Collibra

Collibra Data Intelligence Cloud

Browser Extension

Version BETA

Collibra

Collibra Browser Extension

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You can find the most up-to-date technical documentation on our Documentation Center at

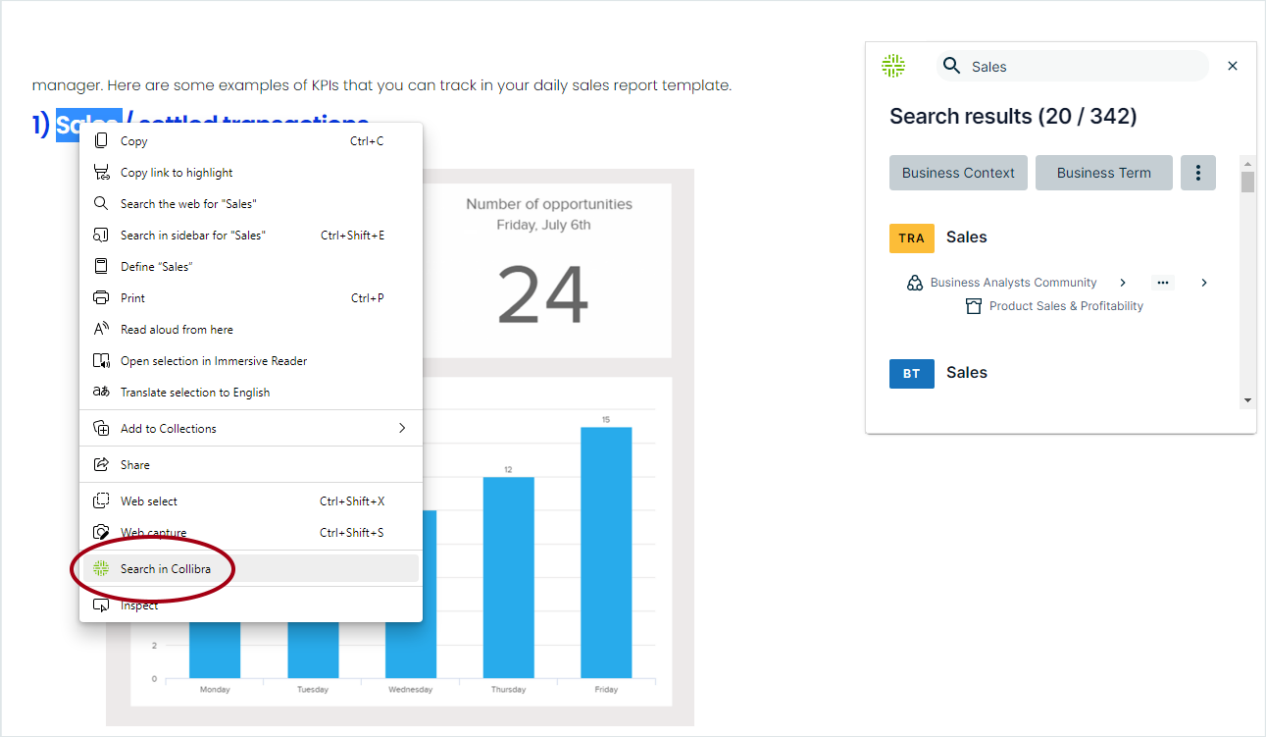
https://productresources.collibra.com/docs/collibra/latest/Content/BrowserExtension/to_browser-extension.htm

Contents

About Collibra Browser Extension

Collibra Browser Extension allows you to quickly search for definitions of business terms and acronyms, and information about column names and product names, from any web page against your Collibra Data Intelligence Cloud environment. Thus, when browsing a web page, you can easily find more information from your Collibra environment about any text that is displayed on the current page, without having to open the web interface of Collibra.

> Note Collibra Browser Extension works on any web page. However, if you want to see the Collibra Browser Extension overlay on a web page, you must add a web domain.

