

Collibra Platform Self-Hosted

Collibra Platform

Collibra Platform Self-Hosted - 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 Platform Self-Hosted 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 Platform Self-Hosted such as searching for data, using dashboards and the global Create button.

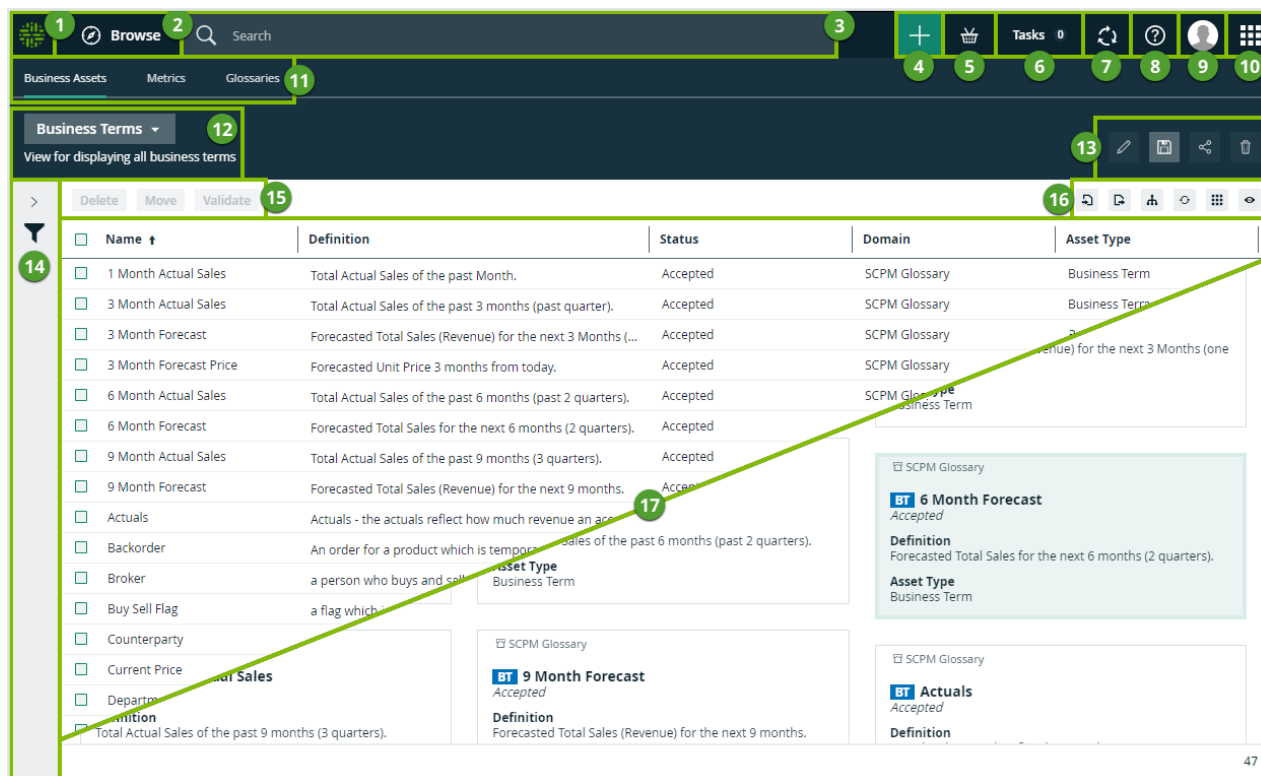
In this chapter

Screen elements in the user interface

The Collibra Platform Self-Hosted user interface contains a number of common elements that appear throughout the product.

You can navigate through Collibra Platform Self-Hosted using your mouse or keyboard. For more information, see [Accessibility](#).

Page layout



No.	Element name	Description
1	Home button	Open the Homepage or your default dashboard .
2	Navigation browser	Open the Browse pane.
3	Search field	Search for any resource in Collibra.
4	+ button	Create any resource from any location.
5	Shopping basket	Request access to assets.
6	Tasks indicator	Check how many workflow tasks are awaiting your attention and manage those tasks from the My tasks page.
7	Activities tracker	Check the Collibra activities and view the history of all the jobs you started.

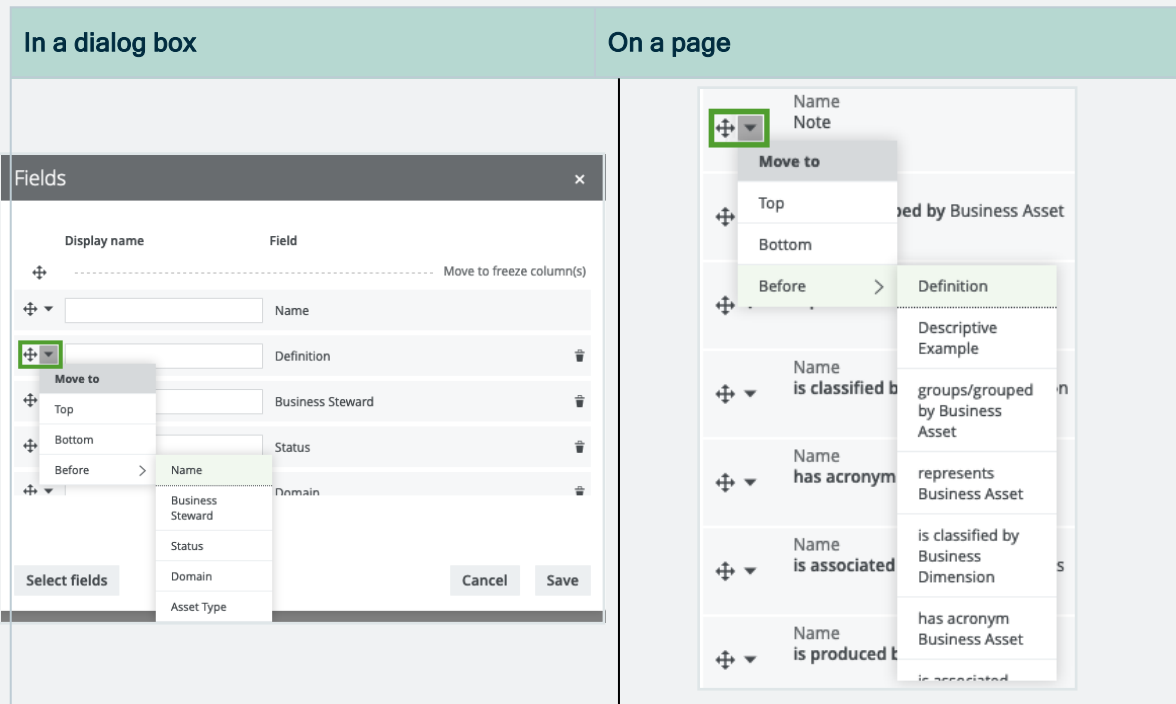
No.	Element name	Description
8	Info	Get access to the product documentation, to Collibra Product Resource Center and University, and to the Collibra support portal. Note If you have the Sysadmin role, you can access the API documentation.
9	Avatar	View and modify your profile , sign out, and report a problem.
10	Application menu	Open another application: •  Business Glossary: Manage your business terms. •  Catalog: Manage data sets. •  Policy manager: Manage your organization's policies. •  Reference Data: Manage your code values and code sets. •  Global view: See all assets in a single view. •  Data Helpdesk: Manage issues. •  Stewardship: Manage your tasks. •  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.
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.



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. Perform one of the following steps:
 - 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.

Action	Description									
Moving the focus point	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. 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. 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>Customer account  New Data Dictionary</td><td>Customer account  <u>New Data Dictionary</u></td></tr></table>	Type	Unfocused element	Focused element	Button			Link	Customer account  New Data Dictionary	Customer account  <u>New Data Dictionary</u>
Type	Unfocused element	Focused element								
Button										
Link	Customer account  New Data Dictionary	Customer account  <u>New Data Dictionary</u>								
Clicking and activating screen elements	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.									
Opening and closing dialog boxes and pop-ups	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 .									
Selecting and clearing checkboxes	Navigate to a checkbox and press the space bar to select it or clear it.									
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.									

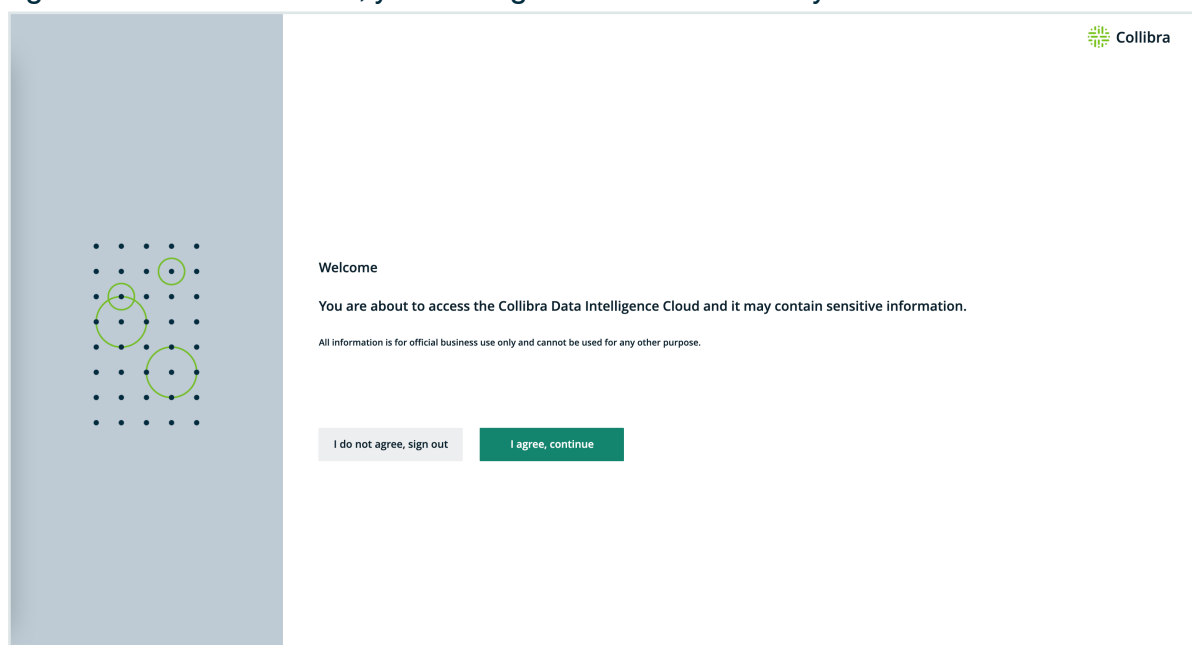
Action	Description
Skipping repetitive sections	Most pages in Collibra Platform Self-Hosted contain repetitive sections at the top of the page, such as the main menu. You can skip this section using the Skip to content button. This button is the first available element when you start navigating in a repetitive section using your keyboard. 

Signing in and signing out

As soon as you have a user account, you can sign in to Collibra Platform Self-Hosted.

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.

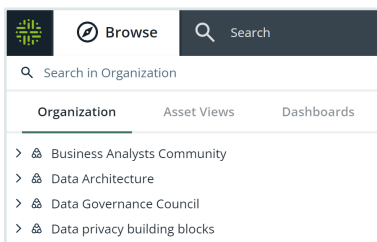
Sign out

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.

Access a community, domain, asset view, or dashboard

You can access a community, domain, asset [view](#), or dashboard via the **Browse** pane.



The **Browse** pane provides an overview of the following:

- All communities and domains on the **Organization** tab.
By default, the **Organization** tab shows only the top-level communities. To view the subcommunities and domains in a community, click **>** next to the community name. When you click a community or domain, the corresponding community or domain page appears. This page contains the community or domain details and allows you to make changes.

- All **pinned** asset views on the **Asset Views** tab.
- All **dashboards** on the **Dashboards** tab.

Tip You can search for a community, domain, asset view, or dashboard by using the search field.

The Create button

In Collibra Platform Self-Hosted, 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. The resources available to you here depend on your location in Collibra: • 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. • If you are on a domain page, the suggested resources are all the asset types that are assigned to the domain. • If you are on a community page, the suggested resources are all the asset types that are assigned to the domains in the community. • If you are on an asset page, the suggested resource is an asset of that same type. 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.

