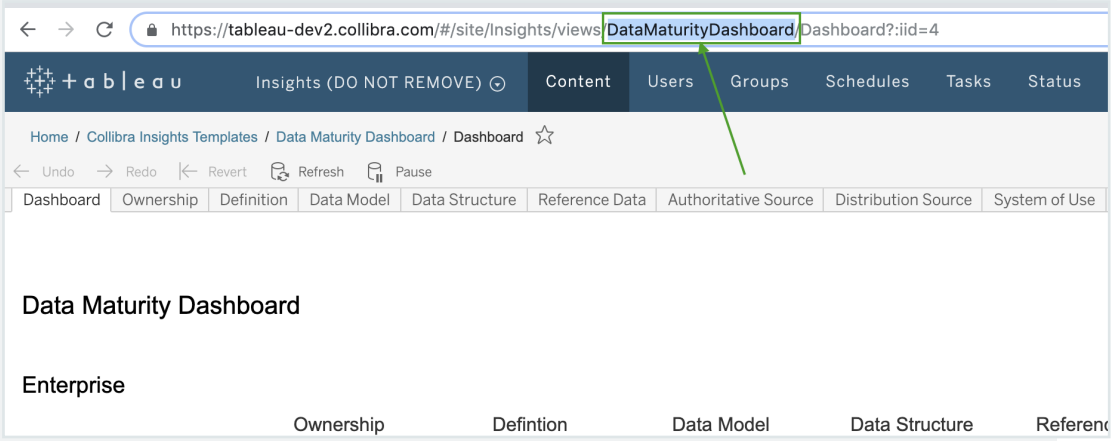
> Note You have to carry out this step for all three reports.

    - In field **a Report view name**, enter the name of a report, as you want it to appear on the report button in the Insights widget, for example:
        - Data Maturity Dashboard
        - Privacy & Risk Readiness
        - Process Register

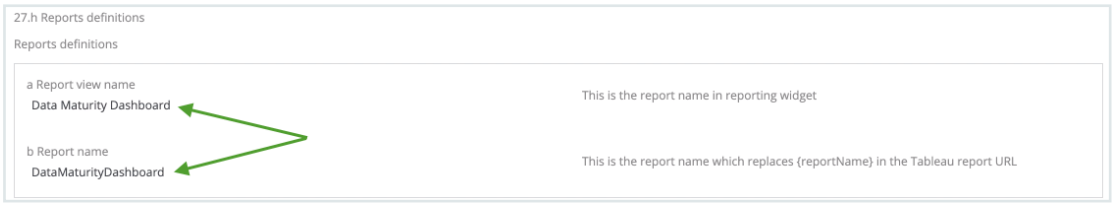



    - In field **b Report name**, enter the report name, for example:
        - DataMaturityDashboard
        - PrivacyRiskReadiness
        - ProcessRegister

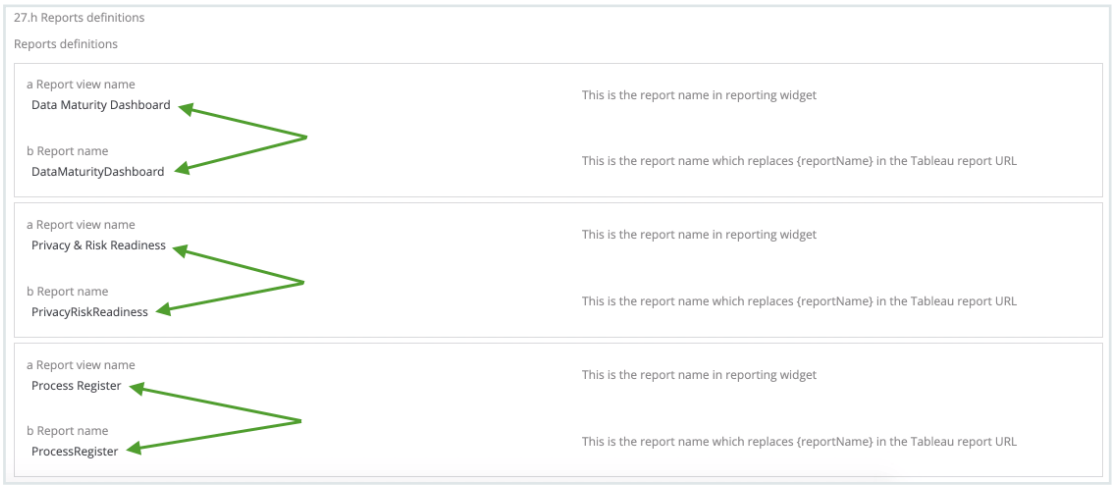
Tip Use the name as it appears in the URL of the Tableau report, for example "DataMaturityDashboard".




The settings in Console should look similar to the following example image:




- Click **Add**, and then add the report definitions for the remaining two reports.




13. Click **Save all**.

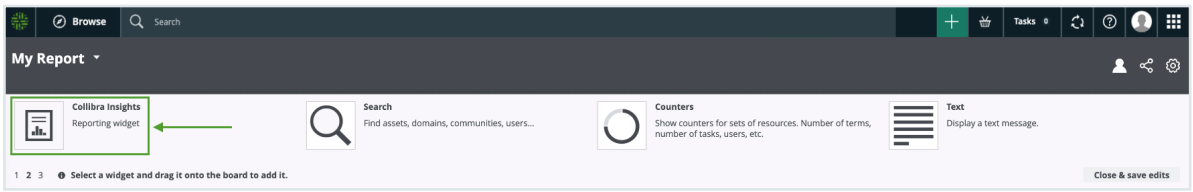
## Step 5: Add a dashboard in Collibra and configure the Insights widget

> Tip To facilitate the viewing of each report, we recommend that you add and configure a separate dashboard for each report. To do so, you have to complete this step for each report.

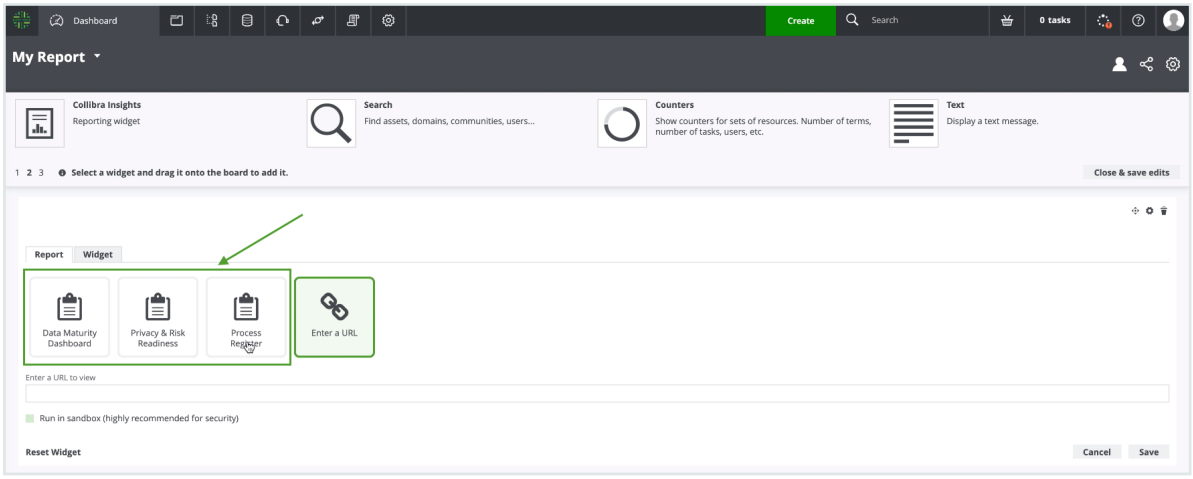
1. In the Collibra main menu, click → **Dashboards**.
2. In the view bar, click → **Add Dashboard**.
3. Enter the required information.

| Property | Description |
|---|---|
| Name | The name of your new dashboard. |
| Description | A description of the dashboard (optional). |
| Layout | The number of columns in the layout of the dashboard.<br>Tip Ensure that **1 column** is selected. |
| Always visible in the toolbar. | Option to always show the dashboard in the toolbar. |

4. Click **Save**.
5. In the view bar, click → **Edit widgets**.
6. Find the Insights widget and drag it onto the dashboard.



» The three reports that you configured in Collibra Settings are shown:




7. Select the report you want to show on the dashboard.
8. Click **Save**.
   » The report is shown on the dashboard you created.

## What's next?

Optionally, you can:

- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

# Generate a dashboard report via URL on GCP

After creating the Reporting Data Layer on Google Cloud Platform, you can generate a dashboard report via a URL, from tools such as Tableau Online, Power BI, Qlik, or ThoughtSpot.

## Prerequisites

You have:

- The Insights global role, to be able to view a report in Collibra Data Intelligence Cloud.
- Created the Reporting Data Layer on GCP.
- A license for Tableau Desktop 2018.3.
- A Tableau Server or Tableau Online account.

- The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

## Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event
4. Obtain the shareable link
5. Add a dashboard in Collibra and add your report via URL

### Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
   - Process Register Report Template
   - Privacy and Risk Readiness Report Template
   - Data Maturity Report Template

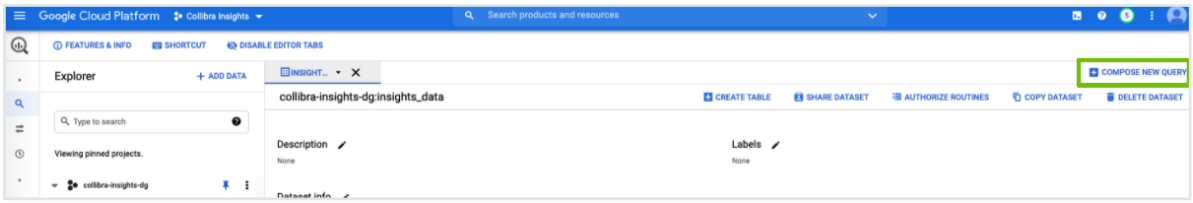
   » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

   » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

### Step 2: Install the SQL views associated with the Tableau workbook files

> Note
> - If this is the first time you are installing the SQL views, you have to carry out this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views, but are now installing a new version of a report, you have to install the new SQL view, if one was provided with the new report.

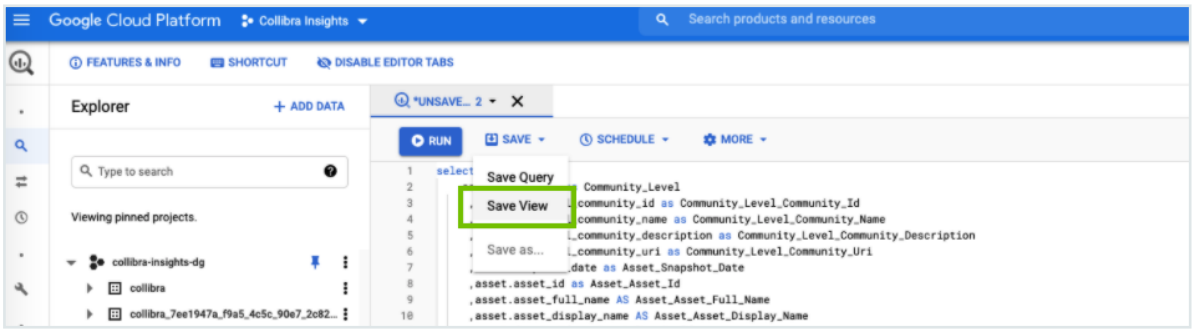
1. In the **BIG DATA** section of the GCP left-hand menu, click **BigQuery**.
2. In the **Explorer** page, click **COMPOSE NEW QUERY**.




3. From one of the report template packages you downloaded from Collibra Marketplace, drag and drop one of the SQL files into a new query tab.
   » The code appears in the query tab.
4. In the code, change any occurrences of "<customer_dataset>" to "<*the-name-of-your-Insights-dataset*>".

> Tip The dataset name is the value you entered in the Dataset ID field in step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure.

5. Click **Save** > **Save View**.




   » The **Save view** dialog box appears.
6. In the **Save view** dialog, enter the relevant information:

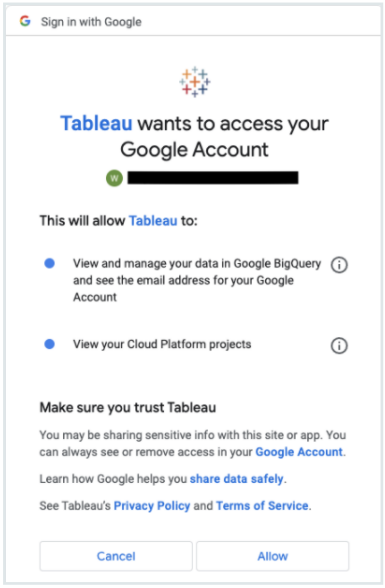


| Field | Description |
|---|---|
| Project | The project you are using for Insights deployment. |
| Dataset ID | The value you entered in the Dataset ID field in step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure. |
| Table name | The name of the report SQL file, for example "data_maturity". |

7. Repeat steps 3-5 for the SQL files in the other two report template packages.

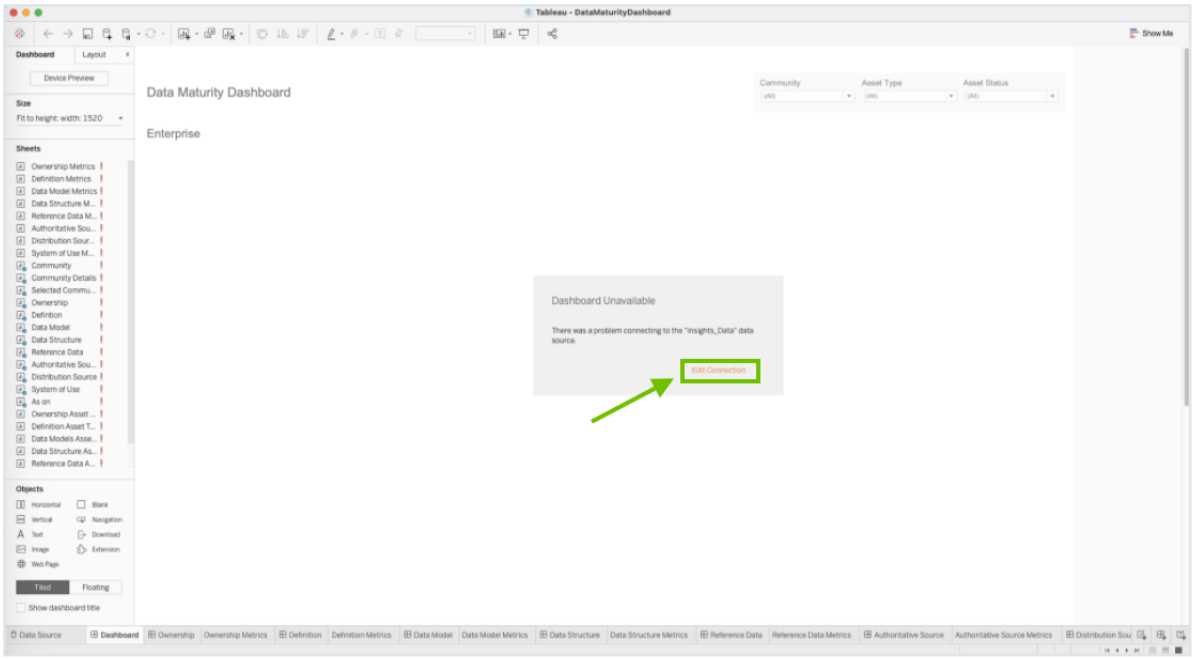
## Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace, for example DataMaturity.
2. Open the Tableau Workbook file, in this example DataMaturityDashboard.twbx.
   » The Google sign in page appears.
3. Select the relevant Google account.
   » You are prompted to allow Tableau to access your Google account.



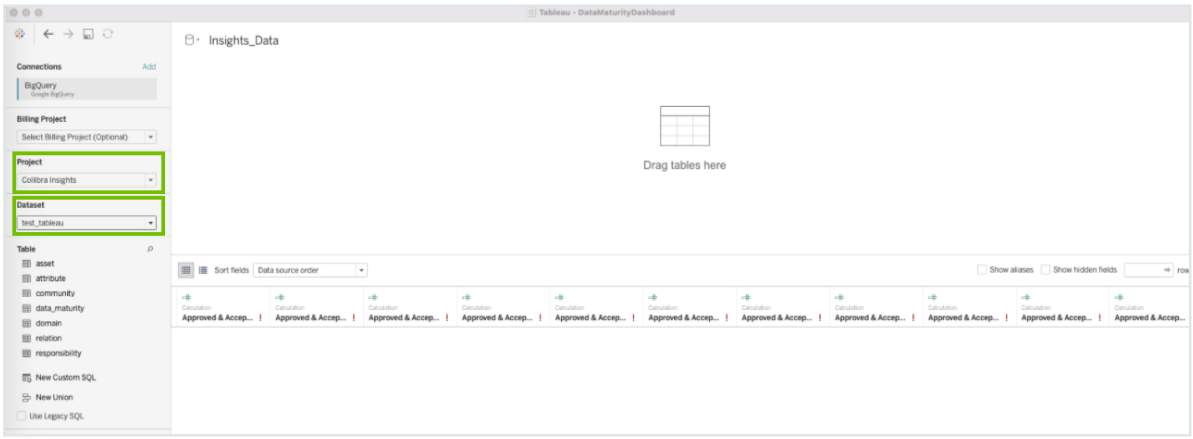

4. Ensure that both access options are selected, and then click **Allow**.

5. In the Tableau DataMaturityDashboard, click **Edit Connection** in the **Dashboard Unavailable** notification.



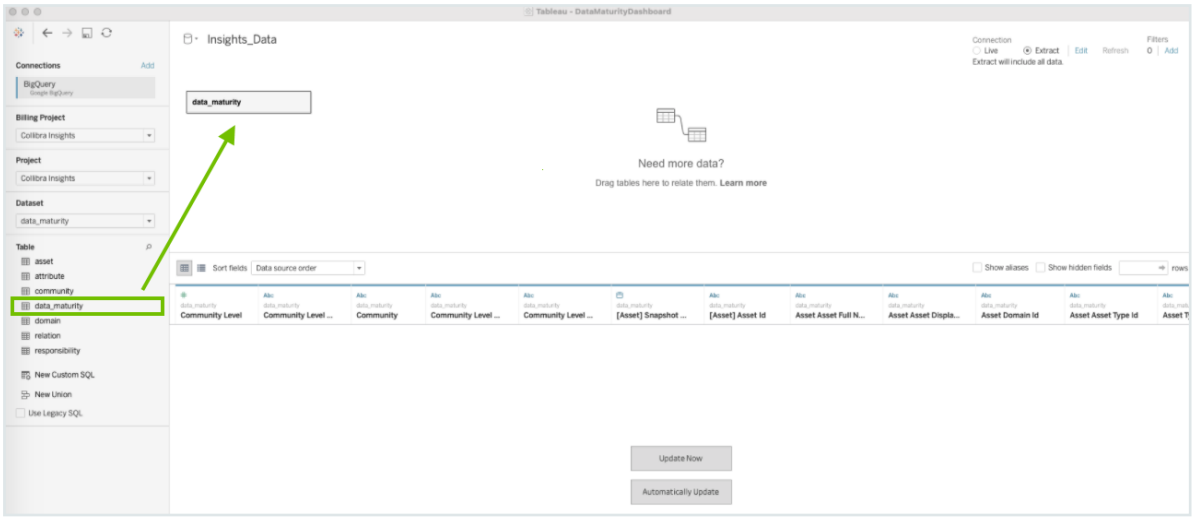

» The **Data Source** tab opens.

6. Specify the following information:




| Field | Description |
|---|---|
| Project | The project you are using for Insights deployment. |
| Dataset | What should the user choose? |

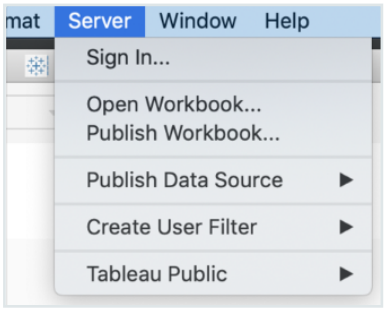
7. In the **Table** section, double-click on the **data_maturity** view.
   » The view appears in the main frame, indicating that a link to the data is made.




8. In the upper-right corner of the page, select an **Extract** connection.




9. In the lower-left corner of the page, click the **Dashboard** tab.
10. In the **Save As** dialog box, enter a name for the database extract file.
11. Click **Save**.
    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
12. When the dashboard is loaded, click or **File** > **Save**, to save the database extract.
13. In the main menu, click **Server** and then click **Sign In**.




14. In the **Tableau Server Sign in** dialog box, click **Connect**.

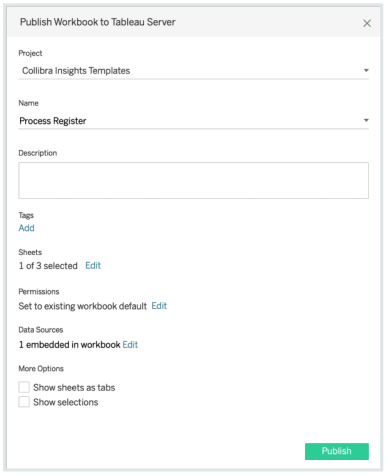



15. Enter your Tableau sign in credentials.

16. Select the site to which you want to publish the Tableau workbook.




17. Click **Server** and then select **Publish Workbook**.
    » The following dialog box appears.



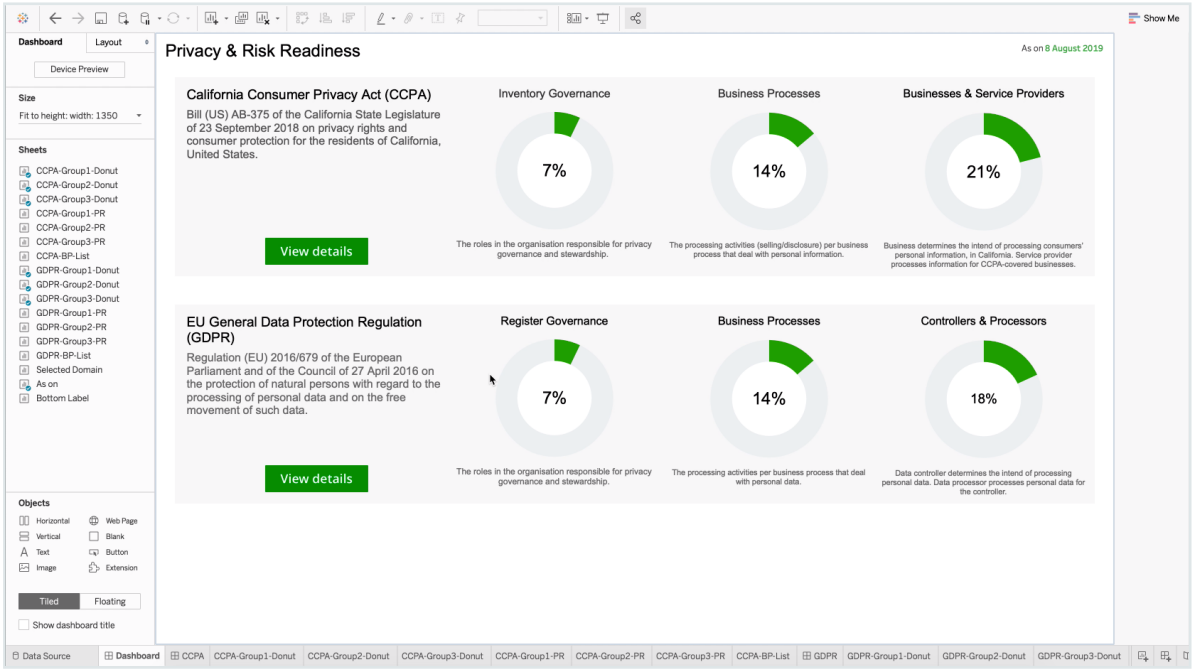

18. Enter the required information.
    The following fields are of interest for this task:

| Property | Description |
|---|---|
| Project | The project to which you want to publish. |
| Name | The name of the workbook. |
| Refresh Schedule (Full Extract) | The frequency with which the currently cached database extract is purged, and a new extract is cached.<br>Tip We recommend that you schedule a daily refresh. |

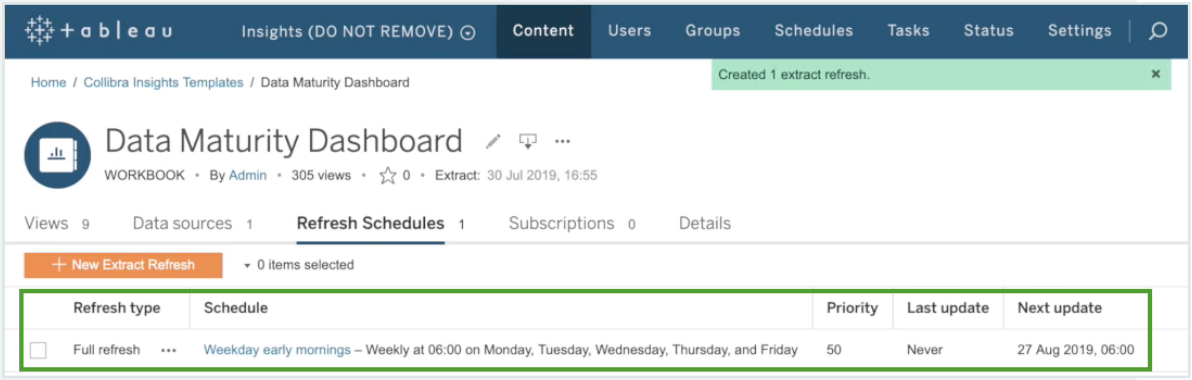
| Property | Description |
| --- | --- |
| Sheets | Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it.<br><br>Tip To avoid clutter, we recommend that you click **Edit** and then click **Only Dashboards**. |
| Data Sources | Determines:<br><br>◦ Whether the data is embedded in the workbook or published separately.<br>◦ How users authenticate with data sources.<br><br>Tip We strongly recommend the following settings. Click **Edit** and then:<br>◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**.<br>This enables users to view the report without having to authenticate themselves every time.<br>◦ In the **Authentication** drop-down menu, select **Allow refresh access**.<br>This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field. |

| Property | Description |
| --- | --- |
| More options | Additional publication options. The "Include external files" determines whether or not external files are included in the publication.<br><br>Note Only the DataMaturityDashboard.twbx file refers to external files. The **Include external files** option will not be available for the other Tableau workbook files.<br><br>Tip Ensure that the **Include external files** is selected, so that the images we've included with the Tableau workbook files are included in the publication. |

19. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

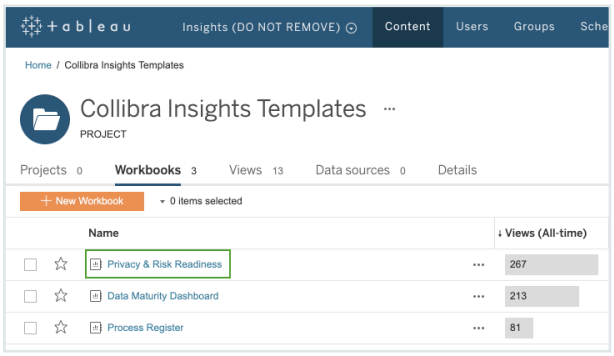


Tip In the Refresh Schedules tab, you can see the refresh schedule event you configured.

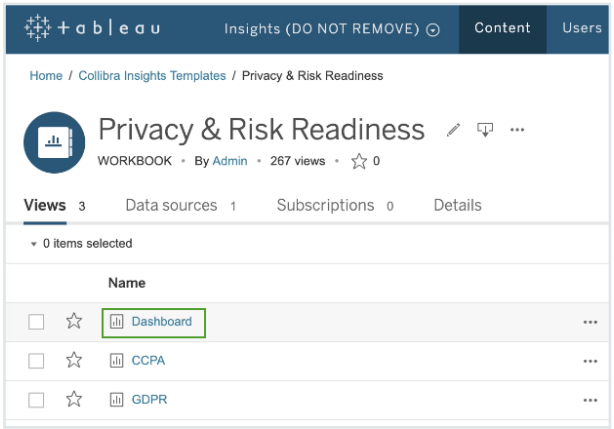



## Step 4: Obtain the shareable link

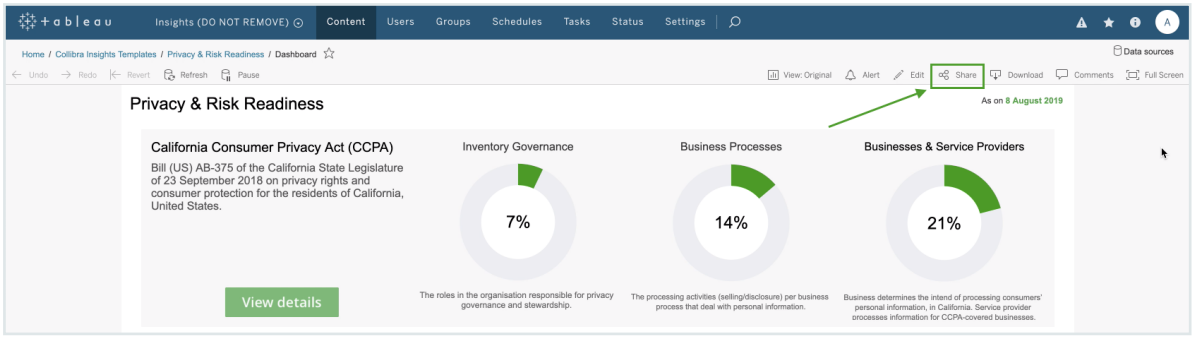
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example **Privacy & Risk Readiness**.



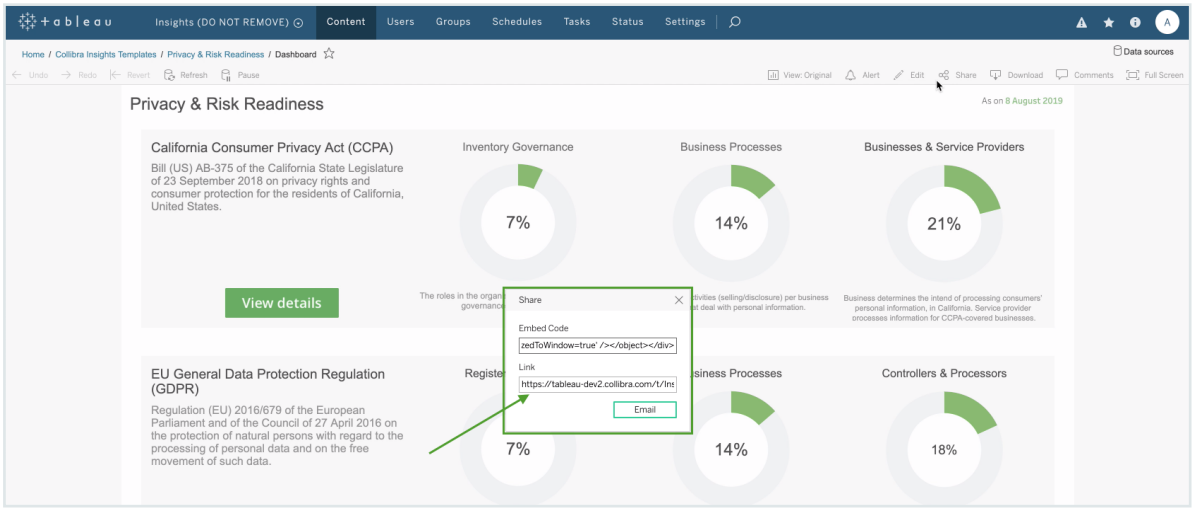

2. Click **Dashboard**.



3. Click **Share**.




4. In the **Share** dialog box, copy the URL in the **Link** field.




## Step 5: Add a dashboard in Collibra and then add your report via URL

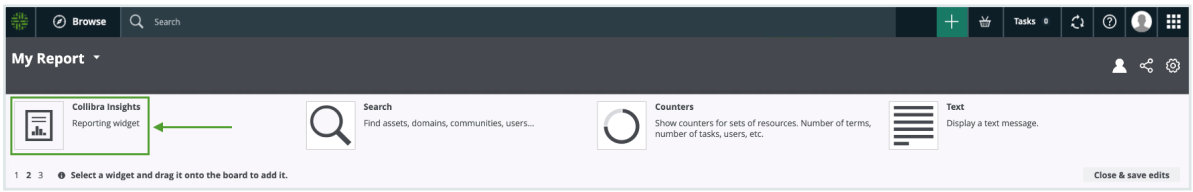
> Tip To facilitate the viewing of each report, we recommend that you add and configure a separate dashboard for each report. To do so, you have to complete this step for each report.

1. In the Collibra main menu, click → **Dashboards**.
2. In the view bar, click → **Add Dashboard**.

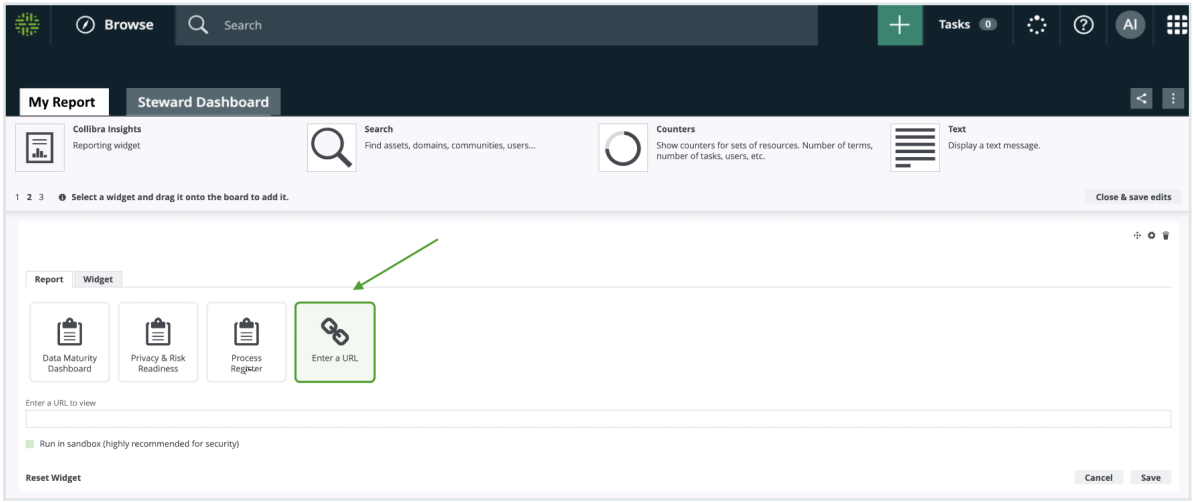
3. Enter the required information.

| Property | Description |
|---|---|
| Name | The name of your new dashboard. |
| Description | A description of the dashboard (optional). |
| Layout | The number of columns in the layout of the dashboard.<br>Tip Ensure that **1 column** is selected. |
| Always visible in the toolbar. | Option to always show the dashboard in the toolbar. |

4. Click **Save**.
5. In the view bar, click ⚙ → **Edit widgets**.
6. Find the Insights widget and drag it onto the dashboard.




7. Click Enter a URL, and enter the relevant URL.




8. Click **Save**.
   » The report is shown on the dashboard you created.

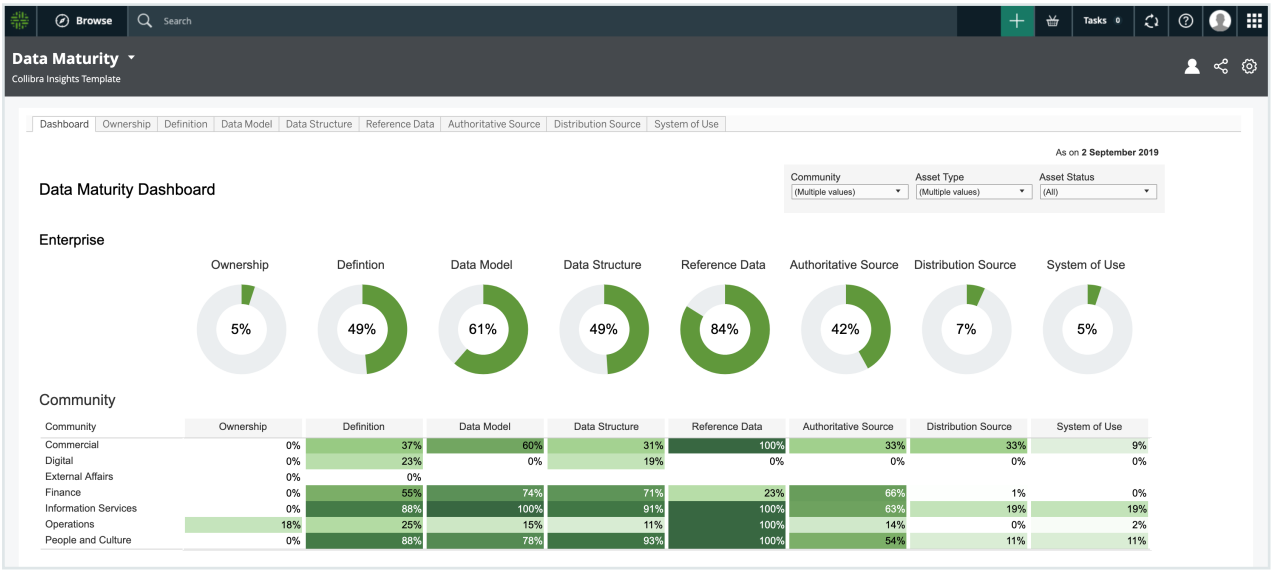
# What's next?

Optionally, you can:

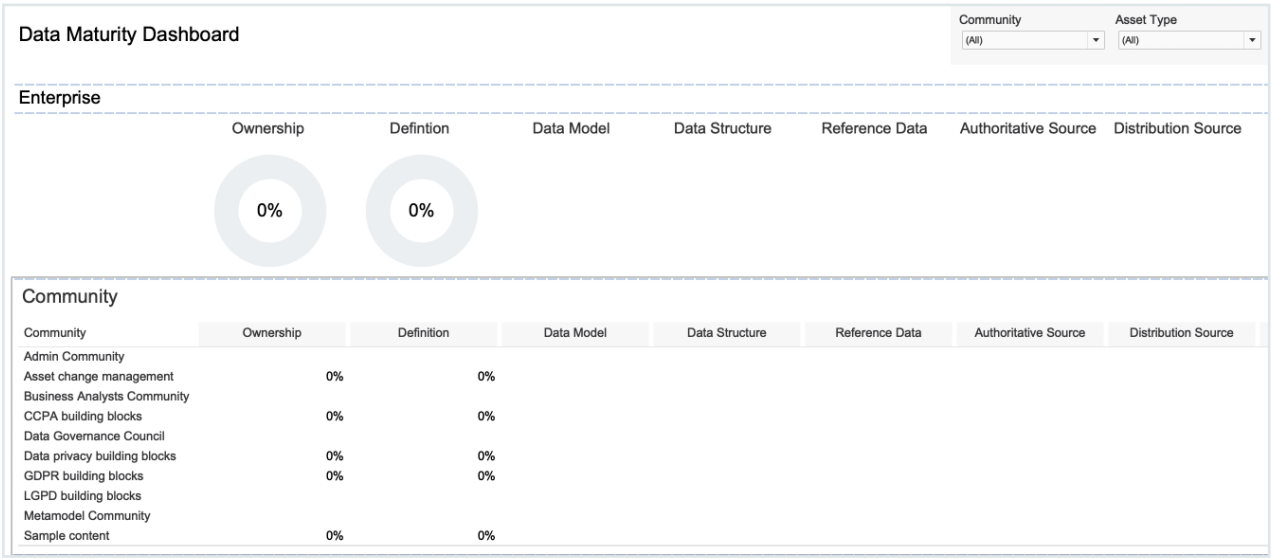
- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

# Improving the visual output of the Data Maturity report

A well configured Data Maturity report will look something like the following image.




However, it's possible that you correctly configured the Data Maturity report, but it looks more like the following image.

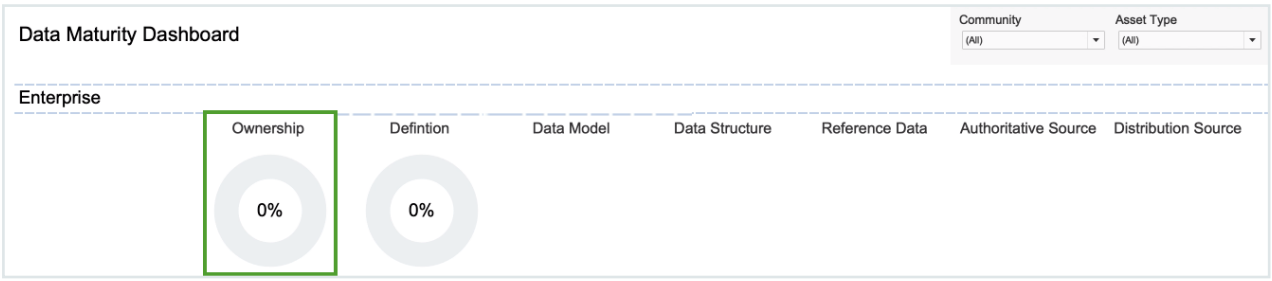


# Common scenarios and tips

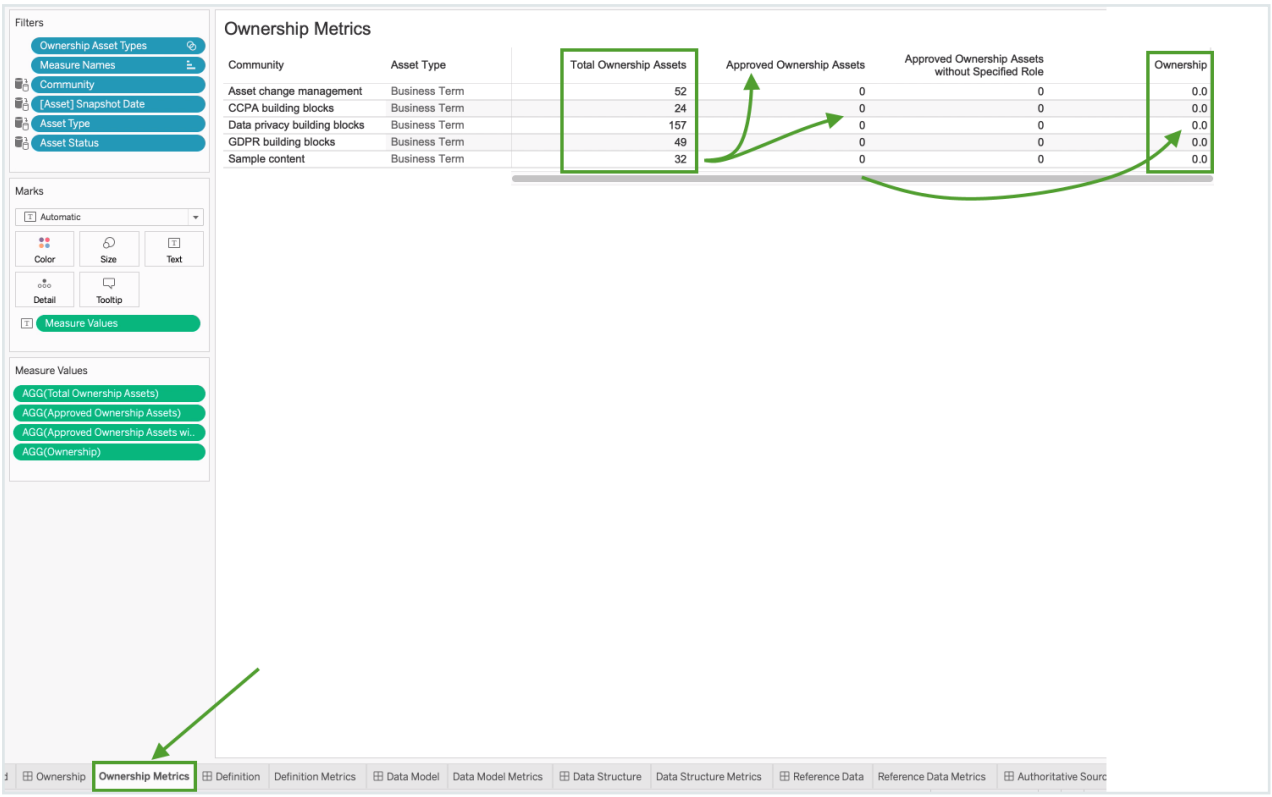
Here are some common scenarios, explanations and tips for improving the visual output of the report.

### The progress circle charts show 0%

In the following example image, the Ownership progress circle chart shows 0%.



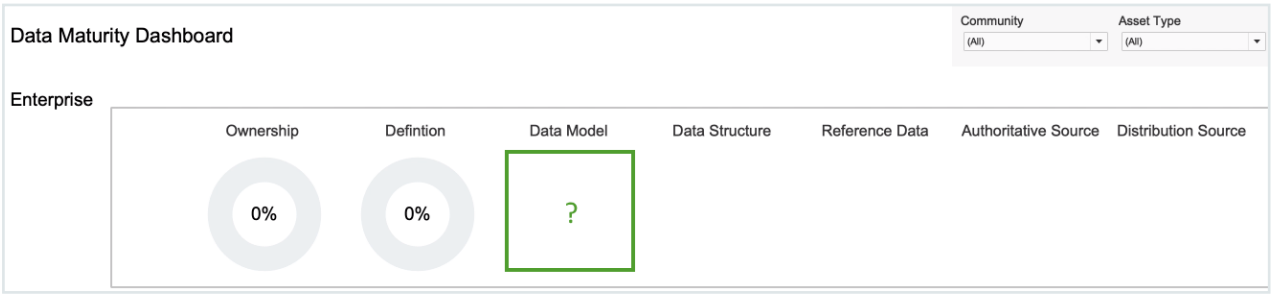

If you go to the **Ownership Metrics** tab, you see that there are many Business Term assets for inclusion in the report. One might expect that the presence of these assets would be reflected in the circle chart. However, the formula for calculating the percentage entails a division operation involving the number of assets with the status Approved. In this example, there are no assets that have the status Approved, and this "0" value results in an Ownership percentage of 0%.




> Tip Keep in mind that progress circle charts are reliant on approved assets. In other words, the more mature the data set, the more meaningful the progress circle chart will be.

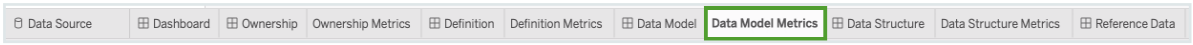
### No progress circle chart is shown

In the following example image, no progress circle chart is shown for the Data Model metric.

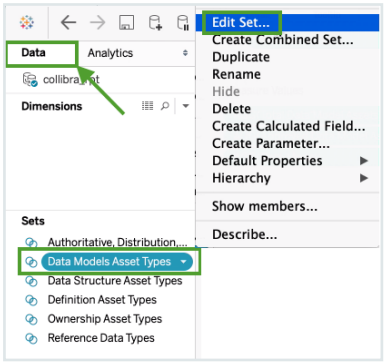



> Tip Ensure that the relevant asset types are selected for the Data Model metric.

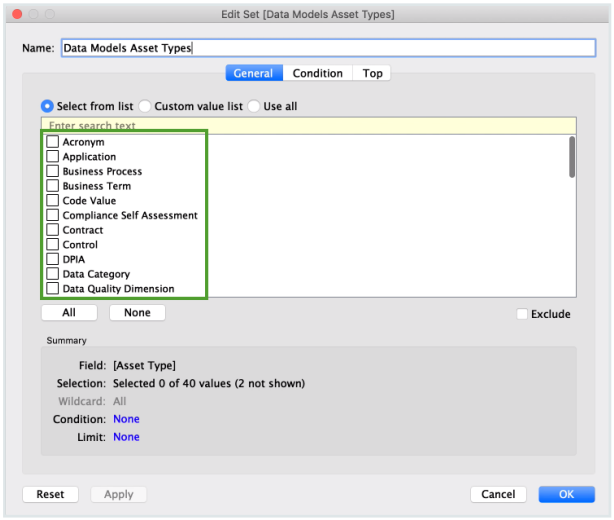
1. At the bottom of the page, click the **Data Model Metrics** tab.




2. In the **Data** tab, select **Data Models Asset Types**, and then select **Edit Set**.




» The Edit Set dialog box appears; however, no asset types are selected.




3. Select the asset types that you want to monitor, for example Data Model, Data Entity and Data Attribute.
4. Click **OK**.

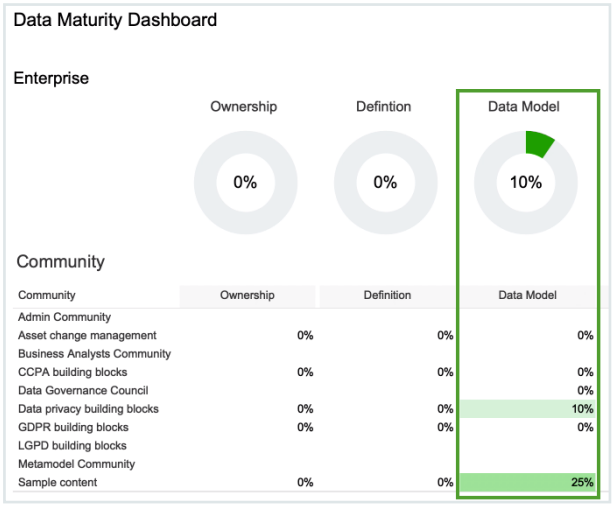
» The data is now shown, in accordance with the selected asset types.

Data Model Metrics

| Community | Asset Type | Total Data Model Assets | Approved Data Model Assets | Data Model |
|---|---|---|---|---|
| Asset change management | Business Term | 52 | 0 | 0.0 |
| | Code Value | 52 | 0 | 0.0 |
| CCPA building blocks | Business Term | 24 | 0 | 0.0 |
| Data Governance Council | Business Process | 2 | 0 | 0.0 |
| Data privacy building blocks | Business Process | 82 | 28 | 0.3 |
| | Business Term | 157 | 0 | 0.0 |
| | Code Value | 52 | 0 | 0.0 |
| GDPR building blocks | Business Term | 49 | 0 | 0.0 |
| Sample content | Business Process | 82 | 28 | 0.3 |
| | Business Term | 32 | 0 | 0.0 |

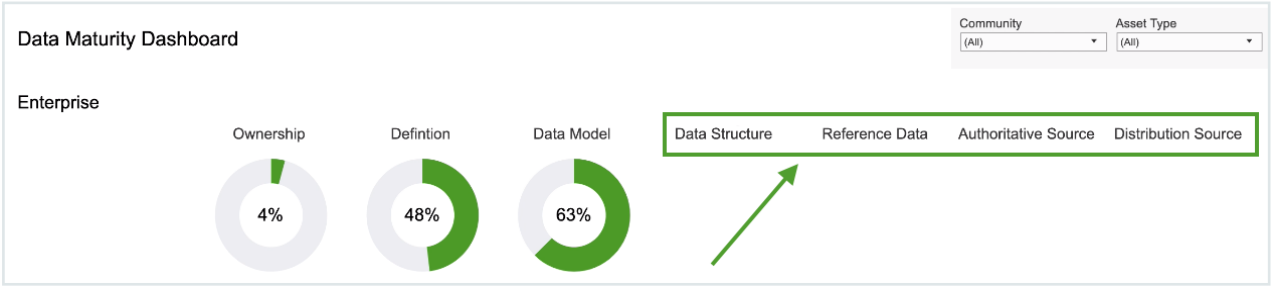
> Note Keep in mind that the formula for calculating the percentage entails a division operation involving the number of assets with the status Approved.