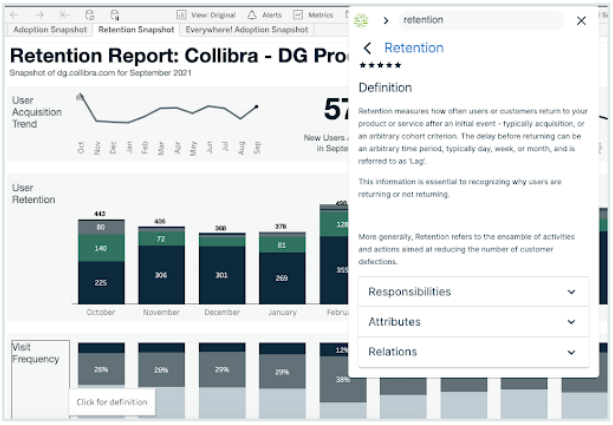


Power BI or Tableau

If you are working in a business intelligence (BI) tool such as Power BI or Tableau, the Browser Extension can automatically identify the document on which you are working and

show you the main information of that document, in a single click.

For example, when working on a Tableau dashboard, if you click the Collibra overlay, the information of that dashboard is shown in the extension.



> Note The extension supports dashboards, reports, and workbooks in Power BI, and supports only dashboards in Tableau.

How the Browser Extension communicates with Collibra

Collibra Browser Extension uses REST API to communicate with Collibra Data Intelligence Cloud. When you sign in to Collibra using your web browser, a cookie is created and stored in your browser. The extension uses this cookie to identify and authenticate you when making requests to Collibra's REST API.

The extension itself does not handle the authentication process. Instead, it relies on the browser to provide one of the specific cookies ('JSESSIONID', '__Secure-Session-ID', or '__Host-Session-ID') from the configured Collibra platform URL. These cookies serve as proof of your authentication, allowing the extension to access the appropriate information and perform actions within Collibra.

All communication between the extension and Collibra's API occurs over HTTPS, using the Transport Layer Security (TLS) protocol.

Get started with the Browser Extension

You can use Collibra Browser Extension for a seamless interaction between web pages and your Collibra Data Intelligence Cloud resources.

The Browser Extension allows you to:

- Search for definitions, product names, and more, from any web page via the context menu.
- Find business context and view the lineage of data in business intelligence tools, for example Power BI and Tableau, with a single click.

Step 1: Before you start

Ensure that you can access the Collibra environment of your company.

Step 2: Install the extension

Download and install the Collibra Browser Extension from the web store of your browser.

> Note You can add the extension on all Chromium-based web browsers, such as Google Chrome and Microsoft Edge.

Step 3: Configure the extension

Add the URL of the Collibra environment of your company, and, optionally, some web domains.

> Tip Adding web domains allows the extension to automatically match data from a business intelligence tool, for example Power BI or Tableau, with resources in your Collibra environment.

Step 4: Use the extension

You can use the extension in the following ways:

- Search via context menu.
- Auto-match data.

Add the Browser Extension to your browser

You can add Collibra Browser Extension to your browser via the web store.

Before you begin

Ensure that you have a Chromium-based browser, such as Google Chrome or Microsoft Edge.

Steps

Chromium-based browsers

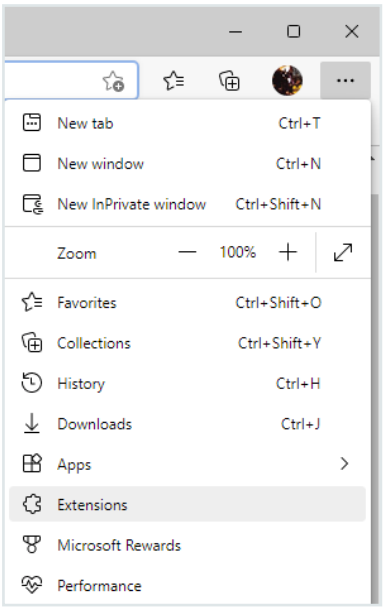
1. Open the web store of your browser.

   > Tip For more information, go to the user guide of your browser.