Item	Description
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 Platform Self-Hosted 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:

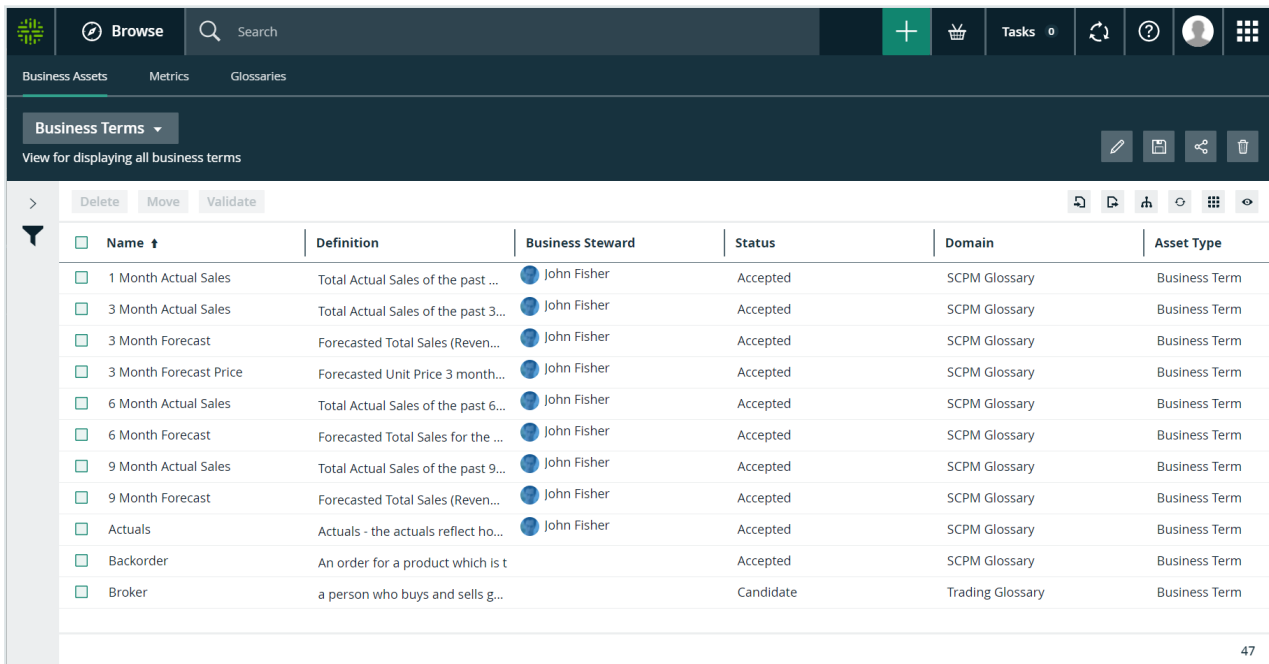
- The [display mode](#), to specify whether assets are shown in a table or as tiles.
- Filters, to specify which assets are displayed.
- Applied sorting, to specify the order of the assets.
- Visible columns (for tables) or fields (for tiles), to specify which information about assets is displayed.

- 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.

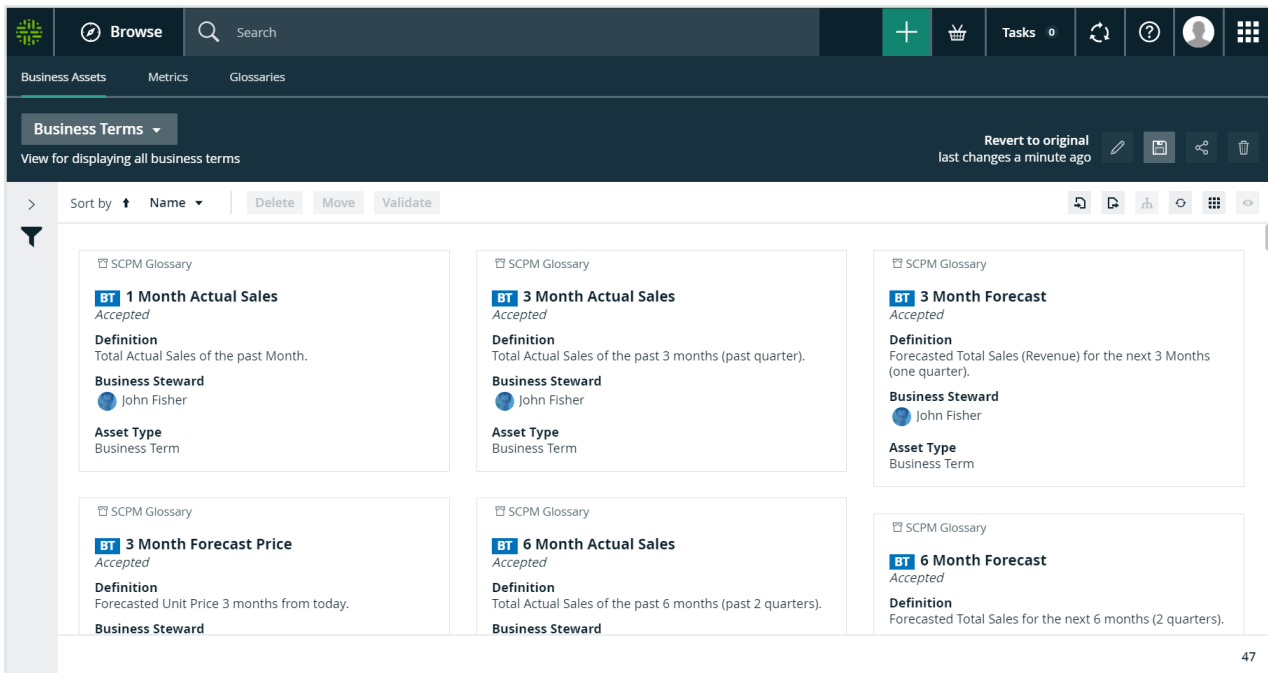
A view is also the basis for [Importing and exporting](#).

Example of a view in table display mode:



Name	Definition	Business Steward	Status	Domain	Asset Type
1 Month Actual Sales	Total Actual Sales of the past ...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Actual Sales	Total Actual Sales of the past 3...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast	Forecasted Total Sales (Reven...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast Price	Forecasted Unit Price 3 month...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Actual Sales	Total Actual Sales of the past 6...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Forecast	Forecasted Total Sales for the ...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Actual Sales	Total Actual Sales of the past 9...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Forecast	Forecasted Total Sales (Reven...	John Fisher	Accepted	SCPM Glossary	Business Term
Actuals	Actuals - the actuals reflect ho...	John Fisher	Accepted	SCPM Glossary	Business Term
Backorder	An order for a product which is t		Accepted	SCPM Glossary	Business Term
Broker	a person who buys and sells g...		Candidate	Trading Glossary	Business Term

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.

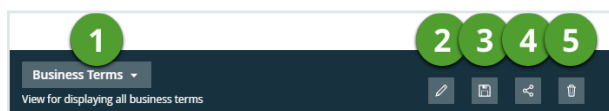
Asset views are available in the following applications:

Application	Tabs with a view selector
Business Glossary	• Business Assets • Glossaries
Reference Data	• Code Values/Sets • Hierarchies
Data Catalog	• Reports • Data Sets • Data Dictionary • Technology Assets
Data Helpdesk	• Issues • 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.

Number	Button	Description
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. On 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: ◦ Public: All Collibra Platform Self-Hosted users can use the new view. ◦ Private: Only the creator of the view can use the new view. ◦ 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: ◦ Default: The new view becomes the default view when you open the table or set of tiles. ◦ 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. On 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 the view configuration

You can edit the configuration of a [view](#), for example, change its fields and filters.

Steps

1. Navigate to the set of assets (in the table or tile [display mode](#)) for which you want to edit the view configuration (for example, Business Glossary).
2. [Switch](#) to the view whose configuration you want to edit.
3. If required:
 - Edit the view's [filters](#).
 - [Customize the table](#) or [customize the set of tiles](#).
 - [Enable hierarchy](#) or [wrap text](#).
4. On the view toolbar, click , and then click **Save**.

Note If multiple users edit the configuration of the same view, only the changes made by the user who last saved the view are applied.

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: ◦ Public: All Collibra Platform Self-Hosted users can use the new view. ◦ Private: Only the creator of the view can use the new view. ◦ 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: ◦ Default: The new view becomes the default view when you open the table or set of tiles. ◦ 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.

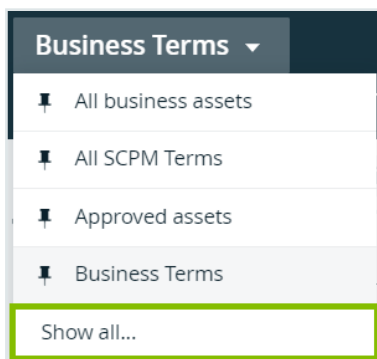
Delete a view from the view bar

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. On 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**.

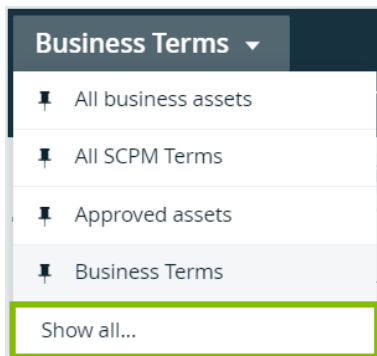
Pin a view to the view selector

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.

Business Assets views

< Return to current view

☐ My Views only

	Name ↑	Description
	Acronyms	View for displaying all acronyms
	All business assets	View for displaying all business assets
	All SCPM Terms	View for displaying all business terms for...
	Approved assets	View for displaying all approved assets
	Business Terms	View for displaying all business terms
	In Progress	View for displaying all assets with status '...

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. b. Click the name of the view you want to display.

Global views

Global views enable you to show all assets of Collibra Platform Self-Hosted 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 , and then click  **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.

Prerequisites

- You have the **ADMIN** or **SUPER** role in Collibra Console.
- You have the **SUPER** role in Collibra Console.
- You have the **ADMIN** or **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. 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**.
3. Go to the **Table** section.
4. 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. The default value is 60. A value of 0 means that there is no time limit.

5. Click **Save all**.

Asset filters

Asset filters enable you to quickly find the data in Collibra Platform Self-Hosted 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

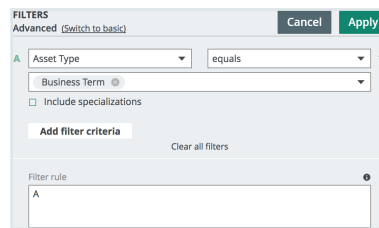
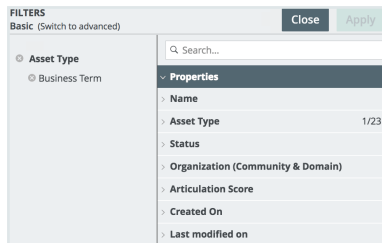
Collibra Platform Self-Hosted has two modes for filtering data:

- **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.

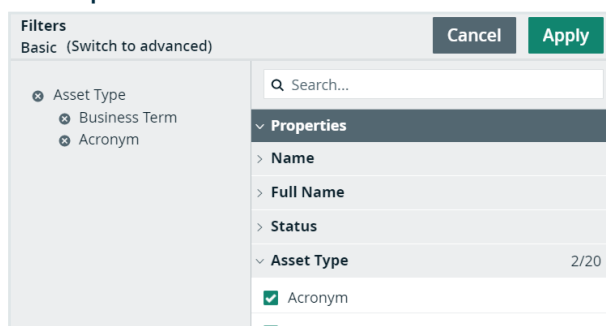
The characteristics are grouped in the following categories:

- **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

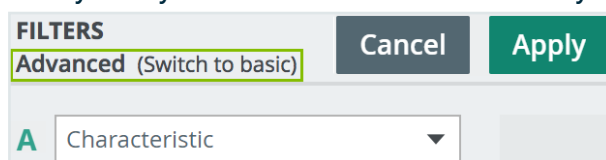
- If you use filters in hierarchy views (not available in tile display mode), Collibra only applies the filter at the 'root' (start) level of the hierarchy. Child rows are not filtered.
- In the **Roles** category of the filter characteristics, you can select one or more specific users or user groups, 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**.



The screenshot shows a UI element titled "FILTERS". Below the title, there is a tab labeled "Advanced" with a link "(Switch to basic)" next to it. To the right of the tab are two buttons: "Cancel" and "Apply". Below the tab and buttons is a dropdown menu with the text "Characteristic" and a downward arrow.

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.

FILTERS
Basic (Switch to advanced)

Cancel

Apply

✕ **Status**

✕ Accepted

🔍 status

✕

▼ **Properties**

▼ **Status** 1/17

☒ Accepted

☐ Approval Pending

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

FILTERS

Cancel

Apply

Basic (Switch to advanced)

✕ Asset Type

✕ Attribute

▼ Properties

> Name

▼ Asset Type 1/23

☒ Acronym

☐ Attribute

> Status

> Organization (Community & Domain)

> Articulation Score

> Created On

> Last modified on

> Tags

▼ Attributes

> Abbreviation

> Data Source

> Data Type Precision

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 defined in Collibra, for example, Business Steward, Requester, and Assignee.

The following table contains some examples of operators, per filter criterion type.

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

Filter criterion type	Operators
Resource role, for example, Business Steward	- contains - does not contain - equals - does not equal - starts with - does not start with - ends with - does not end with - exists - does not exist Note If you select the logical operator "equals," you can select the value Current User to find all assets to 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. Filtering by resource role and a specific user is extended to user groups that include the specified user, for the selected resource role. Example John Fisher is included in a user group named The Dream Team. There are a number of assets to 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 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 following filter finds assets that meet the following criteria: they have the asset type **Business Term** OR the assets have both the domain **Business Glossary** and one of the following three statuses: **Accepted**, **Approval Pending**, or **Candidate**.