5. On the **Dashboard** tab, the progress circle chart is now shown for the Data Model metric.



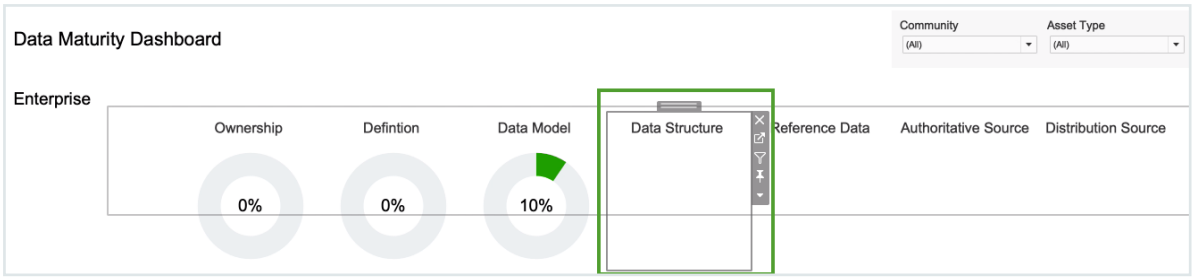

### The report includes non-applicable metrics

In this example image, we are not interested in the Data Structure, Reference Data, Authoritative Source and Distribution Source metrics, and want to remove them from the report.




## Remove a single metric

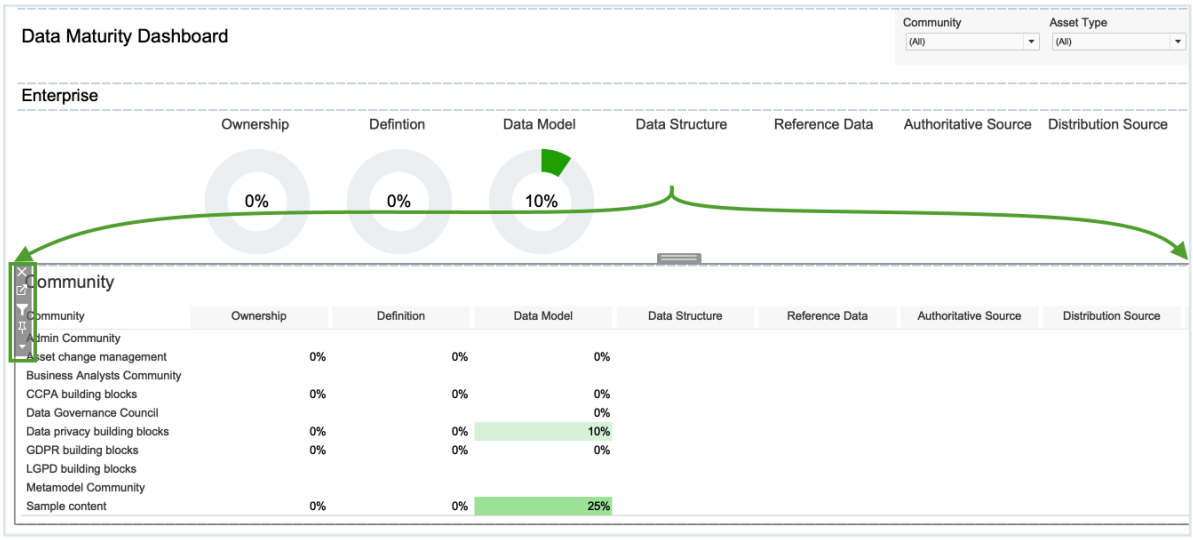
1. Select a single metric.
   You might have to first select the section, for example **Enterprise**, and drag the frame so that you can click an individual metric.



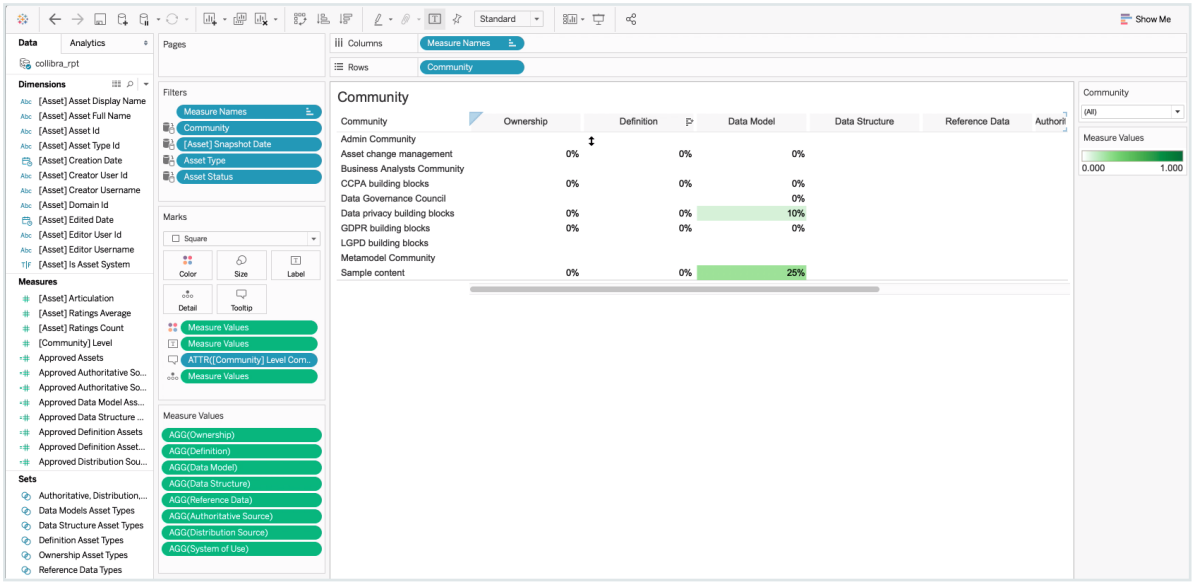

2. Click the Remove from dashboard icon ✕.

# Remove several metrics at once

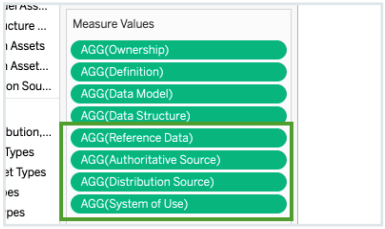
1. Click in the **Community** section, so that the entire section is highlighted.



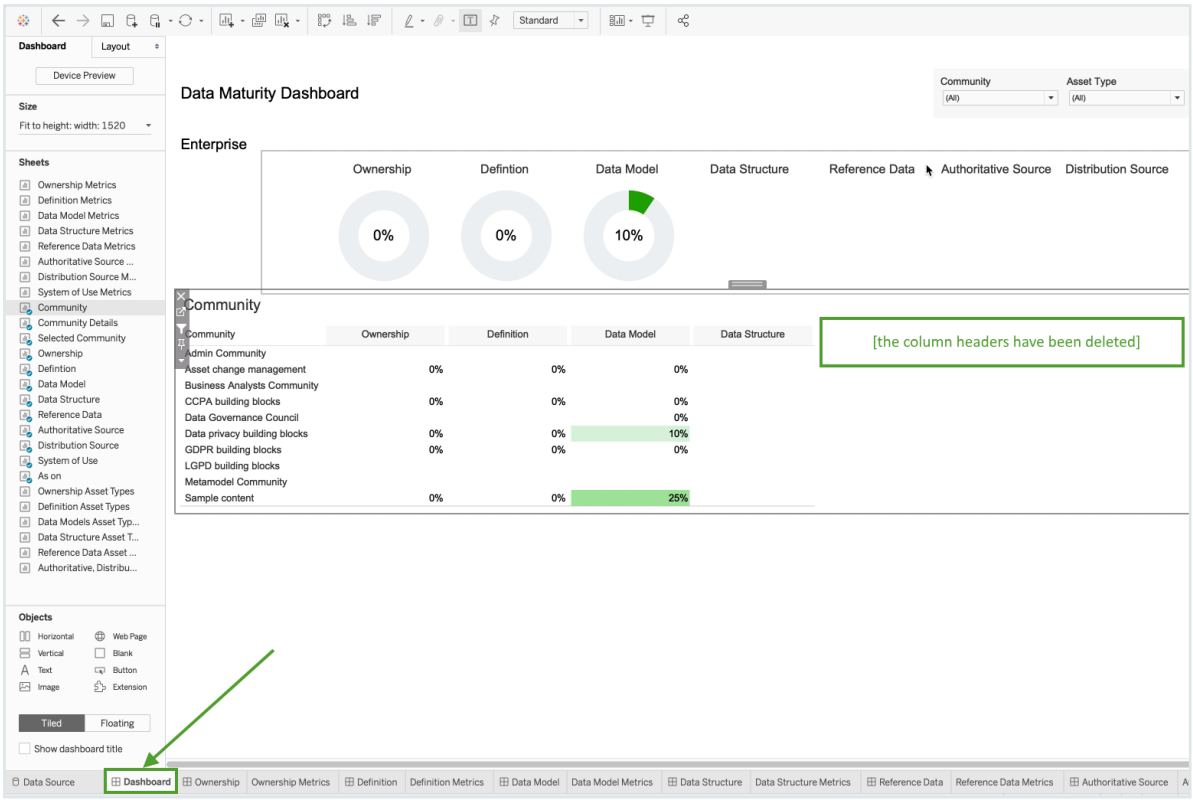
2. Click the "go to sheet" icon .
   » The Community data sheet opens.




3. In the **Measure Values** section, select the metrics that you want to remove.
   In this example, we selected Data Structure, Reference Data, Authoritative Source and Distribution Source.



4. Right-click on the selected metrics and select **Remove**.
   » The metrics at the Community level are deleted.

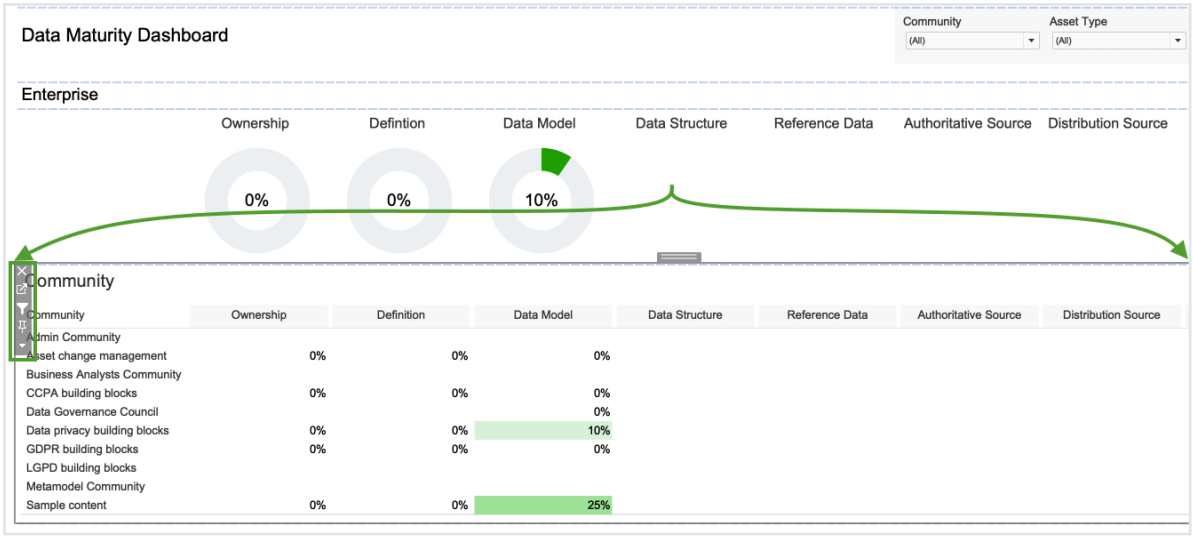



### Assets you expected to see in the report are not shown

If assets that you expected to see in the report are not shown, it could be that the status of the assets are not correctly reflected in the relevant measures. By default, the reports are configured to show only assets with the status Approved. Assets with other statuses will not be shown in the reports.

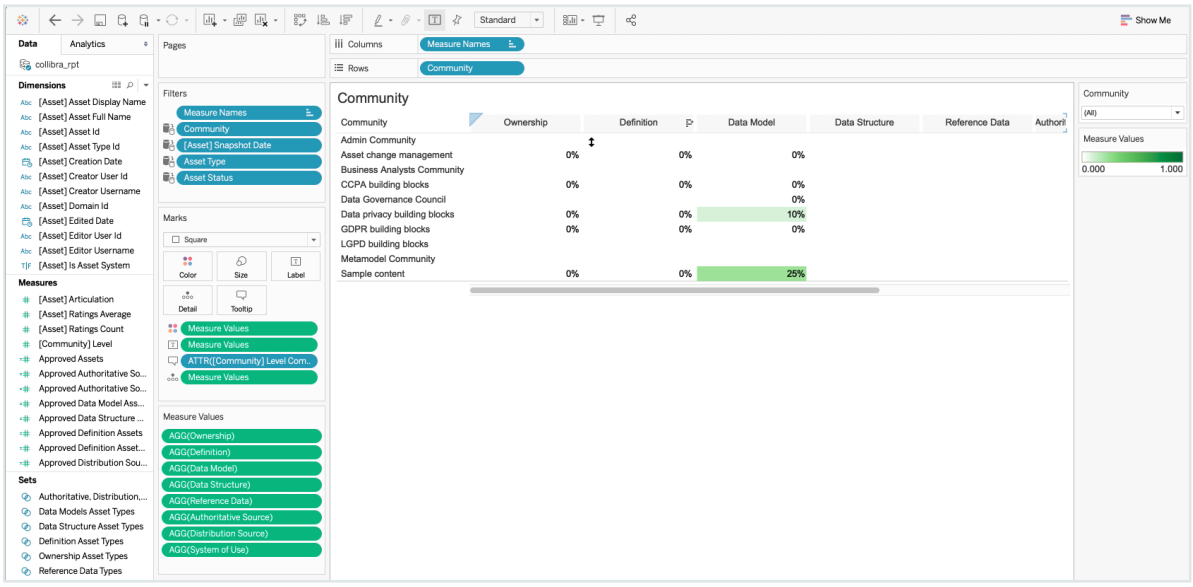
The report templates, however, are fully configurable. You can edit the relevant measures, to include other statuses, such as Accepted.

1. Click in the **Community** section, so that the entire section is highlighted.

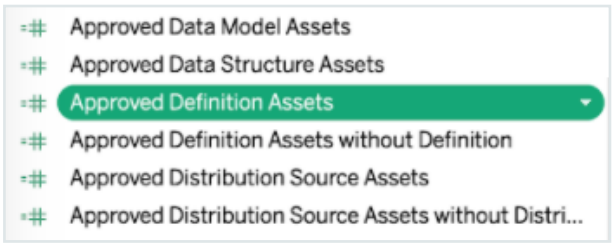



2. Click the "go to sheet" icon .

» The Community data sheet opens.




3. In the **Measure Values** section, select the measure that you want to edit.
In this example, we selected Approved Definition Assets.




4. Right-click on the selected measure and select **Edit**.

5. In the calculation logic, change the asset status from "Approved" to the status you want, for example "Accepted".



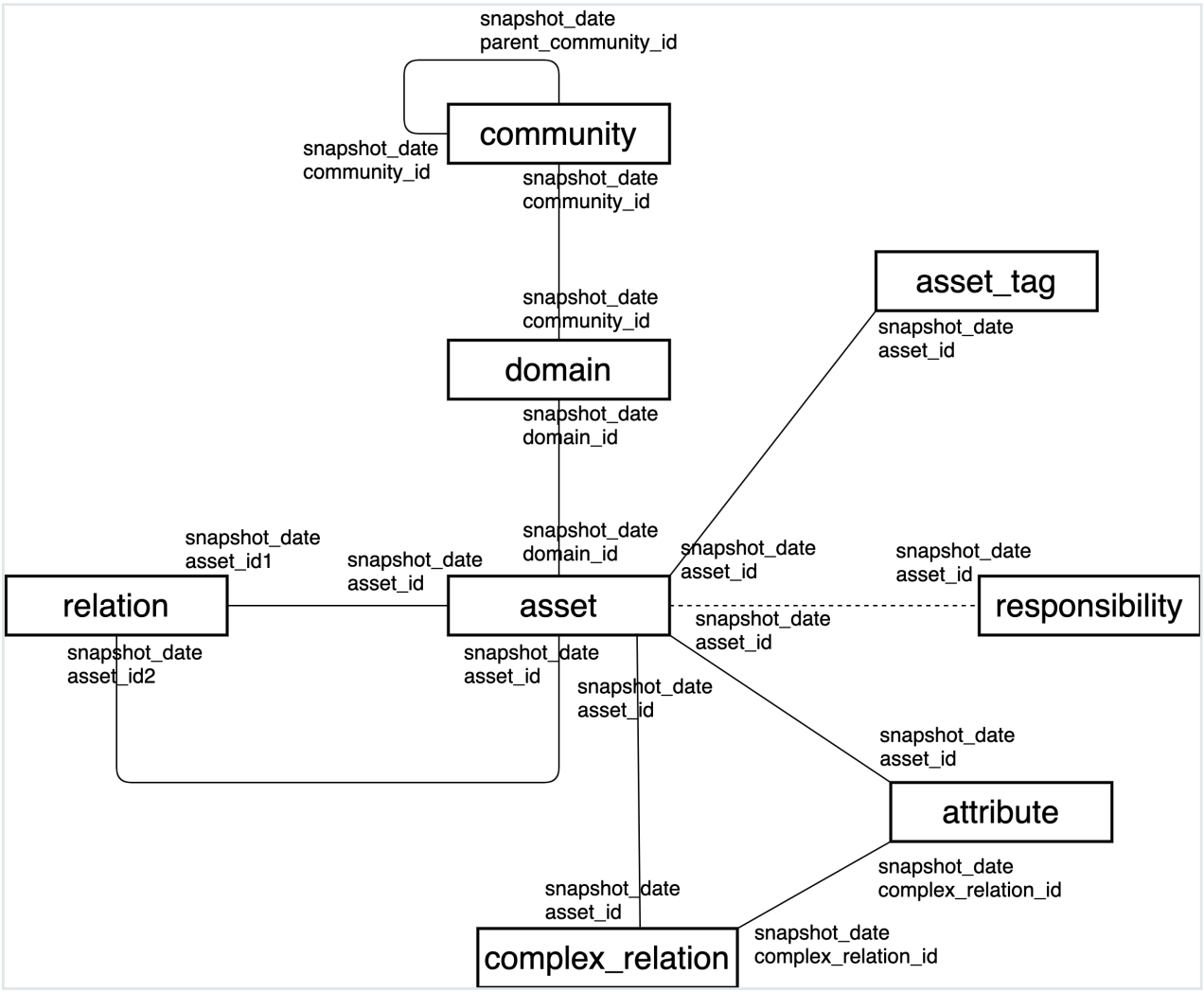

6. Click OK.

# Reporting Data Layer entity relationship diagram

The following Entity Relationship Diagram image shows how the different Reporting Data Layer tables can be linked. All tables contain both packaged and custom variants of the concept.

> Note Nested communities can be identified via the parent-child relation. Subcommunities also have the ID of the community stored next to them.

To combine data for a given date, each table link clause must include the "snapshot_date".



# Tables

| table_name | Description |
|---|---|
| Asset | Contains all of the assets in your Collibra Data Intelligence Cloud environment, including each asset's type and current status. |
| Asset_tag | Contains all of the tags attached to the assets in your Collibra environment. |
| Attribute | Contains all of the asset attributes in your Collibra environment. |
| Community | Contains all of the communities in your Collibra environment, including subcommunities and domains. |
| Complex_ relation | Contains all of the relation legs for all of the complex relations in your Collibra environment. |
| Domain | Contains all of the domains in your Collibra environment that contain assets. |
| Relation | Contains all of the relations in your Collibra environment, from head to tail and vice versa. |
| Responsibility | Contains all of the responsibilities in your Collibra environment that are directly assigned at the asset level or domain level.<br><br>Note Inherited responsibilities from the community level are not included in the Reporting Data Layer. |

# Asset

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | date | The date on which the snapshot was created. This is synchronized with the snapshot table. |
| asset_id | 2 | character varying | The resource UUID of the asset. This is a unique identifier. |
| asset_full_name | 3 | character varying | The full name of the asset. |
| asset_display_name | 4 | character varying | The display name of the asset. |
| domain_id | 5 | character varying | The resource UUID of the domain. This is a unique identifier. |
| asset_type_id | 6 | character varying | The resource UUID of the asset type. This is a unique identifier. |
| asset_type_name | 7 | character varying | The name of the asset type. |
| status_id | 8 | character varying | The resource UUID of the status. |
| status_name | 9 | character varying | The name of the status. |
| articulation | 10 | double precision | The articulation score of the asset. |

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| ratings_average | 11 | double precision | The aggregated average of the ratings of the asset. |
| ratings_count | 12 | integer | The number of ratings of the asset. |
| is_asset_system | 13 | boolean | Indication whether the asset is a system asset. |
| creator_user_id | 14 | character varying | The UUID of the user who created the asset. |
| creator_username | 15 | character varying | The username of the user who created the asset. |
| creation_date | 16 | timestamp with time zone | The date on which the asset was created. |
| editor_user_id | 17 | character varying | The UUID of the user who last edited the asset. |
| editor_username | 18 | character varying | The username of the user who last edited the asset. |
| edited_date | 19 | timestamp with time zone | The date on which the asset was last edited. |

## Asset_tag

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | date | The date on which the snapshot was created. |

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| tag_id | 2 | character varying | The resource UUID of the tag attached to the asset. |
| asset_id | 3 | character varying | The resource UUID of the asset to which the tag is attached. |
| tag_name | 4 | character varying | The display name of the tag attached to the asset. |
| creator_user_id | 5 | character varying | The UUID of the user who created the tag. |
| creator_username | 6 | character varying | The username of the user who created the tag. |
| creation_date | 7 | timestamp with time zone | The date on which the tag was created. |
| editor_user_id | 8 | character varying | The UUID of the user who last edited the tag. |
| editor_username | 9 | character varying | The username of the user who last edited the tag. |
| edited_date | 10 | timestamp with time zone | The date on which the tag was last edited. |
| is_tag_system | 11 | boolean | Indication whether or not the tag is a system tag. |

# Attribute

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | datetime | The date on which the snapshot was created. This is synchronized with the snapshot table. |
| attribute_id | 2 | character varying | The UUID of the attribute. |
| asset_id | 3 | character varying | The UUID of the related asset |
| asset_type_name | 4 | character varying | The name of the asset type of the relation asset. |
| attribute_type_id | 5 | character varying | The UUID of the attribute type. |
| attribute_type_name | 6 | character varying | The name of the attribute type. |
| attribute_type_description | 7 | character varying | The description of the attribute type. |
| kind | 8 | character varying | The kind of attribute. |
| is_attribute_integer | 9 | boolean | Inidication whether the attribute is an integer. |
| expression_long | 10 | character varying | The value of the attribute. |

| column_name | ordinal_ position | data_type | Description |
|---|---|---|---|
| boolean_value | 11 | boolean | The value of the attribute converted to a boolean. |
| datetime_ value | 12 | datetime | The value of the attribute converted to date_time. |
| numeric_value | 13 | numeric | The value of the attribute converted to numeric. |
| creator_user_ id | 14 | character vary- ing | The UUID of the user who created the attribute. |
| creator_user- name | 15 | character vary- ing | The username of the user who created the attribute. |
| creation_date | 16 | timestamp with time zone | The date on which the attribute was cre- ated. |
| editor_user_id | 17 | character vary- ing | The UUID of the user who last edited the attribute. |
| editor_user- name | 18 | character vary- ing | The username of the user who last edited the attribute. |
| edited_date | 19 | timestamp with time zone | The date on which the attribute was last edited. |
| complex_ relation_id | 20 | character varying | The UUID of the complex relation for which the attribute is defined. |

# Community

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | date | The date on which the snapshot was created. This is synchronized with the snapshot table. |
| community_id | 2 | character varying | The UUID of the community. |
| community_name | 3 | character varying | The name of the community. |
| community_description | 4 | text | The description of the community. |
| is_community_system | 5 | boolean | Indicator of whether the community is a system community. |
| uri | 6 | character varying | The URI of the community. |
| parent_community_id | 7 | character varying | The UUID of the community containing this community. |
| level | 8 | integer | The level of the community containing this community. The top level starts at 1. |
| level_community_id | 9 | character varying | The UUID of the community containing this community at a certain level. |

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| level_community_name | 10 | character varying | The name of the community containing this community at a certain level. |
| level_community_description | 11 | text | The description of the community containing this community at a certain level. |
| level_community_uri | 12 | character varying | The URI of the community containing this community at a certain level. |
| creator_user_id | 13 | character varying | The UUID of the user who created the community. |
| creator_username | 14 | character varying | The username of the user who created the community. |
| creation_date | 15 | timestamp with time zone | The date on which the relation was edited. |
| editor_user_id | 16 | character varying | The UUID of the user who last edited the community. |
| editor_username | 17 | character varying | The username of the user who last edited the community. |
| edited_date | 18 | timestamp with time zone | The date on which the community was last edited. |

# Complex_relation

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | date | The date on which the snapshot was created. This is synchronized with the snapshot table. |
| complex_relation_type_id | 2 | character varying | The UUID of the complex relation type. |
| complex_relation_type_name | 3 | character varying | The name of the complex relation type. |
| complex_relation_type_description | 4 | character varying | The description of the complex relation type. |
| complex_relation_id | 5 | character varying | The UUID of the complex relation. |
| relation_type_id | 6 | character varying | The UUID of the relation leg type. |
| relation_role | 7 | character varying | The role of the relation leg. |
| asset_id | 8 | character varying | The UUID of the related asset. |
| creator_user_id | 9 | character varying | The UUID of the user who created the complex relation. |
| creator_username | 10 | character varying | The username of the user who created the complex relation. |

| column_name | ordinal_ position | data_type | Description |
|---|---|---|---|
| creation_date | 11 | timestamp with time zone | The date on which the complex relation was created. |
| editor_user_id | 12 | character vary-ing | The UUID of the user who last edited the complex relation. |
| editor_user-name | 13 | character vary-ing | The username of the user who last edited the complex relation. |
| edited_date | 14 | timestamp with time zone | The date on which the complex relation was last edited. |

## Domain

| column_name | ordinal_ position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | date | The date on which the snapshot was created. This is synchronized with the snapshot table. |
| domain_id | 2 | character vary-ing | The UUID of the domain. |
| domain_name | 3 | character vary-ing | The name of the domain. |
| domain_ description | 4 | text | The description of the domain. |

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| domain_uri | 5 | character varying | The URI of the domain.<br><br>Note If you create a community or domain in a development environment and you restore a backup of the development environment on your production environment, the URI for the community or domain in the report will reflect that of the development environment, not the production environment. |
| is_domain_system | 6 | boolean | Indicator of whether the domain is a system domain. |
| domain_type_id | 7 | character varying | The UUID of the domain type. |
| domain_type_name | 8 | character varying | The name of the domain type. |
| domain_type_description | 9 | character varying | The description of the domain type. |
| community_id | 10 | character varying | The UUID of the community. |
| creator_user_id | 11 | character varying | The UUID of the user who created the domain. |
| creator_username | 12 | character varying | The username of the user who created the domain. |

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| creation_date | 13 | timestamp with time zone | The date on which the domain was created. |
| editor_user_id | 14 | character varying | The UUID of the user who last edited the domain. |
| editor_username | 15 | character varying | The username of the user who last edited the domain. |
| editor_date | 16 | timestamp with time zone | The date on which the domain was last edited. |

## Relation

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | date | The date on which the snapshot was created. This is synchronized with the snapshot table. |
| reation_type_id | 2 | character varying | The UUID of the relation type |
| role_or_corole | 3 | character varying | The role of the relation in the direction from head to tail, co-role of the relation in the direction from head to tail. |

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| direction | 4 | character varying | The direction of the relation. Can be either:<br>• Head-to-tail, in which the first asset is the head and the second asset is the tail.<br>• Tail-to-head, in which the first asset is the tail and the second asset is the head. |
| asset_id1 | 5 | character varying | The UUID of the first asset in the relation. |
| asset_type_id1 | 6 | character varying | The UUID of the asset type of the first asset in the relation. |
| asset_type_name1 | 7 | character varying | The name of the asset type of the first asset in the relation. |
| asset_id2 | 8 | character varying | The UUID of the second asset in the relation. |
| asset_type_id2 | 9 | character varying | The UUID of the asset type of the second asset in the relation. |
| asset_type_name2 | 10 | character varying | The name of the asset type of the second asset in the relation. |
| is_relation_generated | 11 | boolean | Indication whether the relation is generated. |
| creator_user_id | 12 | character varying | The UUID of the user who created the relation. |

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| creator_username | 13 | character varying | The username of the user who created the relation. |
| creation_date | 14 | timestamp with time zone | The date on which the relation was created. |
| editor_user_id | 15 | character varying | The UUID of the user who last edited the relation. |
| editor_username | 16 | character varying | The username of the user who last edited the relation. |
| edited_date | 17 | timestamp with time zone | The date on which the relation was last edited. |

## Responsibility

| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| snapshot_date | 1 | date | The date on which the snapshot was created. This is synchronized with the snapshot table. |
| role_id | 2 | character varying | The UUID of the role of the responsible user or user group. |
| role_name | 3 | character varying | The name of the resource role of the responsible user or user group. |
| asset_id | 4 | character varying | The UUID of the asset. |

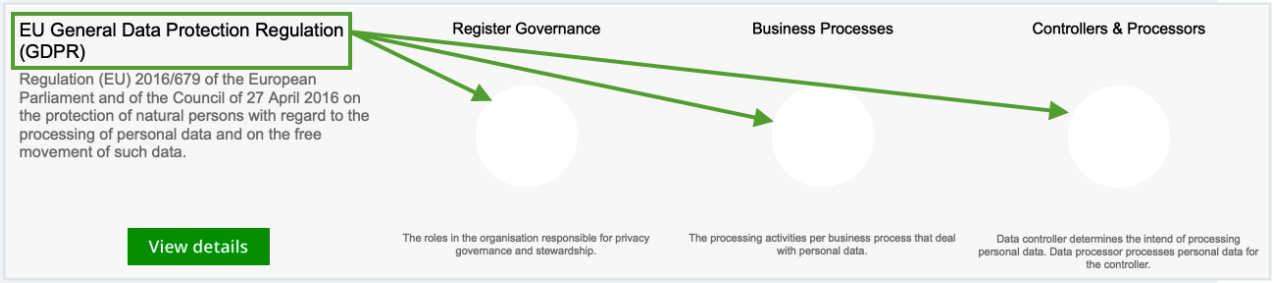
| column_name | ordinal_position | data_type | Description |
|---|---|---|---|
| user_id | 5 | character varying | The UUID of the responsible user. This field is only used if the responsibility is assigned to a user. |
| username | 6 | character varying | The username of the responsible user. This field is only used if the responsibility is assigned to a user. |
| user_firstname | 7 | character varying | The first name of the responsible user. This field is only used if the responsibility is assigned to a user. |
| user_lastname | 8 | character varying | The last name of the responsible user. This field is only used if the responsibility is assigned to a user. |
| user_email | 9 | character varying | The username of the responsible user. This field is only used if the responsibility is assigned to a user. |
| user_language | 10 | character varying | The language of the responsible user. This field is only used if the responsibility is assigned to a user. |
| is_user_guest | 12 | boolean | Indication whether the responsible user is a guest user. |
| is_user_api | 13 | boolean | Indication whether the responsible user is an API user. |
| is_user_activated | 14 | boolean | Indication whether the responsible user's account is activated. |

| column_name | ordinal_ position | data_type | Description |
|---|---|---|---|
| is_user_ enabled | 15 | boolean | Indication whether the responsible user's account is enabled. |
| is_respons- ibility_system | 16 | boolean | Indication whether the responsibility is a system responsibility. |
| creator_user_id | 17 | character vary- ing | The UUID of the user who created the responsibility. |
| creator_user- name | 18 | character vary- ing | The username of the user who created the responsibility. |
| creation_date | 19 | timestamp with time zone | The date on which the responsibility was created. |
| editor_user_id | 20 | character vary- ing | The UUID of the user who last edited the responsibility. |
| editor_ username | 21 | character vary- ing | The username of the user who last edited the responsibility. |
| edited_date | 22 | timestamp with time zone | The date on which the responsibility was last edited. |
| group_id | 23 | character vary- ing | The UUID of the user group to which the responsibility is assigned. |
| group_name | 24 | character vary- ing | The name of the user group to which the responsibility is assigned. |

# Remove non-applicable regulation placeholder from Privacy & Risk Readiness report

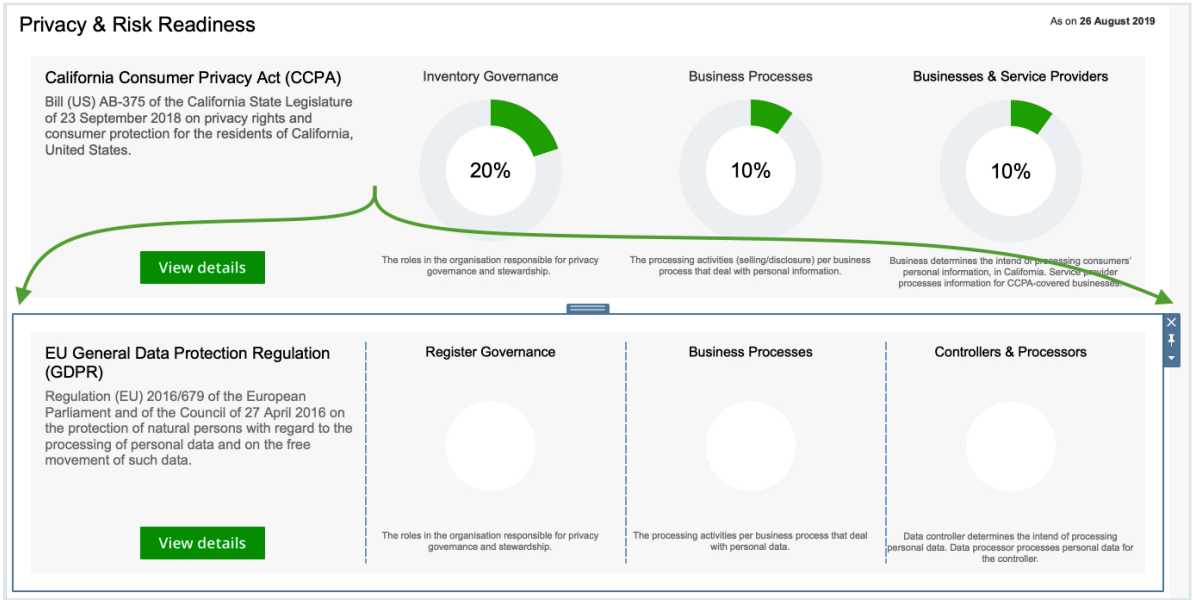
If you have purchased only one of the Collibra Data Privacy modules, CCPA or GDPR, you can remove the non-applicable placeholder from the report, as there will be no data to visualize.

Example In this example, the GDPR module was not purchased. Therefore, no GDPR-specific data is available.




## Steps

1. Click on the non-applicable regulation, so that the entire section is highlighted.



2. Click ✕.
3. Click **Delete Containers**, to confirm the deletion.

# Dashboards

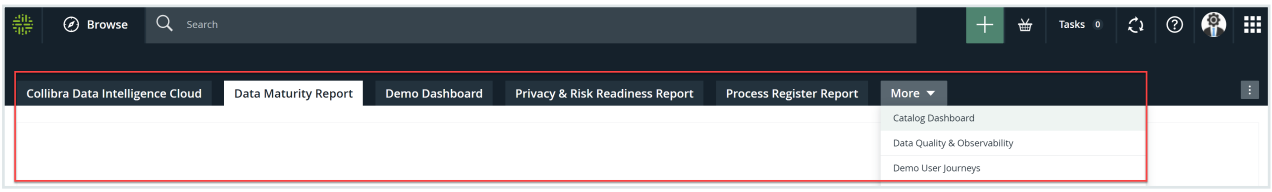
A dashboard is a page that provides a high-level overview on the different areas of the product. It contains one or several configurable dashboard widgets that can show text, a shortcut to the search, the organization browser, buttons to start a workflow, and more.

You can create as many dashboards as you want, each with a particular purpose.

> Tip Dashboards cannot be assigned to a community or any other resource.

## Where dashboards are located

All dashboards appear as tabs on the dashboard bar or as options on the **More** menu on the page that appears when you sign in to Collibra Data Intelligence Cloud or when you click . The default dashboard, however, is opened by default. You can view a dashboard by clicking the respective tab on the dashboard bar or by selecting the respective option on the **More** menu.




## Permissions

No particular license is needed to manage and share your own dashboards; however, certain global permissions are needed.

| Permission | With this global permission, you can |
| --- | --- |
| Manage your own Views, Dashboards, Search filters | Create dashboards or copy existing ones. |
| Share your own Views, Dashboards, Search filters | Share any of the dashboards that you copied or created. |
| Manage and share anyone's Views, Dashboards, Search filters | • Create dashboards or copy existing ones.<br>• Edit the properties of any dashboard.<br>• Share any dashboard.<br>• Delete any dashboard. |

# Create a dashboard

You can create a new dashboard, and then add and edit widgets to suit your needs.

> Tip You can create as many dashboards as you want without causing problems for Collibra's performance.

## Prerequisites

You have a global role with the **Manage your own Views, Dashboards, Search filters** global permission; for example, Sysadmin.

## Steps

1. On the main menu, click .
2. On the dashboard bar, click ⋮ → **Add Dashboard**.

3. Enter the required information.

| Property | Description |
| --- | --- |
| Name | The name of the dashboard. |
| Description | A description of the dashboard. |
| Layout | The layout of the dashboard.<br>Select the number of columns for the dashboard. |
| Pin | Try to show this dashboard in the dashboard tab bar. |

4. Click **Save**.

# What's next?

You can now add widgets to your new dashboard.

# Copy a dashboard

If, for example, you want to reconfigure one of the widgets of a certain dashboard according to your needs, you can copy that dashboard, instead of creating one.

> Tip You can create as many dashboards as you want without affecting the performance of Collibra.

# Prerequisites

You have a global role with the **Manage your own Views, Dashboards, Search filters** global permission; for example, Sysadmin.

# Steps

1. On the main menu, click .
2. On the dashboard bar, click ⋮ → **Save as**.
3. Enter the required information.

| Field | Description |
|---|---|
| Name | The name of the dashboard. |
| Description | The description of the dashboard. |
| Sharing options | Options that determine who can view the dashboard:<br>◦ **Public:** All users.<br>◦ **Private:** Only you.<br>◦ **Share with specific roles, groups & users:**<br>▪ **Roles:** Only the selected roles.<br>▪ **Groups:** Only the selected groups.<br>▪ **Users:** Only the selected users. |
| Promote | Options that determine how and where the dashboard appears:<br>◦ **Default:** As the first page when you sign in to Collibra.<br>◦ **Pin:** As a tab on the dashboard bar when you sign in to Collibra. |

4. Click **Save**.

# What's next?

You can now edit the dashboard properties and widgets according to your needs.

# Edit the properties of a dashboard

You can edit the properties of a dashboard, including the name, description and layout.

## Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit properties**.
4. Enter the required information.

| Property | Description |
|---|---|
| Name | The name of the dashboard. |
| Description | A description of the dashboard. |
| Layout | The layout of the dashboard.<br>Select the number of columns for the dashboard. |
| Pin | Try to show this dashboard in the dashboard tab bar. |

5. Click **Save**.

# Switch to another dashboard

You can switch from one dashboard to another.

## Steps

1. On the main menu, click .
2. In the dashboard toolbar, click the name of dashboard.

# Share a dashboard

You can share a dashboard with other users if the widgets provide information that is useful to them.

## Prerequisites

- If you want to share your own dashboard, you have a global role with the Share your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to share another user's dashboards, you have Manage shared Views, Dashboard and Search Filter global permission.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Share**.
4. Select with whom you want to share the dashboard.
5. Specify whether or not you want to make the dashboard the default dashboard for the users with whom you are sharing it.
6. Click **Save**.

# Delete a dashboard

If a dashboard is no longer useful, you can delete it.

## Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Delete**.
4. Click **Yes**.

# Dashboard widgets

A dashboard widget is an individual pane in a dashboarddashboard. Depending on its type, it has a different purpose. For example, it can contain quick links to important or useful information, statistics in a bar chart or a button to quickly start a workflow.

## Widgets

Collibra Data Intelligence Cloud comes with the following widgets:

| Widget | Description |
|---|---|
| Bar Chart | Asset or task metrics depicted in a bar chart. |
| Search | A search field by which users can search for resources. |
| Text | A block of text, or message. |

| Widget | Description |
|---|---|
| Counters | Asset or task metrics depicted by a graphic element with the total count. |
| Workflow | A collection of workflow buttons by which users can start workflows. |
| To Do | An overview of open tasks and issues. |
| Browser | A hierarchical tree-structure of all communities, subcommunities and domains. |
| Most Viewed | A list of the ten most viewed assets over the last week, month or year. |
| Recent | A list of your ten most recently viewed assets. |

For complete information on adding and editing dashboard widgets, see the Documentation Center.

# The Widgets tab

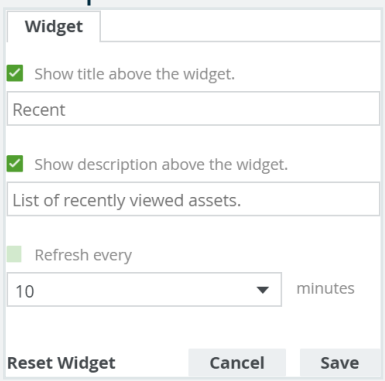
All widgets have:

- A specific tab for configuring and editing the widget.
- The **Widget** tab, which is common to all widgets and contains the common configuration options.

| Field | Explanation |
|---|---|
| Show title above the widget | • **True**: A title is shown above the widget. In this case, specify a title.<br>• **False**: No title is shown above the widget. |
| Show description above the widget | • **True**: A description is shown above the widget. In this case, the packaged description is shown.<br>• **False**: No description is shown above the widget. |

| Field | Explanation |
| --- | --- |
| Refresh every | • **True**: The counter is refreshed according to the refresh rate you specify.<br>In this case, specify the refresh rate. Possible values are: 5, 10, 25, 50 or 100 minutes.<br>• **False**: The counter is not automatically refreshed. |

Example




# Embedded Webpage widget

The Embedded Webpage widget enables you to embed a webpage on your dashboard using an iframe.

> Important Whether or not a third-party webpage can be embedded is determined by the security settings of the third party.

You can enable the widget to run in "sandbox" to reduce security risks. If you do, the webpage will not be able to run potentially harmful scripts, blocks APIs in the frame and cannot access your files and systems.

## Configure the Embedded Webpage widget

You can embed a webpage in a widget on a dashboard.

## Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.
- You have installed the Embedded Webpage widget.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. If required, add an **Embedded Webpage** widget to a dashboard.
5. In the widget, click .
6. Enter the required information.

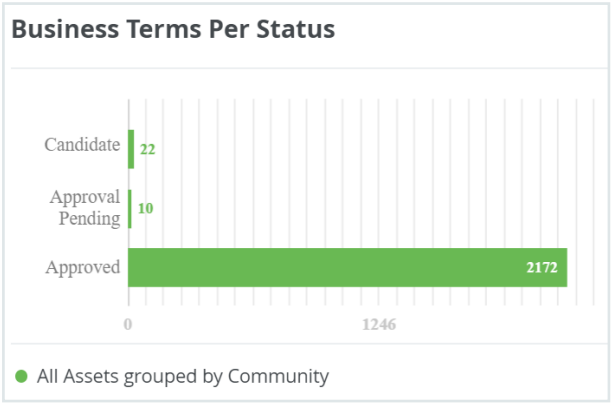
| Field | Description |
|---|---|
| The URL of the webpage to embed | This is the weblink of the webpage you wish to include on the dashboard. |
| Run in sandbox | When running the webpage in Sandbox mode, the webpage will not be able to run potentially harmful scripts, blocks APIs in the frame and cannot access your files and systems.<br>Warning To reduce security risks, we highly recommend that you leave the **Run in sandbox** selected. |
| Reset Widget | Button to reset all fields to their default value. |

7. Click **Save**.

8. If required, resize the widget either by dragging or double-clicking ↕.
9. Click **Close & save edits**.

# Bar chart widget

The Bar Chart widget enables you to display advanced metrics in the form of a bar chart.




## Configure a bar chart

You can add many different bar charts to the dashboard and configure them to suit your needs.

### Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

### Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.

4. If required, add a **Bar Chart** widget to a dashboard.
5. In the widget, click ⚙.
6. On the **Graph** tab, click **Create Template**.
7. In the **Bar Chart Configuration** wizard, click the type of data that you want to use.
   - **Assets**: If you want to display metric information about assets.
   - **Tasks**: If you want to display metric information about tasks.
8. In the **by** field, select how the data is grouped.

   > Note If you group by Attribute Value, you can only select "Boolean" or "Selection" characteristic types.

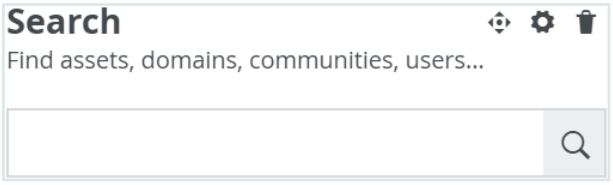
   This setting defines how the bars in the bar chart, also known as groups, are constructed. Depending on what you select, additional fields are shown.
9. Optionally, add up to 25 sets of filtered data:
   a. Click **Add Data Set**.
   b. In the **Filter Label** field, fill in a label name for the bar chart legend.
      This field is mandatory.
      Example: *Business terms*
   c. In the row under the **Filter Label** field, specify a filter.
      Example: *Asset Type equals Business Term*.
   d. Click **Save**.
   e. To add more data filters, repeat steps a - d.
10. Click **Next**.
11. Provide a template name.
12. Select how the items in the bar chart are ordered:
    - Alphabetical.
    - Numerical, meaning that the groups are sorted by their value (the length of the bar).

    If necessary, select a graph type.
13. Click **Save & Apply**.

# Search widget

The Search widget on the dashboard is similar to the **Search** field in the main menu. If you type something and press `Enter`, the same search page is shown as if you searched via the **Search** field, and the search results are the same. The difference is that the Search

widget does not show the most recently viewed resources or, while you are typing, the top results, as does the **Search** field.




If the **Search** widget is not included on your dashboard, you can add it.

# Text widget

The Text widget is a free-text field that allows you to add text to the dashboard. You can use it, for example, to inform users your latest data governance news, point users to certain pages with hyperlinks to a specific view and so on.

When you add content to a Text widget, you can:

- Use the rich text editor in the **Content** tab, to format your text.
- Click <>, to edit the HTML source code.

> Warning
> The text editor supports most HTML elements, inline CSS styling and table (< t >) structures. However, this means an attacker could potentially execute an XSS attack by injecting malicious HTML. However, you can automatically remove the following HTML elements to improve security:
>
> - script
> - svg
> - frame
> - frameset
> - iframe
> - any event handlers
> - any JavaScript
>
> You can enable this in Collibra Console. For more information, see the Troubleshooting section.

## Configure the Text widget

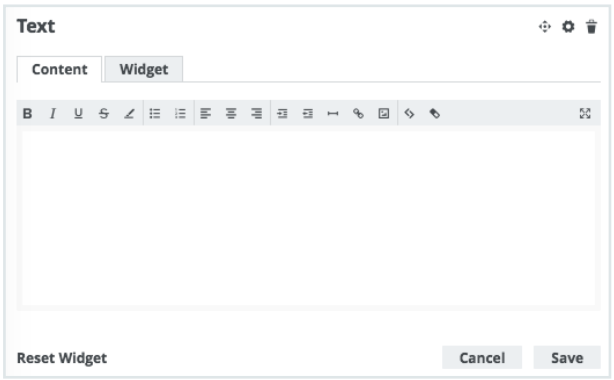
You can configure the Text widget to post a free-text message on the dashboard.

## Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. If required, add a **Text** widget to a dashboard.
5. In the widget, click .
6. Type or cut and paste your text in the field and, optionally, format it using the rich text editor.




> Tip If you want to copy and paste text from other sources into a text field, we recommend that you click <>, and then paste the text into the **Show source code** field. This will remove any unwanted formatting or tagging of the text. For detailed information, see the knowledge base article on Collibra Support Portal.

7. Click **Save**.

## Supported HTML tags

The following table shows the HTML tags you can use to format your text in the Text widget:

| Supported HTML tags | | | | | |
|---|---|---|---|---|---|
| meta | option | small | font | dl | input |
| head | textarea | big | a | dt | select |
| title | h1 | pre | map | em | strong |
| script | h2 | code | style | table | col |
| noscript | h3 | cite | span | td | br |
| svg | h4 | samp | div | th | tfoot |
| iframe | h5 | sub | img | tr | thead |
| frameset | h6 | sup | link | colgroup | tbody |
| frame | p | strike | ul | col | |
| label | i | center | ol | fieldset | |
| form | b | blockquote | li | legend | |
| button | u | hr | dd | no-hyperlink | |

# Counters widget

The Counters widget shows count statistics on your dashboard and the Metrics pages of the Collibra applications, for example the number of total assets in your environment or the number of open tasks or issues.

When configuring a Counter widget, you choose from a fixed list of templates that determine the count statistics that are computed. The following table describes the computation for each template:

| Template name | Description |
|---|---|
| Applications | Number of Technology Assets. |
| Approved Assets | Number of assets with the status "Accepted". |
| Assets | Number of assets. |
| Assets Created Past Day | Number of assets created in the past day (24 hours). |
| Assets Created Past Month | Number of assets created in the past month (28 days). |
| Assets Created Past Week | Number of assets created in the past week (7 days). |
| Business Terms | Number of Business Term assets. |
| Code Values | Number of Code Value assets. |
| Columns | Number of Column assets. |
| Communities | Number of communities. |
| Data Assets | Number of Data Assets. |
| Domains | Number of domains. |
| File Groups | Number of File Group assets. |

| Template name | Description |
| --- | --- |
| Files | Number of File assets. |
| Governance Assets | Number of Governance Assets. |
| Issues resolved past day | Number of Issue assets for which the status became "Resolved" within the past day (24 hours).<br><br>Note This counter does not show how many Issue assets were set to "Resolved" in the past 24 hours. Rather, it shows the total number of Issue assets that had the "Resolved" status at a specific point in time. By default, the Issue assets are counted once every 24 hours. The counting interval can be edited in Collibra Console. Keep in mind that increasing the frequency of the counts may negatively impact performance. |
| Issues resolved past week | Number of Issue assets for which the status became "Resolved" within the past week (7 days).<br><br>Note This counter does not show how many Issue assets were set to "Resolved" in the past 7 days. Rather, it shows the total number of Issue assets that had the "Resolved" status at a specific point in time. By default, the Issue assets are counted once every 7 days. The counting interval can be edited in Collibra Console. Keep in mind that increasing the frequency of the counts may negatively impact performance. |
| KPIs | Number of Key Performance Indicators. |
| My Open Tasks | Total number of unfinished tasks for the user.<br><br>Note "Unfinished" is the status of the task, as documented in the workflow. |

| Template name | Description |
|---|---|
| New Issues | Number of Issue assets with the status "New". |
| Open Issues | Number of unresolved Issue assets. Unresolved Issue assets can have the following statuses:<br>• New<br>• Under Review<br>• Accepted<br>• Invalid<br>• In Progress<br>• Resolution Pending<br>• Pending |
| Open Tasks | Number of unfinished tasks for all users.<br>Note "Unfinished" is the status of the task, as documented in the workflow. |
| Processes | Number of Business Process assets. |
| Reference Data Domains | Number of Code-list domains. |
| Reports | Number of Report assets. |
| S3 Buckets | Number of S3 Bucket assets. |
| S3 File Systems | Number of S3 File System assets. |
| Schemas | Number of Schema assets. |
| Tableau Dashboards | Number of Tableau Dashboard assets. |

| Template name | Description |
|---|---|
| Tableau Projects | Number of Tableau Project assets. |
| Tableau Servers | Number of Tableau Server assets. |
| Tableau Sites | Number of Tableau Site assets. |
| Tableau Stories | Number Tableau Story assets. |
| Tableau Views | Number of Tableau View assets. |
| Tableau Workbooks | Number Tableau Workbook assets. |
| Tables | Number of Table assets. |
| Task Duration | Sum of all task durations. |
| Users | Number of users currently signed in to the environment. |

## Configure the Counters widget

You can add many different counters to the dashboard and configure them to suit your needs.