2. Search for *Collibra Browser Extension*.
   » **Collibra Browser Extension** appears in the search results.
3. Click **Collibra Browser Extension**.
   A page containing the details of the extension opens.
4. Click **Add to Chrome**, and then, in the dialog box that follows, click **Add extension**.
   » **Collibra Browser Extension** is added to your browser.

Microsoft Edge

1. On the main menu, click **Extensions**.



   » The **Extensions** dialog box appears.
2. Click **Manage extensions**.
   The **Extensions** page opens.
3. Click **Chrome Web Store**.

> Tip If the cookie consent window appears, accept or customize the default cookie settings.

4. Sign in to the web store.
5. In the message that appears at the top of the page, click **Allow extensions from other stores**, and then, in the dialog box that follows, click **Allow**.
6. Search for *Collibra Browser Extension*.
   » **Collibra Browser Extension** appears in the search results.
7. Click **Collibra Browser Extension**.
   A page containing the details of the extension opens.
8. Click **Get**, and then, in the dialog box that follows, click **Add extension**.
   » Collibra Browser Extension is added to Microsoft Edge.

What's next?

Configure the Browser Extension.

Preconfigure the Browser Extension

If you are an administrator, you can preconfigure the Collibra Browser Extension via Collibra Console. The preconfiguration enables faster onboarding of new users of the Browser Extension.

Preconfiguring the Browser Extension involves specifying the web domains to show the Browser Extension overlay for a quick search and to enable auto-matching for tools such as Power BI and Tableau.

The preconfiguration eliminates the need for users to specify the web domains. They can, however, still add their own web domains.

Steps

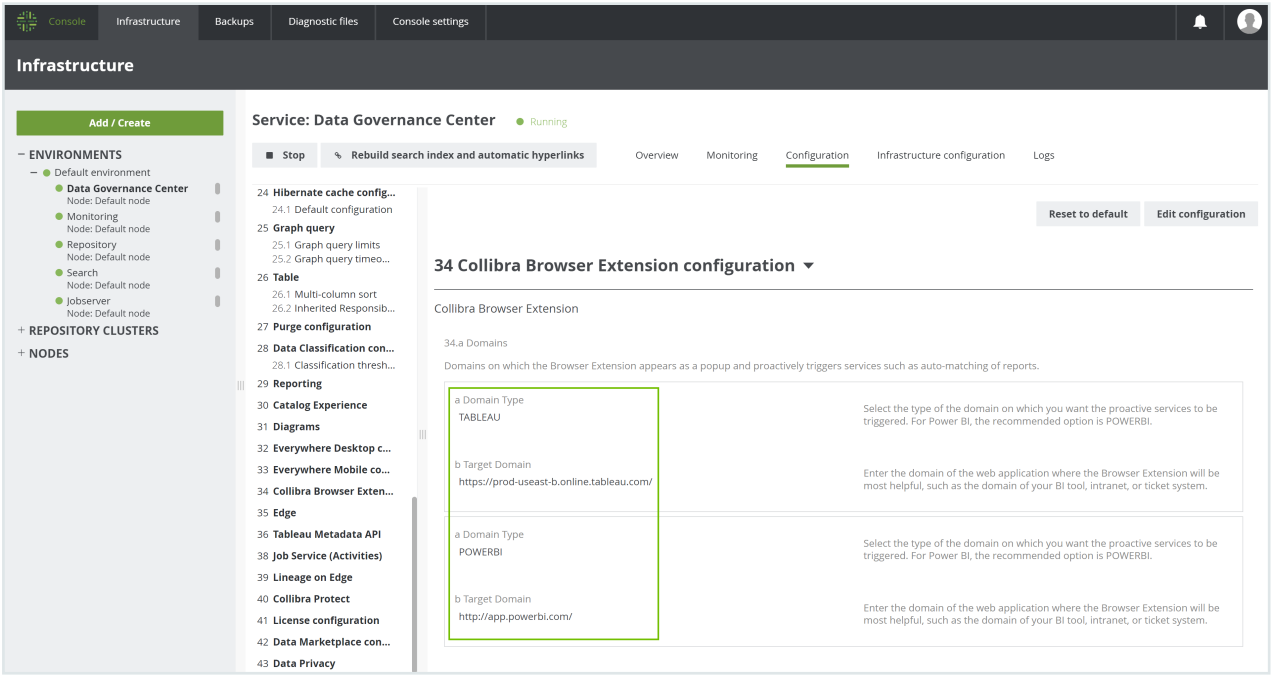
1. Open the DGC service settings for editing:
   a. Open Collibra Console.
      » Collibra Console opens with the **Infrastructure** page.
   b. In the tab pane, expand an environment to show its services.
   c. In the tab pane, click the Data Governance Center service of that environment.
   d. Click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