The screenshot shows the 'Filters' panel in Colibra, set to 'Advanced' mode. It features three filter criteria (A, B, and C) and a filter rule summary.

- Criteria A:** Asset Type equals Business Term. Includes a checkbox for 'Include specializations' which is unchecked.
- Criteria B:** Domain equals New Business Terms.
- Criteria C:** Status equals Accepted, Approval Pending, or Candidate.

Buttons for 'Add filter criteria' and 'Clear all filters' are present. The 'Filter rule' summary at the bottom shows the logic: A OR (B AND C).

Note

The search feature does not recognize non-breaking spaces. Therefore, if the asset for which you are searching has a non-breaking space in its name, it will not appear in the search results if you do not include the non-breaking space in your search text.

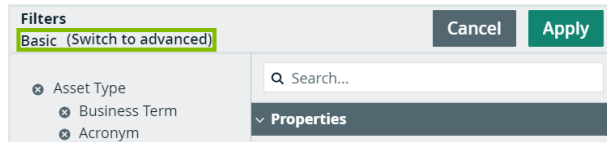
Suppose that you have a Snowflake data source and one of the tables in the database has a non-breaking space in its name. When this table is ingested into Colibra, the name of the corresponding Table asset in Colibra will also have the non-breaking space. If you try to search for the Table asset by typing its name in the search field, it will not work because you cannot replicate the non-breaking space. Instead, you can copy the table name directly from Snowflake—thereby capturing the non-breaking space—and paste it into the search field in Colibra.

Create an advanced filter

You can create an advanced filter so that only the assets you need are shown in a view.

Steps

1. Go to a table or set of tiles that contains the assets you want to see (for example, Glossary).
2. In the **Filters** pane, click **Edit**, and then click **Switch to advanced**.



3. In the **Filters** pane, specify the criterion for the filter:
 - a. In the **Characteristic** field, select a value.
 - b. Select an operator.
 - c. Add one or more values.
 - d. To add the next filter criterion, click **Add filter criteria**.
4. In the **Filter rule** field, specify how the filter criteria must be interpreted.

Tip For more information, go to [Filter rules](#).

5. Click **Apply**.

Tip

If you want to filter assets by a relation type and use an exclusionary logical operator, such as **does not equal** or **does not contain**, add two filter criteria, as shown in the following example.

The screenshot shows the 'Filters' dialog box with the 'Advanced' tab selected. It contains two criteria, A and B. Criterion A is 'Business Asset has acronym ...' with the operator 'exists'. Criterion B is 'Business Asset has acronym ...' with the operator 'does not equal' and the value 'CLV'. The filter rule is 'A AND B'. The dialog also has buttons for 'Close', 'Apply', 'Delete', 'Move', and 'Validate'. A list of filterable assets is shown on the right, including 'Name', 'Days Cash on Hand', and 'Defective goods inventory'.

A. This criterion ensures that the filter considers only the assets that have the specified relation type (**Business Asset has acronym Acronym**).

B. This criterion shows only the assets for which the acronym **does not equal** the specified value (**CLV**), within the subset of assets filtered by **A**.

Without the **exists** filter criterion, the filter results include assets that do not have the **Business Asset has acronym Acronym** relation type, which may not be helpful.

The screenshot shows the 'Filters' dialog box with the 'Advanced' tab selected. It contains a single criterion, A, which is 'Business Asset has acronym ...' with the operator 'does not equal' and the value 'CLV'. The filter rule is 'A'. The dialog also has buttons for 'Close', 'Apply', 'Delete', 'Move', and 'Validate'. A list of filterable assets is shown on the right, including 'Name', 'A/B Testing', 'Account Passwords', 'Adjusted Discharges', 'Adjusted Inpatient Days (retired)', 'Adult PT Clinic Visit (Charged/E&M)', 'Adult PT Clinic Visit (Scheduling)', 'AdWords', 'Affiliate Marketing', 'Agency Hours', and 'Aggregate consumer information'.

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. 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. 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 Platform Self-Hosted, 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:

Name	Definition	Business Steward	Status	Domain	Asset Type
1 Month Actual Sales	Total Actual Sales of the past ...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Actual Sales	Total Actual Sales of the past 3...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast	Forecasted Total Sales (Reven...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast Price	Forecasted Unit Price 3 month...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Actual Sales	Total Actual Sales of the past 6...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Forecast	Forecasted Total Sales for the ...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Actual Sales	Total Actual Sales of the past 9...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Forecast	Forecasted Total Sales (Reven...	John Fisher	Accepted	SCPM Glossary	Business Term
Actuals	Actuals - the actuals reflect ho...	John Fisher	Accepted	SCPM Glossary	Business Term
Backorder	An order for a product which is t		Accepted	SCPM Glossary	Business Term
Broker	a person who buys and sells g...		Candidate	Trading Glossary	Business Term

Example of a view in tile display mode:

The screenshot shows the 'Business Terms' section of the DGC interface. The top navigation bar includes 'Browse', 'Search', and a 'Tasks' count of 0. Below the navigation bar, there are tabs for 'Business Assets', 'Metrics', and 'Glossaries'. The 'Business Terms' tab is active, and a dropdown menu shows 'Business Terms'. A message indicates 'View for displaying all business terms'. On the right, there is a 'Revert to original' button and a timestamp 'last changes a minute ago'. Below this, there are buttons for 'Delete', 'Move', and 'Validate'. The main content area displays a grid of business terms, each with a title, status, definition, business steward, and asset type. The terms are:

- BT 1 Month Actual Sales** (Accepted): Total Actual Sales of the past Month. Business Steward: John Fisher. Asset Type: Business Term.
- BT 3 Month Actual Sales** (Accepted): Total Actual Sales of the past 3 months (past quarter). Business Steward: John Fisher. Asset Type: Business Term.
- BT 3 Month Forecast** (Accepted): Forecasted Total Sales (Revenue) for the next 3 Months (one quarter). Business Steward: John Fisher. Asset Type: Business Term.
- BT 3 Month Forecast Price** (Accepted): Forecasted Unit Price 3 months from today. Business Steward: (empty). Asset Type: Business Term.
- BT 6 Month Actual Sales** (Accepted): Total Actual Sales of the past 6 months (past 2 quarters). Business Steward: (empty). Asset Type: Business Term.
- BT 6 Month Forecast** (Accepted): Forecasted Total Sales for the next 6 months (2 quarters). Business Steward: (empty). Asset Type: Business Term.

The page number 47 is visible in the bottom right corner.

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.

All business assets ▾ 1
View for displaying all business assets

2 [Edit] [Save] [Share] [Delete]

3 [Filter]

4 [Delete] [Move] [Validate] [Action Menu]

5 [Table Menu]

Name ↑ 1	Domain	Asset Type
CSR	New Business Terms	Acronym
CSS	New Business Terms	Acronym
currency conversion	New Business Terms	Business Term
customer	New Business Terms	Business Term
customer activity cycle	New Business Terms	Business Term
customer care	New Business Terms	Business Term
customer communication	New Business Terms	Business Term
customer engineering	New Business Terms	Business Term
customer enticement	New Business Terms	Business Term
customer input terminal	New Business Terms	Business Term

6 7 8 9 110

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.
5	Table menu	The table menu contains buttons for actions that you can perform on the table.

No.	Element name	Description
6	Fields	The fields are the column headers. 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. From the header, you can • Select all visible assets. • Sort on one or more columns, in ascending or descending order. • Apply a column filter. • Clear a column filter.
7	Body	The body of the table shows the actual content of the table in rows. From a table, you can do the following: • Select a row. • 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. You can do the following: • Define the number of rows per page. • Navigate between table pages.
9	Counter	The total number of assets in the table. 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. On 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.

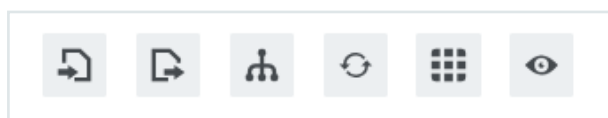
3 / 47	Delete	Move	Validate	Approval	Simple Approval	Vote
☒ Name ↑	Asset Type					
☒ 1 Month Actual Sales	Business Term					
☒ 3 Month Actual Sales	Business Term					
☒ 3 Month Forecast	Business Term					
☐ 3 Month Forecast Price	Business Term					
☐ 6 Month Actual Sales	Business Term					
☐ 6 Month Forecast	Business Term					

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.

Button	Description
	Display a selection of assets as a hierarchy, or tree structure, based on their relation type. When you select only one relation type, Collibra Platform Self-Hosted builds the hierarchy as deeply as possible, traversing occurrences of that single relation type as often as it can. 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. 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 the table display mode.
2. Perform one of the following steps:

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.

3 / 50	Delete	Move
 Name ↑		
☒ 1 Month Actual Sales		
☒ 3MFctRevByProduct		
☐ 3 Month Actual Sales		
☒ 3 Month Forecast		
☐ 3 Month Forecast Price		

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 the table display mode.
2. Perform one of the following steps:
 - Double-click a cell.
 - Hover your cursor over a cell and click .

» The cell editor appears.
3. Perform one of the following steps:
 - 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. Perform one of the following steps:

If you want to change...	do...
the current row only:	a. Click ✓.
all visible rows:	a. Click Apply to all visible rows . b. Click ✓.
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click ✓.

Wrap the text in table cells

Wrapping the text makes the text in the cells of a [table](#) span multiple lines, allowing you to read the complete text within the cells, without having to adjust the column width.

Wrap the text in one cell

Wrapping the text in one cell of a table automatically wraps the text in all the cells within the same row of the table.

Steps

1. Open a view in the table display mode.
2. Hover your cursor over the cell, and then click ▼.
 - » Complete text is shown in all the cells within the same row of the table.

Note This text wrapping is lost when you refresh the page.

Wrap the text in all cells

Before you begin

Ensure that hierarchy is [disabled](#).

Steps

1. Open a view in the table display mode.
2. On the content toolbar, click  → **Wrap Text**.
 - » If the table previously showed more than 20 rows, only 20 rows are now shown per page.
 - » Complete text is shown in all the cells of the table.
3. If you want to save this text wrapping, on the view toolbar, click  → **Save**.

Tip You can undo the text wrapping by [changing](#) the number of rows shown per page.

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 Platform Self-Hosted, 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 the table display mode.
2. On 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

☐ Name ↑	Asset Type	Business Steward
☐ customer revenue	Business Term	Anita Morrison John Fisher

Steps

1. Open a view in the table display mode.
2. On 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 Colibra 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 the table display mode.
2. On 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 the table display mode.
2. On 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 the table display mode.
2. On 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 the table display mode.
2. On 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 the table display mode.
2. On 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 the table display mode.
2. On 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 Colibra 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 the 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 the 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. Example: 1-10																								
one of the 2 previous or following pages	the desired page.																								
the last page	the last page. Example: 100-110																								
Example <table> <tr> <th>☐ Name ▲</th><th>Asset Type</th></tr> <tr> <td>☐ CSR</td><td>Acronym</td></tr> <tr> <td>☐ CSS</td><td>Acronym</td></tr> <tr> <td>☐ currency conversion</td><td>Business Term</td></tr> <tr> <td>☐ customer</td><td>Business Term</td></tr> <tr> <td>☐ customer activity cycle</td><td>Business Term</td></tr> <tr> <td>☐ customer care</td><td>Business Term</td></tr> <tr> <td>☐ customer communication</td><td>Business Term</td></tr> <tr> <td>☐ customer engineering</td><td>Business Term</td></tr> <tr> <td>☐ customer enticement</td><td>Business Term</td></tr> <tr> <td>☐ customer input terminal</td><td>Business Term</td></tr> <tr> <td colspan="2">◀ 1-10 ... 31-40 41-50 51-60 61-70 71-80 ... 101-110 ▶</td></tr> </table>		☐ Name ▲	Asset Type	☐ CSR	Acronym	☐ CSS	Acronym	☐ currency conversion	Business Term	☐ customer	Business Term	☐ customer activity cycle	Business Term	☐ customer care	Business Term	☐ customer communication	Business Term	☐ customer engineering	Business Term	☐ customer enticement	Business Term	☐ customer input terminal	Business Term	◀ 1-10 ... 31-40 41-50 51-60 61-70 71-80 ... 101-110 ▶	
☐ Name ▲	Asset Type																								
☐ CSR	Acronym																								
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☐ customer input terminal	Business Term																								
◀ 1-10 ... 31-40 41-50 51-60 61-70 71-80 ... 101-110 ▶																									

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 .