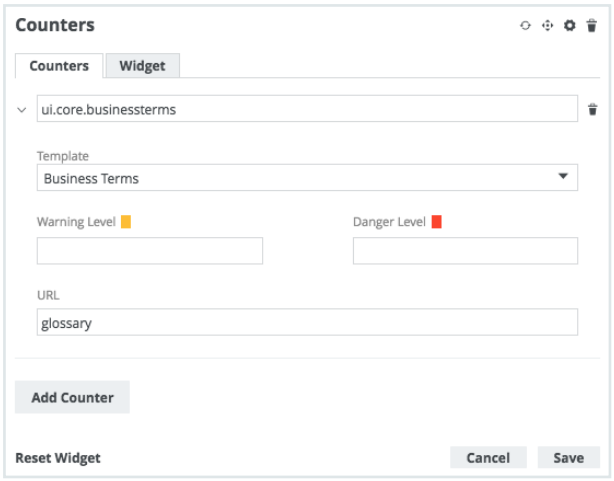
### Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.

- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. If required, add a **Counters** widget to a dashboard.
5. In the widget, click .
6. Enter the required information.


Counters
Counters
Widget
ui.core.businessterms
Template
Business Terms
Warning Level
Danger Level
URL
glossary
Add Counter
Reset Widget
Cancel
Save

7. Click **Save**.

## Warning and danger thresholds

The warning and danger thresholds are optional settings that allow you to visually communicate certain risk or tolerance levels for Issue assets.

The two threshold settings, "Warning level" and "Danger level", can be configured:

- Per counter.
- Alone or in combination with one another.

> Note The threshold settings are designed for use with the following issue-related templates:
>
> - New Issues
> - Open Issues
> - Issues resolved past day
> - Issues resolved pas week

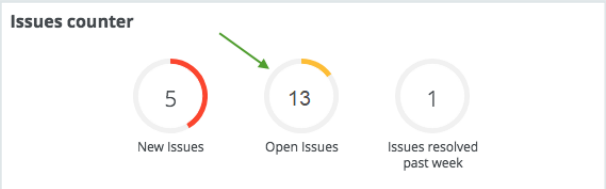
## Example

Let's say that your organization has established that 20 open issues (meaning Issue assets with a status other than "Resolved") exceeds its risk appetite. To give this visibility within the appropriate community of Collibra users, you add the Counters widget to the dashboard, and configure a counter to show the number of open issues, of which there are currently 13.

In accordance with your organization's risk appetite, and to give more meaning to the number of open issues, you set **Warning Level** to 10 and **Danger Level** to 20.




The following example image shows the resulting Counters widget and, specifically, the Open Issues counter:



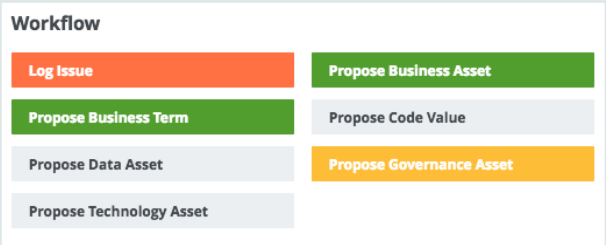

## Understanding the color bands

When values are given to one or both of the threshold settings, the band around the counter will be green, orange or red. The colors have the following meanings:

| Circle color | Meaning |
|---|---|
| Entirely gray | No value has been set for either the warning or danger thresholds. |
| Green | The issue count is lower than both threshold values, or if only one threshold has been set, lower than that value. |
| Orange | The issue count is higher than the warning threshold value, but lower than the danger threshold value (if the danger threshold has been set). |
| Red | The issue count is higher than the warning threshold value (if no danger threshold has been set) or higher than the danger threshold value, if it has been set. |

# Workflow widget

The Workflow widget adds one or more buttons to the dashboard, allowing users to start global workflows from the dashboard.




When you customize this widget, there is a **Buttons** tab instead of a **Content** tab. You can specify which workflows have to be available and how they are displayed.

You can specify the following parameters for each button:

1. The label to display on the button
2. The global workflow that is started by clicking the button
3. The styling of the button

## Configure the Workflow widget

You can add and configure buttons for any enabled workflow.

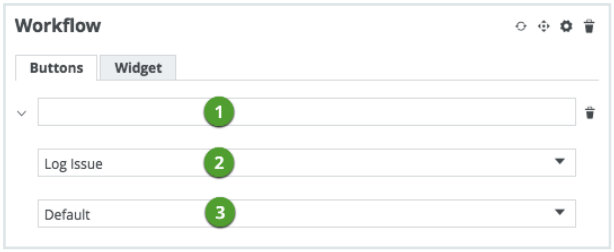
### Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

### Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. If required, add a **Workflow** widget to a dashboard.
5. In the widget, click .

6. Enter the required information.



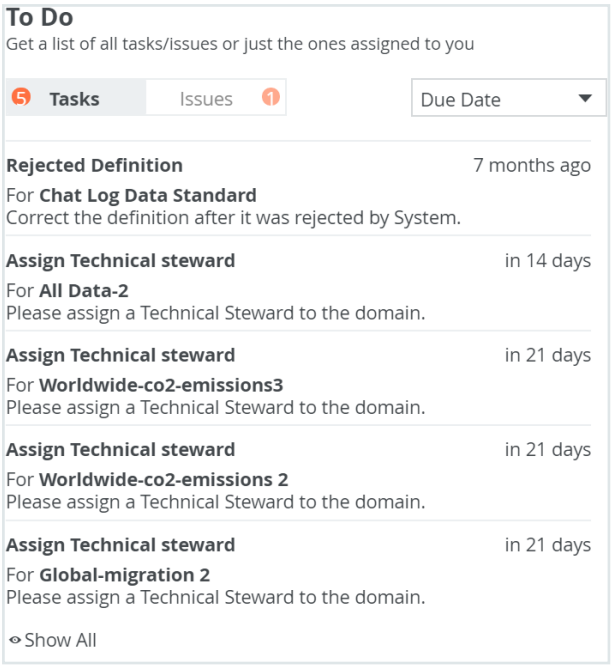

| Tab | Field | Description |
|---|---|---|
| Buttons | 1 | The button text. |
| | 2 | The workflow that will be started when a user clicks the button. |
| | 3 | The color of the button, based on the type of workflow. Possible values and their associated colors are as follows:<br>◦ Default: gray<br>◦ Danger: red<br>◦ Info: gray<br>◦ Success: green<br>◦ Warning: yellow<br>Note This field only determines the color of the button. It has no bearing on the workflow. |

7. Click **Save**.

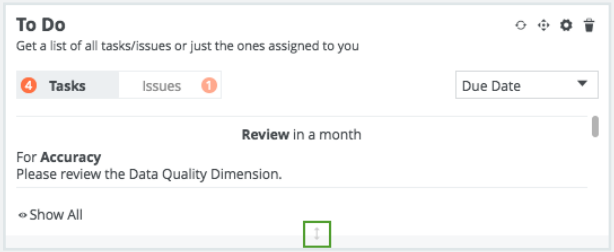
# To Do widget

The To Do widget provides a quick overview of open tasks and issues. You can:

- Click the **Tasks** and **Issues** buttons, to switch between tasks and issues.
- Click ▼ in the drop-down list, to sort the tasks by due date, asset and title.
- Click **Show All**, to go to the My Tasks page, where all tasks are shown.




Tip If there are several tasks or issues shown in the widget, you can vertically resize the widget, to see more items without having to scroll as much in the widget. To resize the widget, click the gray, bi-directional arrow at the bottom of the widget and drag it to size.




Note Issues with the following statuses are not included in the list of open issues:

- Resolved
- Invalid
- Obsolete
- Disabled

You cannot add to, or remove, these excluded statuses. This means that if you create your own statuses, you cannot add them to the excluded statuses.

# Configure the To Do widget

You can configure the widget to show either:

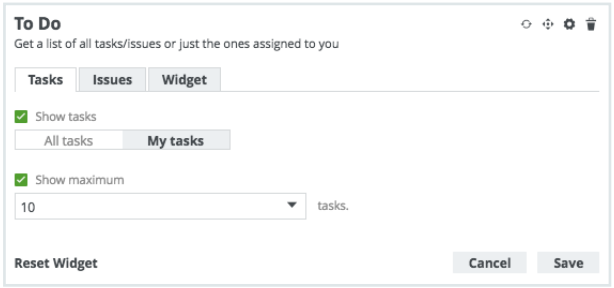
- Only tasks that are assigned to you and open issues that you have created.
- All open tasks and issues across your Collibra environment.

## Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. If required, add a **To Do** widget to a dashboard.
5. In the widget, click .
6. Enter the required information.



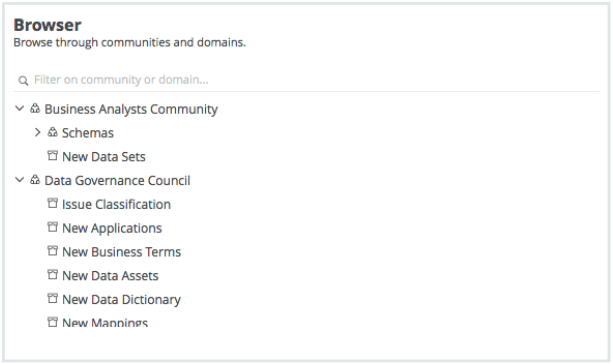
| Tab | Field | Explanation |
|---|---|---|
| Tasks | Show tasks | ◦ **True**: Show tasks in the widget.<br>In this case, specify whether to show all tasks or only tasks assigned to you.<br>◦ **False**: Tasks are not shown in the widget. |
| | Show maximum | ◦ **True**: Limit the number of tasks shown in the widget.<br>In this case, specify the maximum number of tasks that can be shown. Possible values are: 5, 10, 15, 20, 25, 50 or 100.<br>◦ **False**: There is no limit to the number of tasks that can be shown. |
| Issues | Show issues | ◦ **True**: Show issues in the widget.<br>In this case, specify whether to show all open issues or only open issues that you created.<br>◦ **False**: Issues are not shown in the widget. |
| | Show maximum | ◦ **True**: Limit the number of issues shown in the widget.<br>In this case, specify the maximum number of issues that can be shown. Possible values are: 5, 10, 15, 20, 25, 50 or 100.<br>◦ **False**: There is no limit to the number of issues that can be shown. |

7. Click **Save**.
8. Click **Close & save edits**.

# Browser widget

The Browser widget enables you to browse through the available communities and domains, via the dashboard.

You can use the search field at the top of the widget, to quickly find communities and domains.




This widget has no specific configuration settings. Like all other widgets, common configuration settings are available via the Widgets tab.

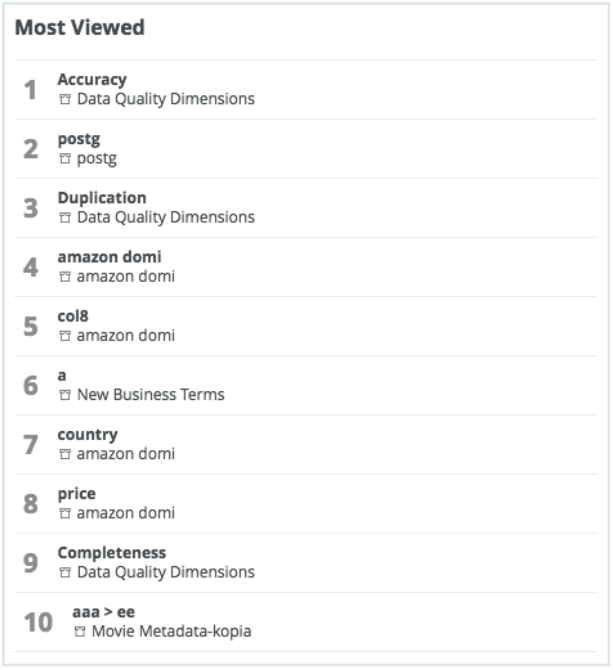
> Tip You can also click the company logo at the top left-hand corner, to Navigating through domains and communities via the Organization Browser.

# Most Viewed widget

The Most Viewed widget shows the ten most viewed assets over a specified time range.

The domain for each asset is shown under the asset name. You can:

- Click an asset name to go to that asset page.
- Click a domain name to go to that domain page.




# Configure the Most Viewed widget

You can configure the widget to show the ten most viewed assets over the last week, month or year.

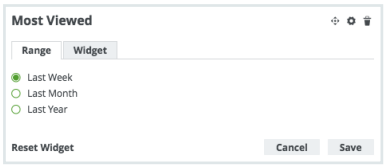
## Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. If required, add a **Most Viewed** widget to a dashboard.

5. In the widget, click ⚙ .
6. Select the time range over which to show the most viewed assets: last week, last month or last year.



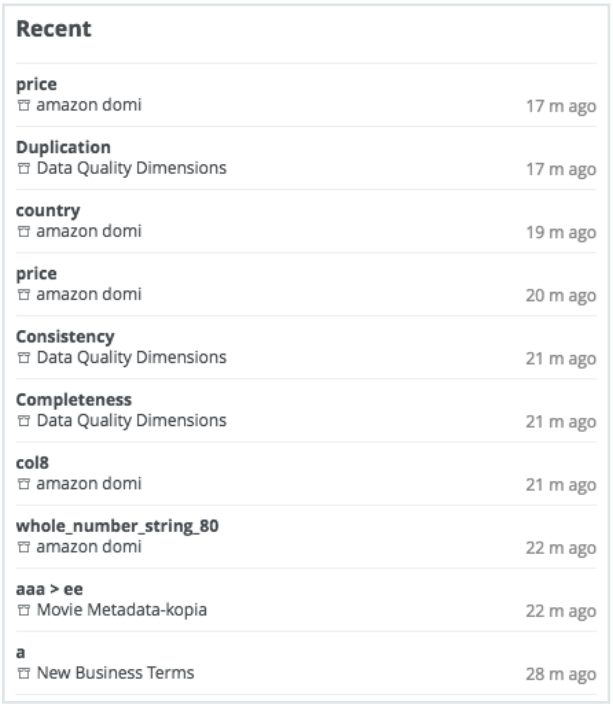

7. Click **Save**.
8. Click **Close & save edits**.

# Recent widget

The Recent widget shows your ten most recently viewed assets.

The domain for each asset is shown under the asset name. You can:

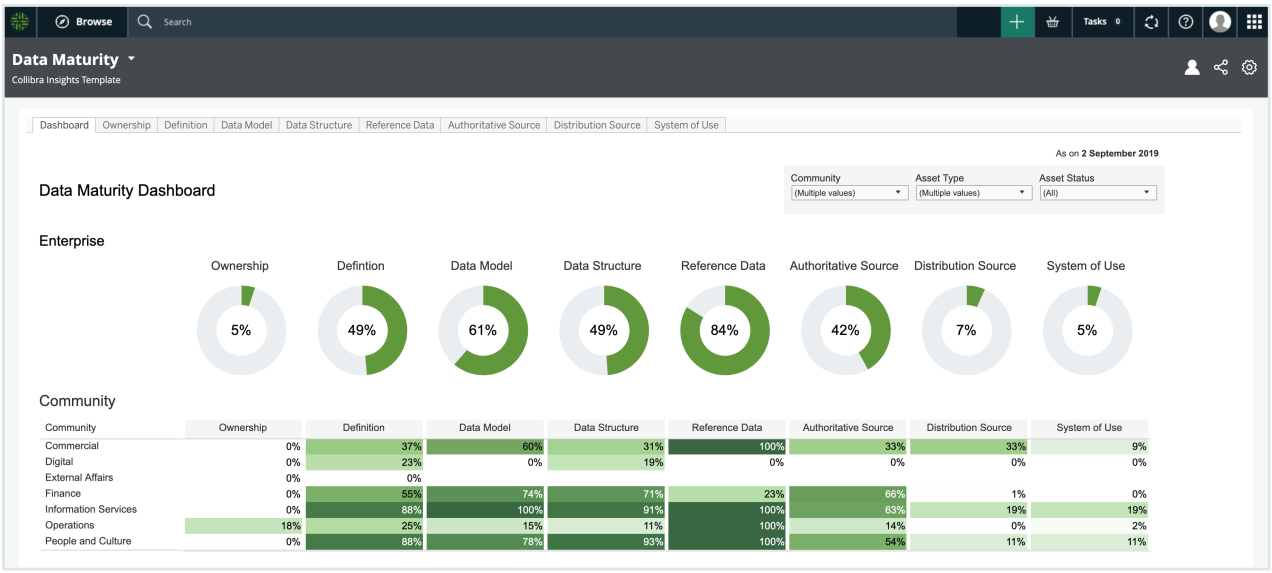
- Click an asset name to go to that asset page.
- Click a domain name to go to that domain page.




This widget has no specific configuration settings. Like all other widgets, common configuration settings are available via the Widgets tab.

# Collibra Insights widget

The Collibra Insights widget enables you to include dashboard reportson your dashboard.




Before configuring the widget, you have to create the reporting data layer. You can then configure dashboard reports via Collibra Settings or generate them via a URL, from tools such as Tableau Online, Power BI, Qlik or ThoughtSpot.

For complete information, see the Reporting Data Layer and Dashboard Reporting Configuration Guide.

> Important Whether or not a third-party webpage can be embedded is determined by the security settings of the third party.

# Add a widget to a dashboard

You can add widgets to curate information-rich dashboards.

# Prerequisites

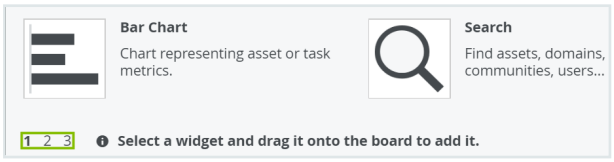
- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example

Sysadmin.

- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

# Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. Click a widget and drag it onto the dashboard.
   You can browse through the widgets by using the page numbers below them.




5. Edit a widget as required.
6. Click **Close & save edits**.

# Move a widget

You can move a widget if you feel like a widget belongs in a different location on the dashboard.

# Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. In the view bar, select the dashboard that you want to change. See Switch to another dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. Click and hold the button (move) on the widget that you want to move.
5. Drag the widget to where you want it on the dashboard and release the mouse button.
6. Click **Close & save edits**.

# Edit a widget

You can edit the dashboard widgets to curate the information shown on the dashboard.

## Prerequisites

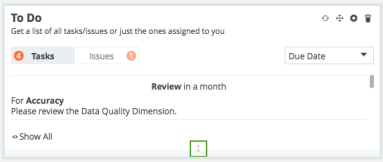
- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

## Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. Edit the content of the widget, to meet your needs.

Note
- Not every widget has the same tabs.
- The **Widget** tab is the same for each widget. Your configuration of the **Widget** tab defines how the widget is displayed on the dashboard.

Tip You can vertically resize any dashboard widget, by clicking and dragging the gray, bi-directional arrow at the bottom of the widget.




5. Click **Save**.

Tip For complete information on working with dashboards and widgets, see the Collibra Documentation Center.

# Delete a widget from a dashboard

If a specific widget is no longer useful on a certain dashboard, you can delete it from that dashboard.

# Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters global permission, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter global permission, for example Sysadmin.

# Steps

1. On the main menu, click .
2. If required, switch to the relevant dashboard.
3. On the dashboard bar, click ⋮ → **Edit widgets**.
4. In the widget, click .
5. Click **Delete** to confirm.
6. Click **Close & save edits**.

# Data Helpdesk

With the Data Helpdesk application of Collibra Data Intelligence Cloud, you can:

- Manage **data issues**[1] efficiently.
- Quickly view newly created issues.
- Process issues assigned to a given user.
- Track the progress of the issues.
- View the data quality dimensions (accuracy, completeness, conformity, consistency, integrity are available out of the box) and the data quality rules.

The following sections describe the issue roles, how to log issues and how to use the default 'Issue Management' workflow. Note that since administrators can change and customize the workflow, the actual behavior of your Collibra may be different than described.

## Data Helpdesk submenu pages

| Page | Description |
|---|---|
| Issues | Contains a table with Issue assets in Collibra. |
| Data Quality | Contains tables with Data Quality and Data Quality Dimension assets. |
| Metrics | Contains a variety of statistics related to how the assets of the Data Helpdesk are used. |

## In this chapter

[1] A problem related to issue management; also referred to as issue.

# Packaged metamodel for the Data Helpdesk

The Data Helpdesk has specific asset types and domain types.

## Asset types

The table below contains the packaged asset types that are relevant for the Data Helpdesk.

## Domain types

The table below contains the packaged domain types that are relevant for the Data Helpdesk.

## Workflows

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

| 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. |
| Issue Creation | This process facilitates issue creation. |

| Name | Description |
| --- | --- |
| Issue Management | This process is used to route and resolve issues. |
| Issue Move | The Issue Move workflow is a process that changes the responsible community of an issue. |
| 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 | 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.<br><br>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. |

# Issue roles

There are several roles involved in the issue management workflow. Some of the roles are assigned automatically by the workflow and others have to be configured or assigned while tasks of the workflow are being executed. Predefined variables can determine which users to select for a given situation. To learn more about configuring variables for workflows, see the Workflow Documentation in the Collibra Developer Portal.

The following table contains the different roles in an issue.

| Role | Description |
|---|---|
| Requester | The requester is the user who has logged an issue, which means that there can only be one requester per issue. The requester is kept up to date on the issue resolution progress and can be asked to provide more information. |
| Reviewer | The reviewer analyzes the created issue and proposes a solution for it but does not implement the solution. The reviewer is responsible to ensure that all the information is available for solving the issue. This user can also mark an issue as invalid.<br><br>Which user is assigned as reviewer, depends on the issue management workflow configuration. The **reviewerUserExpression** variable of the workflow determines which users are able to assign themselves as reviewer for the issue. By default this is the steward. After the workflow has started, the issue manager or the current reviewer can assign a different user as reviewer. |
| Stakeholder | The stakeholders of an issue are responsible for accepting or rejecting the analysis and solution that was proposed by the reviewer. The stakeholders of an issue can be configured through a variable called the **stakeholderUserExpression** in the workflow. By default, this is the steward. It is not possible to change the stakeholders after the workflow has started. |

| Role | Description |
| --- | --- |
| Assignee | The assignee is responsible for the actual implementation of the solution. It is the requester's responsibility to appoint assignees. The assignee receives a task for the implementation of the solution.<br><br>Assignees are suggested by the workflow. The suggested assignees can be configured through the **assigneeUserExpression** variable of the workflow. Assignees can also assign another assignee after the workflow has started. |

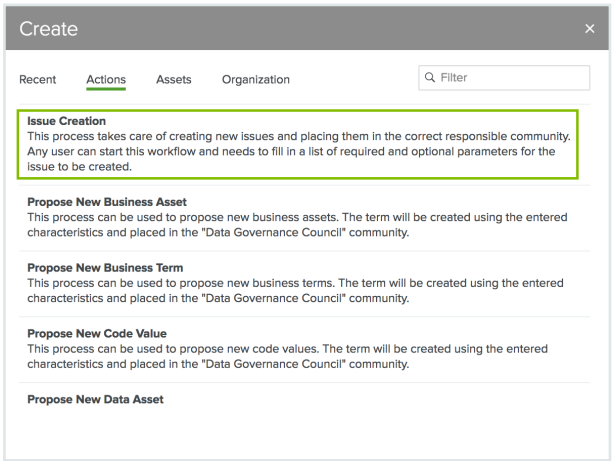
# Create a data issue

By creating a new data issue, you start a workflow to resolve data issues. The workflow behavior varies per company.

# Steps

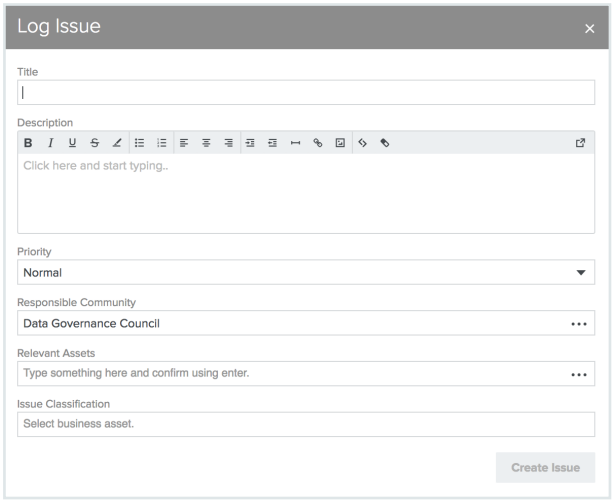
To create a data issue, follow these steps:

1. In the main menu, click the **Create** (+) button.
   » The **Create** dialog box appears.
2. In the **Create** dialog box, click the **Actions** tab.
3. Click **Issue Creation**.



If you don't see **Issue Creation**, you have to add the **Issue Creation** workflow to the global create, see I don't see a workflow in the global create.

4. Complete the **Log Issue** dialog box.



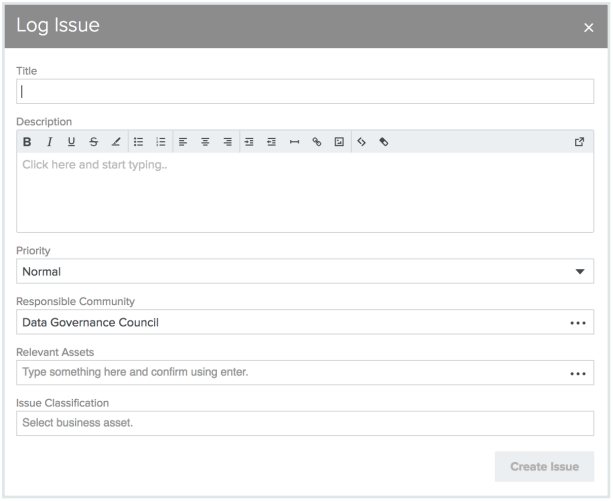

   - **Title** (mandatory): The name and a short descriptive title for the issue.
   - **Description** (mandatory): A full description to explain the details of the issue.
   - **Priority**: The priority of the issue. Possible values are (in order of importance from high to low):
     - Blocking
     - Critical
     - Urgent
     - Normal
     - Minor
   - **Responsible Community**: The community that is, according to you, responsible for solving the issue. By default, this is the Data Governance Council community, which is responsible for taking in all new types of assets and assigning them to the right community.
   - **Relevant Assets**: A list of assets that are impacted by the issue. When you start typing in this field, suggestions appear. Click a suggestion to add the asset to the issue. You can add multiple relevant assets.




     Click ⊗ next to a related asset to remove it from the list.

5. Click **Create Issue**.

Example:




# What's next?

The data issue is created and the proper workflow is automatically started. On the **Diagram** page of the created Data Issue asset page, you can find the assets that are related to the issue.

# Create issue: options

| Option | Description |
|---|---|
| Title | Mandatory.<br>The name and a short descriptive title for the issue. |
| Description | Mandatory.<br>A full description to explain the details of the issue. |

| Option | Description |
| --- | --- |
| Priority | The priority of the issue. Possible values are (in order of importance from high to low):<br>• Blocking<br>• Critical<br>• Urgent<br>• Normal<br>• Minor |
| Responsible Community | The community that is, according to the reporter, responsible for solving the issue. By default, this is the **Data Governance Council** community, which is responsible for taking in all new types of assets and assigning them to the right community. |
| Relevant Asset | A list of assets that are impacted by the issue or that are subject of the issue. When you start typing in this field, suggestions appear. Click a suggestion to add the asset to the issue. You can add multiple relevant assets.<br>  <br>Click ⊗ next to a related asset to remove it from the list. |
| Issue Classification | The classification of the issue, indicating what the issue type is. |

# Tasks in the Issue Management workflow

In this section you can find more information about the various tasks in the Issue Management workflow. For more information about workflows, see Managing workflows in Collibra DGC section.

> Note It is possible that your Collibra Data Intelligence Cloud administrator has renamed the Issue Management workflow.

# Accepting or rejecting a data issue

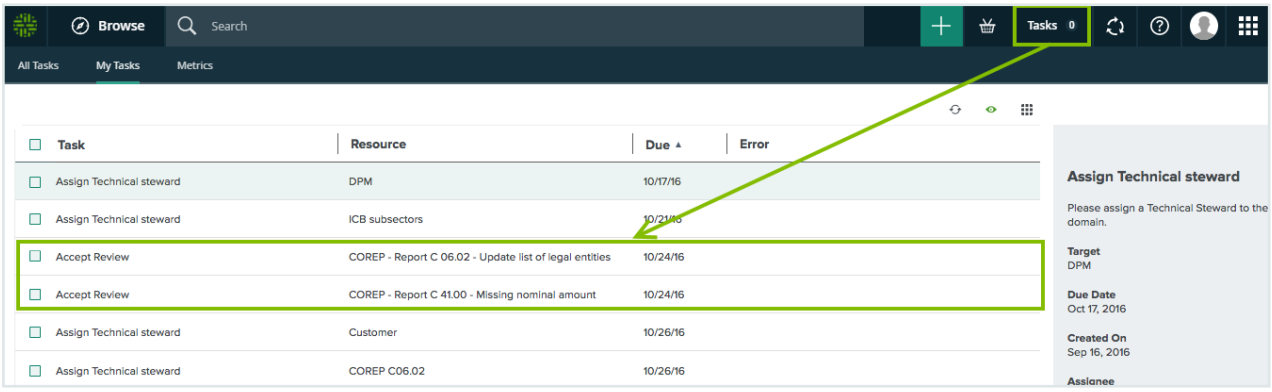
When the issue management workflow is started, tasks are assigned to the users that are defined in the workflow. These are by default the issue stewards. This workflow task has to be completed before a predefined deadline, if not, the issue is escalated to the issue manager who will set a reviewer manually.

The stewards can accept or reject an issue. When one steward accepts the issue, its status becomes **Under Review**.

Only when all stewards reject an issue, the issue is marked as invalid and the requester is notified.

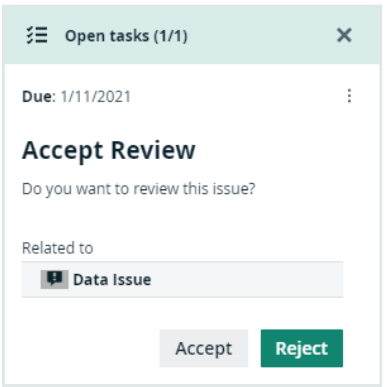
You can check if you have issues to accept or reject if you click the **Tasks** button in the main menu. Issues that have passed the due date, appear in red.

Click on the task row to select it. You can accept or reject the task from the sidebar.




When you click the name of the task or the related resource, the issue page opens.

You can accept or reject the issue from the sidebar.



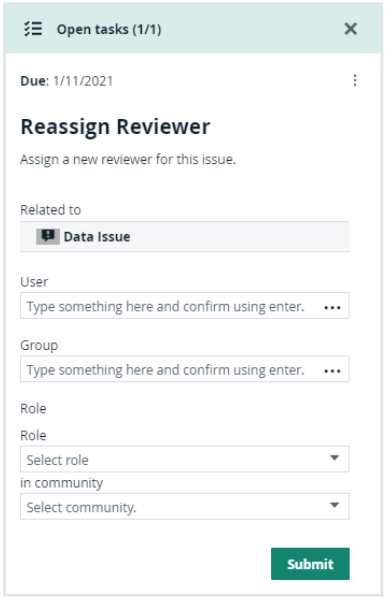
When you accept the issue, the workflow automatically advances to the next step.

> Tip You can also access the issues via **Data Helpdesk** → **Issues** and apply a filter to find the issues that require an action from you.

# Analyzing and proposing a solution

When the status of a task is **Under Review**, you can perform the following actions:

- **Reassign Reviewer**: Choose this action if you find that an other user is more suited to analyze the issue. The status of the task becomes **Reassign Reviewer**. Click **Submit** to assign a new user, role or group as the new reviewer for the issue.



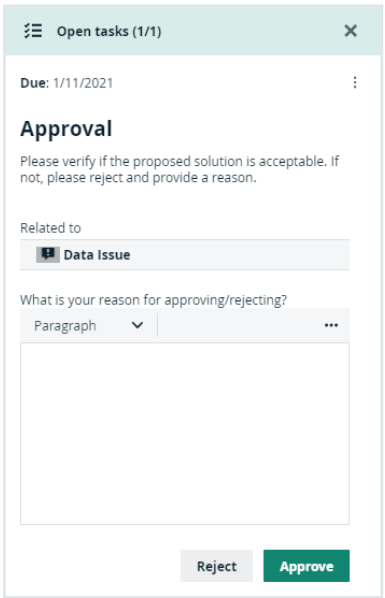

- **More Information**: Choose this action if you need more information from the issue requester. The status of the issue becomes **Pending**. This action creates a task for the requester to provide more information about the issue.
  When the requester has completed this task, the workflow returns to you with a task with the same four options.
- **Invalid Issue**: Choose this action to mark the issue as invalid. The requester is notified and the issue management workflow is finished. Note that this is an irreversible action.
- **Request Approval**: Choose this action to request an approval for your analysis and solution proposal. You can only click this action when you have provided a detailed

analysis of the issue in the issue's **Analysis** attribute. In the **Resolution** attribute, you can propose a solution to the issue. When you request an approval, the contents of the **Analysis** and **Resolution** attributes can be evaluated and approved. The issue is marked as **Submitted for approval**.

# Approve or reject a solution

In the approve/reject step, each stakeholder assigned to the issue is requested to accept or reject the analysis and solution proposed by the reviewer. All the stakeholders have to accept, otherwise the solution is not approved. If one stakeholder rejects the solution, the workflow creates a new task for the reviewer to update the analysis and solution, taking into account the comments given by the stakeholder who rejected the proposed solution. If approved, the issue is marked as Accepted.

1. In the sidebar, provide a reason for your action.
2. Click the **Approve** or **Reject** button.

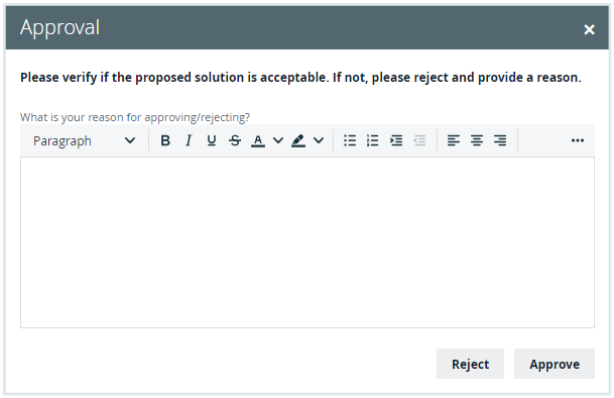



1. In the task bar, click the **Approve/Reject** button.




» The **Approval** dialog box appears.

2. In the dialog box, provide a reason for your action.




3. Click the **Approve** or **Reject** button.

When all the stakeholders have approved the solution, the status of the issue becomes **Approved**.

If the last stakeholder is a reviewer, the user can immediately appoint an assignee to solve the issue or close the issue if no further action is required.

# Appoint assignee or resolve the issue

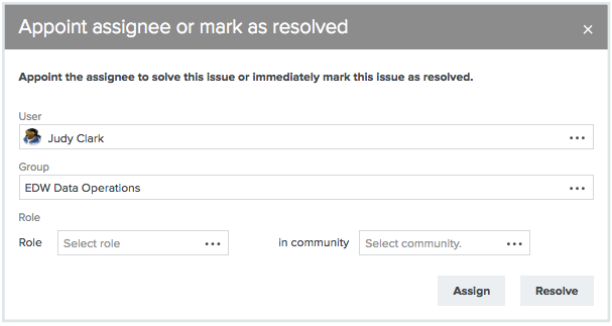
When all the stakeholders have accepted the proposed solution, it does not necessarily mean that the issue is resolved. It is possible that the solution still has to be implemented.

When the solution is approved, the reviewer can decide to appoint an assignee who can implement the actual solution to resolve the issue, or mark the issue as resolved if there is no need for a specific implementation.

After appointing an assignee, the issue is marked as 'In Progress'.

You can appoint an assignee in the following ways:

- Fill in a list of users in the **User** field.
- Add groups in the **Group** field.
- Specify a role, in the **Role** field, that the selected user has to have on the current issue. If you also fill in the **in community** field, all the users with the specified role for the given community become the assignee of the issue.

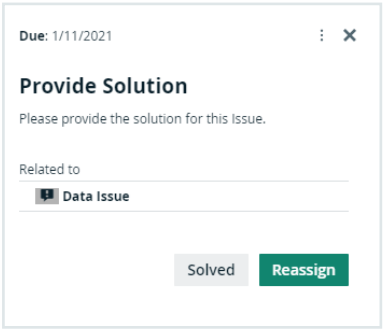



Depending on the issue management workflow configuration, a user can already be proposed to you in the **User** field.

# Provide a solution

In the step to provide a solution, the assignee resolves an issue and provides an implementation.

- The assignee can reassign the task to someone else if that user is more suited to perform the task. When reassigning the task, a similar form is presented as described in the earlier step where the new assignee can be appointed, see Appoint assignee or resolve the issue.
- The assignee can also mark the issue as **Solved**. This ends the task and the workflow afterwards asks the reviewer to check if the solution matches the expectations. In this case, the issue is marked as **Resolution Pending**.




This task has to be completed within a predefined period, if not, the workflow returns to the previous step and presents a new task to the reviewer to appoint a new assignee to perform the task.

Instead of resolving the issue by implementing the proposed solution, it is possible that the issue can be resolved by linking it to a governance asset. For example, by forcing all

assets to comply to a business rule so that the problem described in the issue can not happen again.

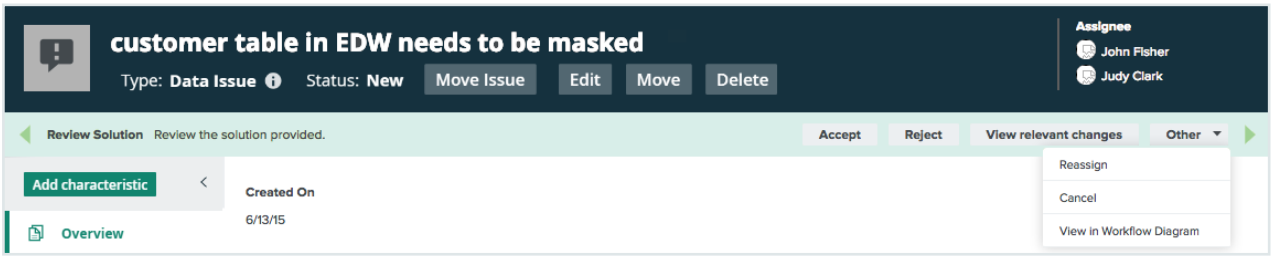
To resolve an issue with a related asset, you need the correct rights in the community as assignee.

You can link the issue with a governance asset as follows:

1. On the issue page, click **Characteristic**.
2. Click the **Relations** tab.
3. Choose the **Resolved by** relation.
4. Enter the resolving governance assets in the dialog box, optionally set a **Start Date** and **End Date**.
5. Click **Save**.
6. The relation appears in the **resolved by Governance Asset** table on the issue page.
7. Click **Solved** in the green bar to mark the issue as resolved.

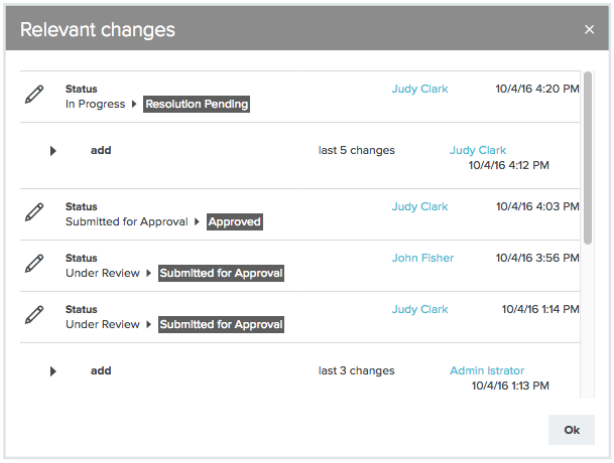
# Review a solution

In the last step of the 'Issue Management' workflow, the reviewer can review the provided solution:




- Click **Accept** to accept the solution and mark the issue as **Resolved** and the requester is notified. This action ends the issue management workflow.
  If there are multiple reviewers, there is only one reviewer who has to accept the solution.
- Click **Reject** to reject the solution and mark the issue as **Under review**. The workflow returns to the Analyze and Propose Solution step, see Analyzing and proposing a solution.

- Click **View relevant changes** to view the history of the issue.




- Click **Other** → **Reassign** to assign the review step to an other user.

# Metrics pages

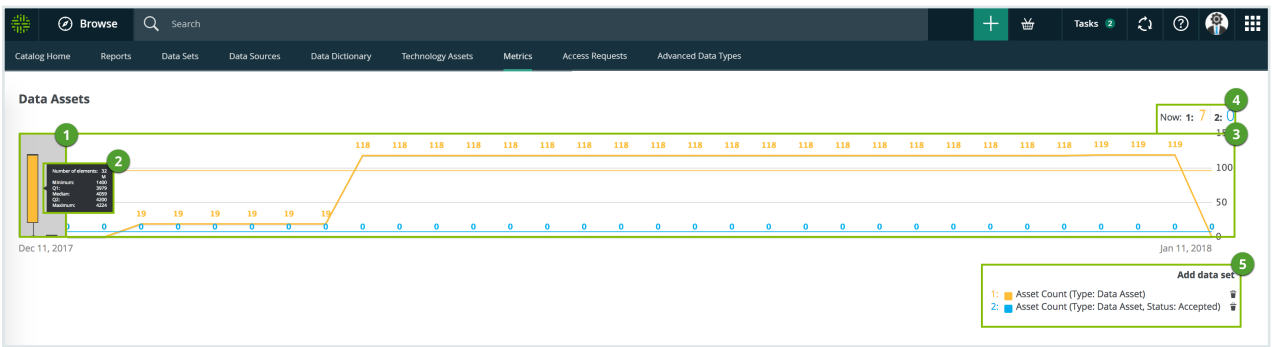
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

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

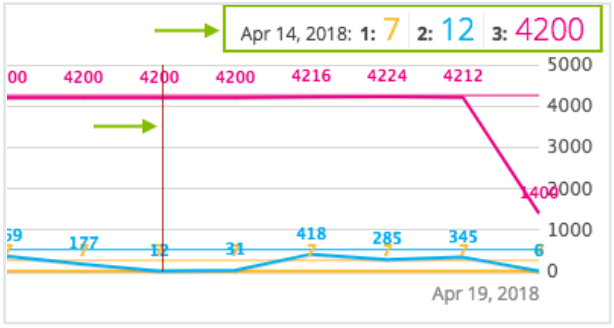
> Note On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with data sets in the true context of CollibraData Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.

# Components

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



| Number | Element | Description |
|---|---|---|
| 1 | Color-coded bars | The color-coded bars give a quick overview of the graph.<br><br>The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values. |
| 2 | Data set details | More details about the graph.<br><br>Hover your pointer over the color-coded bars to the left of each line of graph to view them. |
| | 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 | 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.<br><br>Tip You can edit the time range of the graph. |

| Number | Element | Description |
|---|---|---|
| 4 | Counts by day | 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.   |
| 5 | Legend | The legend of the graph, which also allows you to add, edit and delete the data sets. |

# 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 | The type of data that will be counted.<br><br>Depending on the filter type that you select, different fields become available. |
| Active Users | A daily count of the active users to have viewed the relevant assets.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **License**: Limit the results to active users with a specific license type.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **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.<br>◦ **Product**: Limit the results to active users within a specific Collibra Data Intelligence Cloud application.<br>◦ **Role**: Limit the results to active users that have been assigned a specific role. |

| Filter setting | Description |
| --- | --- |
| Asset Count | A daily count of the relevant assets (either data or technology assets) that have been viewed.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Type**: Limit the results to a specific type.<br>◦ **Domain**: Limit the results to assets from a specific domain.<br>◦ **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.<br>◦ **Status**: Limit the results to assets with a specific status.<br>◦ **Community**: Limit the results to a specific community. |
| Changed Task Count | A daily count of workflow tasks that have been changed.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Workflow**: Limit the results to a task in a specific workflow.<br>◦ **Task Type**: Limit the results to tasks of a specific type.<br>◦ **Task**: Limit the results to a specific task.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **Task Status**: Limit the results to tasks that have a specific status (**Completed**, **Deleted** or **Unfinished**).<br>◦ **User**: Limit the results to a specific user. |

| Filter setting | Description |
| --- | --- |
| Domain Count | A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Type**: Limit the results to a specific type.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community. |
| License Available | A daily count of Collibra licenses that have been available to users.<br><br>This is calculated by subtracting the licenses in use from the total licenses your organization has.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **License**: Limit the results to a specific type.<br>◦ **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 | A daily count of Collibra licenses in use by all users in your organization.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **License**: Limit the results to active users with a specific license type.<br>◦ **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 | A daily count of Collibra asset page hits.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Community**: Limit the results to a specific community.<br>◦ **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.<br>◦ **Domain**: Limit the results to assets from a specific domain. |

| Filter setting | Description |
| --- | --- |
| Task Count | A daily count of workflow tasks carried out.<br>◦ **Workflow**: Limit the results to a task in a specific workflow.<br>◦ **Task Type**: Limit the results to tasks of a specific type.<br>◦ **Task**: Limit the results to a specific task.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **Task Status**: Limit the results to tasks that have a specific status (**Completed**, **Deleted** or **Unfinished**).<br>◦ **User**: Limit the results to a specific user. |
| Task Duration | A daily count of workflow task duration.<br>You can restrict the count results via the following additional filters:<br>◦ **Workflow**: Limit the results to a task in a specific workflow.<br>◦ **Task Type**: Limit the results to tasks of a specific type.<br>◦ **User**: Limit the results to a specific user.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **Task**: Limit the results to a specific task. |

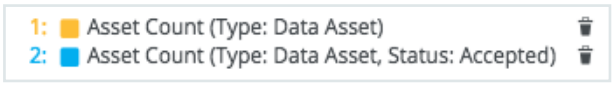
5. Click **Save data set**.

# 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 | The type of data that will be counted.<br><br>Depending on the filter type that you select, different fields become available. |
| Active Users | A daily count of the active users to have viewed the relevant assets.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **License**: Limit the results to active users with a specific license type.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **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.<br>◦ **Product**: Limit the results to active users within a specific Collibra Data Intelligence Cloud application.<br>◦ **Role**: Limit the results to active users that have been assigned a specific role. |

| Filter setting | Description |
| --- | --- |
| Asset Count | A daily count of the relevant assets (either data or technology assets) that have been viewed.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Type**: Limit the results to a specific type.<br>◦ **Domain**: Limit the results to assets from a specific domain.<br>◦ **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.<br>◦ **Status**: Limit the results to assets with a specific status.<br>◦ **Community**: Limit the results to a specific community. |
| Changed Task Count | A daily count of workflow tasks that have been changed.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Workflow**: Limit the results to a task in a specific workflow.<br>◦ **Task Type**: Limit the results to tasks of a specific type.<br>◦ **Task**: Limit the results to a specific task.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **Task Status**: Limit the results to tasks that have a specific status (**Completed**, **Deleted** or **Unfinished**).<br>◦ **User**: Limit the results to a specific user. |

| Filter setting | Description |
| --- | --- |
| Domain Count | A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Type**: Limit the results to a specific type.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community. |
| License Available | A daily count of Collibra licenses that have been available to users.<br><br>This is calculated by subtracting the licenses in use from the total licenses your organization has.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **License**: Limit the results to a specific type.<br>◦ **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 | A daily count of Collibra licenses in use by all users in your organization.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **License**: Limit the results to active users with a specific license type.<br>◦ **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 | A daily count of Collibra asset page hits.<br><br>You can restrict the count results via the following additional filters:<br><br>◦ **Community**: Limit the results to a specific community.<br>◦ **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.<br>◦ **Domain**: Limit the results to assets from a specific domain. |

| Filter setting | Description |
| --- | --- |
| Task Count | A daily count of workflow tasks carried out.<br>◦ **Workflow**: Limit the results to a task in a specific workflow.<br>◦ **Task Type**: Limit the results to tasks of a specific type.<br>◦ **Task**: Limit the results to a specific task.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **Task Status**: Limit the results to tasks that have a specific status (**Completed**, **Deleted** or **Unfinished**).<br>◦ **User**: Limit the results to a specific user. |
| Task Duration | A daily count of workflow task duration.<br>You can restrict the count results via the following additional filters:<br>◦ **Workflow**: Limit the results to a task in a specific workflow.<br>◦ **Task Type**: Limit the results to tasks of a specific type.<br>◦ **User**: Limit the results to a specific user.<br>◦ **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.<br>◦ **Community**: Limit the results to a specific community.<br>◦ **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

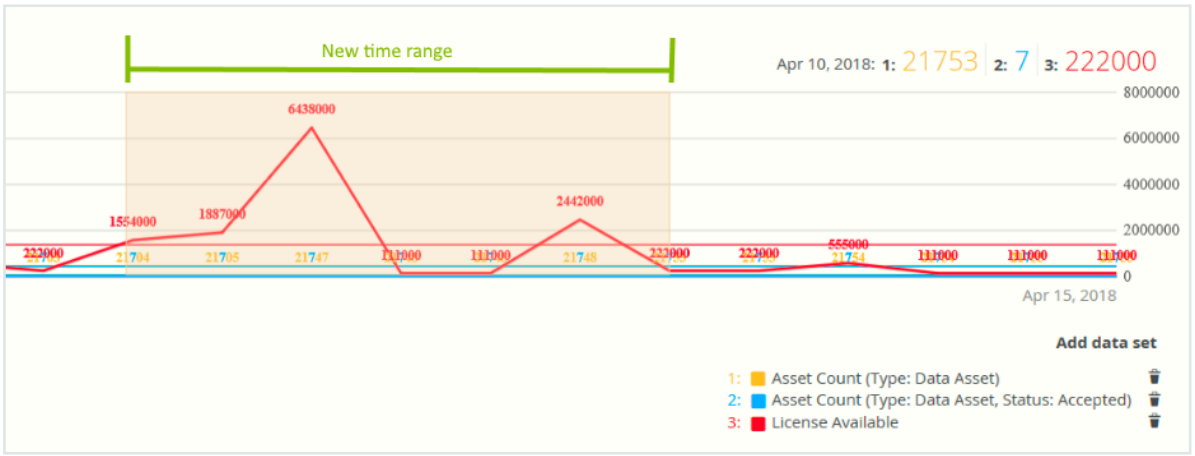
By default, the graphs on the Metrics pages are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

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

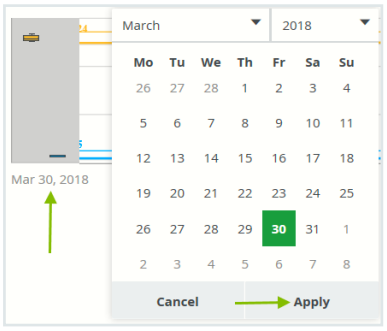
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
   » The Metrics page appears.
3. Optionally, Add a data set to a metrics graph a data set to a graph.
4. In the relevant graph, click at (or near) the first date in your 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.