Field	Description
Domain Type	The type of the web domain on which you want the proactive services to be triggered (for example, Power BI or Tableau). Tip ◦ For the Power BI domain, select **POWERBI**. We recommend that you select **POWER_BI_UNRESTRICTED** only if the default domain type for Power BI, **POWERBI**, does not work as expected (for example, for an on-premises Power BI implementation). ◦ For websites for which we do not provide the auto-matching feature, select **DEFAULT**.

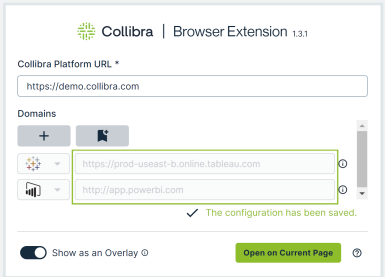
Field	Description
Target Domain	The address of the web application where the Collibra Browser Extension will be most helpful, such as the web address of your Business Intelligence tool, intranet, or ticket system.

> Tip To add more web domains, in the **Collibra Browser Extension configuration** section, click **Add**.

4. Click **Save all**.
   » You have preconfigured the Browser Extension.



> Note The web domains that you specified appear in the Browser Extension.



Configure the Browser Extension

After adding Collibra Browser Extension, you must add the address of your Collibra Data Intelligence Cloud environment. Optionally, you can add web domains for Power BI, Tableau, and other important web applications. We recommend that you also pin the Extension to the toolbar of your browser.

Add the Collibra URL

Steps

1. Open Collibra Browser Extension.
2. In the **Collibra Platform URL** field, enter the address of your Collibra Data Intelligence Cloud environment.
   » The configuration is saved.

Optional: Add web domains

Why you should consider adding web domains

Some web applications have their own context menu, for example, Google Docs and Tableau. On such applications, you cannot perform a search via a context menu, as you would on other applications. You can consider adding web domains for such applications so that you can use the Browser Extension via the Collibra overlay.

You can also consider adding web domains for the web applications that you consider important so that the Collibra overlay appears on those applications for you to quickly launch the extension or as a reminder for you to use the extension. Adding web domains also allows you to benefit from the auto-matching feature.

Steps

1. Open Collibra Browser Extension.
   » The Collibra Browser Extension configuration dialog box opens.

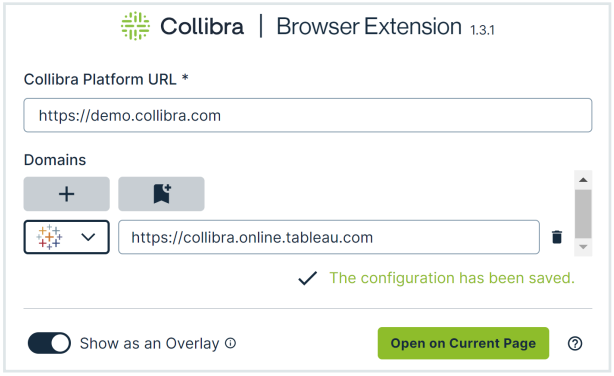
2. In the **Domains** section, click +.