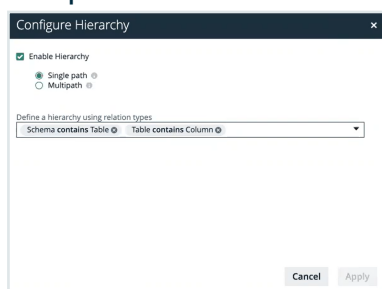
Working with hierarchies

A hierarchy is a visual representation of relations between assets. The hierarchy feature for asset views enables you to display a set of assets in a table as a hierarchy or a tree structure based on the [relations](#) between the assets. You can select which relation types to display in the hierarchy.

Note Collibra Platform Self-Hosted 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 [enabling](#) hierarchies, you can choose between the following types of hierarchies:

- **Single-path hierarchy:** For each node at a certain level in the hierarchy, there is only one path to the nodes at the next level.



Name	Asset Type	Domain	Community	schema contains table	table contains column
Schema1	Schema	DEV-24487 PDD1	DEV-24487	Table2, Other Table1, Table1	
Other Table1	Table	DEV-24487 PDD2	DEV-24487		Other Column1
Table1	Table	DEV-24487 PDD1	DEV-24487		Column1, Column2
Column1	Column	DEV-24487 PDD1	DEV-24487		
Column2	Column	DEV-24487 PDD1	DEV-24487		
Table2	Table	DEV-24487 PDD1	DEV-24487		Column3
Schema2	Schema	DEV-24487 PDD1	DEV-24487	Table3	
Table3	Table	DEV-24487 PDD1	DEV-24487		
Schema3	Schema	DEV-24487 PDD1	DEV-24487		

- **Multi-path hierarchy:** At each junction, any relation type in the hierarchy path is traversed to find more nodes. That is, all relations are traversed for any asset, at any depth.

Note

- In a hierarchy, **filters** are applied only at the root level.
- You cannot export or import a hierarchy.
- In a hierarchy, you cannot use the tile **mode of display**.

Example

Single-path hierarchy

Suppose that 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]

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

Suppose that some of those Report Attributes are represented by Business Assets via the following relation type:

[Data Asset] represented by [Business Asset]

Note Report Attribute is a child asset type of Data Asset.

You can depict this as a single-path hierarchy using the following relation types:

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

The maximum depth of the resulting hierarchy is two.

Suppose that those Reports are grouped into other Reports. 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 in this hierarchy, the target asset type of the relation (Report) is also 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**

While this hierarchy shows the Groups relations between the Reports, it does not show the Report Attributes contained in each Report. A single-path hierarchy does not allow two relation types to be simultaneously depicted in a hierarchy as follows:

- **[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.

Configure Hierarchy

☒ Enable Hierarchy

☒ Single path

☐ Multipath

Define a hierarchy using relation types

Business Asset **groups** Business Asset

Report **contains** Report Attribute

1 2

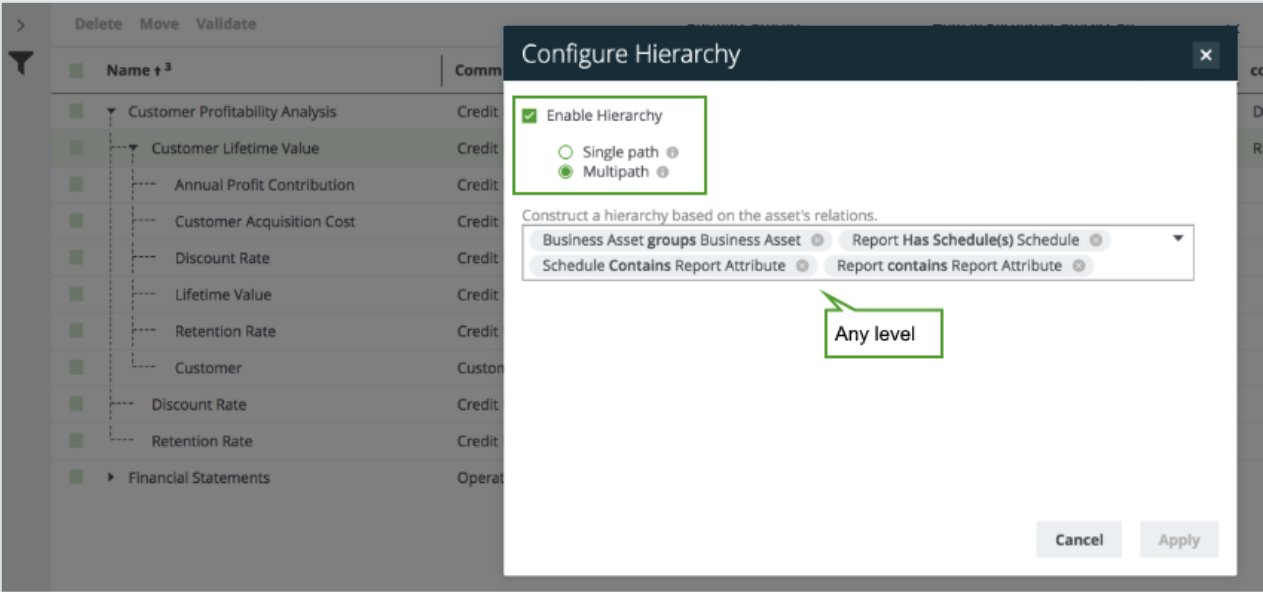
Cancel Apply

> Delete Move Validate		
Name ↑	Asset Type	
Customer Profitability Analysis	Report	Level 1: Reports
Customer Lifetime Value	Report	
Annual Profit Contribution	Report Attribute	Level 2: Report Attributes
Customer	Report Attribute	
Customer Acquisition Cost	Report Attribute	No Report Attributes at level 1
Discount Rate	Report Attribute	
Lifetime Value	Report Attribute	
Retention Rate	Report Attribute	
Financial Statements	Report	
FRY-14M-CCAR	Report	Level 1: Reports
FRY-14Q-CCAR	Report	
FRY - 9C	Report	

Multi-path hierarchy

Considering the example described earlier, in a multi-path hierarchy, you can simultaneously view:

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



Name	Asset Type
Customer Profitability Analysis	Report
Customer Lifetime Value	Report
Annual Profit Contribution	Report Attribute
Customer	Report Attribute
Customer Acquisition Cost	Report Attribute
Discount Rate	Report Attribute
Lifetime Value	Report Attribute
Retention Rate	Report Attribute
Discount Rate	Report Attribute
Retention Rate	Report Attribute
Financial Statements	Report

Report Attributes at level 1

Important When viewing the hierarchy for a community or domain, if the parent of a node that is in the community or domain belongs to a different community or domain, that node is not shown in the hierarchy.

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 the table display mode.
2. On the content toolbar, click .
 - » The **Configure Hierarchy** dialog box appears.
3. Enter the required information.

Field	Description
Enable Hierarchy	Select or clear this checkbox to enable or disable hierarchies, respectively.
Single path	A hierarchy in which, for each node at a certain level, there is only one path to the nodes at the next level.
Multipath	A hierarchy in which all relations are traversed for any asset, at any depth.
Define a hierarchy using relation types	Specify the relation types that you want to use for your hierarchy.

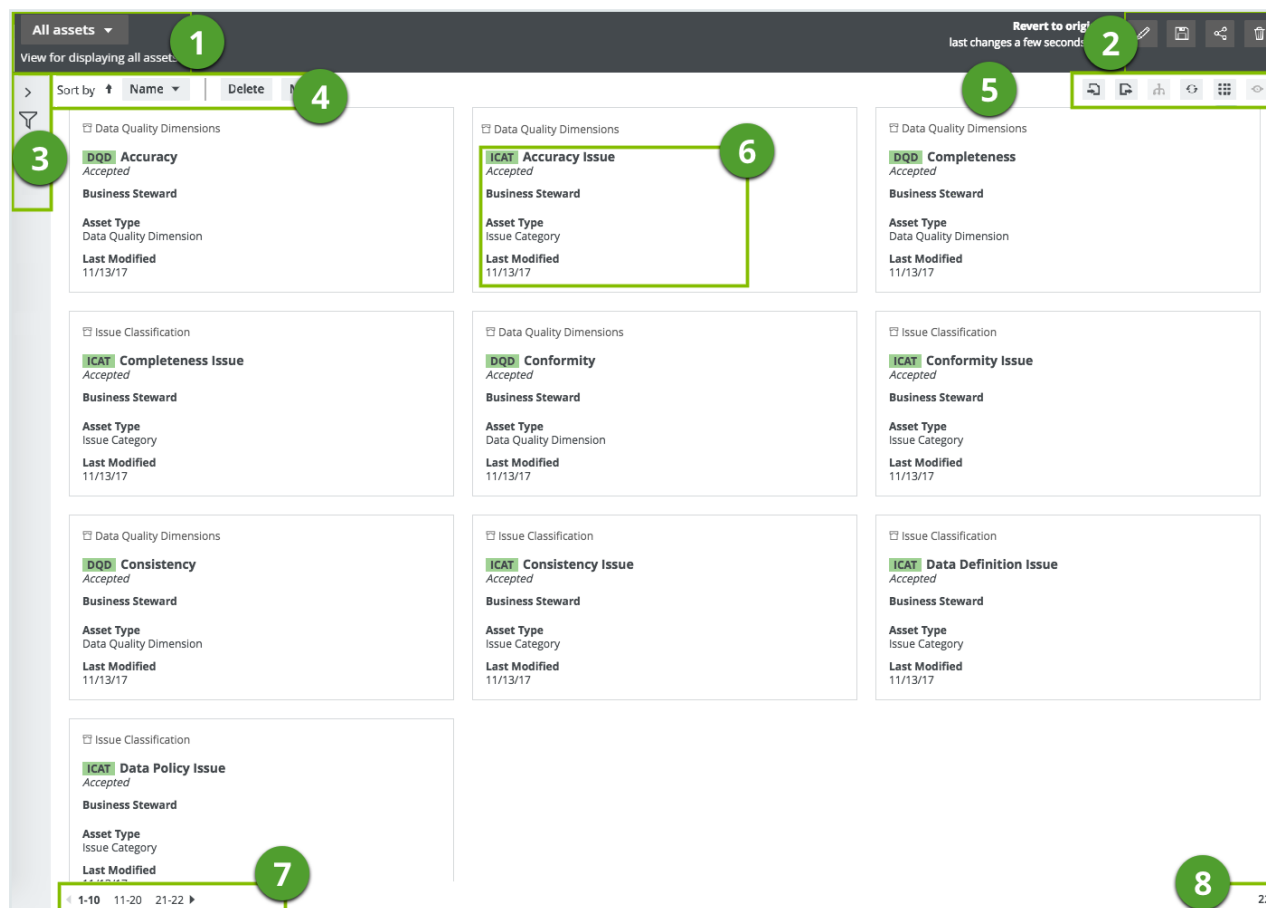
4. Click **Apply**.

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: • 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.
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. 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. You can: • Change the number of per page. • Navigate between tiles pages.
8	Counter	The total number of tiles. 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

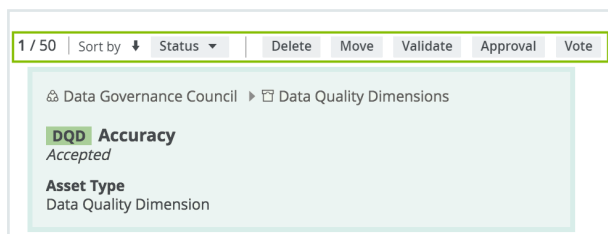
If you are in table display mode, you can quickly convert the table to a set of tiles.

Steps

1. Open a view in the table display mode.
2. On 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.

Button	Description
	Enable or disable hierarchies. 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. You can also switch to table display mode.
	Enable or disable the preview. 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 Platform Self-Hosted, 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. On 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.

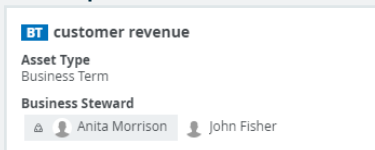
5. Click **Update**.
6. If required, do the following:
 - [Change a field name](#).
 - [Change the order of the fields](#).
7. Click **Save**.

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. On 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. On 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. On 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. On 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. On 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. On 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.

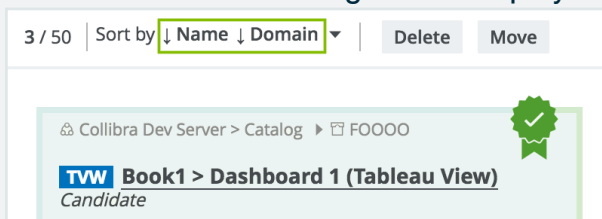
Sort a set of tiles

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.