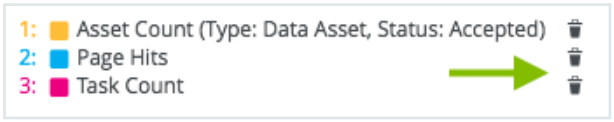
# Remove a data set from a metrics graph

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

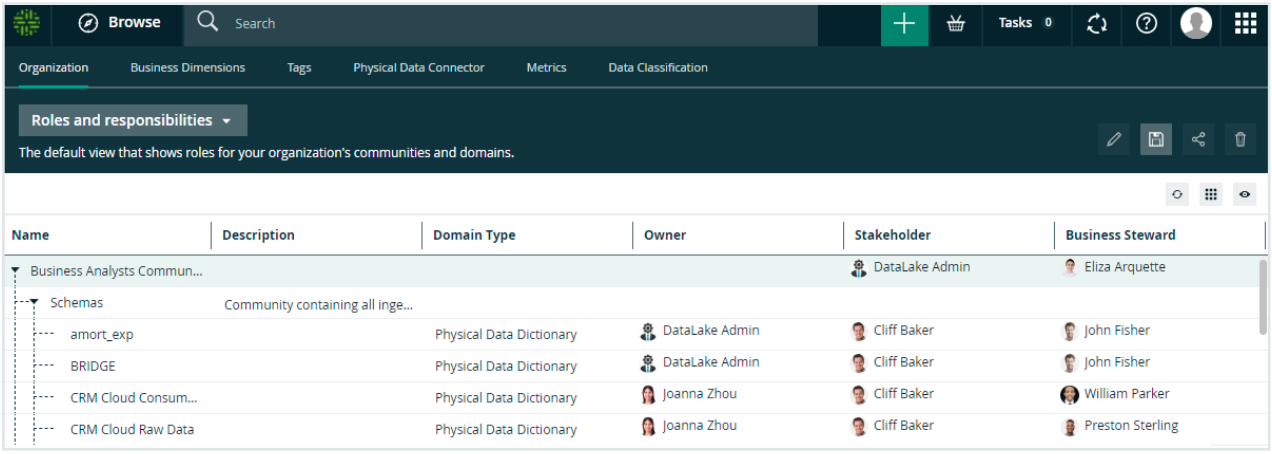
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
   » The Metrics page appears.
3. In the legend under the relevant graph, click on 🗑 next to the data set you want to delete.




   » The graph is updated.

# Data Stewardship

The Collibra Data Stewardship application helps data stewards manage their daily tasks. It also helps the administrators manage their stewards.
Stewards can monitor and maintain their own space in the company's data governance ecosystem. This gives them a clear picture of their responsibilities inside the data governance structure.




# Data Stewardship submenu pages

| Page | Description |
|---|---|
| Organization | Contains a view with the hierarchical overview of communities and domains. |
| Business Dimensions | Contains views for Business Process assets, Data Category assets and Line of Business assets. |
| Tags | Provides an overview of all tags in Collibra Data Intelligence Cloud. |

| Page | Description |
| --- | --- |
| Physical Data Connector | Contains a table with high-level database information. |
| Metrics | Contains a variety of statistics related to how the assets of the Stewardship application are used. |
| Data Classification | Shows the available data classes in your Collibra environment. |

# Using workflows

Workflows in Collibra Data Intelligence Cloud allow you to define process steps, in BPMN standards, to get work done from initiation until completion, while at the same time defining ownership of every individual step. They allow users to complete tasks in a strictly guided and controlled way.

Start a global workflow ..... 775

Start an asset workflow from an asset page ..... 775

Start an asset workflow from an asset table or set of tiles ..... 775

My Tasks page ..... 776

Viewing workflow tasks ..... 778

Working with tasks ..... 779

# Start a global workflow

If you want to start a workflow that is not linked to an asset, follow these steps:

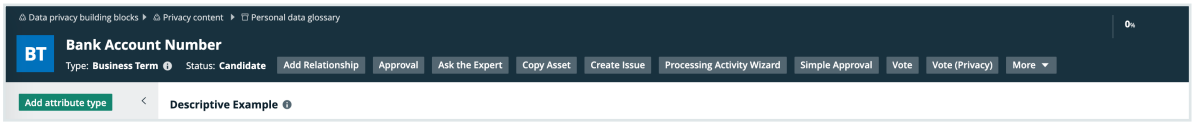
1. Go to a dashboard.
   - If the dashboard does not have the workflow widget and you have the right permissions, you can add it yourself, see Add a widget to a dashboard.
   - If you are not logged in and the guest user access is enabled for the workflow, you have to provide some identification and click **Continue**.
2. In the workflow widget, click on the button of the workflow that you want to start.
3. Fill in the required information in the dialog box and click the button at the bottom to confirm.

> Note The button's label depends on the workflow, for example, "Propose" for the Propose Business Term workflow or "Create" for the New Data Set workflow.

# Start an asset workflow from an asset page

If you are on an asset page and you want to start a workflow for that asset, follow these steps:

1. In the title bar, click the workflow that you want to start.




2. If necessary, fill in the form.
3. Click **Submit** at the bottom, to confirm.
   If you do not see the **Submit** button, you have to scroll to the bottom in the dialog box.

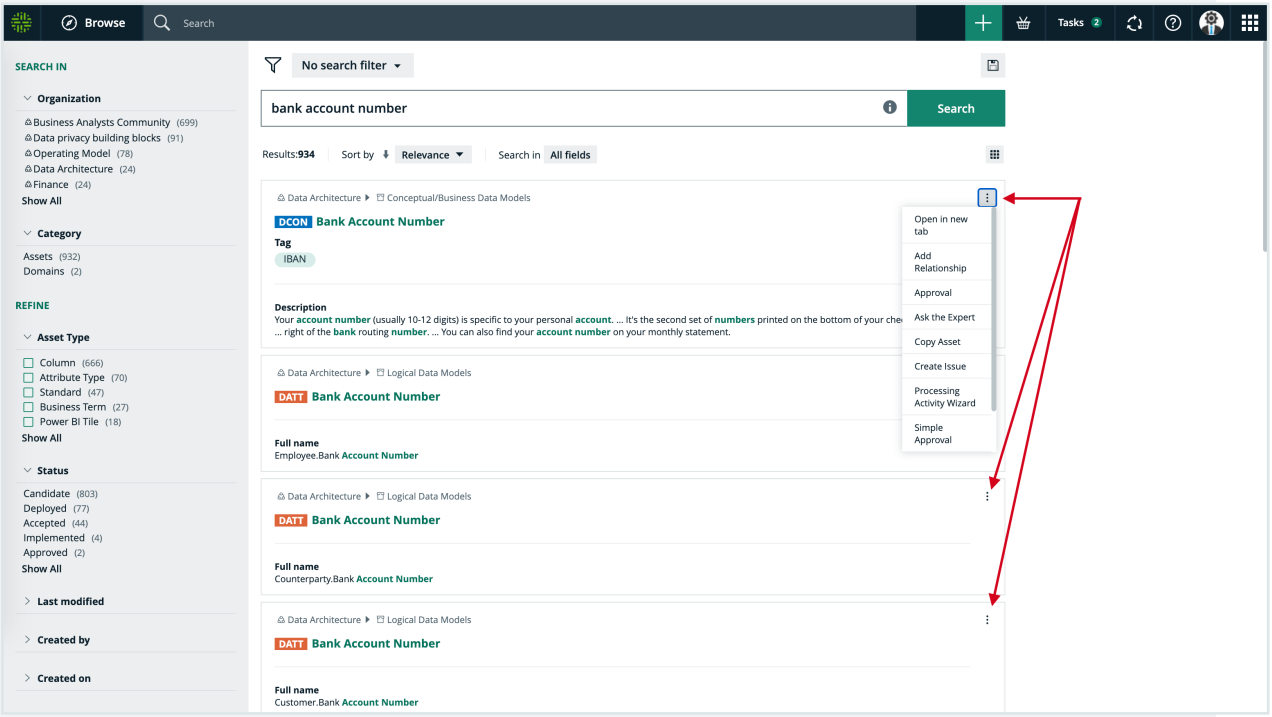
# Start an asset workflow from an asset table or set of tiles

You can start a workflow for one or more specific assets.

## Steps

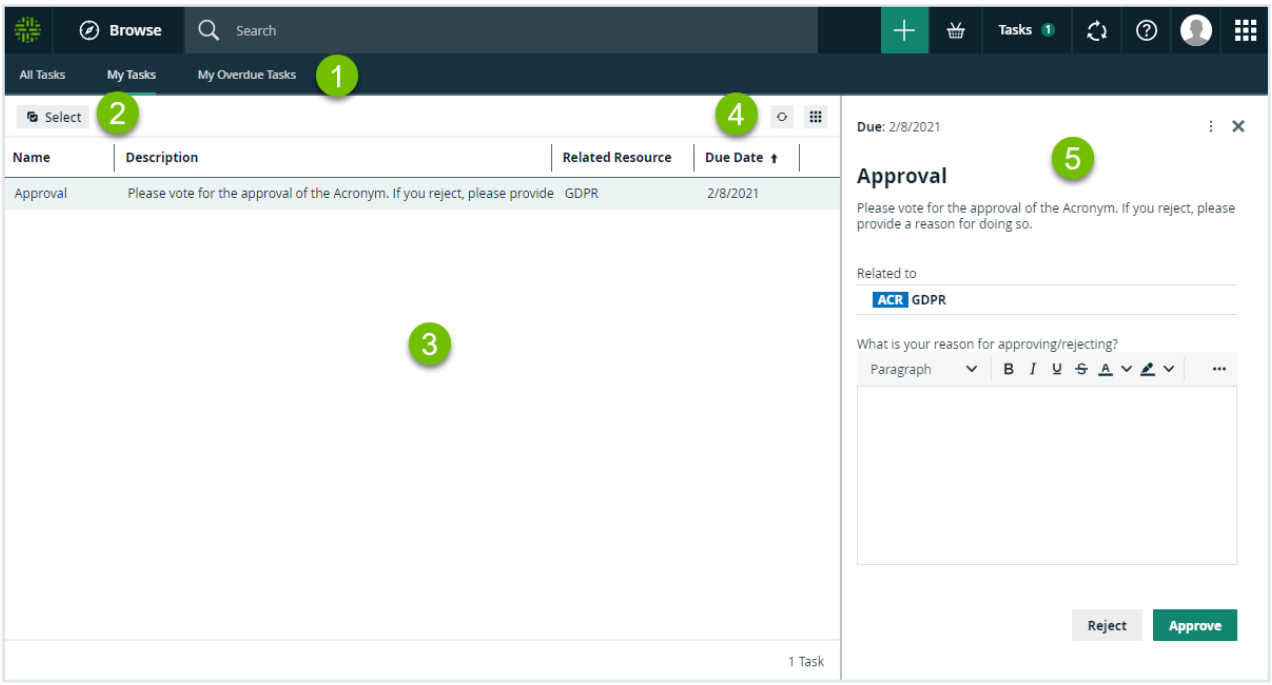
1. Navigate to a table or set of tiles.
2. If you are:
   - in table display mode, select the check boxes in front of the assets for which you want to start a workflow.
   - in tile display mode, select the tiles for which you want to start a workflow. More information: Select multiple tiles.
3. In the menu above the selected assets, click the name of the workflow you want to start.
   Only workflows that can be started for all selected assets at once are available.
   If necessary, fill in the form that is displayed.
4. Click **Submit**.

Tip On the search page, you can also start an asset workflow by clicking ⋮ for the relevant asset.




# My Tasks page

The following image shows the different parts of the **Tasks** page:



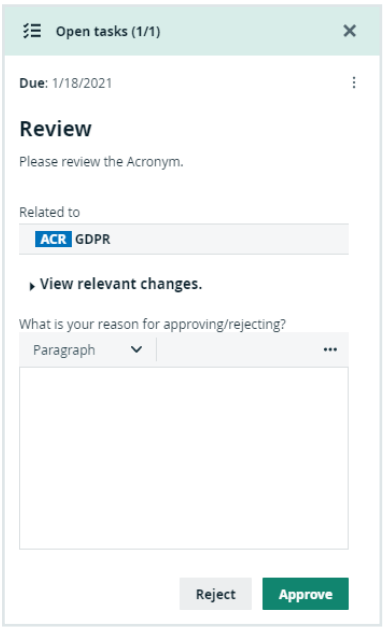

| Element | Name | Description |
|---|---|---|
| 1 | Tasks submenu | Contains the following pages:<br>• **All Tasks**: Shows all the tasks for which you have permission to view.<br>• **My Tasks**: Shows all the tasks that have been assigned to you.<br>• **My Overdue Tasks**: Shows the tasks that have been assigned to you that are past their due date. |
| 2 | Select button | Allows you to select one or multiple tasks for bulk operations. |
| 3 | Tasks table | Shows a list of tasks. |
| 4 | Table menu | Contains refresh and display options for tasks table. |
| 5 | Sidebar | Contains all the elements that allow you to complete the task. |

# Viewing workflow tasks

Workflows create tasks that ask users to provide input or to perform certain actions. You can view the tasks that are currently assigned to you in different locations, in different contexts.

If a task is part of a workflow that has been started for a specific resource, you can consult the task on the resource page.

It is displayed in the sidebar:




You can also view all the tasks that have been assigned to you per resource. On the main menu bar, click the **Tasks** button.




A page with a list of your tasks is displayed by default. You can order the tasks alphabetically by clicking the column headers.

With the correct permission, you can do the following:

- Consult all other open tasks, on the **All Tasks** page. This view shows all your tasks and tasks for other users, for which you have permission to view.
- Cancel or reassign the tasks on the **All Tasks** page. When you cancel a task, you have to provide a reason in the dialog box that is displayed. After you have

confirmed, the reason is shown as a comment on the corresponding asset page. You must not, in any way, complete tasks of other users.

An **Error** column displays an error message if the workflow task encountered an unexpected error.

# Working with tasks

Each task asks you to perform some kind of action. This can be something external to the application, provide input or change something in the application directly. When a task requires input, you are presented with a form to fill in the required information. You can complete tasks on the asset page or on the tasks pages.

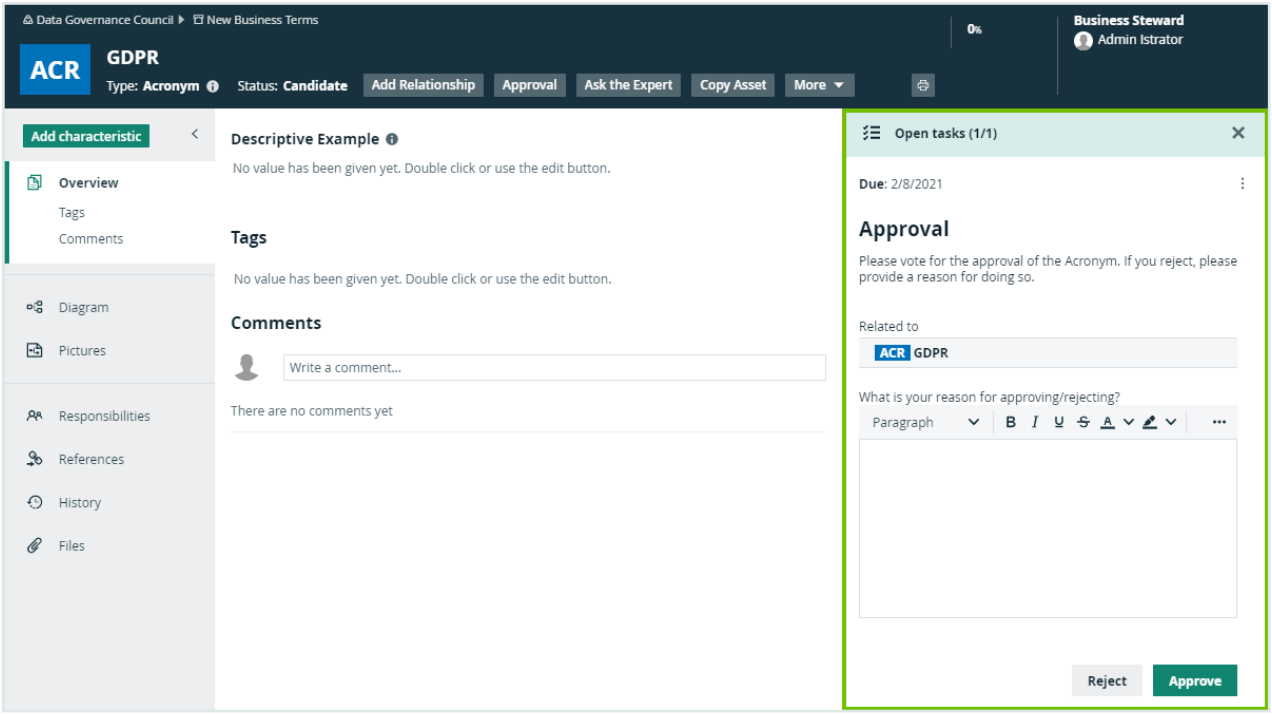
If you have more than one consecutive task assigned to you, each subsequent task is displayed immediately after the previous one is completed. This is especially useful in situations where a workflow is designed with multiple forms, one after the other, or a when you have more than one role for a resource.

An example of this behavior is shown in the asset page screenshots in this section, where the user is assigned to Subject Matter Expert, Stakeholder, and Steward.

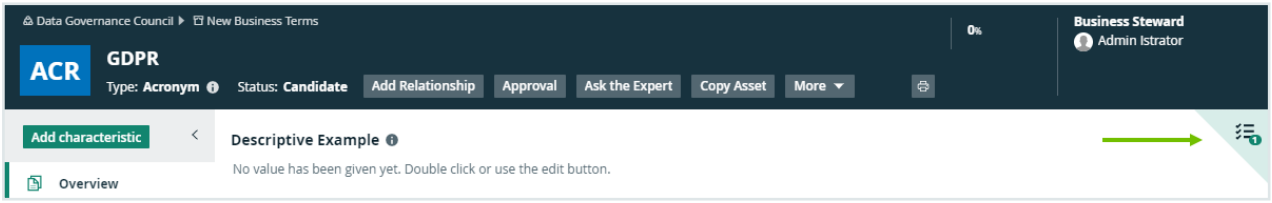
For an example of a complete workflow, see Tasks in the Issue Management workflow.

# Completing a task on the asset page

On asset pages, all task-related data is shown in the sidebar. You can complete all tasks actions from the sidebar.




If the sidebar is not open, a task button indicates the number of active tasks.

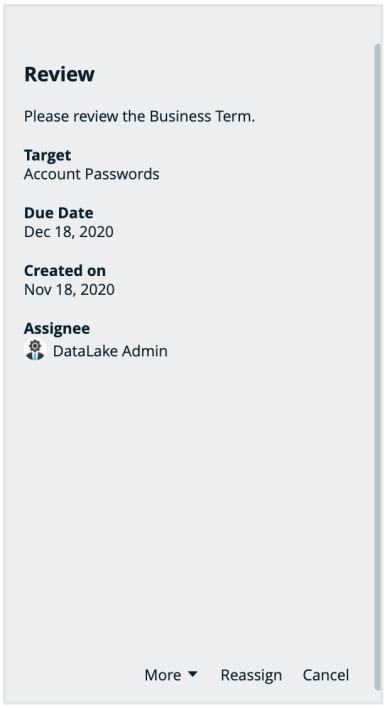



# Completing a task from My Tasks page

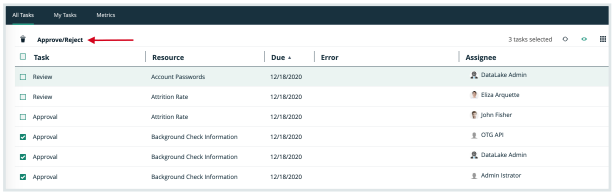
On the **My Tasks** page, all your tasks are listed in a table.

To complete tasks from here you can use one of the following options:

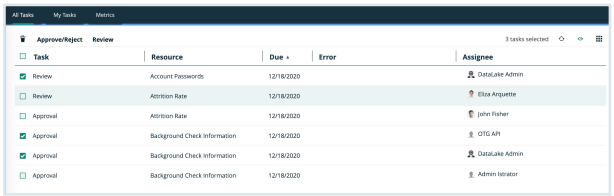
- In the preview panel on the right of a selected task, you get information about the task and the step in the workflow diagram. Click on one of the buttons to complete the task.




- When you select a check box in front of a task, the actions that are possible for that task are displayed above the table. Click on one of the buttons to complete the task.




- When you select the check boxes of multiple tasks, the actions that are possible for that task are also displayed above the table. Click on one of the buttons to complete multiple tasks at once.




- If there is a form to fill in, it contains the names of all the assets for which you are completing a task.
  Even when you select different types of tasks, all the different options to complete a task are displayed. However, only the tasks for which the action is possible are completed and you cannot complete all of the tasks at once.

# Cancel a task

With the correct permissions, you can cancel a task.

1. On the main menu, click **Tasks**.
2. Click in the row of task that you want to cancel. Do not click the task name or resource name as that will open respectively the task details or asset page.
   » The row is highlighted and the preview pane on the right is updated.
3. At the bottom of the preview pane, click **Cancel**.
4. Fill in an optional reason to cancel the task and click **Cancel Task**.

> Note Canceling a task means that the entire workflow is canceled and an event is created. It is possible that other workflows are listening for this event and are started automatically when this event occurs.

# Reassign a task

With the correct permissions, you can reassign a task. To do so, follow these steps:

1. On the main menu, click **Tasks**.
2. Click in the row of task that you want to cancel. Do not click the task name or resource name as that will open respectively the task details or asset page.
   » The row is highlighted and the preview pane on the right is updated.
3. At the bottom of the preview pane, click **Reassign**.
4. Fill in the **Reassign task** dialog box.
   » The workflow continues with the new set of users as candidates for the task. Keep in mind that if the task expects, for example, an attribute to be changed by one of the newly assigned users, that user needs the permission to do so.
5. Click **Reassign**.

# View a workflow diagram

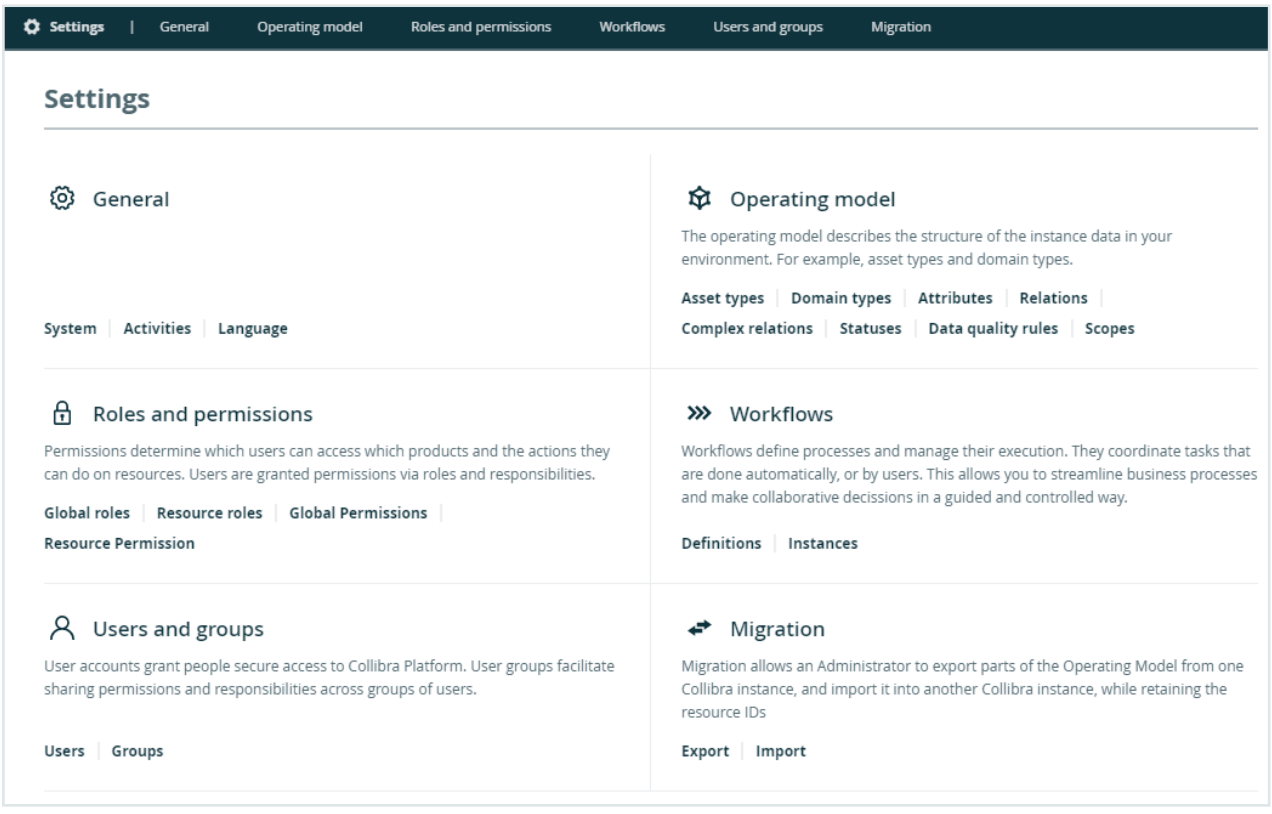
Each task is part of a workflow. With the correct permissions, you can open the full workflow diagram. This allows you to see in which stage of the workflow the task is located.

1. On the main menu, click **Tasks**.
2. Click the row of task that you want to cancel. Do not click the task name or resource name as that will open respectively the task details or asset page.
   » The row is highlighted and the sidebar displays the task.
3. In the sidebar, click the ellipses ⋮ → **View in workflow diagram**.
   » A rendering of the current position of the task in the workflow is displayed.

# Collibra settings

The settings of Collibra Data Intelligence Cloud allow you to customize the operating model of your environment to your needs.

By default, the settings open on a landing page that allows you to navigate to each of the sections. Contact Collibra support if you want to enable or disable this Settings landing page.



# General settings page

On the **General** settings page of the Collibra settings, you can view and edit general settings. For example, you can see technical information and all activities. You can also add additional interface languages and manage banners.

## Tab pages

The **General** settings page of the Collibra settings is split in several tab pages:

| Tab page | Description |
|---|---|
| System | This tab page contains information about the installation of your Collibra environment. You can also do the following:<br>• Rebuild the search index.<br>• Rebuild automatic hyperlinks.<br>• Upgrade the activity history. |
| Activities | This tab page contains a table with activities. You can also see this information, in a more compact form, if you click on the menu bar. |
| Language | This tab page allows you to edit or translate the interface text of Collibra. |
| Banners | This tab page allows you to create, edit or delete banners. |

# Rebuild hyperlinks

Collibra Data Intelligence Cloud can automatically create hyperlinks between assets. However, if those hyperlinks are outdated, you can rebuild them.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **General**.

» The general settings appear on the **Activities** tab page.

3. In the **Automatic Hyperlinks** section, click **Rebuild automatic hyperlinks**.

# Upgrade the activity history after an upgrade to 2020.11/5.7.7

After an upgrade to 2020.11/5.7.7, the activity history of assets is not automatically visible in Collibra Data Intelligence Cloud. To view the activity history, you have to upgrade the history.

> Note
> - The backup you restore needs to contain history data. This is one of the options when creating a backup.
> - This is a one-time only action, subsequent upgrades don't require this extra step.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **General**.
   » The general settings appear on the **Activities** tab page.
3. At the bottom of the page, click **Upgrade History**.

## What's next?

The history in the backup is converted to the new environment. The conversion time depends on the size of the history in the backup.

You can see the status of the history upgrade by viewing your activities.

# Interface text languages

The interface text of Collibra Data Intelligence Cloud is available in several languages. The default language is English, but you can download French, German and Spanish

translations from the Downloads section of the Collibra Product Resource Center.

You can choose the interface language in your profile page. As an administrator, you can also edit and translate the interface text.

## Supported languages

Collibra supports the following languages:

- English
- French
- German
- Spanish

> Important Collibra does not support other languages for the interface text and your instance data. For example, there are known issues with sorting and filtering non-Latin characters, and the Search feature might not return the right search results.

## Limitations

Most of the text in the interface of Collibra is translatable, including buttons, messages, tooltips, dialog boxes. However, there are some important limitations:

- The operating model is not translatable:
  - Asset types
  - Domain types
  - Statuses
  - Characteristic types
  - Roles
  - Scopes
- Instance data is not translatable:
  - Asset names
  - Characteristics
  - Tags and comments
  - Names of views and filters
  - Text in dashboards and widgets

## Structure of the interface text

The interface text is divided in translation messages, which consist of the following elements:

| Element | Description |
|---|---|
| Message key | The message key is a unique identifier that Collibra uses to retrieve the correct interface text.<br>Example Activities.ActivitiesTable.status.error = Error |
| Equal sign | An equal sign between spaces ( = ).<br>Example TextEditor.edit = Edit |
| A piece of interface text | The interface text is the actual piece of text in the user interface.<br>Example COMMENT_ADDED = Comment Added |
| Variables (optional) | Interface text may contains variables, which are placeholders for a piece of information. They are filled in when the text appears on the screen. They are represented by a number between curly brackets (*{0}*).<br>Example PASSWORD_TOO_SHORT = The password must be at least {0} characters long. |
| Markup (optional) | Interface text may contain HTML tags to format text or to create hyperlinks in a piece of interface text.<br>Example core.header.expired = Your password has expired!<br>Please change your password <a href="{0}" >here</a>. |

## Edit or translate interface text

You can edit or translate the interface text of the Collibra Data Intelligence Cloud to meet your company's needs.

You can work directly in the editor of Collibra, or you can copy the translation messages to a text file. You can then send the file to qualified translators, who probably don't have the required permissions to work in Collibra.

You can also add translations by placing an I18N file with translation messages directly into your server. In that case, the translation messages have to follow the Collibrastructure and the file name has to be the two-letter lowercase abbreviation of the languages as specified in ISO 639-1, for example **nl.i18n** for Dutch or **ja.i18n** for Japanese.

We recommend you use only one translation method. If you upload an I18N, and then edit translation messages in Collibra, you may not see the changes you expect.

> Tip You can download files containing the translation of the Collibra interface into French, German and Spanish from the Downloads page of the Collibra website.

> Note Message keys are not always backwards compatible with other Collibra versions. When you upgrade to a newer version, there might be new keys, renamed keys or keys that have been deleted.

## Prerequisites

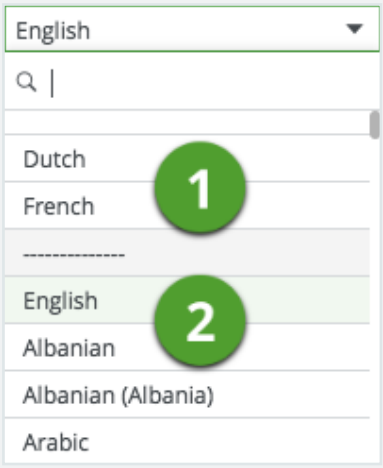
- You have a global role that has the System administration global permission.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **General**.
   » The general settings appear on the **Activities** tab page.
3. In the tab pane, click **General** → **Language**.

4. At the top of the editor, choose the interface language.

   Note Languages that contain previously edited text are shown at the top of the drop-down menu.

   » If you chose a previously edited language (1), the editor contains the list of translation messages.
   » If you chose a new language (2), click **Load Defaults** to fill the editor with the default English UI text.

   Warning Clicking **Load Defaults** multiple times inserts multiple copies of the interface text, so only click it once.

5. Edit or translate the interface text, or paste the content from your translation file.
6. Click **Save**.

## What's next?

You can choose the interface language in your account settings.

# Banners

Banners are messages that are visible for all users, on all pages of Collibra Data Intelligence Cloud.

If you have a global role with the System Administration global permission, you can create, edit and delete banners in the **Banners** page of the **General** section of the Collibra settings.

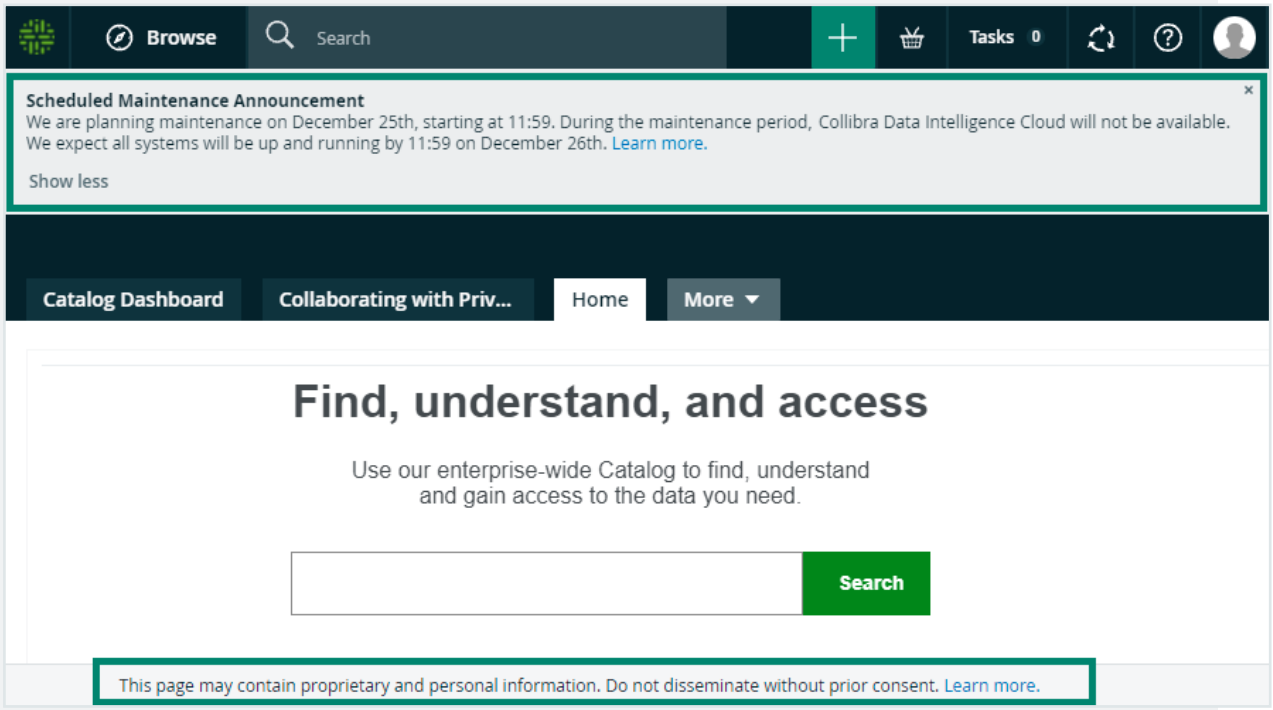
## Top Banner

The top banner appears at the top of the page. It can contain up to 500 characters of rich text, including line breaks, but no images. You can dismiss it, after which it no longer appears until the message is updated. This is typically a good place to make company-wide announcements.

## Bottom Banner

The bottom banner appears at the bottom of the page. It can contain up to 250 characters of rich text, but no line breaks or images. You cannot dismiss the bottom banner and it is always visible, even in printed output. We recommend that you only use the bottom banner to display important information, such as disclaimers and legal information.

Example



# Create a banner

You can create a banner to post messages to all Collibra users.

> Tip You can dismiss the top banner, so use it to post temporary announcements. You cannot dismiss the bottom banner, so use it to post important information, such as disclaimers and legal information.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open the **Banners** page of the **General** section of the Collibra settings:
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. In the **General** section, click **Banners**.
      » The **Banners** page opens.
2. In the **Top Banner** or **Bottom Banner** section, double-click or click .
3. Enter the content of the banner.
4. Click **Publish**.
   » The **Publish Banner** dialog box appears.
5. Click **Publish**.
   » The banner is now visible on all pages for all users.

# Edit a banner

You can edit a banner to update the message to all Collibra users.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open the **Banners** page of the **General** section of the Collibra settings:
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. In the **General** section, click **Banners**.
      » The **Banners** page opens.
2. In the **Top Banner** or **Bottom Banner** section, double-click or click .
3. Edit the content of the banner.
4. Click **Publish**.
   » The **Publish Banner** dialog box appears.
5. Click **Publish**.
   » The updated banner appears on all pages for all users.

# Delete a banner

You can delete a banner if it's no longer needed.

## Prerequisites

You have a global role that has the System administration global permission.

## Steps

1. Open the **Banners** page of the **General** section of the Collibra settings:
   a. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   b. In the **General** section, click **Banners**.
      » The **Banners** page opens.
2. In the **Top Banner** or **Bottom Banner** section, double-click or click .
   » The **Remove Banner** dialog box appears.
3. Click **Remove**.
   » The banner is no longer visible on any page.

# Operating model settings page

On the **Operating model** settings page of the Collibra settings, you can view and edit the operating model, which defines the structure of the instance data, for example asset types, domain types, characteristic types and statuses.

## Tab pages

The **Operating model** settings page of the Collibra settings is split in several tab pages:

| Tab page | What you can do |
|---|---|
| Asset types | View and edit asset types and their assignments. |
| Domain types | View and edit domain types |
| Characteristics | View and edit characteristic types. |
| Attributes | View and edit attribute types. |
| Relations | View and edit relation types. |
| Complex relations | View and edit complex relation types. |
| Statuses | View and edit statuses. |
| Data quality rules | View and edit data quality rules. |
| Scopes | View and edit scopes. |

# Roles and permissions settings page

On the **Roles and permissions** settings page of the Collibra settings, you can view and edit the permissions and roles to define which actions users can do.

# Tab pages

The **Roles and permissions** settings page of the Collibra settings is split in several tab pages:

| Tab page | Description |
|---|---|
| Global roles | This tab page allows you to view and edit global roles, and add or remove users. |
| Resource roles | This tab page allows you to view and edit resource roles, and add or remove users. |
| Global permissions | This tab page allows you to view global permissions, and add or remove global permissions to or from global roles. |
| Resource permissions | This tab page allows you to view resource permissions, and add or remove resource permissions to or from resource roles. |

# Permissions

A permission is an authorization to access an application of Collibra Data Intelligence Cloud, or to view or edit a resource.

Users are not granted permissions directly, but through global roles and responsibilities.

Collibra provides a set of permissions that are included in the default roles.

## Permission types

Collibra has two types of permissions:

- Global permissions
- Resource permissions

## Required license type of permissions

Collibra has several types of permissions, based on the license type that a user needs to act on the permission.

| Resource permission type | Description |
|---|---|
| Consumer permission | A consumer permission is a permission for which a consumer license or higher is required. |
| Author permission | An author permission is a permission for which an author license is required. |

## Actions

- Determine which global permissions are included in global roles.
- Determine which resource permissions are included in resource roles.

## Global permissions

A global permission is a permission that applies across all Collibra applications. It can be added to a global role.

For an overview of the permissions in each packaged global role, see the online version of this documentation.

| Global permission | Description | Required license |
|---|---|---|
| Asset grid | The Asset grid global permission contains global permissions that allow users to configure asset grids. | |
| Administration | The Asset grid > Administration global permission allows users to create and manage asset grids.<br><br>Note This global permission is only visible if **Asset Grid Permission** is enabled in Collibra Console. | Consumer |

| Global permission | Description | Required license |
|---|---|---|
| Catalog | The Catalog global permission contains global permissions that allow users to use advanced features of Data Catalog. | |
| Advanced Data Type | The Catalog > Advanced Data Type permission group contains global permissions that allow users to manage advanced data types. | |
| Add | The Catalog > Advanced Data Type > Add global permission allows users to create advanced data types. | Author |
| Remove | The Catalog > Advanced Data Type > Remove global permission allows users to delete advanced data types. | Author |
| Update | The Catalog > Advanced Data Type > Update global permission allows users to edit advance data types. | Author |
| Register Profiling Information | The Catalog > Register Profiling Information global permission allows API users to enable data profiling when registering a data source. | Author |
| Technical Lineage | The Catalog > Technical Lineage global permission allows users to see the technical lineage of a data source. | Consumer |

| Global permission | Description | Required license |
|---|---|---|
| Edge | The Edge global permission contains global permissions that allow users to install and manage Edge sites.<br><br>> Note Currently, Edge is an on-demand cloud service. It will only become the default service once the migration from Jobserver to Edge is complete. | |
| Insights | The Insights global permission groups contains global permissions related to Insights. | |
| Download the Insights reporting data | The Insights > Download the Insights reporting data global permission allows users to download the data from Insights. | Author |
| View Insights reports | The Insights > View Insights reports global permission allows users to open and see Insights reports. | Consumer |
| Product Rights | The Product Rights permission group contains global permissions that allow users to access Collibra applications. | |
| Assessments | The Product Rights > Assessments global permission allows users to access the Assessments application. | Consumer |
| Business Semantics Glossary | The Product Rights > Business Semantics Glossary global permission allows users to access the Business Glossary application. | Consumer |

| Global permission | Description | Required license |
|---|---|---|
| Catalog | The Product Rights > Catalog global permission allows users to access the Data Catalog application. | Consumer |
| Data Dictionary | The Product Rights > Data Dictionary global permission allows users to access the Data Dictionary application. | Consumer |
| Data Helpdesk | The Product Rights > Data Helpdesk global permission allows users to access the Data Helpdesk application. | Consumer |
| Data Stewardship Manager | The Product Rights > Data Stewardship Manager global permission allows users to access the Data Stewardship application. | Consumer |
| Policy Manager | The Product Rights > Policy Manager global permission allows users to access the Policy Manager application. | Consumer |
| Reference Data Manager | The Product Rights > Reference Data Manager global permission allows users to access the Reference Data application. | Consumer |
| System Administration | The Product Rights > System Administration global permission allows users to manage all sections of the Collibra Settings, including the general settings, the operating model , roles, permissions, users, groups and workflows. | Author |
| User Administration | The Product Rights > User Administration global permission allows users to manage users and groups. | Author |

| Global permission | Description | Required license |
|---|---|---|
| Workflow Administration | The Product Rights > Workflow Administration global permission allows users to access the **Workflow** tab page of the Collibra Settings. | Author |
| Resources | The Resources permission group contains global permissions that allow users to see and manage assets, domains and communities. | |
| Manage all resources | The Resources > Manage all resources global permission allows users to see and manage all communities and domains, and assets whose type belongs to a product whose Product Right the user has, regardless of responsibilities. | Author |
| Tags | The Tags permission group contains global permissions that allow users to see and manage tags in the Data Stewardship application. | |
| Manage tags | The Tags > Manage tags global permission allows users to edit and delete tags on the tags page in the Data Stewardship application. | Author |
| View tags | The Tags > View tags global permission allows users to see the **Tags Overview** page in the Data Stewardship application. | Consumer |
| View Permissions | The View Permissions permission group contains global permissions that allow users to see all views, which includes dashboards, diagram views, asset views, search filters and relation views on an asset page. | |

| Global permission | Description | Required license |
|---|---|---|
| View All | The View Permissions > View All global permission allows users to see all communities, domains and the assets within them, thus ignoring view permissions. | Consumer |
| Views, Dashboards, Search filters | The Views, Dashboards, Search filters permission group contains global permissions that allow users to manage and share views, dashboards and search filters. | |
| Manage shared Views, Dashboards, Search filters | The Views, Dashboards, Search filters > Manage shared Views, Dashboards, Search filters global permission allows users to share, edit and delete views, dashboards and search filters that are shared. | Author |
| Manage your own Views, Dashboards, Search filters | The Views, Dashboards, Search filters > Manage your own Views, Dashboards, Search filters global permission allows users to edit and delete your own views, dashboards and search filters. | Consumer |
| Share your own Views, Dashboards, Search filters | The Views, Dashboards, Search filters > Share you own Views, Dashboards, Search filters global permission allows users to share your own views, dashboards and search filters. | Consumer |
| Workflow | The Workflow permission group contains global permissions that allow users to manage workflows. | |
| Manage all workflows | The Workflow > Manage all workflows global permission allows users to see, reassign and delete all running workflow tasks. | Author |

| Global permission | Description | Required license |
|---|---|---|
| Use workflow message events | The Workflow > Use workflow message events global permission allows users to retrieve workflow messages.<br><br>Note This is used for API users. For more information, see Workflow permissions. | Consumer |

## Resource permissions

A resource permission is a permission that applies to a resource and its children. They are combined into resource roles to create responsibilities.

For an overview of the permissions in each packaged resource role, see the online version of this documentation.

| Resource permission | Description | Required license |
|---|---|---|
| Asset | The Asset permission group allow users to work with assets. | |
| Add | The Asset > Add resource permission allows users to create assets. | Author |
| Remove | The Asset > Remove resource permission allows users to delete assets. | Author |
| Update | The Asset > Update resource permission allows users to edit assets.<br><br>Note This only refers to the asset name and automatic hyperlinking. | Author |

| Resource permission | Description | Required license |
|---|---|---|
| Update Status | The Asset > Update Status resource permission allows users to change the status of assets. | Author |
| Update Type | The Asset > Update Type resource permission allows users to change the asset type of assets. | Author |
| Attribute | The Asset > Attribute permission group allow users to work with attributes of assets. | |
| Add | The Asset > Attribute > Add resource permission allows users to add characteristics to assets.<br><br>Tip If you want to use images and attachments in attributes of assets, you also need the Attachment > Add permission. | Author |
| Remove | The Asset > Attribute > Remove resource permission allows users to remove characteristics from assets. | Author |
| Update | The Asset > Attribute > Update resource permission allows users to edit characteristics of assets.<br><br>Tip If you want to use images and attachments in attributes of assets, you also need the Attachment > Add permission. | Author |
| Data | The Asset > Data permission group allow users to work with data from data sources. | |

| Resource permission | Description | Required license |
|---|---|---|
| Access Data | The Asset > Data > Access Data resource permission allows users to create Tableau provision files. | Consumer |
| View Samples | The Asset > Data > View Samples resource permission allows users to see sample data of data sources. | Consumer |
| Responsibilities | The Asset > Responsibilities permission group allow users to manage the responsibilities of assets. | |
| Add | The Asset > Responsibilities > Add resource permission allows users to create responsibilities for assets. | Author |
| Remove | The Asset > Responsibilities > Remove resource permission allows users to delete responsibilities from assets. | Author |
| Update | The Asset > Responsibilities > Update resource permission allows users to edit responsibilities of assets. | Author |
| Tags | The Asset > Tags permission group allow users to work with tags. | |
| Update | The Asset > Tags > Update resource permission allows users to edit and delete tags on asset pages and asset tables. | Consumer |
| Attachment | The Attachment permission group allow users to manage attachments. | |

| Resource permission | Description | Required license |
|---|---|---|
| Add | The Attachment > Add resource permission allows users to add attachments to resources. | Consumer |
| Remove | The Attachment > Remove resource permission allows users to remove attachments from resources. | Consumer |
| Update | The Attachment > Update resource permission allows users to edit attachments of resources. | Consumer |
| Comment | The Comment permission group allow users to work with comments. | |
| Add | The Comment > Add resource permission allows users to add comments to resources.<br><br>Tip If you want to use images and attachments in comments, you also need the Attachment > Add permission. | Consumer |
| Remove | The Comment > Remove resource permission allows users to delete comments from resources. | Author |
| Update | The Comment > Update resource permission allows users to edit comments of resources.<br><br>Tip If you want to use images and attachments in comments, you also need the Attachment > Add permission. | Author |
| Community | The Community permission group allow users to manage communities. | |

| Resource permission | Description | Required license |
|---|---|---|
| Add | The Community > Add resource permission allows users to create and edit communities.<br><br>Tip If you want to use images and attachments in the description of communities, you also need the Attachment > Add permission. | Author |
| Configure external system | The Community > Add resource permission allows users to set up connections to external data sources. | Author |
| Remove | The Community > Remove resource permission allows users to delete communities. | Author |
| Update | The Community > Update resource permission allows users to edit communities.<br><br>Tip If you want to use images and attachments in the description of communities, you also need the Attachment > Add permission. | Author |
| Responsibilities | The Community > Responsibilities permission group allow users to manage the responsibilities of communities. | |
| Add | The Community > Responsibilities > Add resource permission allows users to create responsibilities for communities. | Author |

| Resource permission | Description | Required license |
|---|---|---|
| Remove | The Community > Responsibilities > Remove resource permission allows users to delete responsibilities from communities. | Author |
| Update | The Community > Responsibilities > Update resource permission allows users to edit responsibilities of communities. | Author |
| Domain | The Domain permission group allow users to manage domains. | |
| Add | The Domain > Add resource permission allows users to create and edit domains.<br><br>Tip If you want to use images and attachments in the description of domains, you also need the Attachment > Add permission. | Author |
| Remove | The Domain > Remove resource permission allows users to delete domains. | Author |
| Update | The Domain > Update resource permission allows users to edit domains.<br><br>Tip If you want to use images and attachments in the description of domains, you also need the Attachment > Add permission. | Author |
| Responsibilities | The Domain > Responsibilities permission group allow users to manage the responsibilities of domains. | |

| Resource permission | Description | Required license |
|---|---|---|
| Add | The Domain > Responsibilities > Add resource permission allows users to create responsibilities for domains. | Author |
| Remove | The Domain > Responsibilities > Remove resource permission allows users to delete responsibilities from domains. | Author |
| Update | The Domain > Responsibilities > Update resource permission allows users to edit responsibilities of domains. | Author |
| Rating | The Ratings permission group allow users to work with ratings. | |
| Add | The Rating > Add resource permission allows users to rate assets, edit and delete your own ratings. | Consumer |
| Remove | The Rating > Remove resource permission allows users to delete other users' ratings. | Author |
| Update | The Rating > Update resource permission allows users to edit other users' ratings | Author |
| Validation | The Validation permission group allow users to validate assets. | |
| Validation execution | The Validation > Validation Execution resource permission allows users to manually start validation of an asset from the asset page or an asset table. | Author |

| Resource permission | Description | Required license |
|---|---|---|
| View Permissions | The View Permissions permission group allow users to manage the view permissions of domains and communities. | |
| Edit View Permissions | The View Permissions > Edit View Permissions resource permission allows users to edit the view permissions of domains and communities. | Author |
| Workflow | The Workflow permission group allow users to manage workflows tasks. | |
| Manage Workflows | The Workflows > Manage Workflows resource permission allows users to see all running workflow tasks.<br><br>Note It does not give you permission to cancel or reassign tasks, as this is determined by the workflow definition. | Author |

## Enable permission to use tags

To enable the permission to use tags, follow these steps:

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Permissions** → **Resource**.
   » The matrix of resource permissions and roles appears.
4. In the table, look up **Tags**.

5. In the role column, click ✕ to enable the permission.
   If you see ✓, that role is permitted to use tags.




A user with one of the selected resource roles on an asset can use (add, update and delete) tags on that asset.

## Disable the permission to use tags

To disable the permission to use tags, follow these steps:

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Permissions** → **Resource**.
   » The matrix of resource permissions and roles appears.
4. In the table, look up **Tags**.
5. In the role column, click ✓ to disable the permission for the role.
   If you see ✕, that role is not permitted to use tags.




# Roles

A role is a collection of permissions that can be assigned to users and user groups.

## Role types

The role type determines whether the permissions in the role apply to resources or the Collibra Data Intelligence Cloud applications.

Collibra has two types of roles:

- Global roles
- Resource roles

# Global roles

A global role is a role that consists of global permissions. You assign a user to a global role to determine which Collibra applications the user can use.