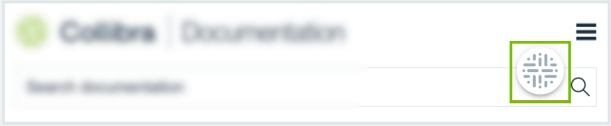
> Tip
> - If you want to add the URL of the webpage that is currently open, click instead and ignore the following steps.
> - is disabled if the URL of the webpage that is open is already added.

3. In the drop-down list box, select the web application, for example, **Tableau** or **Power BI**.

> Tip If the required web application is not available in the list, select **Other**.

4. In the text box, enter the URL of the webpage.



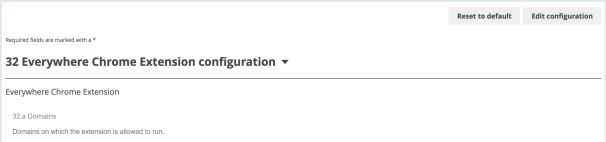
> Tip
> - To remove a web domain, click next to it.
> - The **Show as an Overlay** option is selected by default, indicating that the Collibra overlay is shown on the webpage that you added.
>
> 
>
> - The **Open on Current Page** button enables you to show the Collibra overlay on the page that is currently open. This overlay, however, disappears if you refresh or reopen the current page.

» The configuration is saved.

> Note When you search via the Browser Extension for the first time, you are prompted to enter your credentials.

Web domains added via Collibra Console

An administrator can add web domains in advance via Collibra Console.

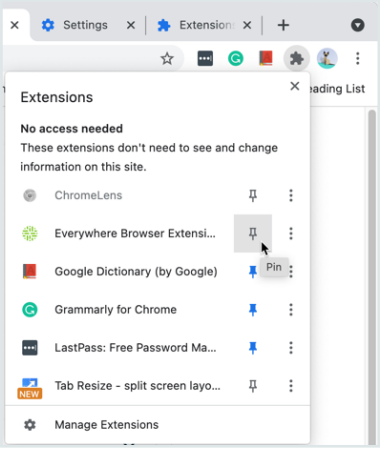


In the Browser Extension configuration dialog box, you cannot edit or delete a web domain that is added via Collibra Console.

Recommended: Pin the Browser Extension

> Tip Ensure that extensions are visible in the toolbar of your browser.

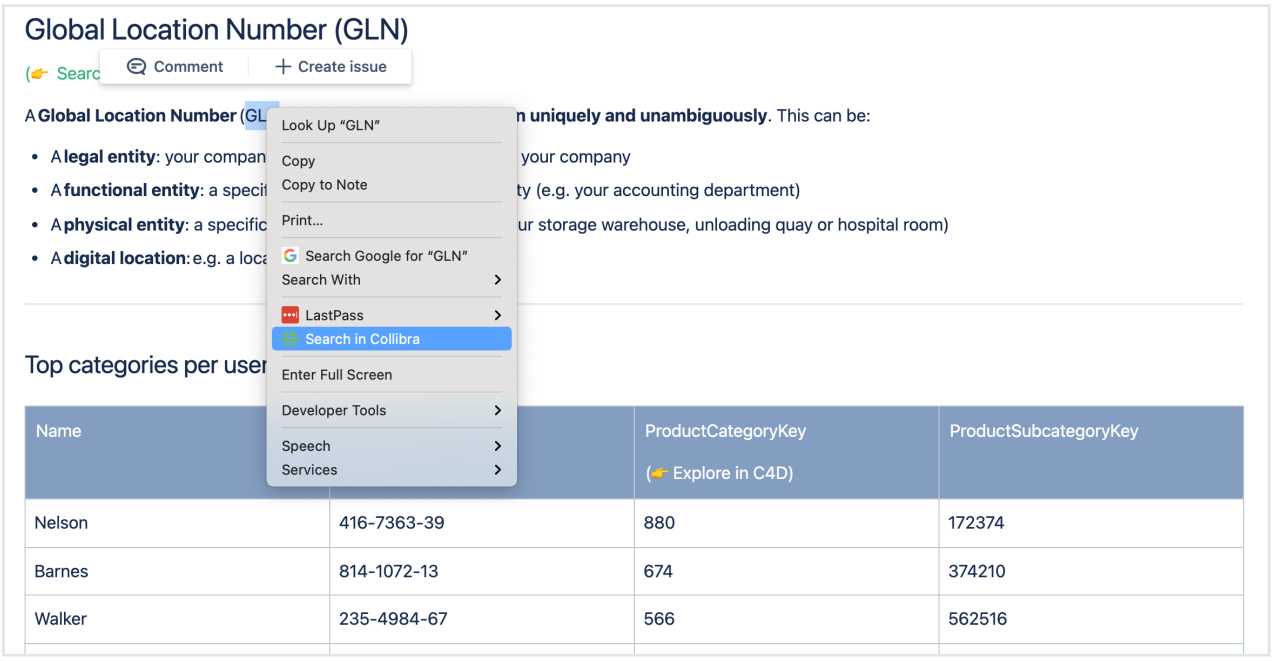
If you want the Browser Extension to always be accessible in your browser, pin the Extension to your extension list.