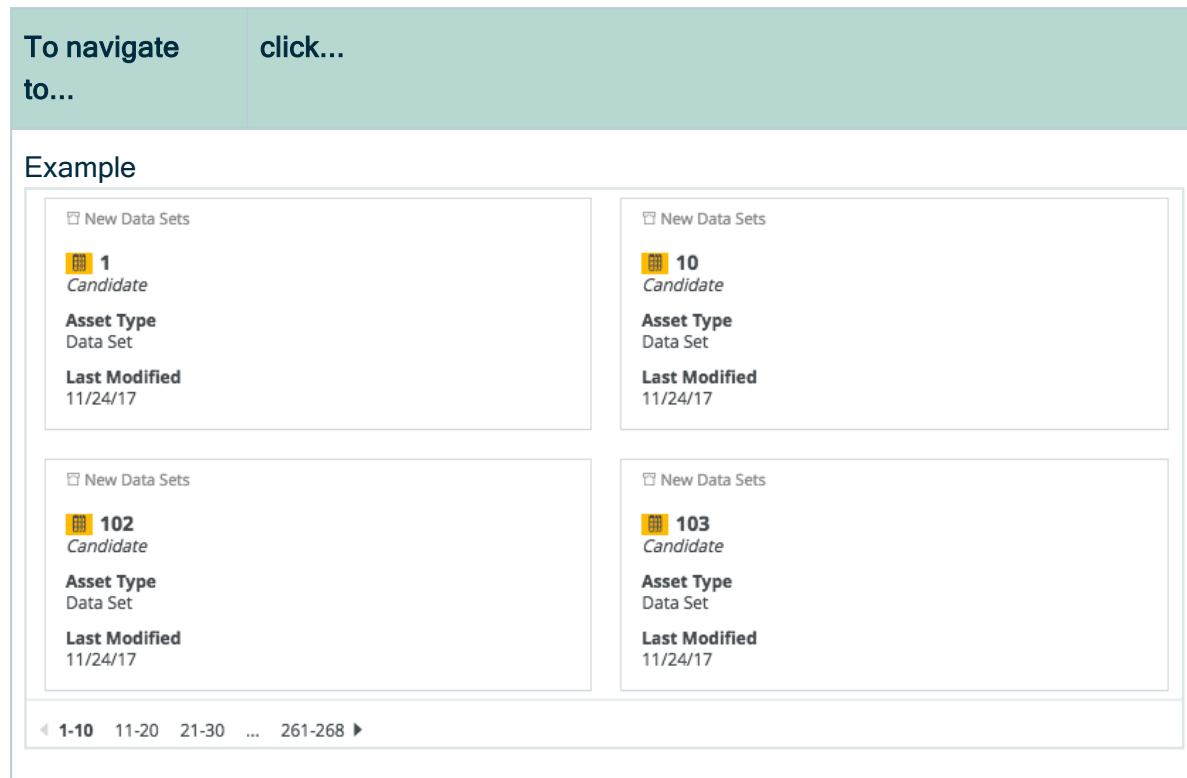
Tip You can [change](#) the number of tiles per page.

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. Example: 1-10
one of the two previous or following pages	the desired page.
the last page	the last page. Example: 261-268



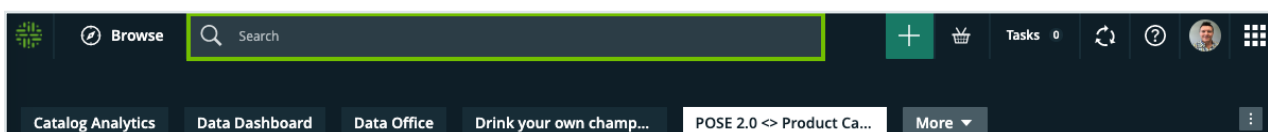
Filtering tiles

You can use advanced [Asset filters](#) to filter the tiles shown in tile display mode.

Search

You can use the [Search field](#) and the [Search widget](#) to find any resource in Collibra Platform Self-Hosted, such as assets, communities, domains, users, and user groups. Both options take you to the [Search page](#), where you can edit your search text and work with the search results as needed.

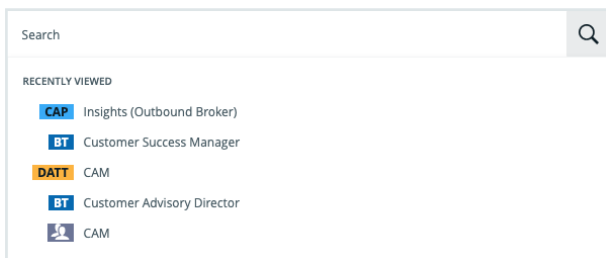
Search field



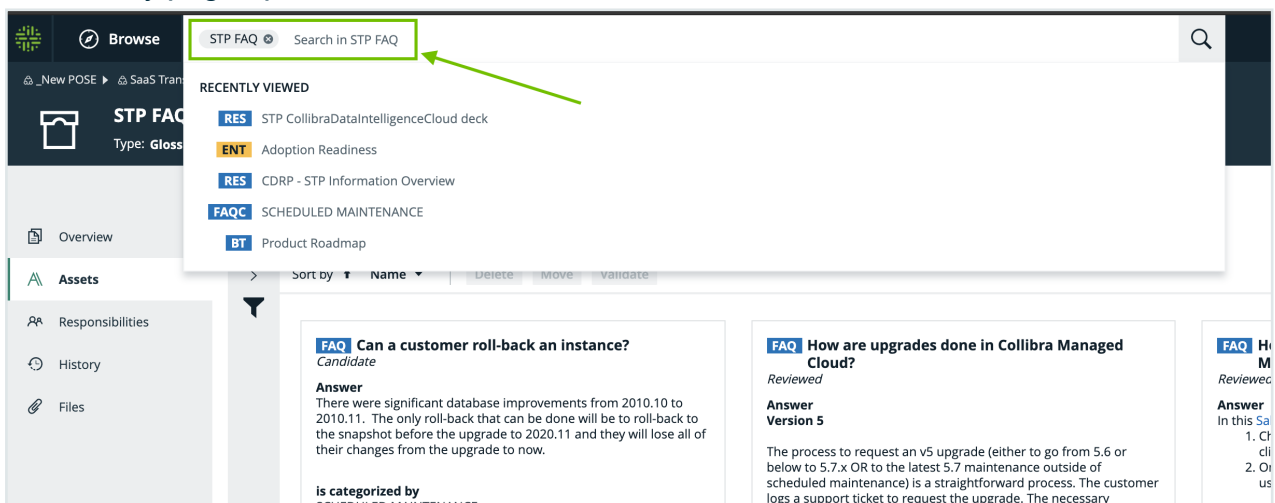
The search finds resources that contain a word that begins with your search text. For example, if you enter *ca*, the search results could contain **California**, **Lewis Carroll**, or **Meer-cat**.

Recently viewed

When you click in the **Search** field, the 5 most recently viewed resources are shown in the quick search panel.

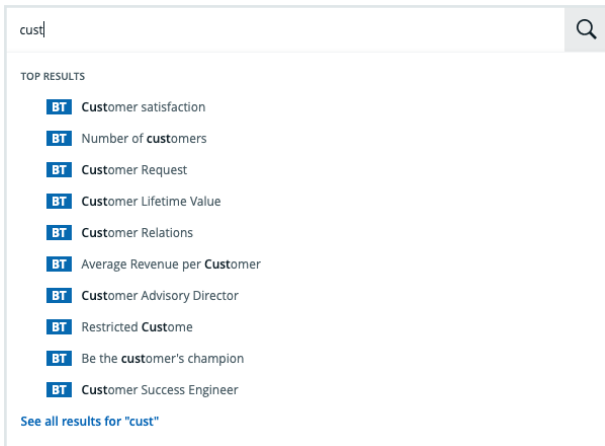


If **refreshed navigation** is enabled for your Collibra environment, the search results are automatically filtered by the current domain or community if you search with a domain or community page open.



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 only in the **Name** field. As such, these results might not appear as the top results on the Search page when you perform a search.
- Boosting influences the order of the top results.

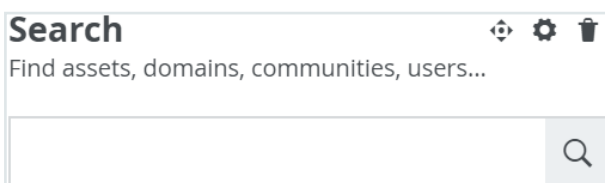
Actions

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

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

Search widget

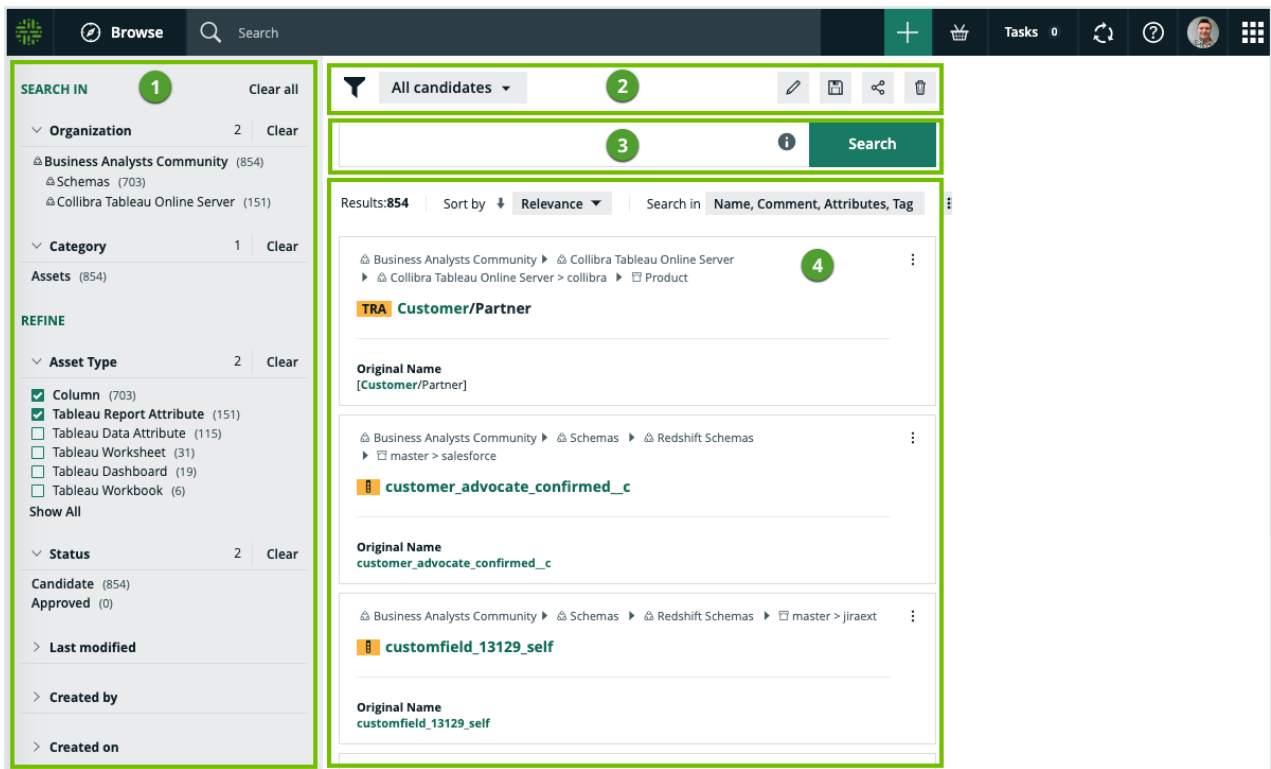
The Search widget on the dashboard is similar to the **Search field** in the main menu. If you type something and press **Enter**, the same **search page** is shown as if you searched via the **Search** field, and the search results are the same. The difference is that the Search widget does not show 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.

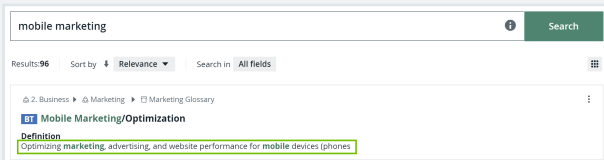
Search page

The **Search** page contains the following sections.



No.	Section	Description
1	Facet pane	A dynamically generated collection of facets that allows you to: • Add and remove search fields to make your search broader or narrower. • Navigate and refine your search results. Note The facet pane is shown only if your search produces results.

No.	Section	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. The following icons are available: •  : Create a search filter or save a copy of an existing filter. •  : Edit the name and description of a search filter. •  : Share a search filter. •  : Delete a search filter.
3	Search input field	Shows your search text. You can edit your search text here. For examples of how wildcards and symbols work in your search text, click ⓘ .

No.	Section	Description
4	Search results	Shows the following: • The results that match your search. • The total number of results. • The applied sorting criterion and sorting order. By default, search results are sorted in order of descending relevance. • The selected fields in which the search is performed. By default, all fields are searched. Tip • Click  to: ◦ Add or remove fields that are shown for each search result. ◦ Edit the number of results shown per page. • For any result that is an asset, click  to show the workflows that are available for the asset. • Click the name of a search result to open its detailed page. • In Collibra Console, you can influence the order of the search results by editing the boost factor of resources and attribute types. For more information, go to Relevance in search results. Note If the text in a field is long, the text is shortened when shown in the search results. For example, in the following image, the highlighted definition in the search result shows only a part of the full definition. 