## Global roles

The following table contains the packaged global roles.

| Global role | Description |
|---|---|
| Assessments | A user who can access Assessments. |
| Asset Grid Admin | A user who can access Asset Grid. |
| Catalog | A user who can access Data Catalog. The global permissions in this role only require a consumer license. |
| Catalog Author | A user who can access Data Catalog. Users with this role can also create, edit and delete advanced data types. |
| Data Dictionary | A user who can access the Data Dictionary application, which contains all the technical metadata of the physical data sources and other data assets. |
| DataSteward | A user who can access the Data Stewardship application for viewing tags, Business Dimensions and the organization structure, including the responsibilities of the communities and domains. |
| DataSteward Author | A user who can access the Data Stewardship application to see tags, Business Dimensions and the organization structure, including the responsibilities of the communities and domains. Users with this role can also manage tags on the tags overview page. |
| Edge integration engineer | A user who can add, edit and delete Edge connections and capabilities. |

| Global role | Description |
|---|---|
| Edge manager | A user who can create, edit and delete Edge sites. |
| Edge site | A user who can create a connection between itself, as an Edge site, and Collibra Data Intelligence Cloud.<br><br>Note The user is not a person, but an Edge site. The user is automatically created when you install an Edge site. |
| Edge site administrator | A user who can download the download and installer files to install an Edge site. |
| Glossary | A user who can access the Business Glossary application.<br><br>Users with this role can access all business semantics glossary functionality and workflows concerning business term proposal and approval, data element usage, structure and glossary alignment. |
| Data Helpdesk | A user who can access the Data Helpdesk application, where users can log issues and check issue statuses and assignees. |
| Policy Manager | A user who can access the Policy Manager application, which is a collection of all governance assets. |
| ReferenceData | A user who can access the reference data accelerator.<br><br>Users with this role are typically allowed to:<br><br>• Access all reference data functionality and workflows concerning code proposal, code approval and code mapping.<br>• Define and manage the crosswalk, code value and codes set asset types and their subtypes.<br>• Define and manage complex relation types such as code mapping. |
| SysAdmin | A user who can configure and manage the Collibra Data Intelligence Cloud.<br><br>Users with this role are typically allowed to:<br><br>• Access and modify the **Settings**.<br>• Define and manage the operating model. |

# Create a global role

You can create a new global role. For example, you can do this if the packaged roles don't meet your specific needs.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Roles**.
   » The overview of global roles appears.
4. Above the table, to the right, click **Add**.
   » The **Global Role Creation** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Name | Type a name for the role. |
| Description | Type a description for the role. |
| Users | Enter the users or user group that are granted this role.<br>Note You can still assign a global role to a user later. |

6. Click **Save**.

## What's next?

- Determine which global permissions are included in this role.
- Assign users to the role.

## Edit a global role

You can edit a global role. You can do so, for example, if you want to edit the name or the description of a role.

> Note Do not confuse this with adding or removing global permissions.

### Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. Double-click a cell.
   » The cell editor appears.
4. Edit the cell.
5. Click ✔.

## Add or remove global permissions to a global role

You can determine which global permissions are included in a global role.

### Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.

2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Permissions** .
   » The matrix of global permissions and roles appears.
4. If required, add or remove columns:
   a. In the content toolbar, click ⠿ → <the name of the role>.
5. Above the table, to the right, click **Edit**.
   » You can now edit the matrix of permissions and roles.
6. Select or clear the checkboxes to add permissions to, or remove them from a role.
7. Above the table, to the right, click **Save**.

## Assign a global role to a user or a user group

You can assign a global role to a user or user group.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the row of the role to which you want to assign users or user groups, double-click the **Members** column.
4. Start typing in the field and click the user or user group that you want to assign. Press `Enter` to assign multiple users or groups at once.
5. Click **Save**.

## Delete a global role

You can delete a global role. For example, you can do this if you no longer need a specific role.

### Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the row of the role, click 🗑.
   » The **Delete** dialog box appears.
4. Click **Delete**.

## Resource roles and permissions

A resource role is a role that consists of resource permissions and applies to a resource and its children. For example, if you assign a resource role to a domain, it also applies to all assets in the domain. If you assign a resource role to a community, it also applies to all its subcommunities, domains and assets in the community. The purpose of resource roles is to grant resource permissions to users through a responsibility. For example, they determine which users can edit assets via the asset page or in a workflow.

# In this chapter

### Resource roles

The following table shows the packaged resource roles.

| Resource role | Description |
|---|---|
| Assignee | A user who is assigned to complete a task. |
| Business Steward | A user who is involved in daily, business-related decisions about the best ways to turn policy into practice. |
| Chief Data Officer | A high-level decision maker who is responsible for enterprise-wide data governance and the utilization of information as an asset. |

| Resource role | Description |
|---|---|
| Community Manager | A user who acts as liaison between all the different roles and groups. This user can also analyze and pack up issues, so that the data governance council can make decisions. Assigning and removing roles and responsibilities are also among this user's duties. |
| Council Member | A user who represents business and technical data stakeholder functional groups. |
| Data Analyst Level 1 | This role is assigned to a user on a date element level when this user is allowed to see a data sample of this data element. |
| Data Analyst Level 2 | This role is assigned to a user on a date element level when this user has full access to the data. |
| Data Category Manager | |
| Data Custodian | A user who collects and holds information on behalf of a data provider or requester and who is responsible for managing the use, disclosure and protection of data. |
| Issue Manager | A user who identifies and prioritizes issues with business impact, directs resources to the most urgent issues and reassigns tasks to different users in the absence of the assigned user. |
| Normal | A user who does not have any assigned responsibilities. |
| Owner | A user who is responsible for accuracy, integrity, and timeliness of an information asset and for establishing the controls for its generation, collection, processing, access, dissemination and disposal. |
| Requester | A user who makes a request related to an information asset. |
| Reviewer | A user who is assigned to review an outcome of a user task. |
| Stakeholder | A user who can use, affect or be affected by an asset under discussion. This user wants to be involved or notified, but can only provide comments and reviews. |
| Subject Matter Expert | A user who performs specific data-related tasks and is consulted to provide guidance and feedback to individuals with stewardship responsibilities. |

| Resource role | Description |
|---|---|
| Technical Steward | A user who is involved in daily, data-related decisions, executes business decisions and implements business requirements in a technology platform. |

## Create a resource role

You can create a new resource role. You can do so, for example, if the packaged resource roles don't meet your specific needs.

### Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Roles**→ **Resource**.
   » The overview of resource roles appears.
4. Above the table, to the right, click **Add**.
   » The **Resource Role Creation** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Name | Type a name for the role. |
| Description | Type a description for the role. |

6. Click **Save**.

### What's next?

As new resource roles are created with no resource permissions included, you have to add them for the new resource role.

- As new resource roles are created with no resource permissions included, you have to add them for the new resource role.
- Create a responsibility to assign users to the roles for a resource.

## Edit a resource role

You can edit a resource role. You can do so, for example, if you want to edit the name or the description of a role.

> Note Do not confuse this with adding or removing resource permissions.

### Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Roles**→ **Resource**.
   » The overview of resource roles appears.
4. Double-click a cell.
   » The cell editor appears.
5. Edit the cell.
6. Click ✔.

## Add or remove resource permissions for a resource role

You can determine which resource permissions are included in a resource role.

### Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Permissions** → **Resource**.
   » The matrix of resource permissions and roles appears.
4. If required, add or remove columns:
   a. In the content toolbar, click ⠿ → <the name of the role>.
5. Above the table, to the right, click **Edit**.
   » You can now edit the matrix of permissions and roles.
6. Select or clear the checkboxes to add permissions to, or remove them from a role.
7. Above the table, to the right, click **Save**.

## Delete a resource role

You can delete a resource role. For example, you can do this if you no longer need a specific role.

### Prerequisites

- You have a global role that has the System administration global permission.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Roles and permissions**.
   » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. In the tab pane, click **Roles**→ **Resource**.
   » The overview of resource roles appears.

4. In the row of the role, click 🗑.
   » The **Delete** dialog box appears.
5. Click **Delete**.

# Responsibilities

Responsibilities are used to assign a resource role to one or more users and/or user groups. Based on their responsibilities, users can act on the permissions conveyed to them via the resource role.

## Responsibilities

A responsibility is the assignment of one or more users and/or user groups to a resource role for a resource.

Based on their responsibilities, users can act on the permissions conveyed to them via the resource role.

Child resources always inherit the responsibilities from their parent resources:

- If the resource is a community, the responsibilities are inherited by subcommunities, domains and assets in the community. For example, if you are a Business Steward for a certain community, you are a Business Steward for all the subcommunities, domains and assets inside that community.
- If the resource is a domain, the responsibilities are inherited by the assets in the domain.
- If the resource is an asset, the responsibilities only apply to the asset itself, because assets never have children.

Example
Suppose the following setup:

- Anita Morrison is assigned the Community Manager resource role for a community called "Enterprise".
- John Fisher is assigned the Business Steward resource role for a domain called "Critical Data Elements" in the "Enterprise" community.
- Joanna Zhou is assigned the Owner resource role for a domain called "Critical Data Elements" in the "Enterprise" community.
- William Parker is assigned the Owner resource role for an asset called "Customer Revenue" in the "Critical Data Elements" domain.

This leads to the following responsibilities:

| Resource | Direct responsibilities | Inherited responsibilities |
|---|---|---|
| Enterprise community | • Anita Morrison as Community Manager | • None |
| Critical Data Elements domain | • John Fisher as Business Steward<br>• Joanna Zhou as Owner | • Anita Morrison as Community Manager |
| Customer Revenue asset | • William Parker as Owner | • Anita Morrison as Community Manager<br>• John Fisher as Business Steward<br>• Joanna Zhou as Owner |

Note You can view direct and inherited responsibilities of a resource in different places.

## View responsibilities for a resource

You can view the responsibilities for a resource in the following locations:

- In the **Responsibilities** tab of a resource.
- In any view that displays communities, domains or assets, in the specific column or field for that role.

a. Open any view in table or tiles mode.
b. Do one of the following:
   - In tile mode: add the required fields.
   - In table mode, add the required column.

> Note
> - Each role has its own field or column.
> - Depending on the settings in Collibra Console, you may also see the inherited responsibilities.

- In the **Responsibilities** tab of a user's profile page.

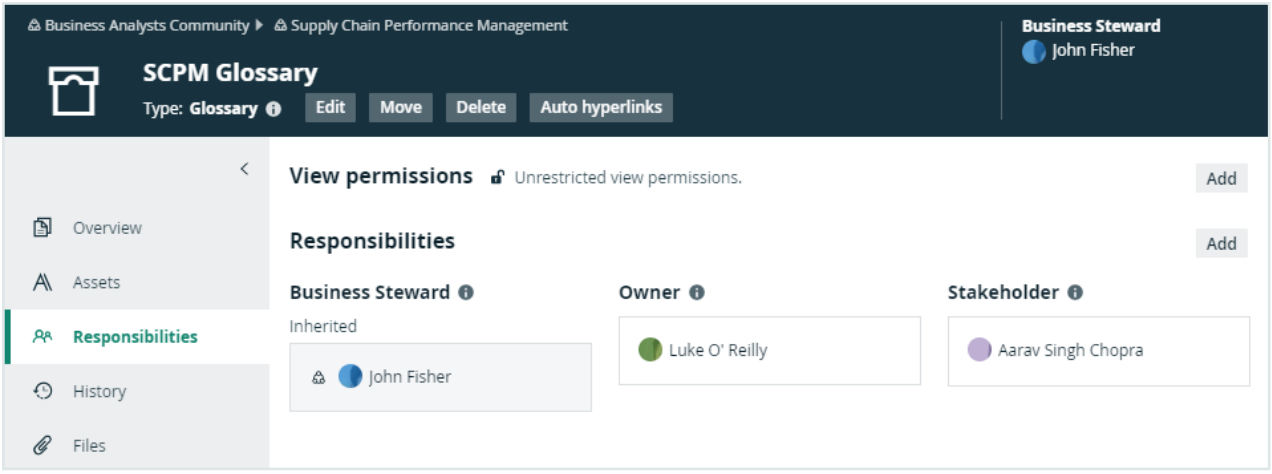
> Tip You can also view your own responsibilities.

a. Open a profile page.
b. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
- In the **Responsibilities** tab of a user group page.
a. Open a group page.
   i. On the main menu, click , then **Settings**.
      » The Collibra settings page opens.
   ii. Click **Users and groups**.
      » The users and groups settings appear on the **Users** tab page.
   iii. In the tab pane, click **Users** → **Groups**.
      » The user group table appears.
b. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
- In the **Preview** pane of an asset, for example on an asset page.

> Note The preview pane only shows the direct responsibilities.

## The Responsibilities page

The **Responsibilities** page shows the view permissions and the responsibilities of a resource.




The background colors of the responsibilities show where the responsibility comes from.

| Color | Description |
|---|---|
| Gray | The user or group inherited the role. |
| White | The user or group was directly assigned to this role for the resource. |

If a user or group has a responsibility but not the required view permissions, a warning appears in the box. For example, a user was assigned the Steward role for a resource but does not have view permissions for it.

For information on view permissions, see the Collibra Data Intelligence Cloud Administration Guide.

## Create a responsibility

You can create a responsibility:

- By assigning a resource role to a user or user group on the responsibilities page of a resource.
- By adding a user in the table column of a role.
- By editing an existing responsibility.

> Important For optimal performance and ease of use, we recommend that you create responsibilities mainly on domains and communities and not directly on

assets. Creating responsibilities directly on large amounts of assets may lead to decreased performance.

## Assign a resource role to a user or user group on the responsibilities page

1. Open a community, domain or asset page.
2. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
3. Above the table, to the right, click **Add**.
   » The **Add responsibilitiy** dialog box appears.
4. Enter the required information.

| Option | Description |
|---|---|
| Role | Enter the role that you want to assign to a user or group for this resource. |
| People | Enter the users and user groups to which you want to assign a role for this resource. |

5. Click **Add**.
   » The users or groups with the assigned role are now displayed in the **Responsibilities** table.

Tip
- If you want to assign a user or user group a resource role that other users or groups already have for this resource, you can click and add them in the **People** field in the **Assign role** box.
- If there are only inherited roles, is not available.

## Assign a role to a user or user group for a resource from a table

1. Open a table that displays communities, domains or assets.
2. If required, add the column of the role that you want to assign to the user.

3. Do one of the following:
   - Double-click a cell in the column of the role.
   - Hover your mouse pointer over a cell in the column and click ✎.
4. Click in the field and enter the user or user group.
5. If required, select **Apply to visible rows**.
   This will create the responsibilities for all visible users.

   > Tip You can filter the columns first, to assign a role to a user for specific resources in one go.

6. Click ✔.

## Edit a responsibility

You can edit a responsibility:

- by deleting it and creating a new one.
- in an asset table.

> Note You cannot edit inherited responsibilities.

### Edit a responsibility in a table

1. Open a table that displays communities, domains or assets.
2. If required, add the column of the role that you want to edit.

   > Warning Depending on the settings in Collibra Console, you may also see the inherited responsibilities. You cannot edit these inherited responsibilities.

3. Do one of the following:
   - Double-click a cell in the column of the role.
   - Hover your mouse over a cell in the column and click ✎.
4. Edit the responsibility:
   - Click in the field and enter a new user or user group.
   - Click ⊗ next to the user or user group to remove the user or user group.
   - If required, select **Apply to visible rows**.
     This will edit the responsibilities of all visible users.

> Tip You can filter the columns first to assign a user to specific resources in one go.

5. Click ✔.

# Delete a responsibility

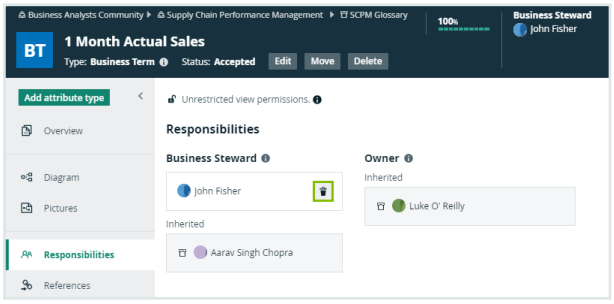
You can delete a responsibility:

- From the responsibilities page of a resource.
- From a table.

> Note You cannot delete inherited assignments.

## Delete a responsibility from the responsibilities page of a resource

1. Open a community, domain or asset page.
2. In the tab pane, click **Responsibilities**.
   » The Responsibilities page appears.
3. In the **Responsibilities** table, click 🗑 next to the name of the user or group that you want to remove.




4. Click **Delete** to confirm.

### Delete responsibilities for a resource from a table

1. Open a table that displays communities, domains or assets.
2. If required, add the column of the role that you want to edit.

   > Warning Depending on the settings in Collibra Console, you may also see the inherited responsibilities. You cannot delete these inherited responsibilities.

3. Do one of the following:
   - Double-click a cell in the column of the role.
   - Hover your mouse over a cell in the column and click ✎.
4. In the cell editor, click ⊗ next to the user or user group.
5. If required, select **Apply to visible rows**.
   This will delete the responsibilities from all visible users.

   > Tip You can filter the columns first to assign a user to specific resources in one go.

6. Click ✔.

# Managing workflows in Collibra

A workflow in Collibra Data Intelligence Cloud is used to automate processes. Collibra comes with many workflows, and you can always add new ones.

When you decide how to configure your Collibra workflows, consider that the workflow events mechanism is not designed for mass import. Avoid triggering workflows as a result of an import operation because it has the potential of impacting the performance of your environment. If you must use workflows after importing large amounts of data, you should:

- Configure all script tasks to run asynchronously to prevent slowing down the import.
- Keep the number of start events to a minimum.
- Restrict the scope of the workflow as much as possible.

# Tab pages

The **Workflows** settings page of the Collibra settings is split in several tab pages:

| Tab page | Description |
|---|---|
| Definitions | This tab page allows you to view and edit workflow definitions. |
| Instances | This tab page allows you to view and edit instances of running workflows. |

# Packaged workflow deployments

In general, when you start your Collibra Data Intelligence Cloud environment, all missing packaged workflows are deployed, enabled and configured with the default settings.

> Note OOTB workflows are not automatically updated after an upgrade.

The following list of rules applies to OOTB workflow deployments in version 5.1 or newer when you (re)start an environment:

- OOTB workflows that are missing (deleted or never deployed), are deployed, enabled and configured with the default settings.
- Deployed OOTB workflows are not automatically updated, even if they are not customized. To install a new version of an OOTB workflow, do either of the following:
  - Remove the existing workflow and then restart the environment. See Deploy updated packaged workflows.
  - Download the updated workflows from the Community Downloads page, customize them if necessary, and deploy them to your environment.
- If you created a workflow with the name of an OOTB workflow and the actual OOTB workflow is not deployed, the actual OOTB workflow is deployed, enabled and configured with a name having an **OOTB_** prefix, for example OOTB_Approval Process.

> Tip Disable the OTTB workflows you do not want to use. If you delete them, they are redeployed when the environment is restarted.

# Workflow engine upgrade

In Collibra Data Intelligence Cloud 5.6 or newer, the workflow engine uses Flowable instead of Activiti because of the lack of development and support for Activiti.

The upgrade has the following impact:

- When you upgrade from version 5.5 or older to Collibra Data Intelligence Cloud 5.6 or newer, all workflows in your environment are redeployed for the new workflow engine. Running instances of workflows continue to use the old workflow engine until their completion, while new instances run with the new workflow engine.
- The upgrade to Flowable ensures the packaged workflows remain functional.

  > Tip Test your custom workflows thoroughly, even if they seem to work as expected.

  > Note Your workflows could show unexpected behavior, especially after upgrading from version 4.6.x.

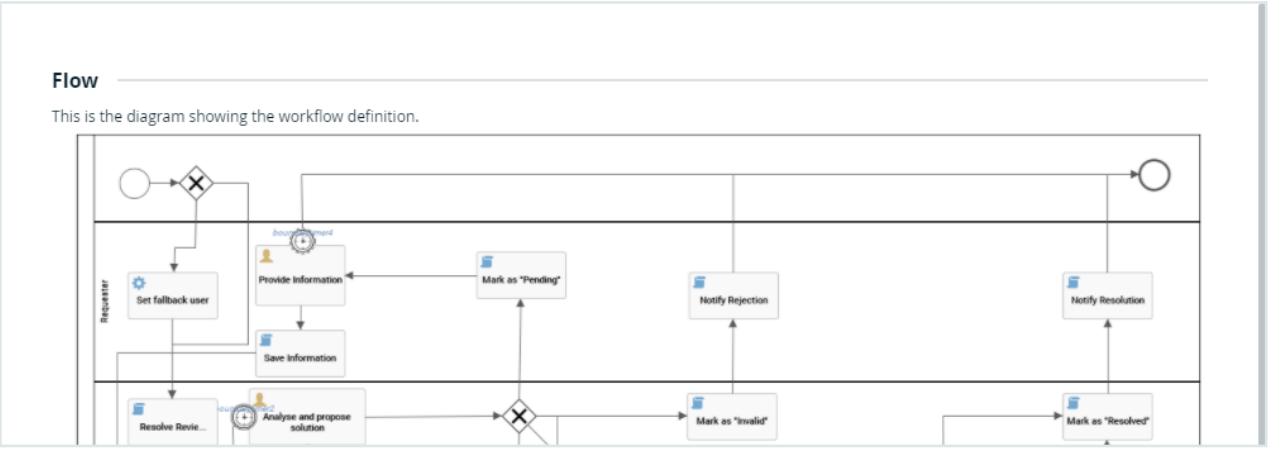
- When you reference the API v2 name space (*http://www.collibra.com/apiv2*), the workflow is validated against V2 methods and deprecated V1 methods trigger a **method does not exist** error when called.

# View and edit workflows

You can view both the XML schema and a visual representation of the workflow definition in Collibra Data Intelligence Cloud.

You must have the Sysadmin global role or a global role that has at least the Workflow Administration global permission to access this page:

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. Select a workflow.
4. In the tab pane, click **Flow**.




> Tip To view large diagrams, drag the image or click ⛶ to enter full screen.

The lower part of the page contains the raw workflow definition:




To edit workflows, follow the procedures described in the Designing workflows section. For minor updates, you can edit the XML schema directly :

1. Click ✎ to edit the XML.
2. Click the **Save** button in the lower-right part of the page to save your changes and exit edit mode.

> Note The changes you make are not reflected in currently running instances of the workflow.

# Deploy a workflow

You deploy a workflow when you upload the workflow definition to Collibra Data Intelligence Cloud.

You can upload a workflow definition in ***.bpmn** or ***.bpmn20.xml** format.

## Prerequisites

You have a global role with the Workflow Administration or the System Administration global permission, for example Sysadmin.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Workflows** → **Definitions**.
3. Click **Upload a file** and select the workflow definition you want to deploy or drag and drop your workflow in the upload section.
   » An **Activity Queue** window displays the upload progress. In case the update fails, you see an error message.

> Warning Uploading a workflow with the same process ID as an existing workflow in Collibra replaces the existing workflow.

> Note Collibra does not accept two workflows with the same display name.

## What's next

After a successful workflow deployment, edit the workflow definition settings in Collibra.

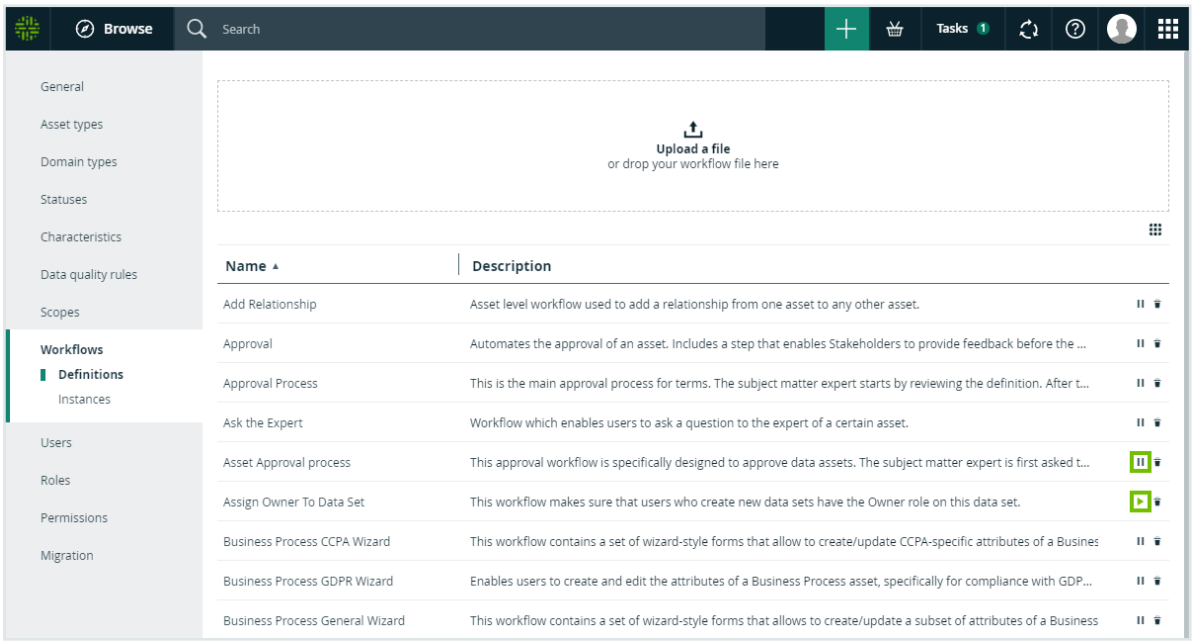
# Enable or disable workflows

You can enable or disable workflows from the workflow definitions table or from the individual workflow definition pages.

You must have the Sysadmin global role or a global role that has at least the Workflow Administration global permission to perform this action.

## Enable or disable a workflow from the workflow definitions table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Workflows** → **Definitions**.
3. At the end of the row, click ▶ or ⏸ to respectively enable or disable a workflow.




## Enable or disable a workflow from the workflow definition page

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.

2. In the tab pane, click **Workflows** → **Definitions**.
3. Click the workflow you want to enable or disable.
4. At the right of the title bar, click ▶ or ⏸ to respectively enable or disable a workflow.




# Workflow configuration options in Collibra

After you have successfully deployed a workflow, the default settings are applied to it. You can change the default settings and the workflow behavior to your organization's needs.

In the overview of a workflow, you can change the header bar and some general workflow settings.

## Workflows title bar




The title bar of workflow definition pages contains the name and status of the workflow and allows you to:

1. Enable or disable the workflow.
2. Edit the display name or status of the workflow.
3. Delete the workflow.

> Note Collibra does not accept two workflows with the same display name.

Workflow statuses description:

- **Deployed** A new workflow has been uploaded to Collibra Data Intelligence Cloud.
- **Enabled**: The workflow is active and can be used.
- **Disabled**: The workflow cannot be used. If the workflow is a step in another workflow, that step fails.

> Note Once a workflow has been enabled, you cannot change the status back to **Deployed**.

## View and edit workflow definition settings

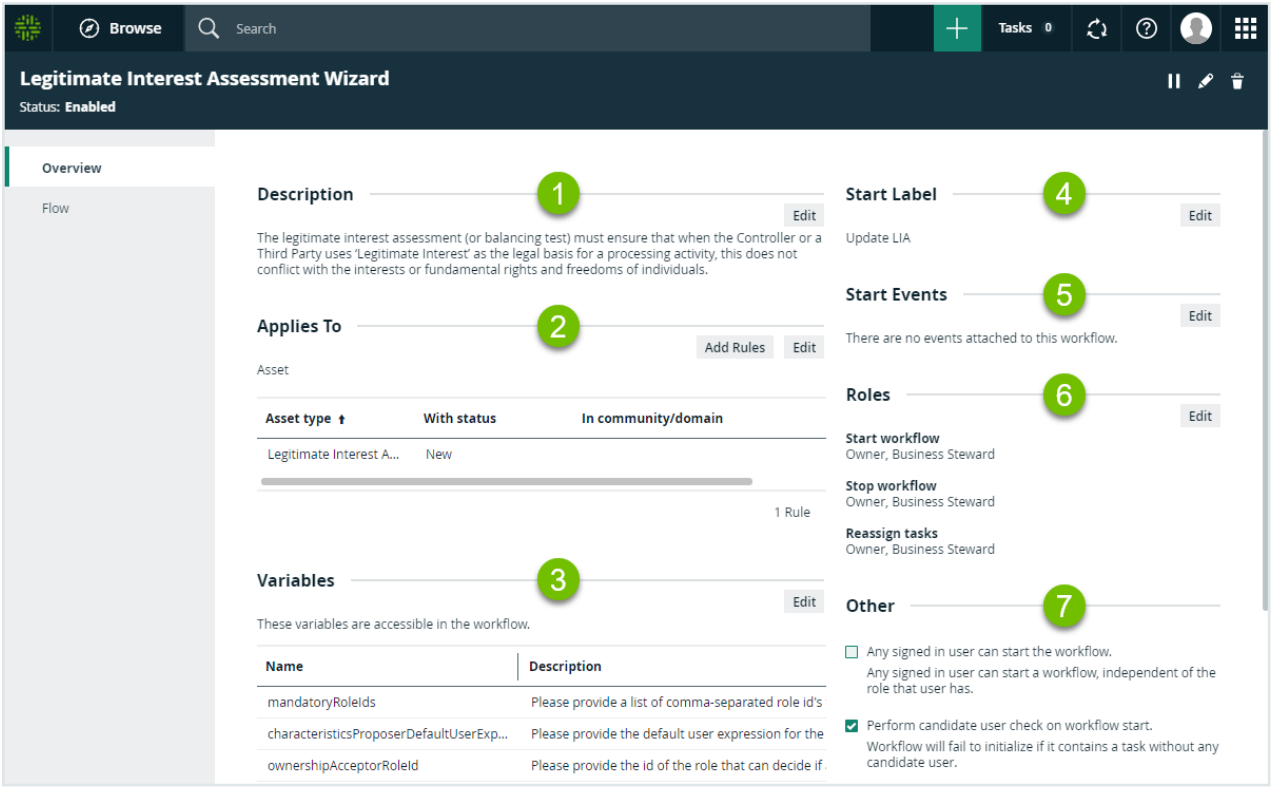
The workflow definition settings are additional parameters that help you manage the workflow behavior and accessibility inside Collibra Data Intelligence Cloud.

When you decide how to configure your Collibra workflows, consider that the workflow events mechanism is not designed for mass import. Avoid triggering workflows as a result of an import operation because it has the potential of impacting the performance of your environment. If you must use workflows after importing large amounts of data, you should:

- Configure all script tasks to run asynchronously to prevent slowing down the import.
- Keep the number of start events to a minimum.
- Restrict the scope of the workflow as much as possible.

You must have the Sysadmin global role or a global role that has at least the Workflow Administration global permission to access this page:

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. Select a workflow to view the definition settings.




## Description

The description is a brief overview of the workflow. You can edit the description by:

- Changing the diagram process properties.
- Editing the workflow XML directly in Collibra Data Intelligence Cloud

## Applies To

This section defines the scope of the workflow. This includes the type of resource the workflow applies to, optional restriction rules and where you can start the workflow from.

Click **Edit** to change the scope to any of the following:

- Asset
- Community
- Domain
- Global

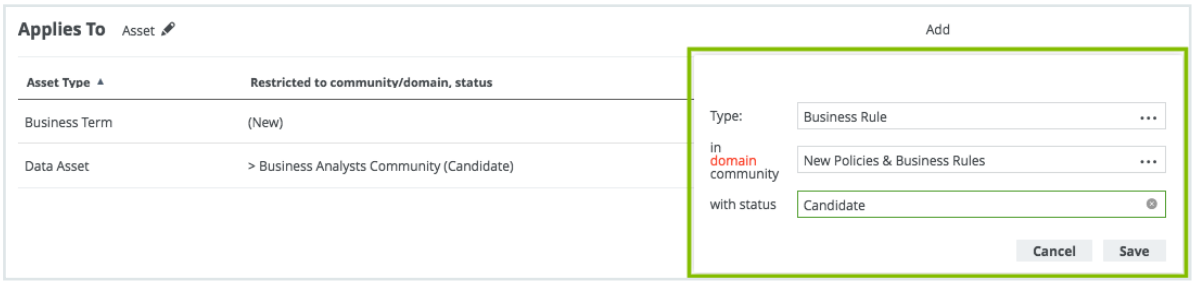
> Note When you change the scope, the rules are removed. If you are changing from or to the Global scope, the roles are also removed.

A global workflow is not restricted to any particular resource and can be added to dashboards.

When you defined the resource that the workflow applies to, you can add restriction rules to finetune the scope of the workflow.

Show me how

1. Click **Add**.
   » A dialog box appears.




> Note The available options depend on the selected scope.

2. Select the **Type**.

> Tip Select **Asset** to associate the workflow with all asset types.

3. Select an optional domain or community the resource belongs to.
4. Select an optional status of the resource the workflow applies to.
5. Click **Save**.
   » The restriction is added to the list. The workflow is restricted to the resources that meet the listed conditions.

> Note If you select multiple restrictions, they use the logical `OR` function.

## Variables

These are configuration variables, a list of process variables that you can edit here.

Click **Edit** to edit the variables.

> Note You can only edit configuration variables that have the **Writable** property set to *true* (default).

> Note If you redeploy a workflow, the configured variables remain the same. If you delete a workflow and then deploy it again, the variables revert to the default values.

## 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. 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. Click **Edit** to edit the start event list.

Combine the **Start Event** with **Applies To** settings to refine when the workflow is triggered.

| Setting | Description |
|---|---|
| Asset Added | The workflow starts when a new asset is created. |
| Asset Removed | The workflow starts when an asset is deleted. |
| Asset Status Changed | The workflow starts when the status of an asset is changed. |
| Asset Domain Changed | The workflow starts when an asset is moved to another domain. |
| Asset Type Changed | The workflow starts when the type of an asset is changed. |

| Setting | Description |
| --- | --- |
| Asset Attribute Changed | The workflow starts when an attribute of an assets is changed. |
| Asset Name Changed | The workflow starts when the full name of an asset is changed. This is the fully qualified name that must be unique within a domain. To learn more, see Identical asset names per domain. |
| Asset Display Name Changed | The workflow starts when the name of an asset is changed. This is the regular name that is used by default in most places in the user interface. |
| Asset Attribute Added | The workflow starts when an attribute is added to an asset. |
| Asset Attribute Removed | The workflow starts when an attribute is removed from an asset. |
| Domain Added | The workflow starts when a domain is added to a community. |
| Domain Removed | The workflow starts when a domain is removed from a community. |
| Role Granted | The workflow starts when a user or a user group is assigned a resource or a global role. |
| Role Revoked | The workflow starts when a user or a user group is removed from a resource or a global role. |
| Workflow Started | The workflow starts when a workflow is manually started.<br><br>Note Manually starting a workflow configured with this option also triggers the workflow. |
| Workflow Canceled | The workflow starts when a workflow is manually canceled.<br><br>Note Manually canceling a workflow configured with this option also triggers the workflow. |
| Workflow Escalation | The workflow starts when a workflow user task is escalated.<br><br>Note The packaged Escalation Process workflow is configured to start with this option. |

| Setting | Description |
|---|---|
| Workflow task completed | The workflow starts when a workflow user task is completed. |
| User Added | The workflow starts when a new user account is created. |
| User Removed | The workflow starts when a user account is removed. |
| User Disabled | The workflow starts when a user account is disabled. |
| Commend Added | The workflow starts when a new comment is added to a resource. |
| Comment Removed | The workflow starts when a comment is removed from a resource. |
| Comment Changed | The workflow starts when a comment is edited. |
| Relation was added on an asset as head | The workflow starts when an asset becomes the head of a relation. |
| Relation was removed from an asset as head | The workflow starts when an asset is no longer the head of a relation. |
| Relation was added on an asset as tail | The workflow starts when an asset becomes the tail of a relation. |
| Relation was removed from an asset as tail | The workflow starts when an asset is no longer the tail of a relation. |
| Asset Tag Event | The workflow starts when a tag is either added to or removed from an asset. |
| Data Classification Accepted | The workflow starts when a result of the data classification process is accepted. |
| Data Classification Rejected | The workflow starts when a result of the data classification process is rejected. |
| Data Classification Added | The workflow starts when a new data class is added to a column asset. |

| Setting | Description |
|---|---|
| Data Classification Removed | The workflow starts when a data class is removed from a column asset, for example when the data class entry is deleted. |
| Data Classification Updated | The workflow starts when a data classification changes, for example when the confidence of a suggested match changes value. |
| Database Registration Completed | The workflow starts when a database is successfully registered. |
| Database Registration Failed | The workflow starts when the registration process of a database fails. |

> Note If you select multiple start events, they use the logical `OR` function.

## 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.

You can enter roles for starting and stopping workflows or reassigning workflow user tasks. The roles you can enter depend on the **Applies To** settings:

- If the scope is **Global**, you can only specify global roles in these fields.
- In all other cases, only resource roles are allowed.

> Note When specifying resource roles, only users that have the role for the specific resource can start and stop the workflow or reassign tasks.

Click ✎ to edit the roles:

- **Start Workflow**: The button with the start label is available to users with these roles.
- **Stop Workflow**: The option to cancel the workflow is available to users with these roles.
- **Reassign Tasks**: The option to reassign the task is available to users with these roles.

> Note The roles are removed when you are changing from or to the Global workflow scope.

## Other

The section contains additional settings that determine who can start the workflow, how the workflow behaves in relation to the resource it applies to and if the workflow can be started from the global **Create** button.

| Setting | Description |
|---|---|
| Any guest user can start the workflow. | Indicates if guest users can start the workflow.<br>If selected, users who are not signed in can start the workflow. When guest users start a workflow, some basic information, such as first name, last name and email address, is requested of them. That information can then be used to contact the user again, if needed.<br>> Note This check box overrides any roles that are specified in the **Roles** section.<br>If you select this check box, you cannot select the **Any signed in user can start the workflow** check box. |
| Any signed in user can start the workflow. | Indicates that any user who is signed in can start the workflow.<br>> Note This check box overrides any roles that are specified in the **Roles** section.<br>If you select this check box, you cannot select the **Any guest user can start the workflow** check box. |
| Perform candidate user check on workflow start. | Checks if all workflow user tasks have a candidate user expression that can be resolved to at least one Collibra Data Intelligence Cloud user. If the check fails, you see an error message when the workflow starts. |

| Setting | Description |
| --- | --- |
| This workflow can only run once at the same time on a specific resource. | Determines if you can start a workflow multiple times, simultaneously for the same resource.<br>If selected the workflow can only be started once for a given resource. If any user tries to start the same workflow for the same resource, an error message is displayed. However, users can still start the same workflow for a different resource or another workflow for the same resource |
| | If **Lock resource** is also selected, no other workflow can start on the same resource while this workflow is running neither can this workflow start if any other workflow is running on the same resource. |
| Show in global create. | Only valid for workflows where the scope is set to **Global**, allows users to start the workflow from the global **Create** button. |

## Duration variables

Both the **escalationDuration** and **escalationType** variables are only generated if there is no timer boundary event attached to the user task. In case there is one attached, it assumes that you will handle the escalation manually and no escalation variables are generated.

For more information about specifying a duration for the variables, please read about the ISO 8601 standard. Also note that we support business day durations. You can denote a business day duration by using a B instead of a P. If you use a business day duration, weekends are not taken into account. If a business day duration ends at a weekend, the first weekday after the weekend is used. You can use the business day duration just like a normal duration.

## Other configuration settings

The following table contains a description of the **Other** configuration settings in Collibra.

| Setting | Description |
| --- | --- |
| Any guest user can start the workflow. | Indicates if guest users can start the workflow.<br><br>If selected, users who are not signed in can start the workflow. When guest users start a workflow, some basic information, such as first name, last name and email address, is requested of them. That information can then be used to contact the user again, if needed.<br><br>> Note This check box overrides any roles that are specified in the **Roles** section.<br><br>If you select this check box, you cannot select the **Any signed in user can start the workflow** check box. |
| Any signed in user can start the workflow. | Indicates that any user who is signed in can start the workflow.<br><br>> Note This check box overrides any roles that are specified in the **Roles** section.<br><br>If you select this check box, you cannot select the **Any guest user can start the workflow** check box. |
| Perform candidate user check on workflow start. | Checks if all workflow user tasks have a candidate user expression that can be resolved to at least one Collibra Data Intelligence Cloud user. If the check fails, you see an error message when the workflow starts. |
| This workflow can only run once at the same time on a specific resource. | Determines if you can start a workflow multiple times, simultaneously for the same resource.<br><br>If selected the workflow can only be started once for a given resource. If any user tries to start the same workflow for the same resource, an error message is displayed. However, users can still start the same workflow for a different resource or another workflow for the same resource |
| | If **Lock resource** is also selected, no other workflow can start on the same resource while this workflow is running neither can this workflow start if any other workflow is running on the same resource. |
| Show in global create. | Only valid for workflows where the scope is set to **Global**, allows users to start the workflow from the global **Create** button. |

# Packaged variables for workflows

Below is a list of variables that you can use in workflows.

| Variable | Description |
|---|---|
| address_commentsDueDate | Due date as duration for the address_comments task. |
| address_commentsTaskNotification | Indicates if a notification email for the address_comments task has to be sent. |
| address_commentsEscalationDuration | Time before the address_comments task is escalated. |
| address_commentsEscalationType | Type of escalation for the address_comments task. |
| comment_provideDueDate | Due date as duration for the comment_provide task. |
| comment_provideEscalationDuration | Time before the comment_provide task is escalated. |
| comment_provideEscalationType | Type of escalation for the comment_provide task. |
| comment_provideTaskNotification | Indicates if a notification email for the comment_provide task has to be sent. |
| commentTimeoutDuration | Time before the comment_provide task times out. |
| correct_definitionDueDate | Due date as duration for the correct_definition task. |
| correct_definitionEscalationDuration | Time before the correct_definition task is escalated. |
| correct_definitionEscalationType | Type of escalation for the correct_definition task. |
| correct_definitionTaskNotification | Indicates if a notification email for the correct_definition task has to be sent. |

| Variable | Description |
| --- | --- |
| reviewCompletionPercentage | Percentage of user candidates that is required to review the definition before the task is completed. |
| reviewTimeoutDuration | Time before the review process is forced to continue. |
| reviewWarningTimeDuration | Time before a reminder for the review definition task is sent. |
| sendVotingActionEmails | Indicates if an action email has to be sent to candidate users, users that are required to vote. |
| smeUserExpression | The user expression for subject matter experts. |
| stakeholderUserExpression | The user expression for stakeholders. |
| stewardUserExpression | The user expression for stewards. |
| voteCompletionPercentage | Percentage of user candidates that is required to vote before the task is completed. |
| voteTimeoutDuration | Time before the voting process is forced to continue. |
| voteWarningTimeDuration | Time before a voting reminder is sent. |

# Edit the workflow configuration options

> Warning For Collibra Data Privacy customers: Collibra Data Privacy comes with workflows for approving data privacy-specific assets. The Collibra packaged approval workflows (Approval Process, Asset Approval Process and Simple Approval Process) should not be used to approve data privacy-specific assets. As such, ensure that your Collibra approval workflows are not associated with data privacy-specific asset types, such as DPIA, PIA, Legitimate Interest Assessment and Compliance Self Assessment.

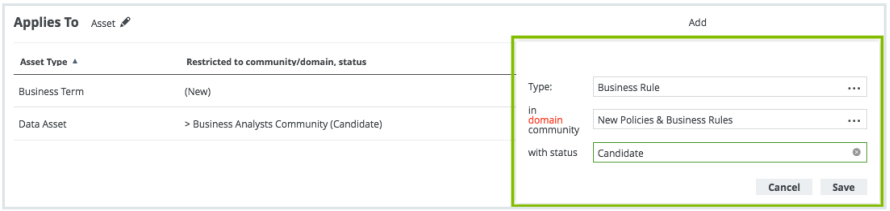
## Prerequisites

You have a global role with the Workflow Administration or the System Administration global permission, for example Sysadmin.

## 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 workflow that you want to configure.
4. Configure the available options:

| | |
|---|---|
| To add a restriction rule: | The following example associates the asset type Business Rule with the workflow you selected in the previous step. For example, if you selected the Approval workflow, you will be able to use the Approval workflow to approve Business Rule assets.<br><br>Note When you change the scope of the workflow, the restriction rules are removed.<br><br>a. Click **Add**.<br>» A dialog box appears.<br>  <br>b. Provide one or more **Types**.<br>In this example, you enter the **Business Rule** asset type.<br><br>Tip Select **Asset** to associate the workflow with all asset types.<br><br>c. Click **domain** or **community**, and then provide the domains or communities to which the asset types belong.<br>d. Select the status of the assets to which the workflow will apply.<br>This setting is not applicable when you are applying the workflow to communities, domains or global.<br>e. Click **Save**.<br>» The asset type is added to the **Applies To** list. The workflow applies to any assets of this asset type, with the status you selected, in the domains or communities you selected.<br><br>Note The restrictions use the logical OR function.<br>In the example figure above, the workflow applies to Business Term assets that have the status New OR Data Asset assets that are in the Business Analysts Community and have the status Candidate. |

| | |
|---|---|
| To modify the **Variables**, **Start Label**, **Start Event** and **Roles**: | a. Click ✎.<br>b. Change the option.<br>c. Click **Save**. |
| To modify the **Other** options: | Select or clear the check boxes. |

# View the running instances of a workflow

You can view the currently running instances of your workflows.

## Prerequisites

You have a global role with the Workflow Administration or the System Administration global permission, for example Sysadmin.

## 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. In the tab pane, click **Workflows** → **Instances**.
   » The overview of workflow instances appears.

For more information about the table, see View running workflow instances.

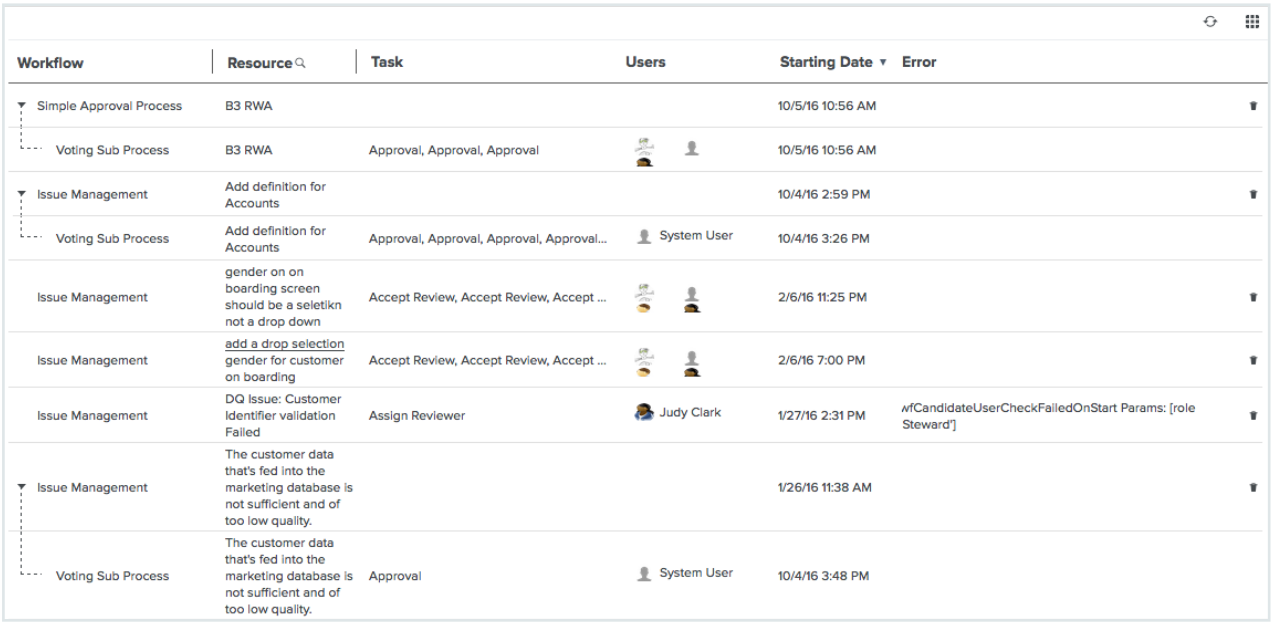
> Note You cannot view running workflows that contain only script tasks on the workflows instances page.

# View running workflow instances

The workflows instances page displays details about running workflows that contain active user tasks. If the user task is part of a sub-process, you can see details about both the main process and the sub-process. You cannot see running workflows that contain only script tasks or that do not contain anymore user tasks.

You must have the Sysadmin global role or a global role that has at least the Workflow Administration global permission to access this page:

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. In the tab pane, click **Workflows** → **Instances**.
   » The overview of workflow instances appears.



| Workflow | Resource | Task | Users | Starting Date | Error |
|---|---|---|---|---|---|
| Simple Approval Process | B3 RWA | | | 10/5/16 10:56 AM | |
| Voting Sub Process | B3 RWA | Approval, Approval, Approval | | 10/5/16 10:56 AM | |
| Issue Management | Add definition for Accounts | | | 10/4/16 2:59 PM | |
| Voting Sub Process | Add definition for Accounts | Approval, Approval, Approval, Approval... | System User | 10/4/16 3:26 PM | |
| Issue Management | gender on on boarding screen should be a seletikn not a drop down | Accept Review, Accept Review, Accept ... | | 2/6/16 11:25 PM | |
| Issue Management | add a drop selection gender for customer on boarding | Accept Review, Accept Review, Accept ... | | 2/6/16 7:00 PM | |
| Issue Management | DQ Issue: Customer Identifier validation Failed | Assign Reviewer | Judy Clark | 1/27/16 2:31 PM | wfCandidateUserCheckFailedOnStart Params: [role Steward'] |
| Issue Management | The customer data that's fed into the marketing database is not sufficient and of too low quality. | | | 1/26/16 11:38 AM | |
| Voting Sub Process | The customer data that's fed into the marketing database is not sufficient and of too low quality. | Approval | System User | 10/4/16 3:48 PM | |

| Column | Description |
|---|---|
| Workflow | The name of the running workflow. |
| Resource | The resource the workflow is associated with. Click the resource name to go to the resource page. |

| Column | Description |
| --- | --- |
| Task | The name of the active user task. |
| Users | The users the active task is assigned to. Click the user name to go to the user profile page. |
| Starting Date | The start date of the process. |
| Error | Possible error message if the workflow instance encountered an error. |
| 🗑 | Button to delete the workflow instance. |

# Back up workflows

You can create backups for individual workflows. This comes in handy if you have modified a packaged workflow definition and want to upgrade to a newer version of Collibra that contains newer workflow definitions.

You must have the Sysadmin global role or a global role that has at least the Workflow Administration global permission to perform this action:

1. Open a workflow. See View and edit workflows.
   Below the diagram of the flow, you can find the raw workflow definition (XML).
2. Select all the raw workflow definition text and copy it.
   You don't have to go into the edit mode.
3. Paste the text in a plain text file editor such as Notepad, Notepad++ or Vim and not an advanced text editor such as Word.
4. Save the text file as a new file on your local file system.

# Delete workflows

You can delete workflows from the workflow definitions table or from the individual workflow definition pages.

You must have the Sysadmin global role or a global role that has at least the Workflow Administration global permission to perform this action.

## Delete a workflow from the workflow definitions table

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Workflows** → **Definitions**.
3. At the end of the row, click to delete the workflow.

## Delete a workflow from the workflow definition page

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Workflows** → **Definitions**.
3. Click the workflow you want to delete.
4. At the right of the title bar, click to delete the workflow.




> Note Currently running instances of a deleted workflow continue to run until their completion. Use the Collibra Command Line Interface to cancel workflow instances in bulk.

# Restore a workflow

You can restore a workflow.

## Prerequisites

You have a global role with the Workflow Administration or the System Administration global permission, for example Sysadmin.

## Steps

1. On your computer, open a workflow that you have previously backed up. See Back up workflows.

2. Copy the XML text from the file.
   If necessary, create a workflow in Eclipse - Flowable and then close all open windows.
3. In the Flowable Explorer pane, right-click your workflow and click **Open With → XML Editor**.
4. Click the **Source** tab.
5. Paste the copied XML text in the blank pane.
6. Click **Save**.
7. Close the XML editor.
8. In Collibra, deploy your workflow, see Deploy a workflow.

# Users and groups settings page

On the **Users and groups settings** settings page of the Collibra settings, you can define users and what they are allowed to do in which part of Collibra Data Intelligence Cloud.