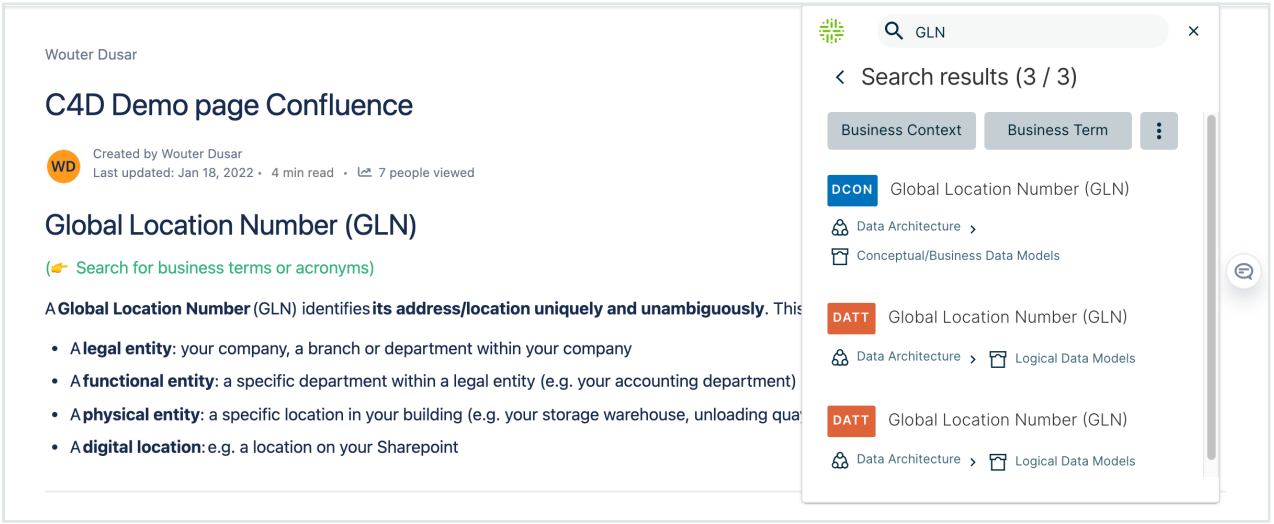


After you pin the Extension, the Collibra logo is shown in your browser.

Search via context menu

To perform a search from a web page against your Collibra Data Intelligence Cloud environment, select the text, right-click the text, and then select **Search in Collibra**. The Browser Extension window shows the search results.