Note It is possible that you or another user created a [search filter](#) that includes a field or facet that no longer exists in your Collibra environment. When this happens, the unavailable field or facet is highlighted to enable you to identify and remove it from the search filter. Unavailable fields and facets are ignored in search queries.

The screenshot shows the Collibra search interface. On the left, under 'SEARCH IN', there are filters for Organization and Category. Under 'REFINE', there is a filter for Asset Type. The 'Invalid' option under Asset Type is highlighted with a green box and an arrow. On the right, the search results for 'a' are shown. A red box highlights a message: 'The search results might not be accurate. Selected filter has invalid option (Facets)'. Below this, the search results for 'a' are displayed, including a definition for 'access key ID'.

Search wildcards

A wildcard is a special character that you can use in your search text to substitute for one or more unknown characters. For example, if you want to find a resource whose full name you do not know, you can use a wildcard in your search text when searching for that resource.

The following table describes the wildcards that you can use in your search text.

Wildcard	Description
?	Represents a single character.
	Example The search text ?owie can show results such as Bowie, Mowie, Rowie.

Wildcard	Description
*	Represents a string of characters. Example The search text B*e can show results such as Bowie , Breeze , and Byte .
~	Represents a fuzzy search—words whose spellings are similar to your search text. Example The search text Owi~ can show results such as Bowie , Ozi , and Zowie .
!	Excludes the word that immediately follows the wildcard. Example The search text !David Bowie can show results such as Jane Bowie and Lester Bowie but will not show David Bowie . The search text !David, however, will show you all results because ! excludes David, rendering the search text blank. Thus, searching for !David is equivalent to searching for everything.
" "	Represents a literal search. Example The search text "David Bowie" can show results such as David Bowie and David Bowie Songs but will not show 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.

Some examples of the objectives of different query clauses are as follows:

- 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 5 occurrences of a given term is more likely to be relevant than a field containing 1 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, go to [Search boost settings](#).

Searching in fields

When you perform a search, by default, the search engine searches for your text in all the fields. On the [Search page](#), you can then select certain fields to reduce the scope of the search to only those selected fields. Conversely, if you apply a search filter for which certain fields have been selected, you can clear one or all of the selected fields to expand the scope of the search.

You can select and clear fields via the **Search in fields** dialog box.

In the following example, 6 of the 547 available fields have been selected. 37 fields have been loaded in the dialog box. If you scroll through the list of fields, more fields are loaded and the count is updated.

Tip When you scroll to show more fields, all attributes are shown first, in alphabetical order. Properties such as Name, Comment, and Tag are shown at the end of the list. Instead of scrolling through numerous fields, you can use the Search field in the dialog box to find specific attributes and properties.

Note It is possible that you or another user created a [search filter](#) that includes a field or facet that no longer exists in your Collibra environment. When this happens, the unavailable field or facet is highlighted to enable you to identify and remove it from the search filter. Unavailable fields and facets are ignored in search queries.

Select fields in which to search

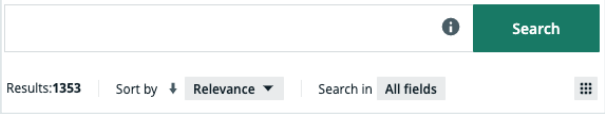
The [Search in fields](#) option enables you to specify in which fields – meaning attributes, relation types and properties – you want to search for your text. By default, no fields are

selected, meaning the search engine searches for your text in all fields.

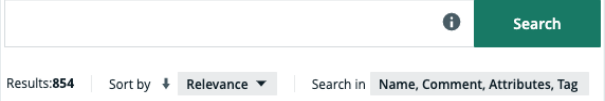
Note Adding relations to the search can significantly hinder search engine performance.

Steps

1. Perform a search via the [Search field](#) or [Search widget](#).
2. On the [Search page](#), click the **All fields** button.

A screenshot of a search interface. At the top is a search input field with a magnifying glass icon on the right and a green 'Search' button. Below the input field, it says 'Results:1353'. To the right of this is a 'Sort by' dropdown menu showing a downward arrow and the word 'Relevance'. Further right is a 'Search in' dropdown menu showing 'All fields'. To the right of this is a small icon of three dots in a square.

Note If one or more fields have already been selected, they are shown instead of the All Fields button. In this case, click the selected fields.

A screenshot of the same search interface as above, but with different settings. The 'Search in' dropdown menu now shows 'Name, Comment, Attributes, Tag' instead of 'All fields'. The 'Results' count is now 'Results:854'. The 'Sort by' dropdown still shows 'Relevance'.

3. Select the fields you want to search in. Click **Clear all** to deselect all fields.
4. Click **Save**.

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.

The screenshot displays the Tableau search interface. On the left, there are two panels: 'SEARCH IN' (labeled with a green circle 1) and 'REFINE' (labeled with a green circle 2). The 'SEARCH IN' panel shows filters for 'Organization' (2 items) and 'Category' (1 item). The 'REFINE' panel shows filters for 'Asset Type' (2 items) and 'Status' (2 items). The main search area shows a search bar with the text 'cust', a search button, and a dropdown menu for 'All candidates'. Below the search bar, the results are displayed as a list of items, including 'Business Analysts Community', 'Collibra Tableau Online Server', and 'Customer/Partner'. The results are sorted by 'Relevance' and show 1353 results.

No.	Part name	Description
1	"Search in" facets	These facets enable you to navigate to resources via organizational path or resource category.

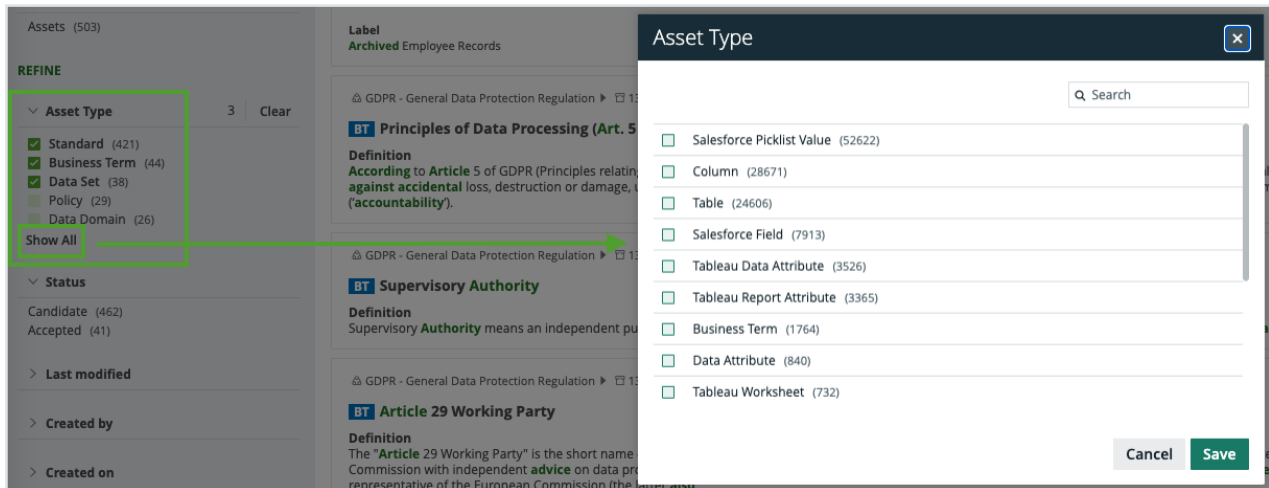
No.	Part name	Description														
2	"Refine" facets	These facets act as filters to refine the search results. The following table shows the packaged "refine" facets: <table><tr><th>Filter criteria</th><th>Use this to show only those search results...</th></tr><tr><td>Asset type</td><td> That are of a specified asset type, such as Business Term, Acronym, Column or Table. This criterion is only applicable if you have selected the category Assets. In the following example image, the search engine searches for your text only in assets of asset type Standard, Column and Data Set. Asset Type3Clear ☒ Salesforce Picklist Value (52622) ☒ Column (28675) ☒ Table (24606) ☐ Salesforce Field (7913) ☐ Tableau Data Attribute (3526) ☐ Tableau Report Attribute (3365) Show All </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><tr><td>Tags</td><td> That have the specified tag(s). You can click the tag in any of the search results, to search for all domains and assets with that tag. </td></tr></table>	Filter criteria	Use this to show only those search results...	Asset type	That are of a specified asset type, such as Business Term, Acronym, Column or Table. This criterion is only applicable if you have selected the category Assets. In the following example image, the search engine searches for your text only in assets of asset type Standard, Column and Data Set. Asset Type3Clear ☒ Salesforce Picklist Value (52622) ☒ Column (28675) ☒ Table (24606) ☐ Salesforce Field (7913) ☐ Tableau Data Attribute (3526) ☐ Tableau Report Attribute (3365) Show All	Status	That have a specified status, such as Candidate, Accepted, Deployed or Rejected.	Last modified	That were modified within the specified time frame; within the last 24 hours, week, month or year.	Created by	That were created by the specified users.	Created on	That were created within the specified time frame; within the last 24 hours, week, month or year.	Tags	That have the specified tag(s). You can click the tag in any of the search results, to search for all domains and assets with that tag.
Filter criteria	Use this to show only those search results...															
Asset type	That are of a specified asset type, such as Business Term, Acronym, Column or Table. This criterion is only applicable if you have selected the category Assets. In the following example image, the search engine searches for your text only in assets of asset type Standard, Column and Data Set. Asset Type3Clear ☒ Salesforce Picklist Value (52622) ☒ Column (28675) ☒ Table (24606) ☐ Salesforce Field (7913) ☐ Tableau Data Attribute (3526) ☐ Tableau Report Attribute (3365) Show All															
Status	That have a specified status, such as Candidate, Accepted, Deployed or Rejected.															
Last modified	That were modified within the specified time frame; within the last 24 hours, week, month or year.															
Created by	That were created by the specified users.															
Created on	That were created within the specified time frame; within the last 24 hours, week, month or year.															
Tags	That have the specified tag(s). You can click the tag in any of the search results, to search for all domains and assets with that tag.															

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.

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.

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.

Search examples

This topic explains how certain configuration settings can affect the search results.

Note The information in this topic is intended to:

- Help Collibra Platform Self-Hosted administrators understand how the search configuration settings affect the search results.
- Help other Collibra users understand why certain search queries might not provide the expected results.

For more information, go to the respective sections on customizing the search index, boosting, stop words, and the exact match features.

Searching for assets that contain stop words in their names

Prerequisites

An asset named **On The Go** exists in your Collibra environment.

Search text

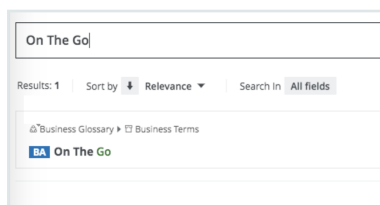
Enter the following search text: *On The Go*

Result

The asset **On The Go** is found.

Interpretation

In the following image, the word **Go** is shown in green. This indicates that **Go** is the word that produced a match. The words **On The**, which are shown in black, did not produce a match.



Furthermore, if you enter the search text *On The*, the asset **On The Go** or any other asset is not found. This is because "on" and "the" are **stop words**, which are filtered from indexing and searches.

Tip The best way to ensure thorough and intuitive search results is to name your assets, domains, and communities as thoughtfully as possible.

Searching for assets that contain more than one word in their names

Search text

Enter the following search text: *marketing team summit*

Interpretation

The search engine interprets your search text as follows: "marketing" or "team" or "summit"

Result

Assets with the following names are found:

Note The order of the actual results may differ from the following order.

- marketing team summit
- marketing_campaign_august
- team123
- summit_planning
- marketing_team_summit_august
- marketingTeamSummit
- marketing team summit August

Searching for assets that contain CamelCase in their names

Search text

Enter the following search text: *MarketingTeam*

Interpretation

The search engine interprets your search text as follows: "marketing" and "team"

Result

Assets with the following names are found:

- **MarketingTeam**
- **marketingteam**
- **marketing_team**
- **marketing team summit**
- **marketing_team_summit**
- **marketing_team_summit_August**
- **xyz marketing abc team def summit ghi**

However, an asset with the following name is not found: **team**. This is because the search engine expects both the words ("marketing" and "team") in the name.