Collibra Data Intelligence Cloud uses a standard user-group-role model. This means that you can create groups and add users to them. Subsequently, you can assign roles to individual users or groups.

Assigning roles to users or groups is important:

- You provide or restrict permissions to do certain actions in Collibra, such as editing asset attributes or deleting domains.
- You define the responsibilities of the user. These responsibilities are mostly used in workflows to assign tasks to the correct users.

You can manage users in the following ways:

- Manually: Create users and groups within Collibra.
- LDAP: Connect Collibra to your company's LDAP server to import users and groups.

# Tab pages

The **Users and groups** settings page of the Collibra settings is split in several tab pages:

| Tab page | Description |
| --- | --- |
| Users | This tab page allows you to view and edit user accounts. |
| Groups | This tab page allows you to view and edit groups. |

# User and group management overview

For handling user management, Collibra Data Intelligence Cloud uses a standard user-group-role model. This means that you can create user groups and add users to them. Subsequently, you can assign roles to individual users or user groups.

Assigning roles to users or user groups is important:

- You provide or restrict permissions to do certain actions in Collibra, such as editing asset attributes or deleting domains.
- You define the responsibilities of the user. These responsibilities are mostly used in workflows to assign tasks to the correct users.

You can manage users in the following ways:

- Manually: Create users and user groups within Collibra.
- LDAP: Connect Collibra to your company's LDAP server to import users and groups.

## Users

A user is an individual who has access to Collibra Data Intelligence Cloud through a user account.

What the user can actually do in Collibra, depends on the license type, the global roles and the responsibilities assigned to the user.

> Tip Users can be added to user groups to easily assign roles and responsibilities to multiple users at once.

## Actions

- Create a user.
- Open a user's profile page.
- Edit a user.
- Delete a user.
- Enable a user.
- Disable a user.
- Set or reset a user's password.
- Add a user to a user group.
- Remove a user from a user group.
- Assign a resource role through a responsibility.
- View which users are currently logged in.

## User type

The user type of a user depends on the license type that the administrator gave to the user.

| User type | Description |
|---|---|
| Consumer | A consumer user is a user with a consumer license. |
| Author | An author user is a user with an author license. |

## User status

The user status of a user determines whether a user can log in or not.

| User status | Description |
|---|---|
| Enabled | A user with the enabled status can log in to Collibra. The license of this user counts towards the maximum number of licenses, if the user has the active password status. |
| Disabled | A user with the disabled status cannot log in to Collibra.The license of this user does not count towards the maximum number of licenses. |

## Password status

| Password status | Description |
|---|---|
| Active | A user with the active password status is a user that has a password. |
| Inactive | A user with the inactive password status is a user that does not have a password. This is typically a temporary status that only occurs right after creating a user. When a password is created for the user, the password status becomes active. It cannot revert to inactive. |

## Out-of-the-box users

Collibra contains a number of out-of-the-box users. They are used to manage various aspects of Collibra.

| Default name | UUID | Purpose |
|---|---|---|
| SYSTEM_USER | "00000000-0000-0000-0000-000000900001"; | The system user is used, amongst others, during the installation of Collibra. It is hidden in Collibra. |
| ADMIN_USER | "00000000-0000-0000-0000-000000900002"; | The admin user is the default administrator used to configure Collibra when it is installed. |
| COLLIBRIAN_USER | "00000000-0000-0000-0000-000000900000"; | The Collibrian user is a user that can be used by Collibra, for example to provide support. It is hidden in Collibra DGC and should not be used for anything else. |

| Default name | UUID | Purpose |
|---|---|---|
| WORKFLOW_USER | "00000000-0000-0000-0000-000000900003"; | The workflow user is used when changes are made through a workflow. It is hidden in Collibra DGC and should not be used for anything else. |

## Create a user

You can create one or more users in one go. At the same time, you can also choose the license type and add the user(s) to user groups.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. Above the table, to the right, click **Add**.
   » The **Create Users** dialog box appears.
4. Enter the required information.

| Field | Description |
|---|---|
| User details | Enter the user details of the new users. |

| Field | Description |
| --- | --- |
| Username* | Type the username of the user to sign in to Collibra Data Intelligence Cloud.<br>**Collibra username requirements**<br>◦ General requirements:<br>▪ Uniqueness: Duplicate username are not allowed, regardless of case<br>> Example `usernamecase` and `UserNameCase` are considered duplicate<br>▪ No leading or trailing spaces<br>▪ No empty usernames<br>▪ Maximum of 255 characters<br>◦ Character limitations: Usernames may only contain characters in the following Unicode categories:<br>▪ Letter<br>▪ Number<br>▪ Symbol<br>▪ Punctuation<br>▪ Non-spacing marks |
| Email* | Type the email address to which Collibra sends emails, such as the registration email and notifications. |
| First Name | Type the first name of the user. |
| Last name | Type the last name of the user. |
| 🗑 | Click to remove a user. |
| Add another user | Click to add another user. |

| Field | Description |
| --- | --- |
| Add to user groups | Enter user groups to add the new users to them. You can also add users to, or remove users from groups afterwards.<br><br>Note<br>A user needs access to at least one of the basic Collibra applications: Business Glossary, Reference Data, Data Stewardship or System administration.<br>You can grant access by assigning one of the global roles that provide the required permissions to the users. |
| License type | Choose the license type for the new user(s). |

Fields marked with * are mandatory

5. Click **Create**.
   » The newly created users are enabled, but inactive.
   » The newly created users receive an email to set a password. As an administrator, you can also manually set or reset it. When the password is set, the user is active.

## Edit a user

You can edit a user.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. Open a user's profile page.
2. Do one of the following:
   - Edit the account settings.
   - Edit the contact information.
   - Edit the email notifications.

- Edit the user details.
- Edit the license type of the user.

## Set or reset a user password

You can set or reset the password of a user:

- From the user table.
- From the user's profile page.
  Do this to reset your own password.

> Note You can only reset the password of users that were created manually.

The default password requirements are outlined in the Password section of our Security configuration: options article.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Set or reset a user password from the user table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. In the row of the user whose password you want to reset, click 🔑.
   » The **Password Reset** dialog box appears.

4. Choose how you want to reset the password.

| Option | Description |
| --- | --- |
| Email a link to the user. | Send an email to the user and let the user set a new password.<br><br>Note The link to reset the password is by default valid for 60 minutes. You can edit the length of the validity in Collibra Console. |
| Generate a new password automatically. | Automatically generate a password. |
| Specify a new password. | Set a password yourself. |

5. Click **Reset Password**.

### Set or reset a user password from the user profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the upper-right corner, click **Reset Password**.
   » An email is sent to the user to let the user set a new password.

   Note The link to reset the password is by default valid for 60 minutes. You can edit the length of the validity in Collibra Console.

## Enable a user

You can enable a user.

Note

- You can only enable users if they were created manually.
- Newly created users are enabled by default.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. In the row of the user that you want to enable, click ✕.
   » The user account is enabled.
   » The icon changes into a green ✓.

## Disable a user

You can disable a user.

> Note You can only disable users if they were created manually.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. In the row of the user that you want to enable, click ✓.
   » The user account is disabled.
   » The icon changes into a green ✕.

## Delete a user

You can delete one or more users in one go.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. Do one of the following:

| If you want to... | Follow these steps |
|---|---|
| Delete a single user | a. In the row of the user that you want to delete, click .<br>» The **Delete user** dialog box appears.<br>b. Click **Delete user**. |
| Delete more than one user | a. Select the check boxes in front of the users that you want to delete.<br>b. In the action toolbar, click **Delete**.<br>» The **Delete <number> users** dialog box appears.<br>c. Click **Delete <number> users**. |

   » One or more users are deleted.
   » If a deleted user posted any comments, those comments remain in the system but without an associated name.

## Export user table as a CSV file

You can export the information in the user table as a CSV file.

## Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Steps

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Users**.
   » The user table appears.
3. Above the table, to the right, click .
   » The **Export users** activity starts.
4. When the **Export users** activity is finished, you can download the CSV file:
   a. On the main menu, click , then **Show more**.
      » Your profile page opens on the **Activities** tab page.
   b. In the **Results** column of the **Export users** activity, click **Results**.
      » Depending on your browser and browser settings, the files are downloaded to a default location or a dialog box appears to specify the location for the downloads.

## Example

This is an example of the user information that is exported:

- User ID
- Password status (**activated** column)
- User status (**enabled** column)
- Username
- Email address
- First name
- Last name
- Gender
- Default language
- Last login time

exporta6d82c651da94d3181517a2e05de8df1

| id | activated | enabled | username | emailAddress | firstName |
|---|---|---|---|---|---|
| 00000000-0000-0000-0000-000000900002 | TRUE | TRUE | Admin | solution-team@collibra.com | Admin |
| 0b42659d-ebc7-4171-b0d8-8fc18b8751da | TRUE | TRUE | john | john.fisher@collibra.com | John |
| 1c4190f2-23a0-410c-a4e1-e1ea979dc67a | TRUE | TRUE | otg-api | rafael.ugolini@collibra.com | OTG |
| 2086de3e-0dbf-44e9-b02b-a2565e623cd4 | TRUE | TRUE | mary | mary.smith@collibra.com | Mary |
| 23ccaf2b-7e25-42ce-89ce-9dc3d743bace | TRUE | TRUE | cliff | cliff.chopra@collibra.com | Cliff |
| 35f55a00-7331-49d0-aa1b-43e4cbeb2d6c | TRUE | TRUE | joanna | joanna.zhou@collibra.com | Joanna |
| 45b944df-b758-4826-b1b7-14351ca21a05 | TRUE | TRUE | william | william.parker@collibra.com | William |
| 5dd073c3-03ee-44e8-b0c4-61ba461236a4 | TRUE | TRUE | eliza | eliza.arquette@collibra.com | Eliza |
| 9693d5ce-9fb4-4e97-b46e-7218526eda14 | TRUE | TRUE | DataLakeAdmin | datalake@collibra.com | DataLake |
| b0ffb1f5-f1aa-41e9-9815-494f45516932 | TRUE | TRUE | dora | dora.portman@collibra.com | Dora |
| dfa71da4-fa9d-462c-87d7-52bec5ad207b | TRUE | TRUE | Gloria | gloria@collibra.com | Gloria |
| ec0162b4-f062-46f9-bbf8-22ff684916a6 | TRUE | TRUE | preston | preston.sterling@collibra.com | Preston |

## View users that are logged in

As an administrator, you can view which users are currently logged in.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. If required, add the column **Online**.
   a. In the content toolbar, click ⠿ → **Columns** → **Currently logged in**.
      » The **Currently logged in** column appears.

# Groups

A group is a logical collection of users.

The main purpose of groups is to facilitate assigning roles and responsibilities. When a group is assigned a resource role, the users in the group receive the resource roles and their permissions.

## Managing groups

There are several options for managing groups. However, you can only use one of the options below. It is not possible to combine them.

- Manage groups in LDAP, using **Group field** mapping.
  - Prerequisite: You have configured the **Group field** setting in the user attributes to assign groups.

    - If there are manually created groups in Collibra Data Intelligence Cloud, they are removed before the LDAP-managed groups are created.
    - No synchronization is required for this option to work.
- Manage groups in Collibra.
    - Prerequisite: You have not configured the **Group field** setting in Collibra Console in the user attribute settings.
    - Groups are managed directly in Collibra. Creating groups and assigning users to the groups is done within Collibra.
    - No synchronization is required for this option to work.

## Out-of-the-box groups

Collibra contains a number of out-of-the-box groups. They are used to manage various aspects of Collibra.

| Default name | UUID | Purpose |
|---|---|---|
| EVERYONE_GROUP | "00000000-0000-0000-0000-000001000001"; | The Everyone group contains all users and is mainly used to manage view permissions. It is hidden in Collibra and should not be used for anything else. |
| USERS_GROUP | "00000000-0000-0000-0000-000001000002"; | The Users group contains all users and can be used for actions that affect all users. It is hidden in Collibra. |

| Default name | UUID | Purpose |
|---|---|---|
| GROUP_DATA_CUSTODIANS | "00000000-0000-0000-0000-000001000003"; | The Data Custodians group is meant for users with the Data Custodian resource role and can be used for actions that affect all such users.<br><br>Note When users are assigned the Data Custodian resource role for a resource, they are not automatically added to the Data Custodians group; however, you can manually add them to the group. |

## User group page

The user group page contains relevant information about that user group.

The view bar contains some basic information about the user group, such as the name and the number of members.

The group page contains the following tab pages:

| Tab page | Description |
|---|---|
| Overview | The overview page contains general information such as the name and the number of members.<br><br>It also contains a table containing the members of the user group, and allows you to add users to or remove users from the groups. |
| Responsibilities | The responsibilities page contains the responsibilities that are assigned to the user group. |

# Create a user group

You can create a user group.

## Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. In the tab pane, click **Users** → **Groups**.
   » The user group table appears.
4. Above the table, to the right, click **Add**.
   » The **Create groups** dialog box appears.
5. Enter the required information.

| Field | Description |
|---|---|
| Name | The names of the new user groups.<br><br>Tip<br>You can create multiple user groups in one go.<br>To do this, press `Enter` after typing a value and then type the next. User group names have to be globally unique. If you type a name that already exists, it will appear in strike-through style. |

6. Click **Save**.

# Open user group page

You can open the user group page of a user group:

- From the settings.
- From the profile page of a member.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Open a user group page from the settings

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. In the tab pane, click **Users** → **Groups**.
   » The user group table appears.
4. Click a group name.

### Open a user group page from the profile page of a member

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the tab pane, click **Groups**.
3. Click the name of a user group.

## Edit a user group

You can edit a user group.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. In the tab pane, click **Users** → **Groups**.
   » The user group table appears.
   » The user group table appears.
4. Double-click a cell.
5. Make the necessary changes.
6. Click ✔ .

## Add a user to a user group

You can add a user to a user group:

- While creating one or more users.
- From the user table.
  Do this if you want to add a user to one or more user groups.
- From the user group page.
  Do this if you want to add multiple users to a single user group.
- From the user's profile page.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Add a user to a user group from the user table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.

3. Do one of the following:
   - Double-click a cell in the **Groups** column.
   - Hover your mouse over a cell in the **Groups** column and click ✎.
4. Click in the field and start typing the name of the group.
5. Select the group from the suggestions.
6. If required, select **Apply to visible rows**.
   This will add all visible users to the groups.

   > Tip You can filter the columns first to add a selection of users to the group.

7. Click ✓.

## Add a user to a user group from the user group page

1. Open a user group page.
2. Above the table, to the right, click **Add**.
   » The **Add to group** dialog box appears.
3. Enter the required information.

| Field | Description |
|---|---|
| Users | Choose one or more users. |

4. Click **Add**.
   » The users are added to the user group and the users now appear in the table.

## Add a user to a user group from the profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the tab pane, click **Groups**.
3. Above the table, to the right, click **Add**.
   » The **Add to groups** dialog box appears.
4. Enter the required information.

| Field | Description |
|---|---|
| Groups | Choose one or more user groups. |

5. Click **Add**.
   » The user is added to the user groups and the groups now appears in the table.

## Remove a user from user group

You can remove a user from a user group:

- By deleting a user.
- From the user table.
  Do this if you want to add a user to one or more user groups.
- From the user group page.
  Do this if you want to add multiple users to a single user group.
- From the user's profile page.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Remove a user from a user group from the user table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. Do one of the following:
   - Double-click a cell in the **Groups** column.
   - Hover the mouse pointer over a cell in the **Groups** column and click ✎.
4. In the user group name, click ⊗.
5. If required, select **Apply to visible rows**.
   This will add all visible users to the groups.

   > Tip You can filter the columns first to add a selection of users to the group.

6. When you have added the groups, click ✔.

## Remove a user from a user group from the user group page

1. Open a user group page.
2. Do one of the following:

| If you want to... | Follow these steps |
|---|---|
| Remove a single user from user group | a. In the row of the user that you want to remove from the group, click 🗑.<br>» The **Remove user from group** dialog box appears. |
| Remove more than one user from the user group | a. Select the check boxes in front of the groups from which you want to remove the user.<br>b. In the action toolbar, click **Remove**.<br>» The **Remove users from group** dialog box appears. |

3. Click **Remove <number of selected users> users**.

## Remove a user from a user group from the profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the tab pane, click **Groups**.
3. Do one of the following:

| If you want to... | Follow these steps |
|---|---|
| Remove a user from a single user group | a. In the row of the group from which you want to remove the user, click 🗑.<br>» The **Remove from group** dialog box appears. |
| Remove a user from more than one user group | a. Select the check boxes in front of the groups from which you want to remove the user.<br>b. In the action toolbar, click **Remove**.<br>» The **Remove from group** dialog box appears. |

4. Click **Remove**.

# Delete a user group

You can delete one or more user groups.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. In the tab pane, click **Users** → **Groups**.
   » The user group table appears.
4. Do one of the following:

| If you want to... | Follow these steps |
|---|---|
| Delete a single group | a. In the row of the group that you want to delete, click 🗑.<br>» The **Delete group** dialog box appears.<br>b. Click **Delete group**. |
| Delete one or more groups | a. Select the check boxes in front of the groups that you want to delete.<br>b. In the action toolbar, click **Delete**.<br>» The **Delete <number> groups** dialog box appears.<br>c. Click **Delete <number> groups**. |

# LDAP user and group management

The Collibra Console administrator can integrate Collibra Data Intelligence Cloud with your company's LDAP servers. This administrator can synchronize user data as well as group-related information. When LDAP is configured, authentication (credential checking) is done directly on the LDAP server(s).

To synchronize with an LDAP server, the LDAP fields have to be mapped to the corresponding Collibra fields and the LDAP server has to be configured correctly.

All the fields that are mapped to an LDAP user attribute are read only in Collibra. You cannot change them in the UI.

You can recognize LDAP users

- by the LDAP column in the user table.
- on the user's profile page.
- in the user table, by the absent 🔑 (reset password) and ✓/✕ (enabled/disabled) user icons.

In the next sections, you can find how to use LDAP in Collibra.

## LDAP synchronization

Synchronization is the process of importing all LDAP data in Collibra Data Intelligence Cloud.

Users can be synchronized in the following ways:

- Automatically: You can configure a CRON job to synchronize the Collibra users with your LDAP.
- Manually: You can synchronize LDAP manually.

Individual user data is synchronized every time a user signs in to Collibra. If the user is authenticated through LDAP, the user data is synchronized with Collibra. If the product identifies the user as deleted from the LDAP server, the user is disabled in Collibra and access is denied.

> Tip To set up the LDAP connection correctly, ensure that you know how your LDAP servers work and how they are structured, or ask your LDAP IT team for help

## Synchronize LDAP users manually

You can manually synchronize your LDAP users to Collibra Data Intelligence Cloud manually.

### Prerequisites

You have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Synchronize LDAP users from the ⚙ **Settings** page

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **General**.
   » The general settings appear on the **Activities** tab page.
3. Click **Synchronize with LDAP**.
   » The LDAP users are displayed in the table.

### Synchronize LDAP users from the **Users** or **Groups** page

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Do one of the following:
   - In the tab pane, click **Users**.
     » The user table appears.
   - In the tab pane, click **Users** → **Groups**.
     » The user group table appears.
3. Above the table, click **Synchronize LDAP**.
   » The LDAP users are displayed in the table.

## LDAP FAQ

### What if the connection between Collibra DGC and the LDAP server is lost?

LDAP users cannot sign in to Collibra anymore. LDAP users who were logged in before losing the LDAP connection can continue working until their HTTP session is closed. When the LDAP synchronization job is triggered manually or automatically through scheduling, a `javax.naming.CommunicationException` is thrown and displayed in the logs.

## What happens if a mapped field of an LDAP user cannot be found for a certain entry on the LDAP server during the synchronization?

The field remains empty when the user is imported in the application. However, both the username and email address are mandatory in Collibra. If either field is not mapped in the configuration, LDAP cannot be enabled. Also, when searching for users on the LDAP server, a filter is used to make sure that only users with a username and email address are returned.

## Are there any mandatory fields to map?

Yes. You have to specify at least a mapped field for the **username** and **email** fields. A user who does not have both mapped field attributes is ignored during the synchronization.

## I'm seeing a lot of connection problems during the synchronization of users and there are no users visible in Collibra DGC after synchronizing. What could be the problem?

First check if the URL and credentials to connect to the LDAP servers are correct. If they are, but the problem persists, it could be related to the paging.

Paging is only possible if your LDAP server supports it. It also requires the connection to remain open during the synchronization process, to keep track of which page is to be processed next.

Paging is enabled by default and can be disabled by entering '0' in the **User page size** field.

## Is the synchronization job really necessary?

No. If you disable the synchronization job, users can still be authenticated in the application. Each time the user logs in, personal information is updated and reflected in Collibra. However, a user's personal information is not visible until the first sign-in to the application. This way the user is not known yet to the application. You also need the synchronization job to enable Groups from LDAP. These are only synchronized in the job,

unless you have mapped the groups as an attribute of the user. Then the groups will be taken in on the first encounter as the group of a user who is signing in.

### What if usernames from LDAP don't comply with Collibra's username requirements?

If a username coming from LDAP does not meet the username requirements of Collibra then this user is skipped during synchronization.

To avoid this problem, ensure that your usernames from LDAP meet the Collibra username requirements.

**Collibra username requirements**

- General requirements:
  - Uniqueness: Duplicate username are not allowed, regardless of case

    > Example `usernamecase` and `UserNameCase` are considered duplicate

  - No leading or trailing spaces
  - No empty usernames
  - Maximum of 255 characters
- Character limitations: Usernames may only contain characters in the following Unicode categories:
  - Letter
  - Number
  - Symbol
  - Punctuation
  - Non-spacing marks

## Profile page

The profile page of a user contains all relevant information about that user.

As a user, you can only open your own profile page. As an administrator, you can also open other users' profile page.

The view bar contains some basic information about the user, such as the name, license type, required license type and email address.

The profile page contains the following tab pages:

| Tab page | Description |
|---|---|
| Overview | The overview page contains general information such as the user's account information, mail notification settings and contact information. |
| Groups | The groups page contains the user groups of which the user is a member, and allows you to add the user to or remove the user from groups. |
| Responsibilities | The responsibilities page contains the responsibilities that are assigned to the user. |
| History | The history page contains the history of the user's actions. |
| Activities | The activities pages contains the list of your activities. |
| Mentions | The mentions page contains a list of all comments in which you are mentioned. |

## Open a profile page

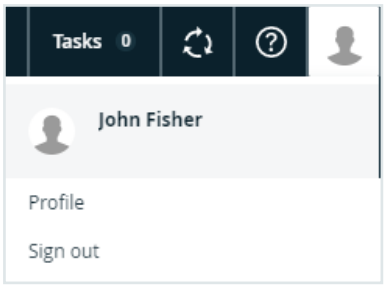
As a regular user, you can open your own profile page. Administrators can open everybody's profile page.

### Prerequisites

If you want to open the profile page of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Open your own profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.




### Open another user's profile page

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. Click the username of the user whose profile you want to open.

## Edit user details

You can edit your own profile such as the application language, email notifications and contact email address on your profile page. You can also reset your password, you receive instructions to do so by email.

### Prerequisites

If you want to edit the user details of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the upper-right corner, click **Edit**.
   » The **Edit** dialog box appears.

3. Enter the required information.

| Field | Description |
| --- | --- |
| First name | Enter the first name of the user. |
| Last name | Enter the last name of the user. |
| Email | Enter the email address on which the user receives all communication from Collibra, such as the registration mail and notifications. |
| License type | Choose the license type of the user. |

4. Click **Save**.

## Edit the user account settings

As a regular user, you can edit the settings of your own user account on your profile page. As an administrator, you can also edit other users' settings.

### Prerequisites

If you want to edit the user account settings of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the **Account** section, click .

3. Enter the required information.

| Field | Description |
| --- | --- |
| Username | Enter the username.<br><br>**Collibra username requirements**<br>◦ General requirements:<br>▪ Uniqueness: Duplicate username are not allowed, regardless of case<br>> Example `usernamecase` and `UserNameCase` are considered duplicate<br>▪ No leading or trailing spaces<br>▪ No empty usernames<br>▪ Maximum of 255 characters<br>◦ Character limitations: Usernames may only contain characters in the following Unicode categories:<br>▪ Letter<br>▪ Number<br>▪ Symbol<br>▪ Punctuation<br>▪ Non-spacing marks |
| Application Language | Choose the interface language.<br><br>As an administrator, you can add or edit interface languages. |

4. Click **Save**.

## Edit the contact information

As a regular user, you can edit contact information of your own user account on your profile page. As an administrator, you can also edit other users' contact information.

> Note You can also add new contact information.

## Prerequisites

If you want to edit the contact information of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

## Edit contact information from a profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. Do one of the following:
   - In the **Contact** section, click ✎.
     Do this to edit the existing fields.
   - In the **Contact** section, click **Add**.
     Do this to add a new field, or edit the existing fields.

   > Note If you edit the email address, a notification email is sent to the old email address.

3. Edit the contact information.
4. Click **Save**.

## Edit contact information from the user table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. Do one of the following:
   - Double-click a cell in the **E-mail** column.
   - Hover your mouse over a cell in the **E-mail** column and click ✎.

   > Note If you edit the email address, a notification email is sent to the old email address.

4. Click in the field and type the new email address.
5. Click ✔.

## Edit the email notification settings

You can edit the email notification settings for your own user account. As an administrator, you can also edit other users' notification settings.

If you enable notifications, you will be notified via email whenever changes are made to assets for which you have been assigned a responsibility.

> Note Only the 20 most recent changes for a given asset are shown in the notification email.

### Prerequisites

If you want to edit the email notification settings of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the **Notifications** section, click ✎.

3. Select or clear the necessary check boxes.

| Field | Explanation |
| --- | --- |
| Notify me of content updates | Specify whether or not you want to receive email notifications.<br><br>If you select this option, email notifications will be sent to the email address shown in the Contact section of your Profile page, at the specified frequency. |
| Days of the week | Receive email notifications only on the days you specify. |
| Monthly | Receive a summary email once a month. |

4. Click **Save**.

## Edit the maintenance announcement settings

You can edit the maintenance announcement settings on your profile page.

If you enable maintenance announcements, you receive notifications in Collibra about scheduled maintenance.

### Prerequisites

Usage statistics are enabled. Contact Collibra support if this is not the case.

### Steps

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the **Scheduled Maintenance Notifications** section, click ✎.
3. Select or clear the check box.
4. Click **Save**.

## Edit a user's license type

As an administrator, you can edit a user's license type via their profile page or **Users** tab page.

### Prerequisites

If you want to edit the license type of another user, you have a global role with the User Administration or the System Administration global permission, for example Sysadmin.

### Edit a user's license type via the profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the upper-right corner, click **Edit**.
   » The **Edit** dialog box appears.
3. In the **License** field, choose the license type of the user.
4. Click **Save**.

### Edit one or more users' license type via the Users tab page

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. In the tab pane, click **Users**.
   » The user table appears.
3. If required, add the **License** column.
4. Edit the cells in the **License** column.

# User licenses

A user license is the overall authorization for a user to perform certain actions in Collibra. What a user can actually do in Collibra depends on the global roles and the responsibilities of the user.

# License types

The license type defines the actions a user is authorized to carry out. There are currently two license types:

| License type | Description |
|---|---|
| Consumer | A Consumer license is the minimum license type. It allows a user to:<br>• View resources.<br>• Collaborate using social features such as comments, tags and ratings.<br>• Use workflows.<br>Note It does not allow users to create, edit or delete resources.<br>You can see which global and resource permissions require a Consumer license, in **Settings**. |
| Author | An Author license is the maximum license type. It allows a user to perform all actions that require Consumer permissions, and create, view, edit and delete resources, such as:<br>• Create, edit and delete assets.<br>• Create, edit and delete communities, domains and responsibilities.<br>• Create and share (anyone's) application, community and domain views.<br>• Create and share (anyone's) dashboards.<br>• Bulk import assets through Excel, CSV or API (Connect).<br>• Manage workflows.<br>• Edit the operating model, for example create, edit and delete asset types.<br>• Manage users, user groups, roles and permissions.<br>You can see which global and resource permissions require an Author license, in Collibra **Settings**. |

Users that have a global role with the System Administration global permission can edit the license type of other users. If those users are enabled and have a global role with at least one Product Rights global permission, they also occupy a license.

The maximum number of licenses of each type is defined in the license file.

Warning If your organization occupies more licenses than the maximum (as stipulated in your contract and identified in the license file), your administrator will receive a warning, but all users will retain access to all Collibra functionality, as determined by their roles and responsibilities. Occupying more licenses than the maximum may have financial and legal implications.

Access to Collibra Console does not require a license.

## License usage

A User is a specific individual that you authorize to use the Collibra software, regardless of whether such individual is using the Collibra software at any given time. Each individual shall be assigned a unique User identification. Multiple individuals may not share the same User identification. In addition to all individual Users, all users of a non-human operated device shall be counted as User if such device has access to the Collibra software in accordance with User roles and responsibilities. Users are limited to the number set forth in the respective Order, and access to the Collibra software will be restricted to such number of Users through a license management key provided by Collibra. If a User no longer requires access to the Collibra software, you may deactivate that individual and you can designate a new individual as a User of the Collibra software without incurring additional fees.

## Required license type

For each user, Collibra calculates the required license type.

The required license type is:

- The license type that a user needs to carry out the actions available to the user via the roles and responsibilities that were assigned to the user.
- The maximum license type of any permission included in a global role or resource role of that user.

If none of the permissions require an Author license, the required license of the user is Consumer.

> Tip You can see the required license type of all permissions in the ⚙ **Settings**. You can also see the required license types of all permissions and the packaged global roles and resource roles in the administration guide:
>
> - Permissions of the packaged global roles
> - Permissions of the packaged resource roles

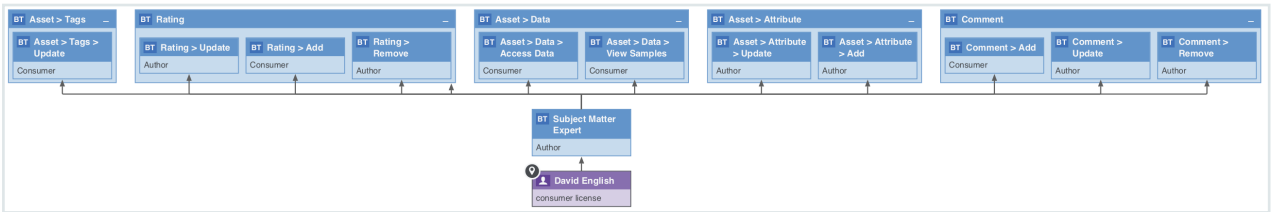
## Mismatches between required license type and given license type

Ideally, the given and required license types match. For example:

- A user with a Consumer license should only have roles and responsibilities that have Consumer permissions.
- A user with an Author license should have roles and responsibilities that have one or more Author permission.

However, a user may have responsibilities with permissions for which the user does not have the correct license type. For example, a user with a Consumer license has been assigned a responsibility that requires Author permissions.

Example
David English is a Data Engineer. He has a user account with a Consumer license, which allows him to consult Collibra Data Intelligence Cloud. He finds some errors and reports them to his colleagues. Because he has advanced knowledge on certain topics, the administrator assigns him the Subject Matter Expert resource role for the relevant communities. With that role, he can add, edit and remove attributes of the assets in the communities. However, the Subject Matter Expert resource role requires an Author license. As a consequence, his Consumer license is insufficient. His administrator should give him an Author license.



> Warning Collibra does not actively enforce the correct license type. Users with a Consumer license can still perform actions that require Author permissions, though they will see a warning message.

If there's a mismatch, consider one of the following:

- Edit the license type of the user.
- Remove the user from the responsibilities or groups that require a higher license type.

## Actions

All users can see their own license type when they open their profile page.

An administrator can do the following:

- View the available number of licenses per license type.
- View and give a license to a user.

## View used licenses

As an administrator, you can view how many licenses of each type are currently in use.

### View used licenses in Collibra Data Intelligence Cloud

1. On the main menu, click , then **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
   » The number of licenses that are in use and the maximum number of licenses for each type are shown above the user table.

### View used licenses in Collibra Console

1. Open Collibra Console.
   » Collibra Console opens with the **Infrastructure** page.

2. Click an environment.
   » The **Overview** page of the environment appears.
3. Click **License**.
   » The **License** page appears, including the license usage information and the enabled products.

# View and compare user license types

As a user, you can view your license type on the profile page. As an administrator, you can view the license type of any user on the user's profile page and in the user table.

> Tip As an administrator, you can immediately edit the license type.

## View user license type in the user profile

1. Click your avatar, then **Profile**.
   » Your profile page appears.
   » On the resource toolbar, below the username, you can see the user's license type.
   » If the user's given license type does not match the user's required license type, the view bar will show the required license type.
2. If the user requires another license type, consider doing one of the following:
   - Edit the user's license type.
   - Remove the user from the responsibilities or user groups that require another license type.

## View user license type in the user table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. If required, add the column **License type**.
   a. In the content toolbar, click ⠿ → **Columns** → **License type**.
      » The **License type** column appears.

4. If required, check if the user requires another license type.
    a. If required, add the column **Required license type**.
        i. In the content toolbar, click → **Columns** → **License type**.
            » The **License type** column appears.
    b. Compare the values of the columns **License type** and **Required license type**.
    c. If the values are not the same, consider doing one of the following:
        - Edit the license type of the user.
        - Remove the user from the responsibilities or user groups that require another license type.

# View the permissions per license type

You can see which global and resource permissions require which license type, in **Settings**.

> Tip You can also see the permissions of the packaged global roles and resource roles in the admin guide:
>
> - Permissions of the packaged global roles
> - Permissions of the packaged resource roles

## Steps

1. On the main menu, click , then **Settings**.
    » The Collibra settings page opens.
2. Click **Roles and permissions**.
    » The roles and permissions settings appear on the **Roles** → **Global** tab page.
3. Do one of the following:
    - In the tab pane, click **Permissions** → **Global**, to view the global permissions and their required license type.
    - In the tab pane, click **Permissions** → **Resource**, to view the resource permissions and their required license type.

    » The required license type is shown in the column **Required license**.

# Edit user license type

As an administrator, you can edit the license type of a user in the following places:

- In the user table.
- On the user profile page.

## Edit user license type in the user table

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Users and groups**.
   » The users and groups settings appear on the **Users** tab page.
3. If required, add the column **License type**.
   a. In the content toolbar, click ⠿ → **Columns** → **License type**.
      » The **License type** column appears.
4. Do one of the following:
   - Double-click a cell in the **License type** column.
   - Hover your mouse over a cell in the **License type** column and click ✎.
5. Click in the field and enter the new license type.
6. If required, select **Apply to visible rows**.
   This will edit the license type of all visible users.

   > Tip You can filter the columns first to edit the license type of a selection of users.

7. Click ✔.

## Edit user license type in the user profile

1. Click your avatar, then **Profile**.
   » Your profile page appears.
   » On the title bar, below the username, you can see the user's license type.
2. In the upper-right corner, click **Edit**.
   » The **Edit** dialog box appears.

3. Enter the required information.

| Field | Description |
|---|---|
| First name | Type the first name of the user. |
| Last name | Type the last name of the user. |
| Email | Type the email address on which the user receives all communication from Collibra, such as the registration mail and notifications. |
| License type | Choose the license type of the user. |

4. Click **Save**.

# Collibra Data Intelligence Cloud license file

To be able to use Collibra Data Intelligence Cloud, you need a valid license file, named **collibra.license**, that you have to upload in Collibra Console.

Your organization's license file defines:

- The Collibra products and applications that your organization can use.
- The expiration date of the user licenses.
- The maximum number of users.

This license file also contains a signature string, to avoid tampering.

## Example license

The following is an example of a Collibra license file:

```
customer = Collibra
writerCount = 10
contributorCount = 0
readerCount = 50
apiUserCount = 0
maxAssets = 2147483647
maxWorkflows = 2147483647
product-connect = true
product-catalog = true
product-glossary = true
```

```
product-reference-data = true
product-helpdesk = true
product-policy = true
product-stewardship = true
product-data-dictionary = false
product-onthego-mobile = true
product-onthego-windows = true
expirationDate = 2100-12-31
guestAccess = true
Vqr27XTn0Swuax...
```

## Maximum number of users per license type

The license file contains the maximum number of user licenses of each license type.

For each license type, Collibra Data Intelligence Cloud counts the number of enabled users.

> Note The apiUserCount parameter in the license file is no longer taken into account in Collibra.

## Applications

Collibra consists of the following applications and external products.

Applications:

- Catalog (product-catalog)
- Business Glossary (product-glossary)
- Reference Data (product-reference-data)
- Data Helpdesk (product-helpdesk)
- Policy Manager (product-policy)
- Stewardship (product-stewardship)
- Data Dictionary (product-data-dictionary)

External products:

- Collibra Connect (product-connect)
- Collibra Everywhere for iOS (product-onthego-mobile)
- Collibra Everywhere for Windows (product-onthego-windows)

## License violations

You can encounter the following license violations:

- Invalid or no license file: You have no license file or have tampered with it.
- Expired: Your license has passed the expiration date that was defined in the license file. When you are close to the expiration date of your license, every user with the Sysadmin role gets a notification message at the top of every page.

  > Note In Collibra Console, every user will see the license expiry message.

- Author user limit exceeded: Contact Collibra Support, at support@collibra.com, for further assistance.

  > Note This does not prevent you from creating new users, or restrict Collibra in any other way. It is, however, a license violation, and may lead to legal action.

In case of license violations, all Collibra users get an error message at the top of every page. You can only remove the error by taking one or more of the following actions:

- Upload a new, suited license file.
- Disable users.
- Delete users.

If there is no license file, an invalid license, or an expired license, Collibra blocks all upgrades.

# Services configuration

On the **Services configuration** settings page of the Collibra settings, you can edit settings that affect your entire platform. For example, you can edit the help menu and configure the search feature.

> Note The services configuration in the Collibra settings is the same as the DGC service settings that require the ADMIN role in Collibra Console. By default, you do not see this section. Contact Collibra support if you want to use this section.

The Collibra configuration includes the following options:

# General settings

The general settings of Collibra Data Intelligence Cloud.

| Setting | Description |
|---|---|
| Enable view rights | • ✓ True (default): The view permissions feature is enabled.<br>• ✕ False: The view permissions feature is disabled. |
| Show target asset type above relation table | • ✓ True (default): Show the asset type of the target asset in the title of relation tables on an asset page. The target asset can be either the head or the tail of the relation, depending on which asset page you have open.<br>• ✕ False: Hide the asset type of the target asset.<br><br>The default value is `true`. |
| Refreshed Navigation | • ✓ True: Use the new, refreshed navigation of the Collibra user interface.<br>• ✕ False (default): Use the classic navigation of the Collibra user interface. |
| Add Asset Grid link to menu | • ✓ True: Add the link to Asset Grid in the main menu of your environment.<br>• ✕ False (default): The link to Asset Grid is not available in the main menu of your environment. |

## Help Menu

The configuration of the Help menu in Collibra Data Intelligence Cloud.

| Setting | Description |
|---|---|
| Links | The list of links in the help menu. |
| Menu item name | The name of the menu item as it will appear in Collibra Data Intelligence Cloud's help menu. |
| Menu index | The position of the menu item in the help menu. The top position starts with the value 1. |
| Menu URL | The target URL of the menu item. |

| Setting | Description |
| --- | --- |
| Show admin only | • ✔ True: The menu item is only visible to users with the Sysadmin role.<br>• ✖ False: The menu item is visible to every user. |

# Email configuration

The configuration of email notifications.

> Note In a Collibra Data Intelligence Cloud environment, you cannot update the email server settings, such as host and port. For more information, see Collibra Data Intelligence Cloud infrastructure.

| Setting | Description |
| --- | --- |
| Default schedule (Requires restart) | The Cron schedule to send emails only at specific times. With this, you can send emails in batches and avoid an overload of mails.<br>Keep in mind that these emails are only workflow emails and have nothing to do with the notification schedule.<br>If you create an invalid Cron pattern, Collibra Data Intelligence Cloud stops responding. |
| Template map | The location of template emails. |
| From address (*) | The email address used as the sender of all outgoing emails.<br>Contact Collibra support to change the From address, see also Email configuration. |

## Notifications

The configuration of notification emails to users.

> Note These settings can be overridden for every user in the preferences.xml file.

| Setting | Description |
|---|---|
| Notification days | The days of the week on which Collibra sends notifications. The days are represented by numbers from 1 to 7, where 1 represents Sunday.<br>Per row you can add one day. |
| Daily roles | The roles that receive notifications on the days defined in **Notification days**. |
| Enable monthly notifications | • ✓ True: The users receive a monthly summary.<br>• ✕ False (default): The users do not receive a monthly summary. |
| Roles for monthly notifications | The roles that receive monthly notification emails. This is only relevant if **Enable monthly notifications** is ✓ True. |
| **Setting** | **Description** |
| Enable hyper-linking | • ✓ True: Hyperlinks are created automatically.<br>• ✕ False (default): Hyperlinks are not created automatically.<br>For more information about automatic hyperlinks, see Hyperlinking.<br>Warning If you enable this setting, the performance of Collibra can decrease. |
| Enable case sens-itivity | • ✓ True: Hyperlinks are case-sensitive.<br>• ✕ False (default): Hyperlinks are not case-sensitive.<br>Note If you edit this setting, you have to reindex Collibra. |
| Excluded asset type IDs | The list of asset types that are ignored by automatic hyperlinking. You can enter multiple asset type IDs, separated by commas.<br>Excluding assets reduces the amount of hyperlinks, which improves performance.<br>Tip We recommend that you exclude technical asset types such as Column, Field, Table, Code Value and Code Set.<br>Note If you edit this setting, you have to reindex Collibra. |

# Recommender configuration

The configuration of the recommender.

| Setting | impacts | Description |
|---|---|---|
| Catalog recommender enabled | All recommendations | • ✓ True (default): The "Data sets you might like" section is included on the Data Catalog Home page. This section shows data sets you might be interested in, as determined by the recommender, which takes into account your data sets and the data sets of similar users.<br>• ✕ False: The "Data sets you might like" section is not included on the Data Catalog Home page. |
| Data set recommender execution time | Recommendations of data sets to users | The schedule (CRON job) by which the data set recommender looks for recommended data sets for a user.<br>By default the data set recommender does this every night. |
| Asset recommender execution time | Recommendations of business assets to data assets | The schedule (CRON job) by which the asset recommender looks for suggested relations between business assets and data sets. |
| Data set matcher execution time | Data set matcher | The schedule (CRON job) by which the data set matcher looks for similar data sets. |
| Data set similarity threshold | Data set matcher | The amount of business assets that have to be related to two data sets before the data sets are considered to be similar.<br>This percentage is expressed by a decimal where 1,00 equals 100%.<br>Example<br>If this value is 0.3 and at least 30% of the related business assets are related to both data sets, they are considered to be similar. |

| Setting | impacts | Description |
|---|---|---|
| Duplicate schema threshold | Schema matcher | The amount of assets that have to be related to both schemas before the schemas are considered to be similar.<br><br>This percentage is expressed by a decimal where 1,00 equals 100%. |
| Fuzzy vs exact matching strategy for business assets | Recommendations of business assets to data sets and of business assets to column assets | The percentage that determines to what extent assets with a similar name become more important.<br><br>The ranking in the search engine results always has an impact on the suggestion score. However, similarity between the asset names can also be taken into account. If you decrease this percentage, the ranking of the search results becomes more important for the suggestion score, while the similarity between the asset names becomes less important. If you increase the percentage, assets with similar names will receive a higher suggestion score.<br><br>This percentage is expressed by a decimal where 1,00 equals 100%. You can enter a value greater than 1,00. |
| Recommendation weights for data sets | Recommendations of data sets to users | An ordered comma-separated list of values that define the importance of properties for recommendations. The order of the values reflects the importance of the value.<br><br>This setting is only used for data set recommendations if your Collibra does not yet have enough data for relevant results from the active recommendations algorithms.<br><br>Possible values:<br><br>• *CERTIFIED*: Data sets that are certified are considered more relevant.<br>• *POPULARITY*: The number of visits to the data set page. |

| Setting | impacts | Description |
|---|---|---|
| Active recommendation algorithms | Recommendations of data sets to users and of business assets to data sets | A comma-separated list of algorithms that calculate recommendations. By default, all available algorithms are listed.<br>Possible values:<br>• *BASELINE*<br>• *USER_MEAN*<br>• *IICF* (Item-Item Collaborative Filtering)<br>• *SLOPE_ONE*<br>• *WEIGHTED_SLOPE_ONE* |
| Data set elements threshold | Recommendations of data sets to users | The maximum number of elements per data set that the recommender will use to train the model. The data set elements are taken randomly.<br>Lowering this number can prevent out-of-memory issues but also impacts the accuracy of recommendations for large data sets. |

> Warning If you create an invalid Cron pattern, Collibra Data Intelligence Cloud stops responding.