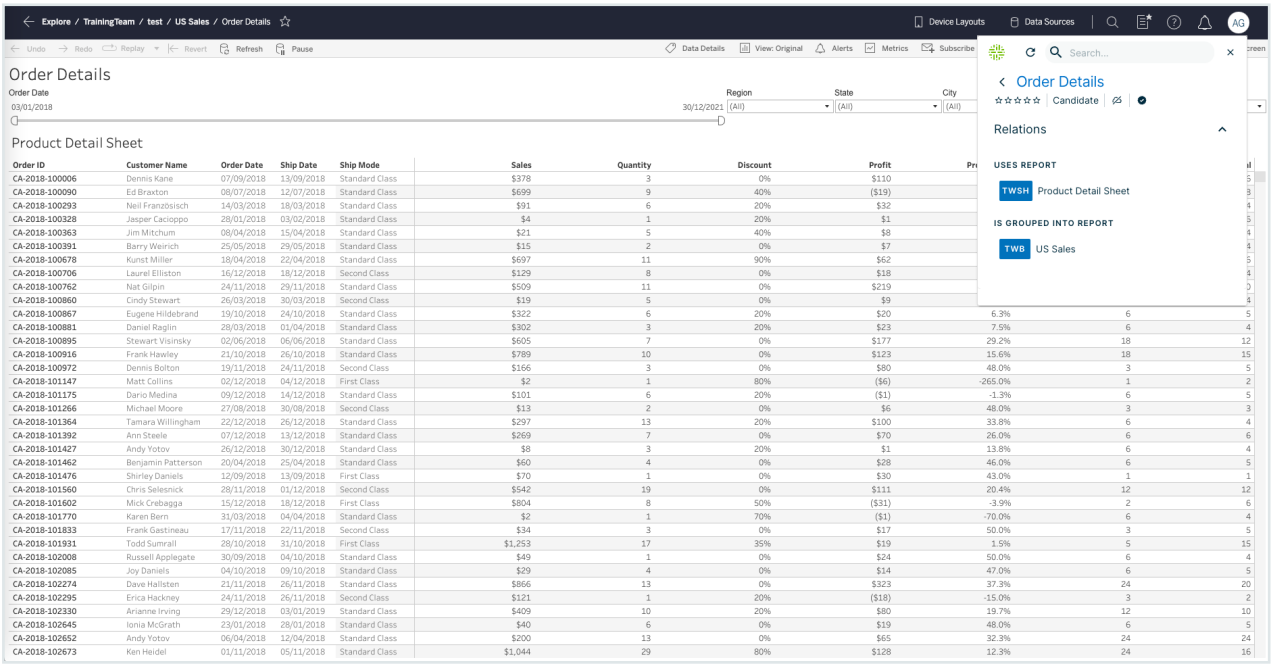


Auto-matching in the BI tools

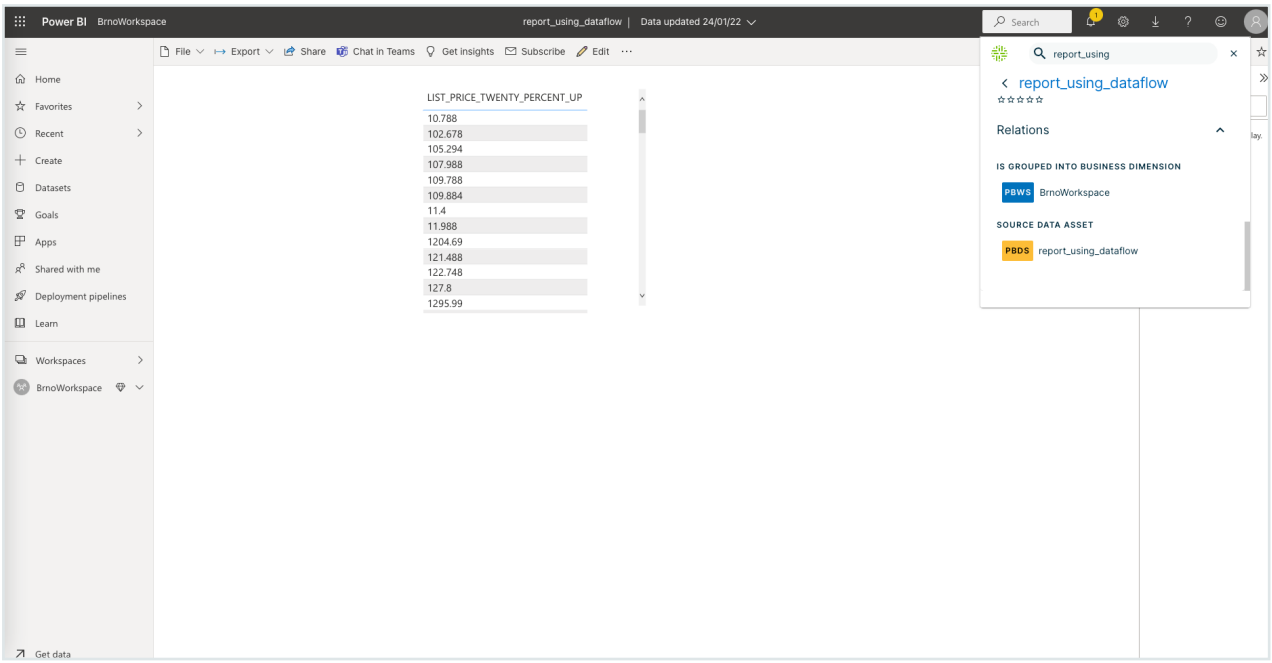
When configuring Collibra Browser Extension, you can add domains of BI tools or web applications such as Power BI and Tableau. The Browser Extension then detects the data from those applications and displays the equivalent Collibra Data Intelligence Cloud resource details, with a single click. When visiting a web domain that you added to the Browser Extension, the Collibra icon is shown as an overlay.