 No search filter ▾
MarketingTeam
Results:7 Sort by ▾ Relevance ▾ Search in All fields
 Data Governance Council ▸  AI Governance BA MarketingTeam
 Data Governance Council ▸  AI Governance BA marketingteam
 Data Governance Council ▸  AI Governance BA marketing_team
 Data Governance Council ▸  AI Governance BA marketing team summit
 Data Governance Council ▸  AI Governance BA marketing_team_summit
 Data Governance Council ▸  AI Governance BA marketing_team_summit_August
 Data Governance Council ▸  AI Governance BA xyz marketing abc team def summit ghi

Searching for assets that contain underscores (snake_case) in their names

Search text

Enter the following search text: *marketing_team_summit*

Interpretation

The search engine interprets your search text as follows: "marketing" and "team" and "summit"

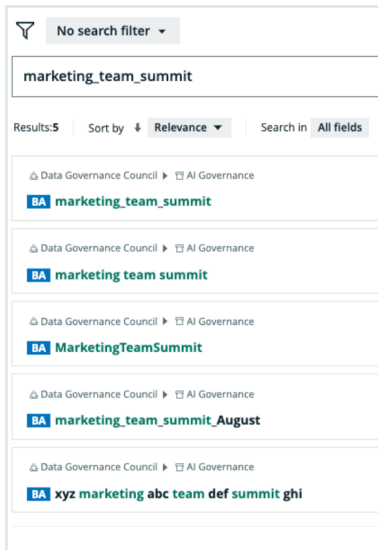
Result

Assets with the following names are found:

- **marketing_team_summit**
- **marketing team summit**
- **MarketingTeamSummit**
- **marketing_team_summit_August**
- **xyz marketing abc team def summit ghi**

However, asset with the following name is not found: **marketingteamsummit**. This is because the search engine treats **marketingteamsummit** as a single term.

An asset with the following name is also not found: **marketing_team**. This is because the search engine expects all the three words ("marketing" and "team" and "summit") in the name.



Searching for assets that contain special characters in their names

Search text

Enter the following search text: *team's calendar*

Interpretation

The search engine interprets your search text as follows: "team" or "calendar"

Result

Assets with the following names are found:

- Team's calendar
- team123
- weekly calendar
- team_calendar_weekly
- marketing team calendar

Searching for assets that contain URLs in their names

Search text

Enter the following search text: *xyz/unified/solutions/data*

Interpretation

The search engine interprets your search text as follows: "xyz" or "unified" or "solutions" or "data"

Result

Assets with the following names are found:

- **xyz/unified/solutions/data**
- **xyz/unified/solutions/data/reports**
- **unified solutions data**
- **solutions data**
- **unified solutions**

How boosting specific resource types affects search results

Prerequisites

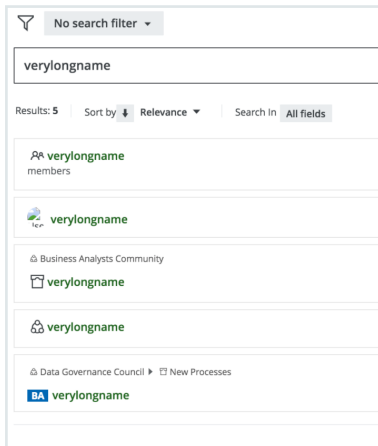
- A resource, user, or user group with the name **verylongname** exists in your Collibra environment.
- Edit the resource type boost factors in Collibra Settings as follows:
 - Asset: 2
 - Community: 4
 - Domain: 6
 - User: 8
 - User group: 10

Search text

Enter the following search text: *verylongname*

Result

The search results are ordered according to the boost factor values of the respective resource types. The user group resource type, with a boost factor of 10, is the most relevant of the results. Asset, with a boost factor of 2, is the least relevant resource type.



How boosting specific fields affects search results

Prerequisites

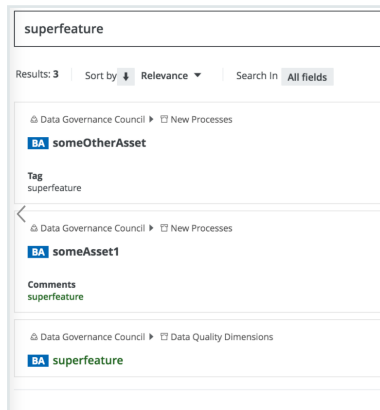
- The following assets exist in your Collibra environment:
 - An asset named **superfeature**
 - An asset named **asset1**, with the following tag: **superfeature**
 - An asset named **asset2**, with the following comment: **superfeature**
- Edit the property boost factors in Collibra Settings as follows:
 - Name: 1
 - Comment: 5
 - Tag: 10

Search text

Enter the following search text: *superfeature*

Result

The search results are ordered according to the boost factor values of the respective fields. The tag field, with a boost factor of 10, is the most relevant of the results. Name, with a boost factor of 1, is the least relevant field.



How boosting attributes affects search results

Prerequisites

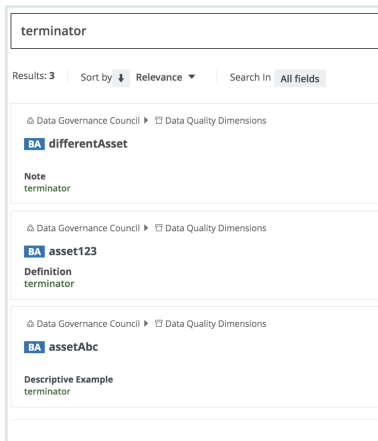
- The following assets exist in your Collibra environment:
 - An asset with the description **terminator**
 - An asset with the definition **terminator**
 - An asset with the note **definition**
- Edit the attribute boost factors in Collibra Settings as follows:
 - Description: 1
 - Definition: 2
 - Note: 3

Search text

Enter the following search text: *terminator*

Result

The search results are ordered according to the boost factor values of the respective attributes. The note attribute, with a boost factor of 3, is the most relevant of the results. Description, with a boost factor of 1, is the least relevant attribute.



How boosting asset types affects search results

Prerequisites

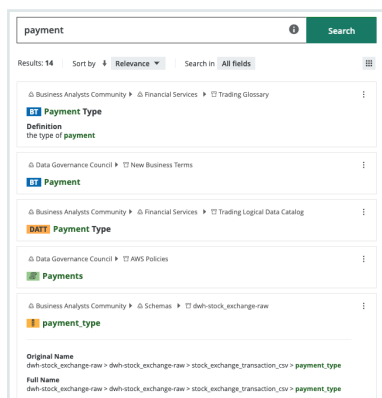
- The following assets exist in your Collibra environment:
 - A Business Term asset with the name **Payment**
 - A Data Attribute asset with the name **Payment Type**
 - A Policy asset with the name **Payments**
- Edit the attribute boost factors in Collibra Settings as follows:
 - Business Term: 3
 - Data Attribute: 2
 - Policy: 1.5

Search text

Enter the following search text: *payment*

Result

The search results are ordered according to the boost factor values of the respective asset types. The Business Term asset type, with a boost factor of 3, is the most relevant of the results. Policy, with a boost factor of 1.5, is the least relevant asset type.



How the exact match boost feature affects search results, regardless of boost factors

Prerequisites

- The following assets exist in your Collibra environment:
 - A Schema asset with the name **Payment**
 - A Business Term asset with the name **Payment Type**
 - A Data Attribute asset with the name **Payment Type**
 - A Policy asset with the name **Payments**
 - Other assets, as shown in the following image
- Edit the asset type boost factors in Collibra Settings as follows:
 - Business Term: 3
 - Data Attribute: 2
 - Policy: 1.5

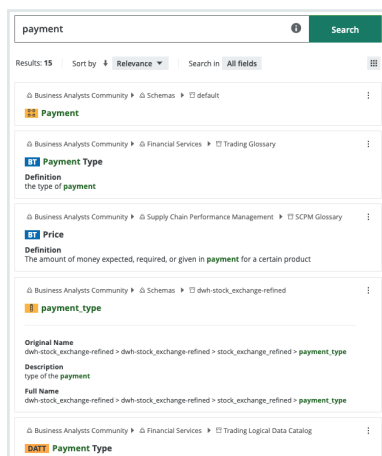
Search text

Enter the following search text: *payment*

Results

The resources that match the exact search text in the Name attribute of the resource are shown first. In this example, there is only one exact match—the Schema asset with the name **Payment**.

After the exact matches, the search results are sorted in order of descending relevance.



How term frequency contributes to relevance scores

Prerequisites

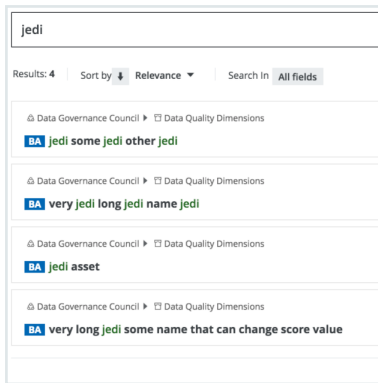
- Several assets, each with a variation of **jedi** in the name, exist in your Collibra environment.
- Default boost factors for all resource types, properties, and attributes.

Search text

Enter the following search text: *jedi*

Result

The search results are ranked as shown in the following image. A combination of the total number of matches in a name and the percentage of matches per total words in a name affect relevance scoring of the results.



Text editors

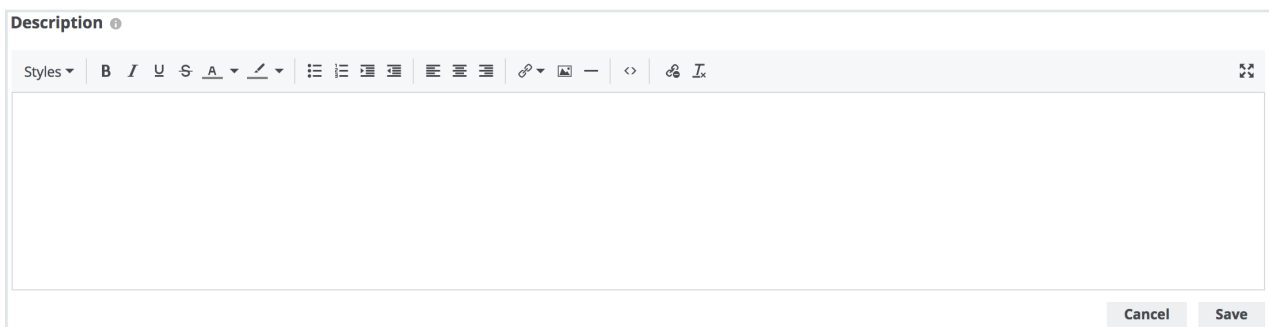
Text editors in Collibra Platform Self-Hosted allow you to enter, format and edit text.

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.

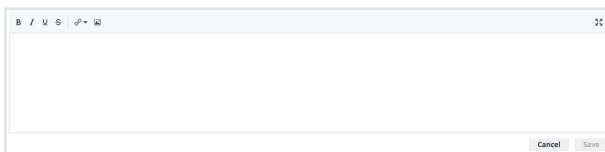
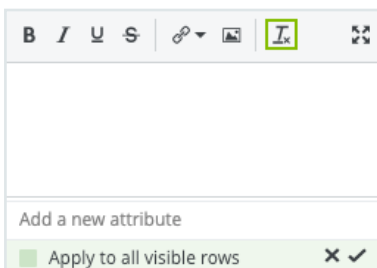


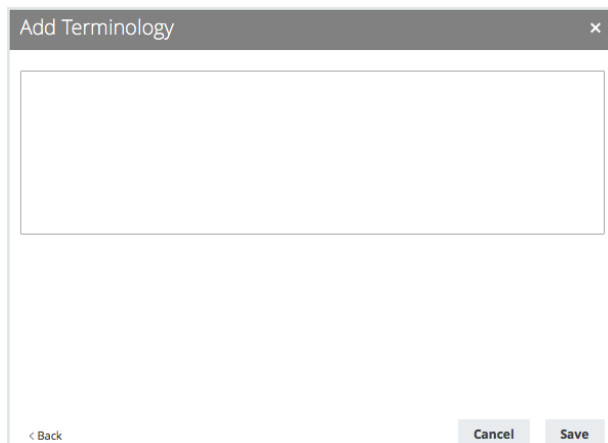
Table text editor

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 • Community, domain and asset pages
Mini text editor	• Comments • 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

Action	PC	Mac
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
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 Colibra runs in the background. While the process is running, you can use Colibra as usual. Activities are, for example, [importing and exporting](#) assets, or [registering](#) a data source and [profiling](#) data.

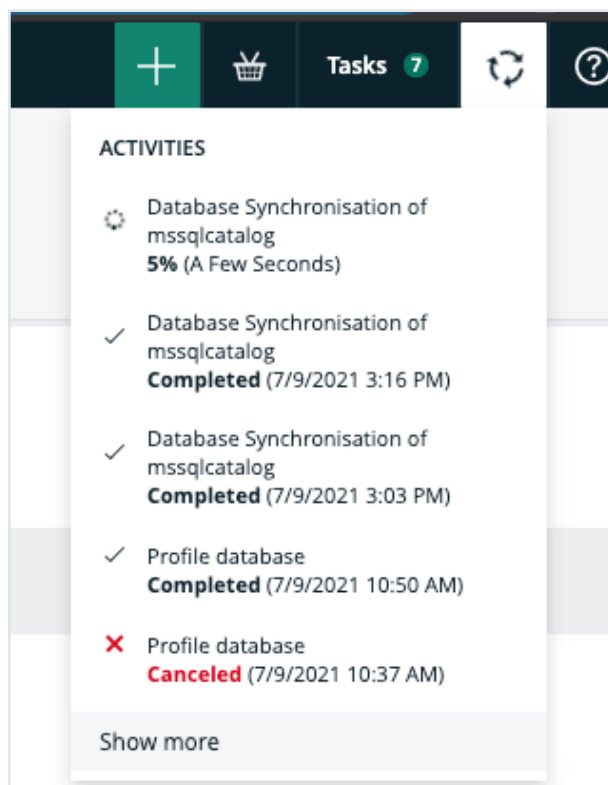
Activities lists

Activities lists show more information about the most recent or ongoing activities in Collibra Platform Self-Hosted, for example the creation date and the status.