# Search index configuration

The configuration of the search index.

| Setting | Description |
|---|---|
| UI search appends wildcard | • ✓ True (default): A wildcard (asterisk) is automatically added to each search query. An asterisk is not added in the following exceptions:<br>◦ If the query contains a tilde (~).<br>◦ If the query ends with a quotation mark (").<br>> Note This applies only to queries via the user interface. A wildcard is not added automatically for REST API queries.<br>• ✗ False: No wildcard is added to the search query. |

| Setting | Description |
| --- | --- |
| Maximum batch size | The amount of resources scanned in one go for the search query.<br>The default value is 5,000. The maximum value is 30,000. |
| Maximum batch size for relations | Maximum batch size for relations reindex. |
| Stop words (Requires restart) | A list of stop words that are ignored as tokens for the index.<br>The default list of English stop words includes:<br>a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, the, their, then, there, these, they, this, to, was, will, with<br>If you choose not to create your own list of stop words, the default list applies.<br>If you create your own list of stop words, you have to:<br>1. Reindex Collibra Data Intelligence Cloud.<br>2. Restart the environment to apply your changes. See Stop an environment and Start an environment. |
| Consistency for Custom facets and Search over Relations | This setting keeps Data Marketplace up to date if you made changes to relations between assets.<br>• ✔ True: The relation information remains consistent between Collibra and Data Marketplace for out-of-the-box filters and relations. If there is a change in the relation between assets , the change will be reflected in the search index after some time.<br>Warning If you enable this setting, the Asynchronous indexing setting must be enabled too because every relation change results in an event that is processed via asynchronous indexation.<br>• ✘ False: Changes to relations are not automatically indexed. This can cause inconsistencies between Collibra and Data Marketplace. You can, however, reindex Data Marketplace relations manually.<br>This is the default value. |

## Tokenizer

The configuration of the tokenizer of the indexing mechanism. If you edit these settings, you need to restart and reindex your environment.

| Setting | Description |
| --- | --- |
| Type | The tokenizer that is used. Currently two tokenizers are supported:<br>• **Standard** (default): This tokenizer uses the word break rules from the Unicode Text Segmentation algorithm, as specified in Unicode Standard Annex #29.<br>• **Character**: This tokenizer sees words as groups of all alphanumeric characters together with a configurable list of extra characters. This can be used if you know for sure which characters should keep certain words together. For example, if you want to keep words with a dash ( - ) together, you have to add the dash in the **allowedCharacters** parameter. |
| Parameter map | The allowed characters if the **Type** is **Character**.<br>• **Field key**: This field has to contain *allowedCharacters*.<br>• **Field value**: The concatenated list of characters that does not split strings into separate tokens. For example, the concatenated list -'allows dashes and apostrophes in tokens. |

## Boosting

The configuration of the boosting function.

| Setting | Description |
| --- | --- |
| Asset | The boost factor of assets. |
| Class Match | The boost factor of data classes. |
| Community | The boost factor of communities. |
| Domain | The boost factor of domains. |
| User | The boost factor of users. |
| User group | The boost factor of user groups. |
| Name | The boost factor of names. |
| Comment | The boost factor of comments. |

| Setting | Description |
|---|---|
| Tag | The boost factor of tags. |
| Attribute boost map | The boost factor of attribute types.<br>• **Field key**: The attribute type ID.<br>• **Field value**: The boost factor of the attribute type. |
| Display exact match of name as first | • ✔ True (default): If the name of an asset is exactly the same as the search text, put it at the top of the search results regardless of boost factors.<br>• ✘ False: Use the regular search order, taking into account boost factors. |
| Asset boost map | The boost factor of asset types.<br>• **Field key**: The asset type ID.<br>• **Field value**: The boost factor of the asset type. |
| Partial exact match enabled | Enables partial exact matching while searching for multi word phrases.<br>• ✔ True (default): For multi-word search text, the search engine considers the exact match percentage with the resource name, when ordering the results.<br>> Example You enter search text "scheduled maintenance". Two example assets are ordered as follows:<br>> a. An asset named "daily **scheduled maintenance**", as two of the three words (66%) match exactly.<br>> b. An asset named "daily **scheduled maintenance** revised", as two of the four words (50%) match exactly.<br>• ✘ False: The exact match percentage is not taken into account in the score calculation. |

# Slow logs configuration

The configuration of the slow logs function.

| Setting | Description |
| --- | --- |
| Indexing threshold | The time limit, in milliseconds, after which an index query is logged in Elasticsearch.<br>If the value is set to 0 (zero), all index queries are logged.<br>Changes to this setting require a full reindex of your Collibra Data Intelligence Cloud environment. |
| Fetching threshold | The time limit, in milliseconds, after which a fetch query is logged in Elasticsearch.<br>If the value is set to 0 (zero), all fetch queries are logged.<br>Changes to this setting require a full reindex of your Collibra Data Intelligence Cloud environment. |

# Statistics configuration

The configuration of statistics.

| Setting | Description |
| --- | --- |
| Buffer size | The maximum amount of statistics entries that the buffer can contain before saving them in the database.<br>The default value is *10*. |
| Buffer flush time | The maximum amount of time in milliseconds to keep statistic entries in memory before saving them in the database.<br>The default values is *10,000*. |

| Setting | Description |
|---|---|
| Cron map | List of statistics, listed by their Cron name, and a Cron interval.<br>These are the default values:<br>**Field key** / **Field value**<br>workflow-task: 0 59 23 * * ?<br>active-users: 0 0/15 * * * ?<br>term-count: 0 59 23 * * ?<br>vocabulary-count: 0 59 23 * * ?<br>page-hit: 0 0 * * * ?<br>task-count: 0 0 * * * ?<br>If you create an invalid Cron pattern, Collibra Data Intelligence Cloud stops responding. |

# Import configuration

The configuration for imports.

| Setting | Description |
|---|---|
| Rebuild hyper-links after import | • ✓ True (default): Automatically rebuild the hyperlinks after an import.<br>• ✕ False: Do not rebuild the hyperlinks after an import. |
| Asset respons-ibilities support | • ✓ True: Enable importing responsibilities at asset level.<br>• ✕ False (default): Disable importing responsibilities at asset level.<br>Warning Setting specific responsibilities on a large number of resources will affect the performance and stability of the system. |

| Setting | Description |
| --- | --- |
| Number of failed commands before stopping import job | An import job with the option to continue on error enabled will stop after the specified number of commands have failed. Any valid command is still committed to the database until the moment the job stops, which can lead to some resources being imported.<br>The default and maximum value is *100*. |
| Temp files storage | The location of the temporary files used by the import job.<br>The default value is *FILE*. |

## Excel import configuration

The configuration of Excel import.

| Setting | Description |
| --- | --- |
| The default CSV separator character | The default separator character of the CSV fields for complex relations. |
| The default CSV quote character | The default quote character of the CSV fields for complex relations. |
| Number of rows per chunk of data | When importing views, the database is called repeatedly, each time importing a chunk of data from the import file. This option defines how many rows each chunk of data can contain.<br>Lower values reduce the burden on memory. Higher values require more memory, but may slightly increase the speed of the export.<br>The default value is 5,000. |

# Excel export configuration

The configuration of Excel export.

| Setting | Description |
| --- | --- |
| The default CSV separator character | The default separator character of the CSV fields for complex relations. |
| The default CSV quote character | The default quote character of the CSV fields for complex relations. |
| Number of rows per chunk of data | When exporting views, the database is called repeatedly, each time fetching a chunk of data to build the export file. This option defines how many rows each chunk of data can contain.<br>Lower values reduce the burden on memory. Higher values require more memory, but may slightly increase the speed of the export.<br>The default value is 5,000. |

# CSV export configuration

The configuration of CSV export.

| Setting | Description |
| --- | --- |
| Always use quotes | • ✔ True: Use quotes for every cell in the CSV.<br>• ✘ False (default): Only use quotes when necessary. |
| Number of rows per chunk of data | When exporting views, the database is called repeatedly, each time fetching a chunk of data to build the export file. This option defines how many rows each chunk of data can contain.<br>Lower values reduce the burden on memory. Higher values require more memory, but may slightly increase the speed of the export.<br>The default value is 5,000. |

# API call logging

The configuration of the API call logging.

| Setting | Description |
|---|---|
| Enabled | • ✔ True: API call logging is enabled.<br>• ✘ False (default): API call logging is disabled. |
| Pattern duration list | The list of methods and a corresponding minimum duration time. The minimum duration time is the minimum time before the method is stored in the database. |
| Minimum duration | The time in milliseconds that an API call must last before it is logged. |
| Method pattern | The method that you want to log in the database. For each pattern that you want to log, you have to add a new pattern. |

# Security configuration

The configuration of security.

| Setting | Description |
|---|---|
| X-Frame options (Requires restart) | The content of the HTTP-header `X-Frame-Options`. This is set on all rendered pages and is used to avoid clickjacking attacks. By default, only pages with the same origin can use the rendered pages in a frame. |
| Limit user sessions | • ✔ True: A user can only open one session.<br>• ✘ False (default): A user can open multiple sessions. |
| Office research guest access | • ✔ True: The Office research integration is always allowed guest access via REST, regardless of the general Guest access setting.<br>• ✘ False (default): The general Guest access setting is kept.<br><br>Note Currently, The Office research integration is only available when Collibra Data Intelligence Cloud is publicly available, which is why this override setting is necessary. |

| Setting | Description |
| --- | --- |
| Prevent advanced html features in text dashboard | Text widgets can contain full HTML. However, this means an attacker could potentially execute an XSS attack by injecting malicious HTML. For more information, see the Troubleshooting section.<br>• ✔ True: Potentially dangerous HTML elements are removed from text attributes when you save the text field.<br>• ✘ False (default): No HTML elements are removed from text attributes when you save the text field.<br>Note<br>If you enable this setting, the following HTML elements are deleted when you save:<br>• script (including JavaScript)<br>• svg<br>• frame<br>• frameset<br>• iframe<br>• any event handlers |
| Guest access | • ✔ True: Anyone that can access the URL, has viewing rights to the system.<br>• ✘ False (default): The user is asked to sign in before having access to any data. |
| Enable schema introspection | • ✔ True: Schema fields are shown during an introspection.<br>• ✘ False (default): Schema fields are hidden during an introspection. |
| Enable customer validation functions | • ✔ True (default): Groovy scripts with custom validation functions can be loaded.<br>• ✘ False: Groovy scripts with custom validation functions cannot be loaded. |

# LDAP

The configuration of an LDAP server to handle the authentication.

| Setting | Description |
| --- | --- |
| Enable LDAP integration (Requires restart) | • ✔ True: The LDAP integration is enabled.<br>• ✘ False (default): The LDAP integration is disabled. |
| Sync after restore | • ✔ True (default): LDAP data is synchronized with Collibra when an initial data set is bootstrapped.<br>• ✘ False: LDAP data is synchronized with Collibra only when the LDAP synchronization job is triggered. |
| User page size | The page size that is used when retrieving users during synchronization.<br>The default value is 500. You can set it to *0* to disable paging.<br>Note This is a global setting. If you are working with multiple LDAP servers, only the value for the main server is taken into account. |
| Group page size | The page size that is used when retrieving groups.<br>You can set it to *0* to disable paging.<br>Note This is a global setting. If you are working with multiple LDAP servers, only the value for the main server is taken into account. |
| Time limit | Specifies the time limit in milliseconds for all LDAP searches.<br>The default value is 120,000.<br>You can set it to *0* to disable the time limit.<br>Tip<br>• If you get **Time limit Exceeded** error messages, increase the default value or check why the LDAP search takes too long.<br>• We recommend that you modify the **User page size** and **Group page size** settings before you modify this setting. |
| Sync job enabled | • ✔ True (default): The synchronization job is enabled.<br>• ✘ False: The synchronization job is disabled. |

| Setting | Description |
|---|---|
| Sync job cron | The schedule to perform an LDAP synchronization (CRON).<br>The default value for this setting is daily at midnight.<br>If you create an invalid Cron pattern, Collibra Data Intelligence Cloud stops responding. |
| User field mapping | The configuration mapping of all the user fields. This determines which LDAP field ismapped to which user field. Empty fields are ignored during the synchronization. |
| Username | The unique user ID in the LDAP, typically UID. This is a mandatory field. |
| Email | The corresponding email field in the LDAP directory. This is a mandatory field. |
| First name | The first name field in the LDAP directory. |
| Last name | The last name field in the LDAP directory. |
| Middle name | The middle name field of the LDAP directory, this is usually givenName. |
| Enabled | Indication whether a user is active or inactive in LDAP. |
| Language | The language and locale of the user. It has to contain a language code and may contain a country code.<br>• The language has to be an ISO language code.<br>• The country has to be an ISO country code.<br>Examples: *pl*, *en_US*, *nl_BE*. |
| Group | The LDAP property that defines to which groups the user belongs. If there is a group entry in the LDAP directory, use the **Group field mapping** settings. |
| Additional email list | An additional email list. |
| Instant messaging fields | The mapping for the user's IM locations. |
| AIM | The mapping for the user's AOL IM account. |
| Google Talk | The mapping for the user's Google Talk IM account. |

| Setting | Description |
|---|---|
| Icq | The mapping for the user's ICQ IM account. |
| Jabber | The mapping for the user's Jabber IM account. |
| Messenger | The mapping for the user's Live Messenger IM account. |
| Skype | The mapping for the user's Skype IM account. |
| Yahoo Mes-senger | The mapping for the user's Yahoo Messenger IM account. |
| Website map | Enter the field value and field key to map a social media website. |
| Phone | The mapping for the user's phone. |
| Fax | The mapping for the user's fax number. |
| Mobile | The mapping for the user's mobile number. |
| Pager | The mapping for the user's pager number. |
| Private | The mapping for the user's private number. |
| Work | The mapping for the user's work number. |
| Other | The mapping for any other phone number for this user. |
| Home address | The mapping for the user's home address. |
| Street | The mapping for the user's street. |
| Number | The mapping for the user's number. |
| City | The mapping for the user's city. |
| Post code | The mapping for the user's postal code. |
| State | The mapping for the user's state. |
| Country | The mapping for the user's country. |

| Setting | Description |
|---|---|
| Work address | The mapping for the user's work address. |
| Street | The mapping for the user's street. |
| Number | The mapping for the user's number. |
| City | The mapping for the user's city. |
| Post code | The mapping for the user's postal code. |
| State | The mapping for the user's state. |
| Country | The mapping for the user's country. |
| Gender | The mapping information for the user's gender. |
| Mapping | The attribute key for the gender value. If the content equals one of the male or female mappings, the user will be saved as male or female. Otherwise a default of *UNKNOWN* will be used. |
| Male value | The value for male users. |
| Female value | The value for female users. |
| Group field mapping | Groups can be defined as a separate structure or as a userField. The following section allows you to sync with a group structure that is unrelated to the user structure. |
| Group name field | The name of the group to use in the application. |
| Users field | The user DNs that are member of the group. |

# Password

The configuration of passwords.

| Setting | Description |
|---|---|
| Minimum length (Requires restart) | The minimum length of passwords.<br>The default minimum length is 12. |
| Maximum length (Requires restart) | The maximum length of passwords.<br>The default maximum length is 1,024. |
| Digits required (Requires restart) | • ✓ True (default): Passwords have to contain one or more digits.<br>• ✕ False: Passwords do not have to contain digits. |
| Non alpha-numeric required (Requires restart) | • ✓ True (default): Passwords have to contain one or more non-alpha-numeric (special) characters.<br>• ✕ False: Passwords do not have to contain non-alphanumeric characters. |
| Uppercase required (Requires restart) | • ✓ True (default): Passwords have to contain one or more upper-case characters.<br>• ✕ False: Passwords do not have to contain upper-case characters. |
| Lowercase required (Requires restart) | • ✓ True (default): Passwords have to contain one or more lower-case characters.<br>• ✕ False: Passwords do not have to contain lower-case characters. |
| Username disallowed (Requires restart) | • ✓ True (default): Passwords cannot be the username.<br>• ✕ False: Passwords can be the username. |
| Expiration interval (months) | The number of months before users have to change their passwords.<br>Set it to *0* if users never have to change their passwords.<br>The default interval is 6 months. |
| Allowed login failures | The number of consecutive failed login attempts that are allowed before the user account is disabled.<br>Set it to *0* for unlimited attempts.<br>The default is 3 login failures. |
| No reuse count | The number of previous passwords users cannot reuse. The default is *1*: the user cannot change his password to what it currently is.<br>Set this to *0* to allow using the same password. |

| Setting | Description |
| --- | --- |
| Password reset link validity period | The number of minutes that a link to reset a password remains valid. Beyond this time, the user has to request a new password reset link.<br>The default value is 60 minutes.<br>The minimum value is 15 minutes, the maximum value is 1,440 minutes (24 hours). |
| Account lock-out duration | The number of minutes that a user cannot sign in after too many failed sign-in attempts. If the number of minutes is set to 0, a Collibra administrator must reset the password to unlock the account. This setting is only applicable if the "Allowed sign-in failures" setting is defined.<br>A locked-out account does not mean that your account is disabled. |

# REST

The security configuration of the REST interface.

| Setting | Description |
| --- | --- |
| CSRF token enabled | • ✓ True: The validity of a request is checked with a CSRF token.<br>• ✗ False (default): The validity of a request is not checked with a CSRF token. |
| Referrer enabled | • ✓ True: The HTTP referrer header is used to identify the origin of the request.<br>• ✗ False (default): The HTTP referrer header is not used to identify the origin of the request. It is recommended to leave this option disabled. |
| Referrer checking allow empty | • ✓ True (default): The HTTP referrer header can be empty.<br>• ✗ False: The HTTP referrer header cannot be empty. |

# SSL

The configuration of SSL.

| Setting | Description |
|---|---|
| Key store name | The name of the keystore file. The file is expected to be in the **<collibra_data>/dgc/security** folder. |
| Key store password | The password of the keystore. |
| Key store type | The type of the keystore file. For example, *JKS* or *PKCS12*. |
| Trust store name | The name of the truststore file. The file is expected to be in the **<collibra_data>/dgc/security** folder. |
| Trust store password | The password of the truststore. |
| Trust store type | The type of the truststore file. For example, *JKS* or *PKCS12*. |

# SSO

The configuration of Single Sign-On (SSO) authentication.

| Setting | Description |
|---|---|
| Mode | The SSO mode of Collibra.<br>The possible values are:<br>• SAML_ATTRIBUTES<br>• SAML_LDAP<br>• SSO_HEADER<br>• SSO_HEADER_LDAP<br>• DISABLED |
| Header | The name of the header to be checked. The contents of this header is used for the search query, which is *SSO_HEADER = username*.<br>The value of the actual query depends on **DN** and possibly **Attribute**. |

| Setting | Description |
|---|---|
| DN | If the **SSO mode** is **SSO_HEADER_LDAP** or **SAML_LDAP**, this field determines whether the distinguished name (DN) or attribute is used:<br>• ✔ True: The header has to contain the distinguished name (DN) of the user in the LDAP.<br>• ✘ False (default): The header has to contain the value of **Attribute**.<br>If the **SSO mode** is **DISABLED**, **SSO_HEADER** or **SAML_ATTRIBUTES**, this field is ignored. |
| Attribute | This field is only used if the **SSO mode** is **SSO_HEADER_LDAP** or **SAML_LDAP**, and if **DN** is **False**.<br>If the above criteria are met, the LDAP has to contain this value.<br>Example<br>If **Attribute** is *FirstName*, then the header should contain the **FirstName** of the user that was signed in. |
| Disable automatic user creation when signing in via SSO | If users try to sign in via SSO, they still need a user account in Collibra. You can either create the user accounts automatically when they sign in, or create the user accounts manually or via LDAP synchronization<br>• ✔ True: User accounts are not created automatically.<br>• ✘ False (default): User accounts are created automatically. |
| Disable the Collibra signin page | When SSO is enabled, a user can still navigate to the /signin page and try to log in via that page. However, you can disable that page.<br>• ✔ True: Users cannot access the Collibra signin page.<br>• ✘ False (default): Users can access the Collibra signin page |
| SAML | The configuration of SAML. |
| Metadata HTTP | The URL of the SAML metadata file to be used. The URL always has to be reachable by the Collibra environment. |
| Entity Provider Entity ID | The entity ID inside the metadata to be referenced.<br>Note A metadata file can describe multiple entity IDs, make sure to use in the entity ID from the correct metadata file. |

| Setting | Description |
|---|---|
| Attribute fields | The mappings of attributes in the SAML response. The values are used as keys to look for in the SAML response.<br>Examples of attribute fields are first name, last name, address information, phone numbers and so on. |
| First name | The mapping for the user's first name.<br>This attribute is optional. The value can be empty. |
| Last name | The mapping for the user's last name.<br>This attribute is optional. The value can be empty. |
| Email | The mapping for the user's email address.<br>This attribute is optional for existing users, but mandatory for new users.<br>Warning If the email address is invalid when you synchronize, the user is deactivated and the user information is not updated. |
| Enabled | The mapping that indicates whether the account of the incoming user is enabled. |
| Group | The mapping (attribute) which indicates to which Collibra groups the user should be added. If the groups don't exist yet, they will be created. This attribute can have multiple values (groups) or the groups can be sent as a comma-separated list of groups.<br>If passing groups in this attribute, you must set **Groups DGC Managed** to *False*. |
| Phone | The mapping for the user's phone. |
| Fax | The mapping for the user's fax number. |
| Mobile | The mapping for the user's mobile number. |
| Pager | The mapping for the user's pager number. |
| Private | The mapping for the user's private number. |
| Work | The mapping for the user's work number. |

| Setting | Description |
|---|---|
| Other | The mapping for any other phone number for this user. |
| Home address | The mapping for the user's home address. |
| Street | The mapping for the user's street. |
| Number | The mapping for the user's number. |
| City | The mapping for the user's city. |
| Post code | The mapping for the user's postal code. |
| State | The mapping for the user's state. |
| Country | The mapping for the user's country. |
| Work address | The mapping for the user's work address. |
| Street | The mapping for the user's street. |
| Number | The mapping for the user's number. |
| City | The mapping for the user's city. |
| Post code | The mapping for the user's postal code. |
| State | The mapping for the user's state. |
| Country | The mapping for the user's country. |
| Instant messaging | The mapping for the user's IM locations. |
| AIM | The mapping for the user's AOL IM account. |
| Google Talk | The mapping for the user's Google Talk IM account. |
| Icq | The mapping for the user's ICQ IM account. |

| Setting | Description |
|---|---|
| Jabber | The mapping for the user's Jabber IM account. |
| Messenger | The mapping for the user's Live Messenger IM account. |
| Skype | The mapping for the user's Skype IM account. |
| Yahoo Messenger | The mapping for the user's Yahoo Messenger IM account. |
| Gender | The mapping information for the user's gender. |
| Mapping | The attribute key for the gender value. If the content equals one of the male or female mappings, the user will be saved as male or female. Otherwise a default of *UNKNOWN* will be used. |
| Male value | The value for male users. |
| Female value | The value for female users. |
| Groups DGC managed | Option to configure that groups should be managed by Collibra, or that groups should be set by the SAML assertion (SAML+Attributes mode).<br>This option is only relevant if **Mode** is *SAML_ATTRIBUTES*.<br>• ✓ True: The groups are fully managed by Collibra. In the UI the admin has the option to assign groups to users, without it being overwritten by SAML.<br>• ✕ False (default): The groups are managed by the SAML assertions. In this case the groups are managed by the SAML IDP. Be sure to configure the **Group** attribute in the **Attribute Fields** section. |

| Setting | Description |
| --- | --- |
| Service Provider Entity ID | Field that determines the value of the `Entity ID` parameter in the service provider metadata returned by Collibra. The default value is empty, in which case Collibra uses the value of the `Base URL` field.<br><br>Enter a custom value if the base URL does not match the `audience` configured in your SAML identity provider.<br><br>**Warning** The value of the `audience` restriction in the SAML response has to be exactly the same as the value of this field.<br><br>**Note** SSO does not work if the `Service Provider Entity ID` field contains the base URL with trailing forward slash (for example `www.collibra.com/`), and the `audience` of your IDP contains the base URL without a trailing forward slash (for example `www.collibra.com`).<br>Both values need to be exactly the same. In this case, you can resolve the issue by changing the value in the configuration of your IDP, or the value of this field. It does not matter whether both have a trailing forward slash or not, as long as they contain the same value. |
| Sign authentication requests (Requires restart) | • ✔ True: Authentication requests have to be signed.<br>• ✘ False (default): Authentication request don't have to be signed. |
| Force authn | • ✔ True (default): The SP authentication request forces re-authentication.<br>• ✘ False: The SP authentication request does not force re-authentication. |
| Force passive | • ✔ True: The reauthentication has to happen in the background.<br>• ✘ False (default): The reauthentication does not have to happen in the background.<br><br>This is only relevant if **Force authn** is *True*. |
| Name ID | Name ID that is used in the SP authentication. The default value is *urn:oasis:names:tc:SAML:2.0:nameid-format:persistent*.<br><br>The Name ID value is mandatory. |

| Setting | Description |
|---|---|
| Name ID allow create | • ✔ True (default): The IDP can create a name ID to fulfill the SP authentication request.<br>• ✘ False: The IDP cannot create a name ID to fulfill the SP authentication request. |
| Disable client address | • ✔ True: The validation of the client IP address in the assertion message is disabled.<br>• ✘ False (default): The validation of the client IP address in the assertion message is enabled. |
| SAML Requested authentication context | Settings for the SAML requested authentication context. The IDP uses the authentication context to authenticate the user. By default, the authentication context mandates user/password authentication over HTTPS. |
| Disable | • ✔ True: The requested authentication context section is not sent in the SAML request.<br>• ✘ False (default): The requested authentication context section is sent in the SAML request. |
| Comparison type | The comparison type that is transmitted in the requested authentication context.<br>Possible values:<br>• *minimum*<br>• *maximum*<br>• *better*<br>• *exact* (default value)<br>For more information about the comparison type values, refer to the SAML specifications. |
| Reference list | The list of class references in the requested authentication context. You can separate list items with the pipe character (\|).<br>For more information about this list, refer to the SAML specifications. |
| Declaration list | The list of class declarations in the requested authentication context. You can separate list items with the pipe character (\|).<br>For more information about this list, refer to the SAML specifications. |

| Setting | Description |
| --- | --- |
| Response decryption mode | Enable the support for encrypted SAML responses.<br>• DISABLED: Collibra only accepts plain-text SAML responses.<br>• OPTIONAL: Collibra can handle both encrypted and plain-text SAML responses.<br>• FORCED: Collibra only accepts encrypted SAML responses.<br>Once OPTIONAL or FORCED is selected, the encryption key pair is generated and added to the Collibra SAML keystore. A self-signed certificate is generated and works in most situations. If your IdP rejects self-signed certificates, you will have to add a certificate that is signed by a trusted 3rd party. |
| Validity period of the SAML certificate | The SAML certificate expiry date in years.<br>By default, the SAML certificate expires after 20 years. |

## Signout

The configuration of redirecting after signing out of Collibra.

| Setting | Description |
| --- | --- |
| Override signout URL (Requires restart) | • ✓ True: Redirect the user to a specific website after signing out.<br>• ✗ False (default): Redirect the user to the sign-in page after signing out. |
| Signout redirect URL (Requires restart) | The URL to be redirected to when signing out. |

## Import/Export

The configuration to avoid the Formula Injection vulnerability in Excel.

| Setting | Description |
| --- | --- |
| Escape Excel formulas | The option to disable Formula Injection into Excel. When enabling this option, an escape character is added at the beginning of Excel formulas during the export and is removed when importing formulas.<br>The escape character will be added to fields that start with one of the following characters:<br>• equation: =<br>• plus: +<br>• minus: -<br>• at-sign: @<br>This option is enabled by default. |
| Excel formulas escape character | The escape character for Excel formulas when exporting or importing data. |

# JWT

The JSON Web Token configuration.

| Setting | Description |
| --- | --- |
| JSON Web Key Set URL | The URL to retrieve public key information needed to verify the authenticity of JSON Web Tokens (JWTs), issued by an authorization server.<br>This setting is required to enable JWT authentication. |
| JWT Token Types | A case-insensitive comma-separated list of accepted JWT media types coming in the **typ** header parameter.<br>Leave blank if the authorization server does not provide a media type parameter.<br>The default values is **at+jwt,jwt**. |
| JWT Algorithms | A comma-separated list of accepted JWT algorithms coming in the **alg** header parameter. See https://tools.ietf.org/html/rfc7518#section-3.1 for details.<br>Leave blank to accept all digital signature algorithms. |
| JWT Issuer | The accepted issuer coming in the **iss** JWT claim.<br>Leave blank if the authorization server does not provide an issuer claim. |

| Setting | Description |
|---|---|
| JWT Audience | A comma-separated list of accepted audience values for the **aud** claim.<br>The value for this field is a configuration setting in your authorization server, which identifies your Collibra environment as the intended recipient of the JWT.<br>Leave blank if the authorization server does not provide an audience claim. |
| JWT Principal ID Claim Name. | The name of the JWT claim containing the principal's identity. See https://tools.ietf.org/html/rfc7519#section-4.1.2 for details.<br>Defaults to the standard subject claim, **sub**.<br>Change this setting only if your authorization server has other means of identifying the principal, for example, a **client_id** claim.<br>This setting is required if JWT authentication is enabled. |
| JWT Maximum Clock Skew | The maximum acceptable difference in seconds between the clocks of the machines running the authorization server and Collibra.<br>Differences smaller than the given amount are ignored when performing time comparisons for token validation.<br>The default value is 60 seconds if left blank. |

# Whitelists

The configuration for whitelist placeholders that can be used in security headers.

| Option | Description |
|---|---|
| connect-src whitelist | The 'connect-src' whitelist. To use this whitelist in a security header, use the '{connectSrcWl}' placeholder. |
| font-src whitelist | The 'font-src' whitelist. To use this whitelist in a security header, use the '{fontSrcWl}' placeholder. |
| frame-src whitelist | The 'frame-src' whitelist. To use this whitelist in a security header, use the '{frameSrcWl}' placeholder. |
| img-src whitelist | The 'img-src' whitelist. To use this whitelist in a security header, use the '{imgSrcWl}' placeholder. |

| Option | Description |
|---|---|
| script-src whitelist | The 'script-src' whitelist. To use this whitelist in a security header, use the '{scriptSrcWl}' placeholder. |
| style-src whitelist | The 'style-src' whitelist. To use this whitelist in a security header, use the '{styleSrcWl}' placeholder. |
| frame-ancestors whitelist | The 'frame-ancestors' whitelist. To use this whitelist in a security header, use the '{frameAncestorsWl}' placeholder. |
| Tableau frame-ancestors whitelist | The tableau 'frame-ancestors' whitelist. To use this whitelist in a security header, use the '{tableauFrameAncestorsWl}' placeholder. |

## Disclaimer

The configuration of a disclaimer upon signing in to Collibra.

| Setting | Description |
|---|---|
| Disclaimer | • ✓ True: Upon signing in, show a disclaimer that you have to agree with before you can continue.<br>• ✗ False (default): Don't show a disclaimer. |
| Disclaimer message | The disclaimer message that is shown after signing in.<br>If you leave this field empty, there is a default message.<br>You can use basic html tags, such as headers, paragraphs, images and hyperlinks. |

# Collibra Connect

The configuration to communicate with Collibra Connect.

| Setting | Description |
|---|---|
| Base URL | The URL to Collibra Connect. |
| Username | The username to connect to Collibra Connect. |

| Setting | Description |
|---|---|
| Password | The password to connect to Collibra Connect. |

# Register data source

Global parameters that apply to Data Source Registration.

| Setting | Description |
|---|---|
| Table types to ignore | A comma separated list of table types that are not ingested. For example, *INDEX* and *SEQUENCE*. |
| AWS regions restriction | A list of AWS regions Data Catalog is allowed to connect to. For example, *eu-west-3* and *us-east-2*. For a list of all AWS locations, see the AWS documentation.<br>• If you want to allow Collibra to make a connection to any AWS region, leave the field empty.<br>• If you remove a region from this list and the region was previously used for an S3 integration, you may want to delete the Glue database from the previously used region manually. By default, Collibra does not remove it. The Glue database has the following naming convention: collibra_catalog_<Asset Id>_<Domain Id><br>For example: collibra_catalog_d3174a88-5ffe-4d50-8fbe-7bf0832ec3af_5d198ce9-4e56-4d0e-a885-58204da50741<br>• When using Edge, a warning is added to the logs if an invalid region is detected in the restricted regions list. |
| AWS API call rate | Allowed number of AWS API calls per second.<br>Use this option to limit the number of API calls per second to prevent throttling errors from the AWS API. |
| Database registration via Edge | An option to enable database registration via Edge.<br>• ✓ True: Register a data source via Edge.<br>• ✗ False: Register a data source via Jobserver only.<br>Note Enabling data source registration via Edge does not prevent you from registering a data source via Jobserver as well. |

| Setting | Description |
|---|---|
| Data Quality Synchronization UI via DQ Connector on Edge | An option to enable the Data Quality extraction interface in Collibra<br>• ✔ True: The Quality extraction tab is available on the configuration page of a database asset<br>• ✘ False (default): The Quality extraction tab is not available and as such, it is not possible to extract and synchronize data quality information.<br>You can only enable Data Quality synchronization if you also enabled Database registration via Edge. |
| Amazon S3 synchronization via Edge | An option to enable Amazon S3 file system registration and synchronization via Edge.<br>• ✔ True: You can register and synchronize an Amazon S3 file system via Edge.<br>• ✘ False: You can only register an Amazon S3 file system via Jobserver.<br>Note Enabling the registration of an Amazon S3 file system via Edge does not prevent you from registering an Amazon S3 file system via Jobserver.<br>For more information, see Working with Amazon S3. |

# Jobserver (*)

The configuration of the Jobserver service.

| Setting | Description |
|---|---|
| Jobserver list | The list of registered Jobserver instances. |
| Name | The name of the Jobserver as it will appear when you register a data source in Data Catalog.<br>The name is a freely chosen name but it is recommended to only use alphanumerical characters and dashes, for example Jobserver-1.<br>You will have to use this name as the ID of the gateway and in the address of this configuration. |

| Setting | Description |
|---|---|
| Protocol | The protocol that is used for the communication between the Data Governance Center service and the Jobserver service.<br>It is recommended to use HTTPS, especially if the services are hosted in different network segments. |
| Address | The address (IP address, URL, hostname) of the Jobserver. |
| Trusted server CA certificate | The certificate of the trusted CA needed to validate the server certificate. If blank, the default truststore will be used. The default truststore is defined in the SSL configuration section of the DGC service.<br>The CA certificate of the server party (Jobserver). |
| Client certificate | The client certificate offered by the DGC service to the server. If blank, you cannot select mutual authentication as the Jobserver service authentication level. |
| Client private key | The private key of the DGC service's certificate. |
| Table profiling data size | The approximate maximum disk size of the data in MB that will be used to profile a table. The value cannot exceed 10,000. |
| Test connection timeout | This timeout is a time limit (in seconds) after which the connection test is stopped and a timeout error is shown. The default value is 60 seconds. |

# Data profiling

The global configuration of Data Profiling. Profiling must be executed again after a change in this section.

| Setting | Description |
|---|---|
| Maximum number of samples | The maximum number of rows taken as a sample during profiling or sampling. The default value is 100. |
| Maximum value length | The maximum length of a value extracted during profiling or sampling. Additional characters are trimmed. |

| Setting | Description |
|---|---|
| Default date pattern | The default format used to decode dates. It is the default pattern used for detecting dates when the **Date Pattern** and/or **Time Pattern** attribute is not specified in Column assets. |
| Default time pattern | The default format used to decode times. It is the default pattern used for detecting times when the **Date Pattern** and/or **Time Pattern** attribute is not specified in Column assets. |
| Default combined date and time pattern | The default format used to decode combined dates and times. It is the default pattern used for detecting combined dates and times when the **Date Pattern** and/or **Time Pattern** attribute is not specified in Column assets. |
| Empty values | A comma separated list of strings enclosed in double quotes. A value that matches one of those expressions is considered an empty value.<br>Please note that a database **null** value is always considered an empty value, for example *""*, *"na"* and *"none"*. |
| Data type detection threshold | The percentage of matching Column values to reach for an Advanced Data Type to be considered a possible Data Type for that Column. This is expressed as a value between 0.0 and 1.0). |
| Anonymize data | An option to anonymize sensitive data.<br>• ✓ True: Content in columns with data type Text or Geo is removed or replaced by a random hash value before the profiling results are sent to the cloud.<br>• ✕ False (default): No content is removed or replaced by a random hash value.<br>Tip If you profile and classify via Edge, the data in columns with data type Text or Geo is automatically anonymized before it is sent to Collibra Data Intelligence Cloud. |

| Setting | Description |
|---|---|
| Database profiling via Edge | An option to enable profiling and classifying synchronized metadata via Edge instead of Jobserver.<br>• ✓ True: Profiling and classify via Edge.<br>• ✕ False: Profile via Jobserver and classify via the Data Classification Platform.<br>Note You can only enable Database profiling via Edge if you also enabled Database registration via Edge. |
| Sample data on Edge (Beta feature) | Option to enable to also view sample data for data sources registered via Edge.<br>• ✓ True: Sample data can be shown for data sources registered via Edge.<br>• ✕ False: Sample data is not available for data sources registered via Edge<br>For all details about the configuration, see Configure the use of sample data via Edge. |

# Beta features

The configuration of features in beta state.

| Setting | Description |
|---|---|
| Tableau provisioning enabled | • ✓ True: Provisioning to Tableau is enabled.<br>• ✕ False (default): Provisioning to Tableau is disabled. |
| Max number of concurrent import jobs | The maximum number of import jobs that can be executed at the same time via the API. This is to avoid memory issues.<br>Default value is 4, set to *0* if there is no limit. |

| Setting | Description |
| --- | --- |
| Task sidebar | • ✓ True: Workflow tasks appear in the sidebar on both resource pages an the task management page. Task forms appear in the sidebar instead of dialog boxes. Users can seamlessly complete their tasks from the task management page and have a side-by-side view of the tasks and resource details on resource pages.<br>• ✕ False (default): Workflow tasks appear in the task bar on resource pages and in a sidebar on the task management page. Task forms appear in dialog boxes. The behavior is the same as with older versions of Collibra. |
| Settings landing enabled | • ✓ True: Show the new Settings landing page in your Collibra environment.<br>• ✕ False (default): Use the classic Settings page in your Collibra environment. |
| Search reindex using Output Module | • ✓ True: Enable the use of the Output Module when executing a search reindex.<br>• ✕ False (default): Disable the use of the Output Module when executing a search reindex. |
| Asynchronous indexing | • ✓ True: Enable asynchronous indexing.<br>• ✕ False (default): Disable asynchronous indexing. |
| New Scope page enabled | • ✓ True (default): Enable the use of the enhanced Scope page.<br>• ✕ False: Disable the use of the enhanced Scope page and use the basic Scope page instead. |
| Data Marketplace | • ✓ True: Data Marketplace is enabled. Anyone with the required permissions can use or configure the Data Marketplace application from the Applications icon ⠿.<br>• ✕ False: Data Marketplace is not enabled. This is the default value.<br><br>After you have enabled this setting, reindex Data Marketplace relations or reindex Collibra completely. |

| Setting | Description |
| --- | --- |
| Search over relations | • ✔ True: The Data Marketplace search also takes specific relations between assets into account. As a result, your search results not only include assets that directly match the search criteria, but also assets that match the criteria through specific relation types.<br>> Example A column with the name "Order" is included in a data set called "Customer". When Search over relations is active and you search in Data Marketplace for "Order", then the data set "Customer" appears in the search results because the data set contains this column.<br>For more information on this feature and the default relation types, see Filtering and searching based on relations in Data Marketplace.<br>• ✘ False: Data Marketplace search results do not take relations into account. This is the default value.<br>After you have enabled this setting, reindex Data Marketplace relations or reindex Collibra completely. |

| Setting | Description |
| --- | --- |
| Throttling enabled | • ✔ True: REST API v1 throttling is enabled.<br>• ✘ False (default): REST API v1 throttling is disabled. |
| Number of requests | The number of allowed request for the configured number of seconds. |
| Number of seconds | The number of seconds during which the configured number of requests can be performed. |

| Setting | Description |
| --- | --- |
| Throttling enabled | • ✔ True: REST API v2 throttling is enabled.<br>• ✘ False (default): REST API v2 throttling is disabled. |
| Number of requests | The number of allowed request for the configured number of seconds. |

| Setting | Description |
| --- | --- |
| Number of seconds | The number of seconds during which the configured number of requests can be performed. |
| **Setting** | **Description** |
| Throttling enabled | • ✓ True: GraphQL throttling is enabled.<br>• ✕ False (default): GraphQL throttling is disabled. |
| Number of requests | The number of allowed request for the configured number of seconds. |
| Number of seconds | The number of seconds during which the configured number of requests can be performed. |

# Graph query

The configuration of the Graph query engine which is used to retrieve data from the repository.

For the general Graph query settings in a cloud environment, you need the SUPER role. Contact Collibra support if you want to edit these settings.. For on-premises environments, you can edit the settings yourself.

The Graph query settings are not available in on-premises environments.

## Graph query limits

| Setting | Description |
| --- | --- |
| Enables limiting of the number of root nodes in result | • ✓ True: Enable limiting the number of root elements as result of a Graph query.<br>• ✕ False (default): Disable limiting the number of root elements as result of a Graph query. |

| Setting | Description |
| --- | --- |
| Maximum number of root nodes that can be requested with graph query API | The maximum number of root nodes that you can request in the view configuration of an API call (REST or workflow).<br><br>If you exceed this value in the view configuration, an exception is shown. If no value is defined in the view configuration, then the default value is taken.<br><br>The default value is 100,000.<br><br>> Note If the number of asset types or domain types exceeds the set number, the hierarchy will be incomplete. Make sure that the limit is always higher than the actual number of asset and domain types. |

## Graph query timeouts

| Setting | Description |
| --- | --- |
| Maximum number of minutes a graph query can run | The maximum number of minutes that the graph query runs before it will time out. The maximum is 1,440 minutes (1 day).<br><br>The default value is 480. |

# Table

The configuration of tables.

| Setting | Description |
| --- | --- |
| Time limit for loading data in tables in seconds | The time limit after which a table stops loading on a page.<br><br>Example A value of *600* means that if a table hasn't loaded within 600 seconds, the task is canceled and a timeout error is shown.<br><br>The default value is 60, the maximum value is *720* seconds. |

## Multi-column sort

The configuration of multi-column sorting.

| Setting | Description |
| --- | --- |
| Multi-column sorting on tables | • ✔ True: Tables can be sorted on multiple columns.<br>• ✖ False (default): Tables can be sorted on one column. |
| Number of columns available for multi-sort | Type the maximum number of columns that can be used to simultaneously sort tables.<br><br>The default value is 3, the minimum is 1, the maximum is 9.<br><br>This setting is only relevant is **Multi-column sorting on tables** is *True*. |

## Inherited responsibilities

| Setting | Description |
| --- | --- |
| Enable Inherited Responsibilities | • ✔ True: Show inherited responsibilities on asset views.<br>• ✖ False (default): Do not show inherited responsibilities on asset views.<br><br>Note This setting only affects asset views and tile sets. It does not affect the Responsibilities tab page of asset pages. |

# Cloud Data Classification configuration

With data classification you can automatically assign data classes to ingested data.

> Note In a Collibra Data Intelligence Cloud environment, you have to create a support ticket to configure this feature.

| Setting | Description |
|---|---|
| Enable Data Classification | • ✔ True: Enable Collibra's data classification technology.<br>• ✖ False (default): Do not use Collibra's data classification technology are not accepted. |

# Reporting

For more information about these settings, see Introduction to the Reporting Data Layer.

| Setting | Description |
|---|---|
| Cloud Provider | Cloud provider - AWS or GCP |
| Customer GUID | The GUID of your Collibra environment.<br>> Note This field is configured by Collibra Cloud Ops. |
| Collibra Insights download bucket name | The name of the AWS S3 bucket in which your reporting data is stored.<br>> Note This field is configured by Collibra Cloud Ops. |
| Collibra Insights AWS S3 Region | The AWS S3 region in which your data is processed.<br>> Note This field is configured by Collibra Cloud Ops. |
| Collibra Insights zip location pattern | A pattern with the format "/zip/insights_%s.zip", where "%s" is replaced by the Collibra Insights snapshot date.<br>> Note This field is configured by Collibra Cloud Ops. |

| Setting | Description |
| --- | --- |
| Tableau report URL pattern | The Tableau URL pattern, which should contain {reportName}.<br><br>Tip You can paste the URL from the Link field in Tableau, as described in Generate the dashboard reports you configured in Collibra Data Intelligence Cloud Settings. |
| Reports definitions | |
| Report view name | The report name, as you want it to appear on the report button in the Insights widget, for example "Data Maturity Dashboard". |
| Report name | The report name, as it appears in the URL of the Tableau report, for example "DataMaturityDashboard". |

# Catalog Experience

Data Catalog Experience improves the layout of Data Catalog's asset pages.

| Setting | Description |
| --- | --- |
| Enable Catalog experience | • ✓ True: Catalog experience is enabled. This will improve the layout of Data Catalog's asset pages, such as those of Data Set, Schema, Table and Column assets.<br>• ✗ False: Catalog experience is disabled. |
| Catalog Experience Titlebar theme | The theme for the Catalog experience. You can choose between the LIGHT and DARK.<br><br>This option is only applicable if the **Enable Catalog experience** option is enabled. |

# Diagrams

These settings determine dialog loading time and size limits.

| Setting | Description |
| --- | --- |
| Maximum loading time for the back end | The time limit, in seconds, after which a diagram stops fetching data.<br>The value must be a positive integer and cannot be greater than 3,600 (one hour).<br>The default value is 300.<br>Example A value of *300* means that if a diagram hasn't fetched all data within 300 seconds, the diagram stops fetching data and an empty diagram with a notification is shown. |
| Size limit for the backend | The maximum number of nodes plus edges that will be fetched by the backend, to build a diagram.<br>The value must be a positive integer and cannot be greater than 100,000.<br>The default value is 10,000.<br>Example A value of *10,000* means that if the total number of nodes plus edges is greater than 10,000, the diagram does not load and a notification is shown. |
| Size limit for the frontend | The maximum number of visible nodes plus edges that can be shown on the page.<br>The value must be a positive integer and cannot be greater than 10,000.<br>The default value is 2,000.<br>Example A value of *2,000* means that if the total number of visible nodes and edges is greater than 2,000, the diagram does not load and a notification is shown. |
| Maximum flow depth | The system-wide maximum number of flow relations between the start node and any other diagram node.<br>The value must be an integer between 1 and 100.<br>The default value is 50.<br>Note<br>• If the maximum flow depth is specified in the selected diagram view, that value supersedes the maximum you specify here.<br>• You can also manually adjust the flow depth in the diagram. |

| Setting | Description |
| --- | --- |
| Diagrams Business Qualifier Filter (*) | • ✔ True: Users can filter diagrams by a specified Business Qualifier asset.<br>• ✖ False (default): Users are unable to filter diagrams by Business Qualifier. |

| Setting | Description |
| --- | --- |
| Domains | Add a web domain, for example of a web application such as Power BI or Tableau, on which the Browser Extension automatically appears as overlay. |

# Edge

Edge configuration options, when changing an option, you only have to refresh the page that runs your Collibra environment.

| Setting | Description |
| --- | --- |
| Enable Edge jobs feature (beta) | • ✔ True: Enable the Edge jobs page, this page gives you a overview of all jobs and their status.<br>• ✖ False (default): Disable the Edge jobs page. |

# Tableau Metadata API

You need the Tableau metadata API to ingest Tableau 2020.2 and newer.

> Warning If you upgrade to Tableau version 2020.2 or newer, but previously synchronized an older Tableau version via the REST API and XML mapping, you have to prepare the migration procedure to prevent losing manually added relations, attributes, tags, comments and stitching results.

| Setting | Description |
| --- | --- |
| Enable Tableau metadata API | • ✓ True: Tableau metadata API is enabled. This enables you to ingest Tableau 2020.2 or newer into Data Catalog.<br>• ✕ False: Tableau metadata API is disabled. If you ingest Tableau 2020.2 or newer, the ingestion will fail. This prevents data loss of manually added relations and attributes. |

# Backup configuration management

| Setting | Description |
| --- | --- |
| Backup service URL | The URL of the backup service. |

# Job Service (Activities)

| Setting | Description |
| --- | --- |
| Number of executor threads for the Job Service | The maximum number of threads, or jobs, that the Job Service can run in parallel.<br>Generally speaking, increasingly the number of jobs running in parallel reduces overall processing time. Conversely, it requires more system resources, which can negatively impact performance. It also increases the risk of job conflicts. |

# Migration

The Migration feature allows you to migrate the operating model and views from one Collibra Data Intelligence Cloud environment to another environment. This makes it easier to migrate changes between development environments, testing environments and the actual production environment.

Migration is not meant to be used for backups, or to migrate instance data, such as assets and domains. You can use the import and export features to move assets to another environment. You can use backups for disaster recovery.

> Note Exporting and importing CMA files is restricted by the file upload settings, which determine the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings.

> Warning
> The versions of the source and target environment have to be the same. Migrating between different versions may lead to unexpected behavior.
>
> For example, migrating does not work correctly if you import a CMA file in an environment of version 2021.07 or older if the CMA file includes assignments of any of the following asset types:
>
> - BI Report Attribute
> - Business Qualifier
> - Column
> - Field
> - Looker Report Attribute
> - Report Attribute
> - Table
> - Tableau Report Attribute

# Overview of the migration procedure

1. Export objects from a source environment.
   a. Choose the objects that you want to migrate.
   b. Download the summary and the archive file.
   c. Review the summary.
2. Create a backup of your target environment.

   > Note This is technically not mandatory, but highly recommended.

3. Import the archive file.
   » You are guided through the import process. This process consists of the following main steps: upload the archive file, review the changes via a simulation, and start the import.
   » Once the import is completed, the model objects are created, edited, or removed as necessary. You can also download an import report.

# Best practice

It is highly recommended not to make risky changes to the metamodel of your Production environment. Instead, we recommend you use a separate Development environment and Testing environment:

1. Create a backup of your production environment.
2. Restore the backup in your Development and Testing environments.
3. Make the necessary changes in the Development environment.
4. Use the migration feature to re-apply the changes from the Development environment to the Testing environment.
5. Thoroughly test the changes in the Testing environment.
6. If required, repeat steps 3 to 5.
7. If you are satisfied with the changes, use the migration feature to re-apply the changes from the Testing environment to the Production environment.

> Note Since migration moves the operating model, the existing instance data in the Production environment is not changed.

# Export model objects

Using the Migration feature, you can export the model objects of a Collibra environment, for example if you want to import them later in another environment.

> Note Exporting and importing CMA files is restricted by the file upload settings, which determine the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings.

## Prerequisites

You have a global role that has the System administration global permission.

# Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Migration**.
   » The migration page appears on the **Export** tab page.
3. Select the model objects that you want to export.

| If you want to export... | Do the following: |
|---|---|
| Assignments | a. At the top of the page, click **Asset type assignments**.<br>b. Select one or more assignments.<br>Tip Click **Select all** to export all assignments, or click the name of a scope to export all assignments in that scope. |
| Global roles | a. At the top of the page, click **Global roles**.<br>b. Select one or more roles.<br>Tip Click **Select all** to export all roles. |
| Resource roles | a. At the top of the page, click **Resource roles**.<br>b. Select one or more roles.<br>Tip Click **Select all** to export all roles. |
| Workflows | a. At the top of the page, click **Workflows**.<br>b. Select one or more workflows.<br>Tip Click **Select all** to export all workflows. |
| Views | You can export different types of views, including asset views, dashboards, diagram views and search filters.<br>Note You can only export views that are public or shared with a global role. |

| If you want to export... | Do the following: |
| --- | --- |
| Dashboard views<br>Diagram views<br>Search filters<br>Global asset views | a. At the top of the page, click **Views**.<br>b. In the filter pane to the left, click the type of view that you want to export.<br>» The views that are public or shared with a global role appear in the table.<br>c. Select one or more views.<br>Tip To export all available views of a certain type, you can select the checkbox in front of the view type in the filter pane. |
| Asset views in application pages | a. At the top of the page, click **Views**.<br>b. In the filter pane to the left, click **Asset views - in Applications**.<br>» The applications pages appear in the table.<br>c. Do one of the following:<br>■ If you want to export all available views in all application pages, select the checkbox in front of **Asset views - in Applications** in the filter pane.<br>■ If you want to export all views of a specific application page, select the checkbox in front of the name of the application page.<br>■ If you want to export specific views, do the following:<br>i. Click the name of an application page.<br>» The available views appear in the right column.<br>ii. Select one or more views. |

| If you want to export... | Do the following: |
| --- | --- |
| Asset views in communities and domains pages | a. Click **Views**.<br>b. In the filter pane to the left, click **Asset views - in Communities and Domains**.<br>» The organization browser appears in the table.<br>c. Do one of the following:<br>■ If you want to export all available views in all community and domain pages, select the checkbox in front of **Asset views - in Communities and Domains** in the filter pane.<br>■ If you want to export all views of an community or domain, select the checkbox in front of the name of the community or domain.<br>■ If you want to export specific views, do the following:<br>i. Click the name of an community or domain.<br>» The available views appear in the right column.<br>ii. Select one or more views. |

> Note Referenced model objects are also exported based on the export logic. For example, if you export a workflow, all roles to which the workflow refers are also exported.

4. In the upper-right corner, click **Export**.
   » The **Provide file name and description** dialog box appears.
5. Enter the required information.

| Field | Description |
| --- | --- |
| Archive file name | The name of the exported archive file.<br>Note The extension is always CMA, which is short for Collibra Migration Archive. |
| Report file name | The name of the report file, which contains a summary of the exported model objects.<br>Note You cannot edit the name of the report file. |
| Description | The description of the archive. |

6. Click **Export**.
   » The report and the archive are downloaded.
7. Click **Close**.

# Migration export logic

The export logic of the migration feature determines how an object is exported: which fields it needs and which other objects it requires.

If you export an object, Collibra Data Intelligence Cloud automatically exports all referenced objects. For example, if you export a workflow, Collibra will also all export roles, asset types and status to which the workflow refers. For that reason, the migration feature differentiates between primary objects and secondary objects:

- Primary objects are objects that you choose to migrate.
- Secondary objects are objects that are needed for the correct behavior of a primary object or another secondary object.

## Primary objects

You can migrate most of the model objects and navigation artifacts:

- Model objects:
  - Assignments
  - Global roles
  - Resource roles
- Workflows
- Navigation artifacts that are public or shared with a role:
  - Table views
  - Dashboards
  - Diagram views
  - Search filters

Note
- For navigation artifacts, you cannot choose specific artifacts to migrate. All navigation artifacts that are public or shared with a role are migrated. Navigation artifacts that are private or only shared with specific users are not migrated.
- For model objects, you can choose specific objects to migrate. For example, you can migrate one specific workflow.
- You cannot choose to migrate anything else. Keep in mind that other objects might be migrated as secondary objects.

## Secondary objects

Secondary objects are objects that are referenced by a primary object or by another secondary object. These could also be instance data.