Examples

When viewing a dashboard in Tableau, if you click the Browser Extension overlay logo, the extension displays the details of the equivalent Tableau dashboard asset in Collibra, including responsibilities, report attributes, and related assets.



The following image shows a report in Power BI and the details of the equivalent Power BI report asset in Collibra.

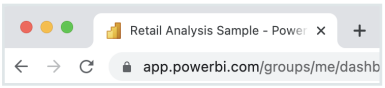


How auto-matching works

When you use a web application such as Power BI or Tableau, Collibra Browser Extension can detect the visited report from the application and retrieve the equivalent report from the connected Collibra Data Intelligence Cloud environment. This topic describes how the Browser Extension performs such auto-matching.

Auto-matching for a Power BI dashboard

When you work on a Power BI dashboard, the extension extracts the title displayed on the browser tab and the universally unique identifier (UUID) of the dashboard from the page address (URL).



The extension then searches the Power BI dashboard asset in Collibra to identify a URL attribute that contains the UUID from the Power BI URL. If no match is found, the extension searches for an asset whose name is the same as the name found in the browser tab title of the Power BI dashboard.

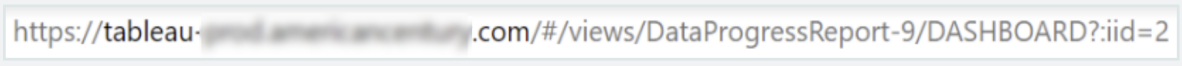
> Tip If auto-matching fails, the extension searches for the name of the dashboard with the asset type as a filter.

Auto-matching for a Tableau dashboard

When you work on a Tableau dashboard, first, the extension searches for the following pattern in the page URL to determine if the current page is a dashboard:

```
<tableau url>/#/site/<path or uuid>/views/<path or uuid>
```

> Note In this pattern:
>
> - The content within the angle brackets (<>) may match any string.
> - **/site** refers to the workbook or site name and is optional for auto-matching.
> - **path or uuid** is not used for auto-matching.

> Tip
> The following image shows a Tableau page URL that meets the required pattern.
>
> 
>

Next, the extension extracts the following information from the breadcrumb on the current page:

- Tableau project
- Tableau workbook
- Tableau dashboard or report

If the page URL meets the required pattern and if the extension can extract the required information from the breadcrumb, the extension automatically identifies the dashboard in the connected Collibra Data Intelligence Cloud environment.

> Tip If auto-matching fails, the extension searches for the name of the dashboard with the asset type as a filter.