These include the following objects:

- Assets
- Asset types
- Assets referenced by a filter clause on a relation type filter
- Characteristic types
  - Attribute types
  - Complex relation types
  - Relation types
- Communities
- Data quality rules
- Domain types
- Domains
- Roles
- Status
- Validation rules

## Objects that cannot be migrated

Some objects will never be migrated. This is a non-exhaustive list:

- Attachments
- Comments

- Data quality scores
- Ratings
- Tags
- Tasks
- User groups
- Users

## Export logic by object

The following table shows an overview of all objects, their exported fields and the secondary objects to which they can refer.

| Object | Migrated fields and secondary objects |
| --- | --- |
| Asset | • Name<br>• ID<br>• Status<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>• Parent domain<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  ◦ Exclude from Autohyperlinking<br>  ◦ Domain type<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ▪ Parent domain types up to root<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ◦ Parent communities, up to the root level<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>• Asset type<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  ◦ Parent asset types, up to the root asset type (for example Business asset)<br>  ◦ Display options<br>  ▪ Color<br>  ▪ Symbol (none, Icon or Code)<br>  ▪ Code<br>  ▪ Icon reference<br>  ◦ displayNameEnabled |

| Object | Migrated fields and secondary objects |
| --- | --- |
| | ◦ ratingsEnabled |
| Asset type | • ID<br>• Name<br>• Description<br>• Parent asset types, up to the root asset type (for example Business asset)<br>• Display options<br>◦ Color<br>◦ Symbol (none, Icon or Code)<br>◦ Code<br>◦ Icon reference<br>• displayNameEnabled<br>• ratingsEnabled |

<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Assignment</td><td>
<ul>
<li>ID</li>
<li>Asset types referenced in the assignment
<ul>
<li>ID</li>
<li>Name</li>
<li>Description</li>
<li>Parent asset types, up to the root asset type (for example Business asset)</li>
<li>Display options
<ul>
<li>Color</li>
<li>Symbol (none, Icon or Code)</li>
<li>Code</li>
<li>Icon reference</li>
</ul></li>
<li>displayNameEnabled</li>
<li>ratingsEnabled</li>
</ul></li>
<li>Articulation rules</li>
<li>Fields referenced in the assignment
<ul>
<li>Attribute types
<ul>
<li>ID</li>
<li>Name</li>
<li>Description</li>
<li>Attribute type kind and its properties
<table>
<tr><th>Kind</th><th>Properties</th></tr>
<tr><td>Date</td><td>None</td></tr>
<tr><td>Multiple selection<br>(Multi value list)</td><td>Allowed values<br>Warning The list of allowed values is overwritten in the target environment, so it may remove values.</td></tr>
<tr><td>Numeric</td><td>Only integers<br>Metric</td></tr>
</table></li>
</ul></li>
</ul></li>
</ul>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td></td><td>
<table>
<tr><th>Kind</th><th>Properties</th></tr>
<tr><td>Script</td><td>Language.<br><br>Note This field is only used for validation rule assets.</td></tr>
<tr><td>Selection<br><br>(single value list)</td><td>Allowed values (adding values, AND removals)</td></tr>
<tr><td>Text</td><td>Plain text</td></tr>
<tr><td>True/False<br><br>(boolean)</td><td>Metric</td></tr>
</table>
<ul>
<li>Relation types
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<li>Role</li>
<li>Co-role</li>
<li>Head asset type
<ul>
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<li>Name</li>
<li>Description</li>
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<li>displayNameEnabled</li>
<li>ratingsEnabled</li>
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<ul>
<li>Complex relation types
<ul>
<li>ID</li>
<li>Name</li>
<li>Description</li>
<li>Display options
<ul>
<li>Color</li>
<li>Symbol (none, Icon or Code)</li>
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<li>Maximum cardinality</li>
</ul>
■ Leg types (relation types)
<ul>
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<li>Asset types that are head or tail of the relation types
<ul>
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| Object | Migrated fields and secondary objects |
| --- | --- |
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| Object | Migrated fields and secondary objects |
| --- | --- |
| | ■ Name<br>■ Description<br>■ Parent asset types, up to the root asset type (for example Business asset)<br>■ Display options<br>■ Color<br>■ Symbol (none, Icon or Code)<br>■ Code<br>■ Icon reference<br>■ displayNameEnabled<br>■ ratingsEnabled<br>■ Categorization relation types<br>■ ID<br>■ Description<br>■ Role<br>■ Co-role<br>■ Head asset type<br>■ ID<br>■ Name<br>■ Description<br>■ Parent asset types, up to the root asset type (for example Business asset)<br>■ Display options<br>■ Color<br>■ Symbol (none, Icon or Code)<br>■ Code<br>■ Icon reference<br>■ displayNameEnabled<br>■ ratingsEnabled<br>■ Tail asset type<br>■ ID<br>■ Name<br>■ Description<br>■ Parent asset types, up to the root asset type (for example Business asset) |

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<li>If domains or communities are included in the scope, their parent communities will be included too. Other children of its parent community will not be included, unless they are also in the scope.</li>
<li>The domain type of the included domains are also included.</li>
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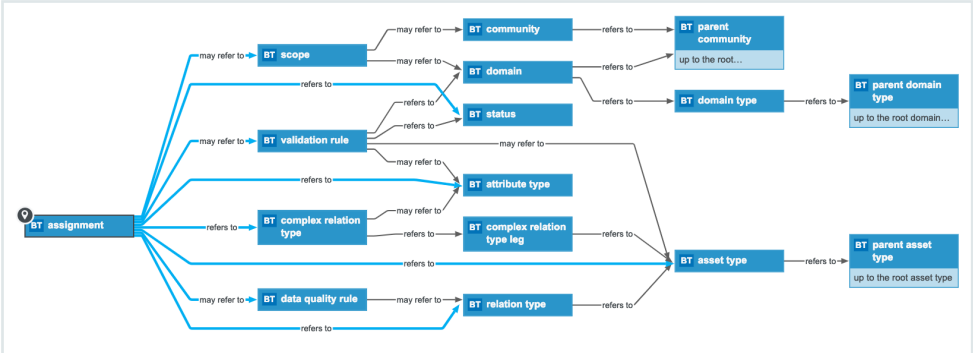
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■■ ID<br>
■■ Description<br>
■■ Role<br>
■■ Co-role<br>
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■■■ ID<br>
■■■ Name<br>
■■■ Description<br>
■■■ Parent asset types, up to the root asset type (for example Business asset)
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| Object | Migrated fields and secondary objects |
| --- | --- |
| |  |

| Object | Migrated fields and secondary objects |
| --- | --- |
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| Object | Migrated fields and secondary objects |
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| Domain type | • ID<br>• Name<br>• Description<br>• Parent domain types up to root<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description |

| Object | Migrated fields and secondary objects |
| --- | --- |
| Relation type | • ID<br>• Description<br>• Role<br>• Co-role<br>• Head asset type<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  ◦ Parent asset types, up to the root asset type (for example Business asset)<br>  ◦ Display options<br>  ▪ Color<br>  ▪ Symbol (none, Icon or Code)<br>  ▪ Code<br>  ▪ Icon reference<br>  ◦ displayNameEnabled<br>  ◦ ratingsEnabled<br>• Tail asset type<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  ◦ Parent asset types, up to the root asset type (for example Business asset)<br>  ◦ Display options<br>  ▪ Color<br>  ▪ Symbol (none, Icon or Code)<br>  ▪ Code<br>  ▪ Icon reference<br>  ◦ displayNameEnabled<br>  ◦ ratingsEnabled |

| Object | Migrated fields and secondary objects |
| --- | --- |
| Roles | • No secondary objects<br>• ID<br>• Name<br>• Description<br>• Global<br>• Permissions |

| Object | Migrated fields and secondary objects |
| --- | --- |
| Scope | • ID<br>• Name<br>• Description<br>• Communities<br>◦ ID<br>◦ Name<br>◦ Description<br>◦ Parent communities, up to the root level<br>▪ ID<br>▪ Name<br>▪ Description<br>Note<br>◦ If the scope contains an entire community that contains subcommunities and domains, the subcommunities and domains are not included.<br>◦ If domains or communities are included in the scope, their parent communities will be included too. Other children of its parent community will not be included, unless they are also in the scope.<br>◦ The domain type of the included domains are also included.<br>• Domains<br>◦ ID<br>◦ Name<br>◦ Description<br>◦ Exclude from Autohyperlinking<br>◦ Domain type<br>▪ ID<br>▪ Name<br>▪ Description<br>▪ Parent domain types up to root<br>▪ ID<br>▪ Name<br>▪ Description |

| Object | Migrated fields and secondary objects |
| --- | --- |
| | ◦ Parent communities, up to the root level<br>▪ ID<br>▪ Name<br>▪ Description |
| Status | • ID<br>• Name<br>• Description |

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| Object | Migrated fields and secondary objects |
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</table>

| Object | Migrated fields and secondary objects |
| --- | --- |
| | ■ Leg types (relation types)<br>■ Role<br>■ Co-role<br>■ Asset types that are head or tail of the relation types<br>■ ID<br>■ Name<br>■ Description<br>■ Parent asset types, up to the root asset type (for example Business asset)<br>■ Display options<br>■ Color<br>■ Symbol (none, Icon or Code)<br>■ Code<br>■ Icon reference<br>■ displayNameEnabled<br>■ ratingsEnabled<br>■ Minimum cardinality<br>■ Maximum cardinality<br>• The parent domain of the validation rule asset<br>◦ ■ ID<br>■ Name<br>■ Description<br>• The Validation Rule Domain type<br>◦ Parent domain types up to root<br>■ ID<br>■ Name<br>■ Description<br>• The Validation Rule asset type<br>◦ Parent asset types, up to the root asset type (for example Business asset)<br>• The status of the validation rule<br>◦ ID<br>◦ Name<br>◦ Description |

| Object | Migrated fields and secondary objects |
| --- | --- |
| Workflow | • Name<br>• Description<br>• Status<br>• Assignment rules (Applies To section)<br>  ◦ Asset types<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ▪ Parent asset types, up to the root asset type (for example Business asset)<br>  ▪ Display options<br>  ▪ Color<br>  ▪ Symbol (none, Icon or Code)<br>  ▪ Code<br>  ▪ Icon reference<br>  ▪ displayNameEnabled<br>  ▪ ratingsEnabled<br>  ◦ Communities<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ▪ Parent communities, up to the root level<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ◦ Domains<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ▪ Exclude from Autohyperlinking<br>  ▪ Domain type<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ▪ Parent domain types up to root |

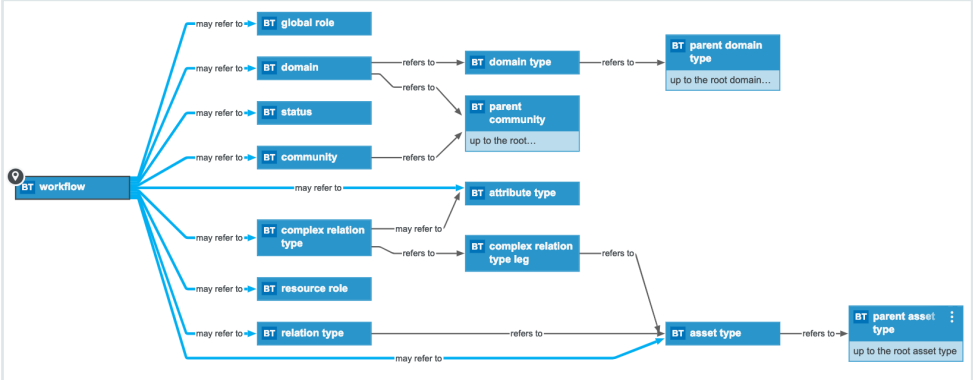
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■ Relation types<br>■ ID<br>■ Description<br>■ Role<br>■ Co-role<br>■ Head asset type<br>■ ID<br>■ Name<br>■ Description<br>■ Parent asset types, up to the root asset type (for example Business asset)
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| Object | Migrated fields and secondary objects |
| --- | --- |
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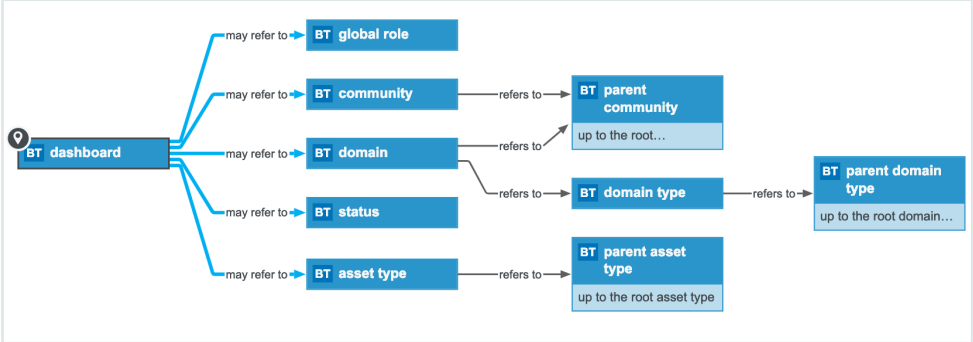
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| Object | Migrated fields and secondary objects |
| --- | --- |
| | ▪ Parent asset types, up to the root asset type (for example Business asset)<br>▪ Display options<br>▪ Color<br>▪ Symbol (none, Icon or Code)<br>▪ Code<br>▪ Icon reference<br>▪ displayNameEnabled<br>▪ ratingsEnabled<br>▪ Minimum cardinality<br>▪ Maximum cardinality<br>◦ Communities<br>▪ ID<br>▪ Name<br>▪ Description<br>▪ Parent communities, up to the root level<br>▪ ID<br>▪ Name<br>▪ Description<br>◦ Domains<br>▪ ID<br>▪ Name<br>▪ Description<br>▪ Exclude from Autohyperlinking<br>▪ Domain type<br>▪ ID<br>▪ Name<br>▪ Description<br>▪ Parent domain types up to root<br>▪ ID<br>▪ Name<br>▪ Description<br>▪ Parent communities, up to the root level<br>▪ ID<br>▪ Name |

| Object | Migrated fields and secondary objects |
| --- | --- |
| | ■ Description<br>◦ Roles<br>◦ Status<br>■ ID<br>■ Name<br>■ Description<br>• Business Item object type (i.e. Global vs Asset)<br>• Roles allowed to start<br>• Roles allowed to stop<br>• Roles allowed to reassign<br>• Start events<br>• Exclusivity<br>• Candidate user check disabled<br>• Guest user accessibility<br>• Registered user accessibility<br>• Process ID<br>• Workflow XML<br>• Flowable forms<br>  |
| Navigation objects | |

| Object | Migrated fields and secondary objects |
| --- | --- |
| Table view | • ID<br>• Name<br>• Description<br>• Configuration<br>• Is preferred<br>• Is default<br>• Sharing rules<br>• Assignment rules |

| Object | Migrated fields and secondary objects |
| --- | --- |
| Dashboard | Any field referenced in a template of a widget:<br>• ID<br>• Name<br>• Asset types<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  ◦ Parent asset types, up to the root asset type (for example Business asset)<br>  ◦ Display options<br>  ▪ Color<br>  ▪ Symbol (none, Icon or Code)<br>  ▪ Code<br>  ▪ Icon reference<br>  ◦ displayNameEnabled<br>  ◦ ratingsEnabled<br>• Communities<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  ◦ Parent communities, up to the root level<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>• Domains<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  ◦ Exclude from Autohyperlinking<br>  ◦ Domain type<br>  ▪ ID<br>  ▪ Name<br>  ▪ Description<br>  ▪ Parent domain types up to root |

| Object | Migrated fields and secondary objects |
| --- | --- |
| | ■ ID<br>■ Name<br>■ Description<br>◦ Parent communities, up to the root level<br>■ ID<br>■ Name<br>■ Description<br>• Roles<br>• Status<br>◦ ID<br>◦ Name<br>◦ Description<br>  |

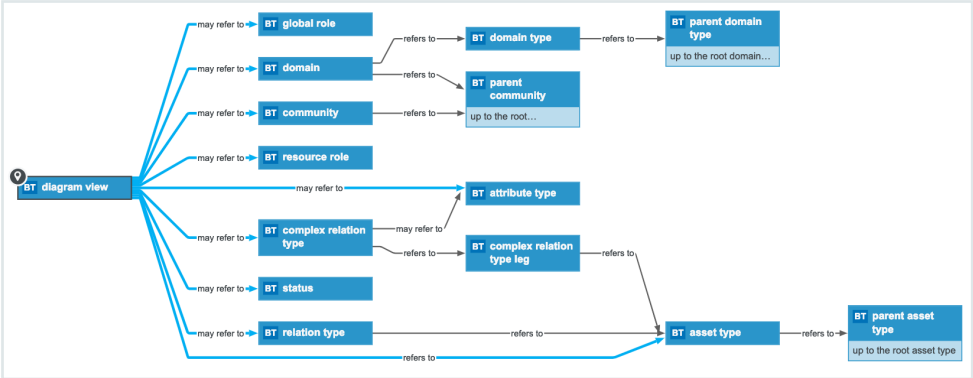
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| Object | Migrated fields and secondary objects |
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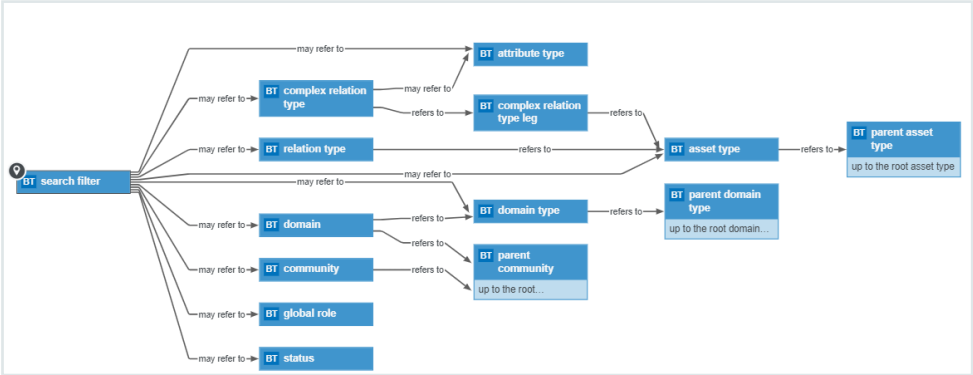
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| Object | Migrated fields and secondary objects |
| --- | --- |
| | • Roles<br>• Status<br>  ◦ ID<br>  ◦ Name<br>  ◦ Description<br>  |

# Understanding the migration export report

After exporting model objects from a Collibra Data Intelligence Cloud environment, a report is created and downloaded alongside the migration file itself. The report is an XLSX file containing a summary of what has been exported.

## Structure of the report

The report consists of three worksheets, each containing specific information:

| Worksheet name | Contents |
| --- | --- |
| Summary | A table that shows the amount of objects of each type that were exported. |
| Primary Resources | A table in which each row contains a primary object that you exported and the objects that it requires. |
| Associated Dependencies | A table in which each row contains a secondary object that was exported to support a primary or another secondary object. Its columns is identical to the Primary Resources worksheet. |

# Columns on the Primary Resources and Associated Dependencies worksheets

The tables on the Primary Resources and the Associated Dependencies worksheets contain information about the exported objects and the objects they require. Each column contains specific information:

| Column name | Contents |
| --- | --- |
| ResourceType | The type of the object that was exported.<br><br>For the primary resources, the available values are:<br><br>• Assignment<br>• Role<br>• View:ASSETTABLE<br>• View:DASHBOARD<br>• View:DIAGRAM<br>• View:DOMAINTABLE<br>• Workflow<br><br>For the associated dependencies, the available values are:<br><br>• AssetType<br>• AttributeType:BooleanAttributeType<br>• AttributeType:DateAttributeType<br>• AttributeType:NumericAttributeType<br>• AttributeType:ScriptAttributeType<br>• AttributeType:SingleValueListAttributeType<br>• AttributeType:StringAttributeType<br>• Community<br>• ComplexRelationType<br>• Domain<br>• DomainType<br>• RelationType<br>• Role<br>• Status<br><br>ID: The unique identifier of the object that was exported.<br><br>Name: The name of the object.<br>In most cases, the name is a clickable link that opens Collibra in your browser and shows you the object. The main exceptions are objects of the View:DIAGRAM type and objects of the View:ASSETTABLE type which are asset views containing a relation type on asset pages.<br><br>For most object types, this column contains only the name of the exported object. However, there are some exceptions:<br><br>• Assignments are exported by asset type. As a consequence, the name is built up accordingly: <asset type> : <assignment>.<br>Example Business Asset : Global Assignment.<br><br>• View:ASSETTABLE objects which represent an asset view containing a relation |

| Column name | Contents |
| --- | --- |
| | type on asset pages have a name which is built up by several elements: assetType-<asset type ID>\|relation type-<relation type ID>. In some cases, the name is followed by true\|catalog.<br><br>Example assetType-00000000-0000-0000-0001-000400000001\|relationType-00000000-0000-0000-0000-000000007062\|true\|catalog<br><br>• RelationType objects represent a relation type, which doesn't have a specific name. Their name is built up as follows: [<head asset type>] <role> / <co-role> [<tail asset type>].<br><br>Example [Business Asset] represents / represented by [Data Asset]<br><br>Dependencies: Overview of the secondary objects that are required by the object. They are ordered by type and show the ID and the name of the secondary object. |
| ID | The unique identifier of the object that was exported. |

| Column name | Contents |
| --- | --- |
| Name | The name of the object.<br><br>In most cases, the name is a clickable link that opens Collibra in your browser and shows you the object. The main exceptions are objects of the View:DIAGRAM type and objects of the View:ASSETTABLE type which are asset views containing a relation type on asset pages.<br><br>For most object types, this column contains only the name of the exported object. However, there are some exceptions:<br><br>• Assignments are exported by asset type. As a consequence, the name is built up accordingly: <asset type> : <assignment>.<br>Example Business Asset : Global Assignment.<br><br>• View:ASSETTABLE objects which represent an asset view containing a relation type on asset pages have a name which is built up by several elements: assetType-<asset type ID>\|relation type-<relation type ID>. In some cases, the name is followed by true\|catalog.<br>Example assetType-00000000-0000-0000-0001-000400000001\|relationType-00000000-0000-0000-0000-000000007062\|true\|catalog<br><br>• RelationType objects represent a relation type, which doesn't have a specific name. Their name is built up as follows: [<head asset type>] <role> / <co-role> [<tail asset type>].<br>Example [Business Asset] represents / represented by [Data Asset]<br><br>Dependencies: Overview of the secondary objects that are required by the object. They are ordered by type and show the ID and the name of the secondary object. |
| Dependencies | Overview of the secondary objects that are required by the object. They are ordered by type and show the ID and the name of the secondary object. |

# Tracing dependents and precedents

For each object, you can trace whether it is required by another object and which secondary objects it requires. Though this is not visually represented in the XLSX file, you can identify the dependencies by means of the ID.

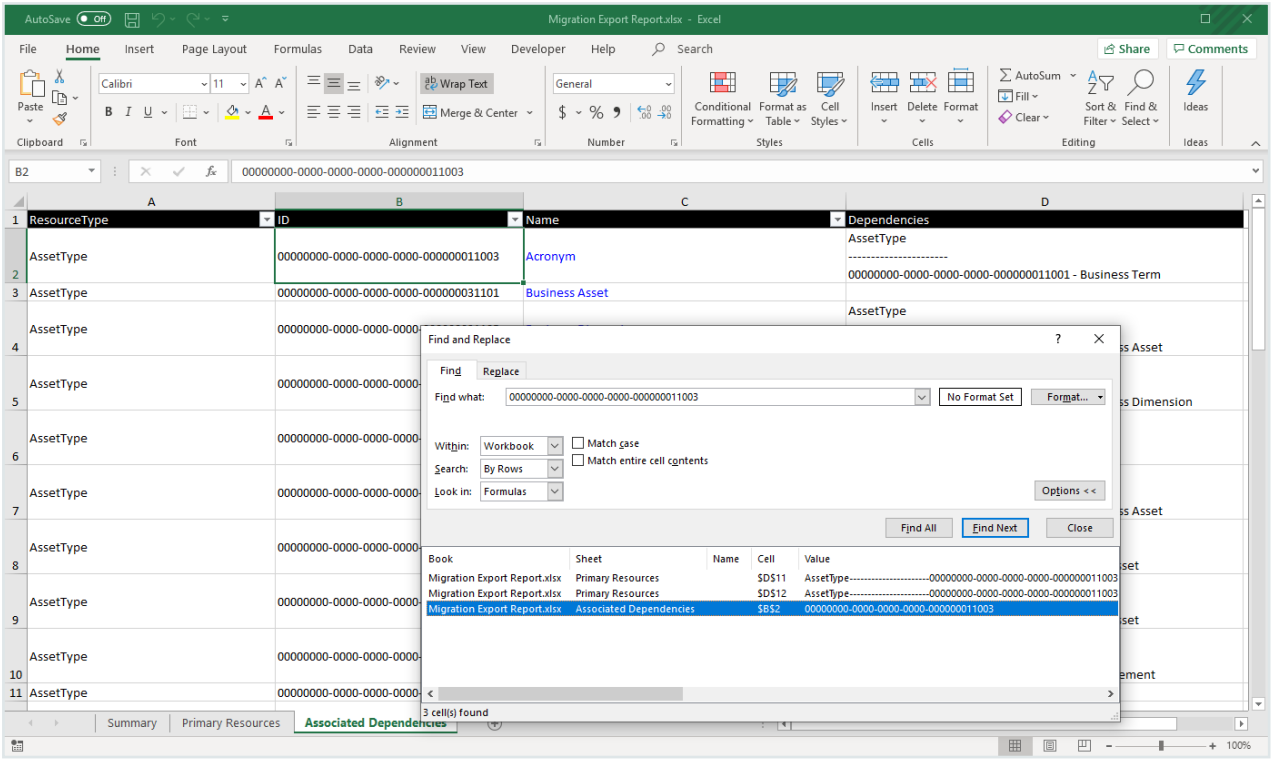
Learn more about the export logic of migration.

You can easily see which objects require which objects in the Dependencies column. A quick way to trace dependents and precedents is to copy the ID of a dependent object, and search for it in the entire workbook.

> Tip
> - All objects in the Associated Dependencies worksheet can be traced back to one or more primary objects.
> - You can let MS Excel find all matches in the entire workbook, which will give you a quick overview of all occurrences of the ID on all worksheets of the workbook.

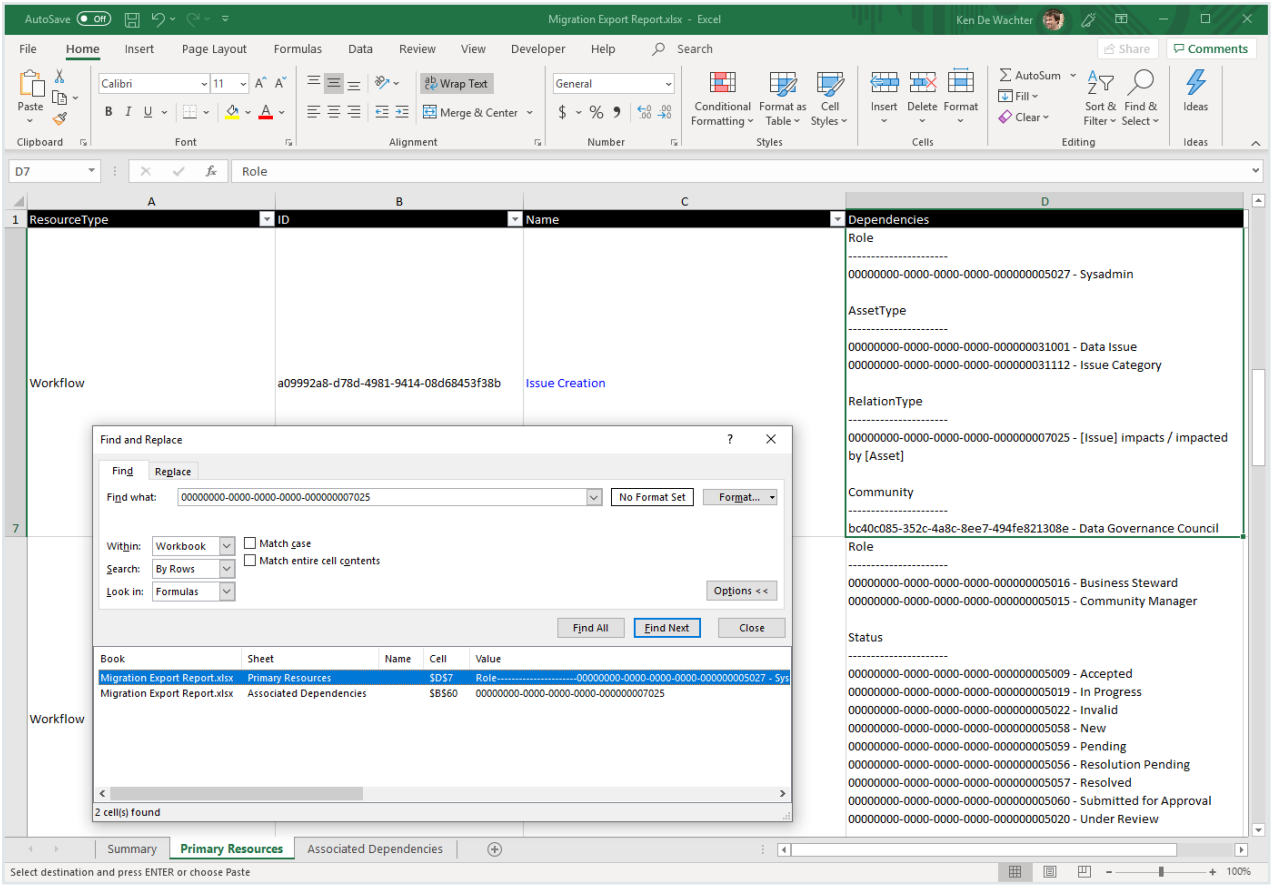
## Example 1: Precedents

You exported a number of workflows. You notice in the report that the Acronym asset type was also exported. You want to know why that asset type was exported. You search for all occurrences of the ID of the asset type in the entire workbook. You find concurrences on the Associated Dependencies and/or Primary Resources worksheets, where you can see which objects require the Acronym asset type.




## Example 2: Dependents

You exported the Issue Creation Workflow. In the Dependencies column, you see that it requires the [Issue] impacts / impacted by [Asset] relation type. You want to see whether that relation type in turn also requires other objects to be exported. You search for all occurrences of the ID of the relation type in the entire workbook. You find the row on the Associated Dependencies worksheet, where you can check its dependencies.




# Import model objects

Using the Migration feature, you can import an archive file containing model objects of a Collibra Data Intelligence Cloud environment.

> Note Exporting and importing CMA files is restricted by the file upload settings, which determine the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra support if you want to change the file upload settings.

> Warning
> - Importing model objects cannot be undone. Make sure that there is a recent backup available before doing this.
> - The versions of the source and target environment have to be the same. Migrating between different versions may lead to unexpected behavior.

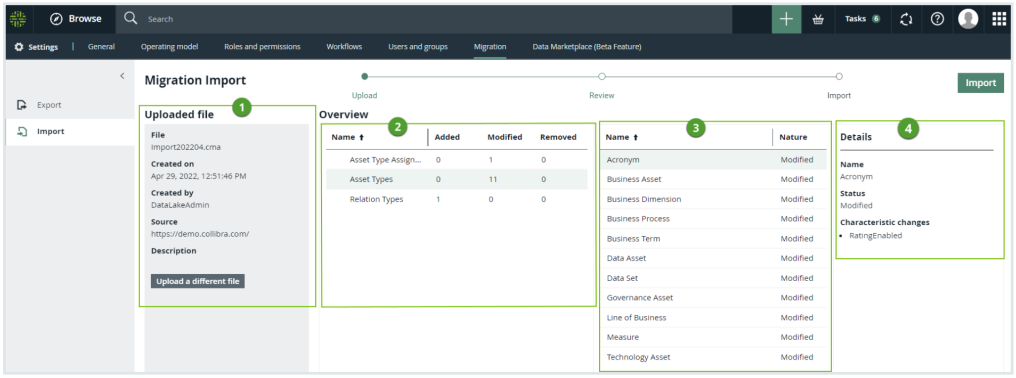
# Prerequisites

- You have a global role that has the System administration global permission.
- An archive file that was exported from an environment that has the same Collibra version.
- A backup of the environment.

# Steps

1. On the main menu, click ⠿, then ⚙ **Settings**.
   » The Collibra settings page opens.
2. Click **Migration**.
   » The migration page appears on the **Export** tab page.
3. In the tab pane, click **Migration** → **Import**.
   » The **Migration Import** page appears.
4. Upload an archive file in one of the following ways:
   - Drag and drop the file in the upload area.
   - Click **Upload a file**, browse to the location of the file and click **Open**.

   » An overview of the model objects that will be added, edited, or removed appears.




| Number | Description |
|---|---|
| 1 | Details about the uploaded archive file. |
| 2 | A table that shows, for each type, the number of model objects that will be added, edited, or removed. |
| 3 | When you select a specific type, the list of model objects appears. For each model object, you can see what will happen. |

| Number | Description |
| --- | --- |
| 4 | When you select a specific model object, details about change appear. |

5. Review the import simulation by verifying the model objects that will be added, edited, and removed.
6. Click **Import**.
   » The **Confirm import** dialog appears.
7. Select **I have an up-to-date backup containing the data and history of this Collibra platform**.
8. Click **Import**.
   » The archive file is imported, meaning that model objects are created, edited, or removed as necessary. This can take some time.
   » Once the import is completed, you can download an import report.

# Migration import logic

The import logic determines how migrated objects are matched to objects in the target environment, and what happens if a match is found.

## Import matching

During import, Collibra Data Governance Center tries to match each migrated object with an object in the target. In most cases, matching is done first based on the ID of the object. If the target environment does not have an object matching the ID, the matching algorithm will try to use a logical key. This logical key may be different depending of the type of object.

1. By ID
2. By logical key

> Tip
> In most cases, the logical key is the Name field, within the same type of object. For others, it is usually a combination of properties. For example:
>
> - For relation types, the logical key is the combination of the source (head) asset type, the role, the co-role and the target (tail) asset type.
> - For assignment, the logical key is the combination of the asset type ID and scope ID.

## Outcome of importing an object

Depending on the similarity of the objects in the archive and the target environment, importing an archive may create or edit objects.

> Tip Migration will never delete objects, but it may reduce assignments, rename assets and so on.

The table below contains the general import logic.

| Outcome | When | Description |
|---|---|---|
| A matched object is not edited. | 1. A match is found based on the matching logic.<br>2. The matched object has the same properties as the migrated object. | If the migrated object and the object in the target environment have the same properties, nothing happens. |

| Outcome | When | Description |
| --- | --- | --- |
| A matched object is edited. | 1. A match is found based on the matching logic.<br>2. The matched object has different properties than the migrated object. | The matched object will be edited with the properties from the migrated object. Migration will never delete objects, but it may reduce assignments, rename assets and so on.<br><br>Example<br>• If you migrate an assignment that includes fewer characteristic types than in the target, Collibra removes those characteristic types from the assignments, but does not delete the actual characteristic types.<br>• If you migrate a view with a filter on a community that has a different name in the target, Collibra renames the community in the target. |

<table>
<tr><th>Outcome</th><th>When</th><th>Description</th></tr>
<tr><td>An unmatched object is updated.</td><td>1. A match is found based on the ID of the objects, but they have different names.<br>2. In the target environment, another object has the same name as the migrated object.</td><td>1. The name of the existing object with the same name will be changed to <code><original name>-Migration-YYYYMMDD hh:mm:ss</code>.<br>2. The matched object will be edited with the properties from the migrated object, including the name.<br><br>Example<br>Before the import:<br>• The target environment contains an asset type with the following information: Name: <code>Crawler</code>, ID: <code>0000</code>.<br>• The target environment contains a second asset type with the following information: Name: <code>AWS Crawler</code>, ID: <code>1111</code>.<br>• The archive contains an asset type with the following information: Name: <code>AWS Crawler</code>, ID: <code>0000</code>.<br><br>After the import:<br>• The target environment contains an asset type with the following information: Name: <code>AWS Crawler</code>, ID: <code>0000</code>.<br>• The target environment contains a second asset type with the following information: Name: <code>AWS Crawler-Migration-20210101 13:15:12</code>, ID: <code>1111</code>.</td></tr>
<tr><td>A new object is created.</td><td>If no match is found.</td><td>A new object is created with all properties from the migrated object, including the ID.</td></tr>
</table>

# Import logic by object

Depending on the migrated object, different fields and secondary objects are exported along with it. This also affects the matching logic when these objects are imported in the target environment. The table below gives further information about how primary and secondary objects are imported.

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Asset</td><td>Matching logic based on:<br>1. ID<br>2. Full name and parent domain<br><br>The following table contains the possible cases and results.
<table>
<tr><th>Case</th><th>Matched asset 1</th><th>Matched asset 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID</td><td>n/a</td><td>Matched asset 1 is updated.</td></tr>
<tr><td>2</td><td>Full name and parent domain</td><td>n/a</td><td>Matched asset 1 is updated.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new asset is created.</td></tr>
</table>
<br>Note Assets in system-owned domains (for example Issues) cannot be migrated.</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Asset type</td><td>
Matching logic based on:<br><br>
1. ID and name<br>
2. Name<br>
3. ID<br><br>
The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched asset type 1</th><th>Matched asset type 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched asset type 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched asset type 1 is updated.<br><br>Matched asset type 2 is renamed.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched asset type 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched asset type 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new asset type is created.</td></tr>
</table>
<br>
Note<br>
• If for an asset type, ratings are disabled in the archive file, but the matched asset type in the target environment has ratings enabled, the import will fail. This is because migration cannot delete the ratings of assets of that type.<br>
• Asset types are imported using the depth-first order.
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Assignment</td><td>Matching logic based on:<br><br>1. ID<br>2. Asset type and scope<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched assignment 1</th><th>Matched assignment 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID</td><td>n/a</td><td>Matched assignment 1 is updated.</td></tr>
<tr><td>2</td><td>Asset type and scope</td><td>n/a</td><td>Matched assignment 1 is updated.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new assignment is created.</td></tr>
</table>
<br>Note Assignments are imported in a specific order:<br><br>1. Global assignments<br>2. Scoped assignments</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Attribute</td><td>Matching logic based on:<br><br>1. ID<br>2. Combination of parent asset, attribute type and value<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched object 1</th><th>Matched object 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID</td><td>n/a</td><td>Matched object 1 is updated.</td></tr>
<tr><td>2</td><td>Combination of parent asset, attribute type and value</td><td>n/a</td><td>Matched object 1 is updated.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new object is created.</td></tr>
</table>
<br>Note<br>• Attributes in system-owned domains (for example Issues) cannot be migrated.<br>• The only fields that you can migrate are validation scripts of validation rule assets and description fields of any resource.</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Attribute type</td><td>Matching logic based on:<br><br>1. ID, name and kind<br>2. Name and kind<br>3. ID and kind<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched attribute type 1</th><th>Matched attribute type 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID, name and kind</td><td>n/a</td><td>Matched attribute type 1 is updated.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td></td><td>
<table>
<tr><th>Case</th><th>Matched attribute type 1</th><th>Matched attribute type 2</th><th>Result</th></tr>
<tr><td>2</td><td>ID and name</td><td>n/a</td><td>Matched attribute type 1 is renamed.<br><br>A new attribute type is created.<br><br>Note<br>Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if:<br><br>1. An attribute type is deleted.<br>2. Using the Java/REST API, a new attribute type is created with the same name and ID as the deleted attribute type, but with a different kind.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched attribute type 1 is renamed.<br><br>A new attribute type is created.</td></tr>
<tr><td>4</td><td>Name and kind</td><td>n/a</td><td>The ID of matched attribute type 1 is updated.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td></td><td>
<table>
<tr><th>Case</th><th>Matched attribute type 1</th><th>Matched attribute type 2</th><th>Result</th></tr>
<tr><td>5</td><td>ID and kind</td><td>n/a</td><td>Matched attribute type 1 is renamed and updated.</td></tr>
<tr><td>6</td><td>ID</td><td>n/a</td><td>A new attribute type is created with a new ID.<br><br>Note<br>Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if:<br>1. An attribute type is deleted.<br>2. Using the Java/REST API, a new attribute type is created with the same name and ID as the deleted attribute type, but with a different kind.</td></tr>
<tr><td>7</td><td>ID and kind</td><td>Name and kind</td><td>Matched attribute type 2 is updated.</td></tr>
<tr><td>8</td><td>ID and kind</td><td>Name</td><td>Matched attribute type 1 is renamed and updated.<br><br>Matched attribute type 2 is renamed.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td></td><td>
<table>
<tr><th>Case</th><th>Matched attribute type 1</th><th>Matched attribute type 2</th><th>Result</th></tr>
<tr><td>9</td><td>ID</td><td>Name and kind</td><td>Matched attribute type 2 is updated.</td></tr>
<tr><td>10</td><td>ID</td><td>Name</td><td>Matched attribute type 2 is renamed.<br><br>A new attribute type is created with a new ID.</td></tr>
<tr><td>11</td><td>None</td><td>n/a</td><td>A new attribute type is created.</td></tr>
</table>
<br>Note If you import an attribute type of the kind Selection or Multiple Selection via the Solution install, allowed values from the CMA file are added to the list of allowed values in the target environment.
<br><br>Tip If you know that fundamental changes were made to attribute types, you can avoid import problems by deleting attribute types in the target migration before importing the archive.
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Community</td><td>
Matching logic based on:<br><br>
1. ID and name<br>
2. Name<br>
3. ID<br><br>
The following table contains the possible cases and results.
<table>
<tr><th>Case</th><th>Matched community 1</th><th>Matched community 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched community 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched community 1 is updated.<br><br>Matched community 2 is renamed.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched community 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched community 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new community is created.</td></tr>
</table>
<br>
Note Communities are imported using the depth-first order.
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Complex relation type</td><td>Matching logic based on:<br><br>1. ID and name<br>2. Name<br>3. ID<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched complex relation type 1</th><th>Matched complex relation type 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched complex relation type 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched complex relation type 1 is updated.<br><br>Matched complex relation type 2 is renamed.</td></tr>
<tr><td>3</td><td>ID</td><td>n/a</td><td>Matched complex relation type 1 is updated.</td></tr>
<tr><td>4</td><td>Name</td><td>n/a</td><td>Matched complex relation type 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new complex relation type is created.</td></tr>
</table>
</td></tr>
</table>

| Object | Import logic |
| --- | --- |
| | Note<br>• When a complex relation leg type has the same role, co-role and target asset type than an existing one in the matched complex relation type, the existing one will be updated, even when the ID is different. Adding a second relation type with the same properties would result in an error.<br>• Updating the assignment of a complex relation type which impacts leg types and attribute types can remove a leg type if it is no longer included in the migration archive. If the leg type has instance data, the import will fail.<br>• Migration does not update leg types when source, target, role, co-role are identical. |

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Data quality rule</td><td>Matching logic based on:<br><br>1. ID and name<br>2. Name<br>3. ID<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched data quality rule 1</th><th>Matched data quality rule 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched data quality rule 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched data quality rule 1 is updated.<br><br>Matched data quality rule 2 is renamed.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched data quality rule 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched data quality rule 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new data quality rule is created.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Domain</td><td>
Matching logic based on:<br><br>
1. ID and name<br>
2. Name and parent community<br>
3. ID<br><br>
The following table contains the possible cases and results.
<table>
<tr><th>Case</th><th>Matched domain 1</th><th>Matched domain 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched domain 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name and parent community</td><td>Matched domain 1 is updated.<br><br>Matched domain 2 is renamed.</td></tr>
<tr><td>3</td><td>Name and parent community</td><td>n/a</td><td>Matched domain 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched domain 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new domain is created.</td></tr>
</table>
<br>
Note Issue domains cannot be migrated
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Domain type</td><td>
Matching logic based on:<br><br>
1. ID and name<br>
2. Name<br>
3. ID<br><br>
The following table contains the possible cases and results.
<table>
<tr><th>Case</th><th>Matched domain type 1</th><th>Matched domain type 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched domain type 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched domain type 1 is updated.<br><br>Matched domain type 2 is renamed.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched domain type 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched domain type 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new domain type is created.</td></tr>
</table>
<br>
Note Domain types are imported using the depth-first order.
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Relation type</td><td>Matching logic based on:<br><br>1. ID, source asset type and target asset type<br>2. Source asset type, target asset type, role and co-role<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched relation type 1</th><th>Matched relation type 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID, source asset type and target asset type</td><td>n/a</td><td>Matched relation type 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Source asset type, target asset type, role and co-role</td><td>Matched relation type 2 is updated.</td></tr>
<tr><td>3</td><td>Source asset type, target asset type, role and co-role</td><td>n/a</td><td>Matched relation type 1 is updated.</td></tr>
<tr><td>4</td><td>None</td><td>n/a</td><td>A new relation type is created.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Roles</td><td>Matching logic based on:<br><br>1. ID and name<br>2. Name<br>3. ID<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched role 1</th><th>Matched role 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched role 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched role 1 is updated.<br><br>Matched role 2 is renamed.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched role 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched role 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new role is created.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Scope</td><td>Matching logic based on:<br><br>1. ID and name<br>2. Name<br>3. ID<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched scope 1</th><th>Matched scope 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched scope 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched scope 1 is updated.<br><br>Matched scope 2 is renamed.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched scope 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched scope 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new scope is created.</td></tr>
</table>
<br>Note The global scope cannot be migrated.</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Status</td><td>Matching logic based on:<br><br>1. ID and name<br>2. Name<br>3. ID<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched status 1</th><th>Matched status 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID and name</td><td>n/a</td><td>Matched status 1 is updated.</td></tr>
<tr><td>2</td><td>ID</td><td>Name</td><td>Matched status 1 is updated.<br><br>Matched status 2 is renamed.</td></tr>
<tr><td>3</td><td>Name</td><td>n/a</td><td>Matched status 1 is updated.</td></tr>
<tr><td>4</td><td>ID</td><td>n/a</td><td>Matched status 1 is updated.</td></tr>
<tr><td>5</td><td>None</td><td>n/a</td><td>A new status is created.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Validation rule</td><td>
Matching logic based on:<br><br>
1. ID<br>
2. Full name and parent domain<br><br>
The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched validation rule 1</th><th>Matched validation rule 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID</td><td>n/a</td><td>Matched validation rule 1 is updated.</td></tr>
<tr><td>2</td><td>Full name and parent domain</td><td>n/a</td><td>Matched validation rule 1 is updated.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new validation rule is created.</td></tr>
</table>
<br>
Note If there is a match, only the Description and Validation script are changed. Other characteristics are not changed.
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Workflow</td><td>Matching logic based on:<br><br>1. Workflow process ID<br>2. Workflow name<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched workflow 1</th><th>Matched workflow 2</th><th>Result</th></tr>
<tr><td>1</td><td>Process ID and workflow name</td><td>n/a</td><td>Matched workflow 1 is updated.</td></tr>
<tr><td>2</td><td>Process ID</td><td>Workflow name</td><td>Matched workflow 1 is updated.<br><br>Matched workflow 2 is renamed with a suffix of – <code>$processId</code>.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new workflow is created.</td></tr>
</table>
</td></tr>
<tr><td>Navigation objects</td><td></td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Table view</td><td>Matching logic based on:<br><br>1. ID<br>2. Name, type, location and common assigned resources<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched table view 1</th><th>Matched table view 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID</td><td>n/a</td><td>Matched table view 1 is updated.</td></tr>
<tr><td>2</td><td>Name, type, location and at least 1 common assigned resource</td><td>n/a</td><td>Matched table view 1 is updated.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new table view is created.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Dashboard</td><td>Matching logic based on:<br><br>1. ID<br>2. Name, type, location and common assigned resources<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched dashboard 1</th><th>Matched dashboard 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID</td><td>n/a</td><td>Matched dashboard 1 is updated.</td></tr>
<tr><td>2</td><td>Name, type, location and at least 1 common assigned resource</td><td>n/a</td><td>Matched dashboard 1 is updated.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new dashboard is created.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Diagram view</td><td>Matching logic based on:<br>1. ID<br>2. Name, type, location and common assigned resources<br><br>The following table contains the possible cases and results.<br><br><table><tr><th>Case</th><th>Matched diagram view 1</th><th>Matched diagram view 2</th><th>Result</th></tr><tr><td>1</td><td>ID</td><td>n/a</td><td>Matched diagram view 1 is updated.</td></tr><tr><td>2</td><td>Name, type, location and at least 1 common assigned resource</td><td>n/a</td><td>Matched diagram view 1 is updated.</td></tr><tr><td>3</td><td>None</td><td>n/a</td><td>A new diagram view is created.</td></tr></table></td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Search filter</td><td>Matching logic based on:<br><br>1. ID<br>2. Name, type, location and common assigned resources<br><br>The following table contains the possible cases and results.<br><br>
<table>
<tr><th>Case</th><th>Matched search filter 1</th><th>Matched search filter 2</th><th>Result</th></tr>
<tr><td>1</td><td>ID</td><td>n/a</td><td>Matched search filter 1 is updated.</td></tr>
<tr><td>2</td><td>Name, type, location and at least 1 common assigned resource</td><td>n/a</td><td>Matched search filter 1 is updated.</td></tr>
<tr><td>3</td><td>None</td><td>n/a</td><td>A new search filter is created.</td></tr>
</table>
</td></tr>
</table>

# Migration import troubleshooting

In some very specific situations, the Migration feature has some limitations which may lead to undesired effects. This topic describes a situation in which objects seem to disappear during the import.

## Import logic

For each object in the migration file, the Migration feature tries to find a match in the target environment. First, it looks for objects of the same object type and with the same ID. If no

matches are found, it looks for objects of the same object type with the same logical key. For most objects, this is the name. For more information about the import logic see Migration import logic.

## Summary

The same object exists in your source and target environment. You renamed the object in your source environment, and created an object of the same type and gave it the original name of the first object. This may cause the import feature to overwrite the first object when importing in the target environment.

## Detailed explanation

1. In the beginning, the source and the target environment are the same.
2. You edit the name of an existing source object, and optionally other properties.
   » This has no effect on the ID of the first source object.
3. You create an object of the same type and gave it the original name of the first object.
4. You export both source objects to a migration file.
5. You import the migration file in the target environment.
   » When importing the migration file in the target environment, two scenarios can take place.

### Scenario 1: The older object is processed first.

a. The import logic looks for the first target object based on the ID.
   » The import logic finds the first target object.
b. The import logic overwrites the first target object with the first source object.
   » This does not affect the ID, but it does change the name of the first target object.
c. The import logic looks for the second object based on the ID.
   » The import logic does not find the second target object.
d. The import logic looks for an object based on the name.
   » The import logic does not find the second target object.
e. The import logic creates a new object with the properties of the second source object, including its name.
f. The two objects in the two environments are identical.

### Scenario 2: The newer object is processed first.

a. The import logic looks for the second target object based on the ID.
   » The import logic does not find a target object.
b. The import logic looks for the second object based on the name.
   » The import logic finds the target object of the first source object.
c. The import logic overwrites the first source object with the second target object.
   » This has no effect on the ID.
d. The import logic looks for the first target object based on the ID.
   » The import logic finds the first target object, which was overwritten by the second source object.
e. The import logic overwrites the first source object again, this time with the first target object.
   » This does not affect the ID, but it does change the name of the first target object.
f. The second target object does not exist in the target environment.

# Replace the Collibra logo

By default, Collibra Data Intelligence Cloud has the Collibra logo on the sign-in page and in the top-left corner.

You can use your own images:

- As the logo in the upper-left corner.
- On the sign-in page and while opening Collibra.

# Prerequisites

- You need a user with the SUPER role in Collibra Console.
- You need knowledge of the JSON syntax.
- You need images with the following properties:
  - The recommended image format is SVG, but JPG and PNG are also supported.
  - The dimensions of the image on the sign-in page must be 310 x 85 px (w x h).
  - The dimensions of the logo in Collibra must be 50 x 45 px (w x h).

- If the custom image is larger, it will be resized to the mentioned dimensions, so make sure that the custom logo has the same width/height ratio.

> Important Contact Collibra support after completing step 1 below If you are changing the logo for a Collibra Data Intelligence Cloud environment. For an on-premises Collibra environment, you can change the logo all by yourself.

# Steps

1. Add your images to the Collibra folder structure:
   a. Create a backup of your cloud environment that only includes the customizations and configuration.
   b. Download the backup.
      » A ZIP file is downloaded to your hard disk.
   c. Edit the backup:
      i. Extract the ZIP file on your local computer.
         » A folder with the name of the ZIP file is created.
      ii. In the created folder structure, go to **<backup-dir>/dgc/images**.

      > Note If any of these folders do not exist, create them.

      iii. Copy your images to this folder.
      iv. In your file browser, open the extracted backup folder with the new logos.
      v. Create a ZIP file of all the contents in this folder.

      > Warning Do not create a ZIP file from the extracted directory itself. Doing so will result in an invalid backup file.

   d. Restore the new backup file:
      i. Open Collibra Console with a user profile that has at least the **ADMIN** role.
         » Collibra Console opens with the **Infrastructure** page.
      ii. Upload the new ZIP file to Collibra Console.
      iii. Restore the customizations and configuration of the new ZIP file.
      iv. Wait until your environment is up and running again.
2. In the tab pane, click the Data Governance Center service of your environment.

3. Click **Configuration**.
4. Click **Edit configuration**.
5. Go to the section **User interface configuration**.
6. In the **Page definition overrides** field, copy the following lines and paste them between the curly brackets:

```
"all": {
   "headerLogo": "/resources/images/<image for the top-left
corner>" ,
   "signinLogo": "/resources/images/<image for the sign-in
page>"
   }
```

> Note
>
> - If there is already content in this field, make sure that you add these lines as new key-value pair.
> - You don't have to use both images. If you only want the change the image on the sign-in page, omit the `headerLogo` line and vice versa.
> - If you want to use a publicly available image that is not stored in the Collibra folder structure, replace the path to the image by the public URL.

7. Click **Save all**.

# What's next?

Sign in to Collibra to see the new images. If you signed in before, you may have to clear your browser cache.

> Tip You can also change the loading message by editing the `ui.core.loadingapplication` key of the interface text.

# Use a custom favicon

By default, Collibra Data Intelligence Cloud has the Collibra logo as favicon.

This article describes how you can use your own favicon.

> Note This procedure is applicable for on-premises and cloud environments.

# Prerequisites

- Your favicon has the name **favicon.ico**.

# Steps

1. Create a backup of your cloud environment that only includes the customizations and configuration.
2. Download the backup.
3. Extract the backup somewhere on your local computer.
4. In the created folder structure, go to **<backup-dir>/dgc/images/icons**.

   > Note If any of these folders do not exist, create them.

5. Copy your **favicon.ico** in this folder.
6. Create a ZIP file of all the content inside the backup folder.
   Do not create a ZIP file from the extracted directory itself, this would result in an invalid backup file.
7. Upload the new ZIP file to Collibra Console.
8. Restore only the customizations and configuration of the new ZIP file.
9. Wait until your environment is up and running again.
10. Clear the cache of your browser and go to your environment.
    » Your own favicon will appear.