There are activities lists in different locations.

Activities list in the main menu

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



Click **Show more** to open 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 your 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.

Overview	Delete							
Groups								
Responsibilities								
History								
Activities								
Mentions								

Created	Name	Status	Job Result	Started	Finished	Results	
☐ 9/23/2019 12:28 PM	Removal of assets	Completed	Success	9/23/2019 12:28 PM	9/23/2019 12:28 PM		
☐ 9/23/2019 12:27 PM	Removal of assets	Completed	Success	9/23/2019 12:27 PM	9/23/2019 12:27 PM		
☐ 9/23/2019 11:16 AM	Removal of assets	Completed	Success	9/23/2019 11:16 AM	9/23/2019 11:16 AM		
☐ 9/23/2019 11:15 AM	Removal of assets	Completed	Success	9/23/2019 11:15 AM	9/23/2019 11:15 AM		
☐ 9/23/2019 11:15 AM	Removal of assets	Completed	Success	9/23/2019 11:15 AM	9/23/2019 11:15 AM		
☐ 9/23/2019 11:11 AM	Removal of assets	Completed	Success	9/23/2019 11:11 AM	9/23/2019 11:11 AM		
☐ 9/23/2019 11:11 AM	Bulk edit Relations	Completed	Success	9/23/2019 11:11 AM	9/23/2019 11:11 AM		
☐ 9/23/2019 11:10 AM	Removal of assets	Completed	Success	9/23/2019 11:10 AM	9/23/2019 11:10 AM		
☐ 9/23/2019 11:05 AM	Removal of assets	Completed	Success	9/23/2019 11:05 AM	9/23/2019 11:05 AM		
☐ 9/19/2019 11:15 AM	Bulk edit Relations	Completed	Success	9/19/2019 11:15 AM	9/19/2019 11:15 AM		
☐ 9/19/2019 10:48 AM	Bulk edit Relations	Completed	Success	9/19/2019 10:48 AM	9/19/2019 10:48 AM		
☐ 9/19/2019 10:47 AM	Bulk edit Relations	Completed	Success	9/19/2019 10:47 AM	9/19/2019 10:47 AM		
☐ 9/19/2019 10:31 AM	Removal of vocabularies	Completed	Success	9/19/2019 10:31 AM	9/19/2019 10:31 AM	Results	
☐ 9/19/2019 10:23 AM	Removal of vocabularies	Completed	Success	9/19/2019 10:23 AM	9/19/2019 10:23 AM	Results	

Column	Description
Created	The date and time that the activity started.
Name	The name of the activity.
Status	The status of the activity. The following statuses can be shown: • Canceled for canceled activities. • Canceling for activities that are in the process of being canceled. • Completed for completed activities. • Error for failed activities. • Running for activities that are still running. • Waiting for activities that are not started yet.

Column	Description
Job Result	Specific results of the job based on whether you selected the option to continue on error. • Success: All imports are completed without any errors. • Completed with error: There are some errors but all successful imports are completed. • Aborted: The import was stopped after reaching the threshold of the number of failed commands set in the import configuration setting in Collibra Console . All successful commands before reaching the threshold were completed. • Failure: Something went wrong and caused the job to stop before processing all imports or reaching the number of failed commands threshold.
Started	The date and time that the activity started.
Finished	The date and time that the activity finished.
Results	If available, a button to see detailed results of the activity. Depending on the activity, the result can be different. 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.

Activities list in the General section of the Collibra settings

The activities list in the **General** section of the [Collibra settings](#) contains a table with all activities started by all users. It also shows more information about each activity, for example the creation date, name, status, start, finish and result.

Settings General Operating model Roles and permissions Workflows Users and groups Migration Data Marketplace									
System Activities Language Banners	Delete								
	Created ↓	Name	Status	Job Result	Started	Finished	Started by	Results	
	☐	10/26/2022 4:0...	Purge old data	Completed	Success	10/26/2022 4:0...	10/26/2022 4:0...	John Fisher ...	
	☐	10/26/2022 3:5...	Full reindex	Completed	Success	10/26/2022 3:5...	10/26/2022 3:5...	John Fisher ...	
	☐	2/9/2021 1:51 P...	Hyperlinks re-c...	Completed	Success	2/9/2021 1:51 P...	2/9/2021 1:51 P...	John Fisher ...	
	☐	2/9/2021 1:51 P...		Completed	Success	2/9/2021 1:51 P...	2/9/2021 1:51 P...	Dora Portma ...	
	☐	2/9/2021 1:51 P...	Full re-index	Completed	Success	2/9/2021 1:51 P...	2/9/2021 1:51 P...	Luke O'Reilly ...	
	☐	10/15/2020 8:3...	Import	Completed	Success	10/15/2020 8:3...	10/15/2020 8:3...	Luke O'Reilly ...	Results
	☐	10/15/2020 4:0...	Purge old data	Completed	Success	10/15/2020 4:0...	10/15/2020 4:0...	Dora Portma ...	
	☐	10/15/2020 12:...	Import	Completed	Success	10/15/2020 12:...	10/15/2020 12:...	Dora Portma ...	Results
	☐	10/14/2020 7:2...	Hyperlinks re-c...	Completed	Success	10/14/2020 7:2...	10/14/2020 7:2...	Luke O'Reilly ...	
	☐	10/14/2020 7:2...	Full re-index	Completed	Success	10/14/2020 7:2...	10/14/2020 7:2...	Luke O'Reilly ...	
	☐	10/14/2020 3:2...	Import	Completed	Success	10/14/2020 3:2...	10/14/2020 3:2...	Preston Sterl ...	Results
	☐	10/14/2020 4:0...	Purge old data	Completed	Success	10/14/2020 4:0...	10/14/2020 4:0...	Dora Portma ...	
	☐	10/13/2020 4:0...	Purge old data	Completed	Success	10/13/2020 4:0...	10/13/2020 4:0...	Preston Sterl ...	
	☐	10/12/2020 4:0...	Purge old data	Completed	Success	10/12/2020 4:0...	10/12/2020 4:0...	Luke O'Reilly ...	
1-50 51-100 101-150 ... 1351-1395 ▶									1395

Column	Description
Created	The date and time that the activity started.
Name	The name of the activity.
Status	The status of the activity. The following statuses can be shown: • Canceled for canceled activities. • Canceling for activities that are in the process of being canceled. • Completed for completed activities. • Error for failed activities. • Running for activities that are still running. • Waiting for activities that are not started yet.

Column	Description
Job Result	Specific results of the job based on whether you selected the option to continue on error. • Success: All imports are completed without any errors. • Completed with error: There are some errors but all successful imports are completed. • Aborted: The import was stopped after reaching the threshold of the number of failed commands set in the import configuration setting in Collibra Console . All successful commands before reaching the threshold were completed. • Failure: Something went wrong and caused the job to stop before processing all imports or reaching the number of failed commands threshold.
Started	The date and time that the activity started.
Finished	The date and time that the activity finished.
Results	If available, a button to see detailed results of the activity. Depending on the activity, the result can be different. 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.

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 Platform Self-Hosted and owned or controlled by the customer. An asset is the capital building block by which to capture information (in terms of characteristics).

Create assets

In Collibra Platform Self-Hosted, domain types are assigned to asset types. You can add an asset to only that domain whose domain type is assigned to the asset type of the asset.

Requirements and permissions

Note The requirements and permissions for creating an asset depend on the values that you select in the **Domain** and **Type** fields when creating the asset.

- You have a [resource role](#) with the Asset > Add [resource permission](#).

Tip This permission is granted through a resource role that is assigned to you either on the domain or on the community to which the domain belongs (via inheritance). For more information, go to [Responsibilities](#).

- You have a [global role](#) that has the relevant [global permission](#) for the type of asset that you are creating. For example, if you want to create a Business Term asset, you must have a global role that has the **Business Semantics Glossary** global permission. Similarly, if you want to create a Policy asset, you must have a global role that has the **Policy Manager** global permission.

Tip To view the global permissions for all packaged (out-of-the-box) asset types, go to [Overview of packaged asset types](#).

Steps

1. Open the product for which you want to create an asset, for example **Business Glossary**.
2. On the main toolbar, click **+**.
 - » The **Create** dialog box appears.
3. On the **Assets** tab, click an asset type from the list.
 - » The **Create Asset** dialog box appears.
4. Enter the required information.

Field	Description
Type	The asset type of the asset that you are creating.
Domain	The domain to which the asset will belong. Tip Ensure that the domain type of the selected domain is assigned to the selected asset type.
Name	A name to identify the asset. Tip You can simultaneously create multiple assets. To do so, after typing the name, press Enter, and then type the next name. Depending on the settings, asset names may need to be unique in their domain. If you enter a name that already exists, it appears in the strike-through style.

5. Click **Create**.
 - » A message stating that one or more assets are created appears in the upper-right corner of the page.

Asset page overview

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

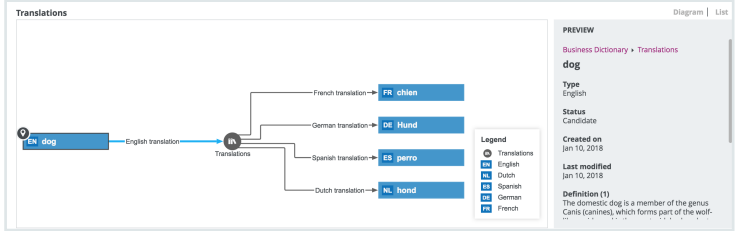
The screenshot displays the SAP Business Analysts Community interface for the 'Country Codes' asset. The page is annotated with 12 numbered callouts:

- 1:** Breadcrumbs (Business Analysts Community > Country Codes).
- 2:** Asset type representation (CODE).
- 3:** Asset name (AD).
- 4:** Resource toolbar (Approval, Approve Asset, Simple Approval, Vote, Edit, Move, Delete, Auto hyperlinks).
- 5:** Progress bar (80%).
- 6:** Status (valid).
- 7:** Business Steward (John Fisher).
- 8:** Add characteristic button.
- 9:** Overview tab.
- 10:** Description (AD is the 2-digit country code for Andorra).
- 11:** Code for Business Term (Andorra).
- 12:** Code Mapping diagram showing a crosswalk from CODE AD to CODE AND and CODE CC-AD.

Number	Section	Description
1	Breadcrumbs	The breadcrumbs of the current asset.
2	Asset type representation	The icon or abbreviation of the asset type . 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. 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. 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.
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. 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. 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 more information, go 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: • True/False: A binary choice. • Date: The format of the date depends on the user's locale settings. • Multiple selection: One or more values from a predefined list. • 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. • Selection: One value from a predefined list. • Text: This may also include images and hyperlinks. Note • If a text attribute is a hyperlink to an asset, you cannot open the link in a new tab by right-clicking. • If a text attribute does not have any value, it shows the following message: No value has been given yet. • If a text attribute has an empty value, it shows the following 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: • Table: You can also choose the columns, or sort and filter their content. • Tiles: You can choose which fields to show 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: 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. 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 a diagram view. Example  The diagram shows a central node 'dog' (English) connected to a 'Translations' node, which then branches out to four language-specific nodes: 'fr chien' (French), 'de Hund' (German), 'es perro' (Spanish), and 'nl hond' (Dutch). A legend on the right identifies the language codes: fr for French, de for German, es for Spanish, and nl for Dutch. A 'PREVIEW' sidebar on the right shows details for the 'dog' asset, including its type (English), status (Candidate), creation date (jan 10, 2018), last modified date (jan 10, 2018), and a definition (The domestic dog is a member of the genus Canis (canines), which forms part of the wolf-).

Relation views

The asset page provides an overview of information related to an asset, based on the assignment of the asset type. 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

related to Business Asset			Add	
Name	Asset Type	Status		
Account Effective Date	Business Term	Candidate		
Account Number	Business Term	Candidate		
account reference number	Business Term	Candidate		
account sequence number	Business Term	Candidate		
Account Status Description	Business Term	Candidate		
Account Type Code	Business Term	Candidate		

- **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

related to Business Asset

Sort by ↑ Name ▾ Add

BT Account Effective Date
Candidate
Asset Type
 Business Term

BT Account Number
Candidate
Asset Type
 Business Term

BT account reference number
Candidate
Asset Type
 Business Term

BT account sequence number
Candidate
Asset Type
 Business Term

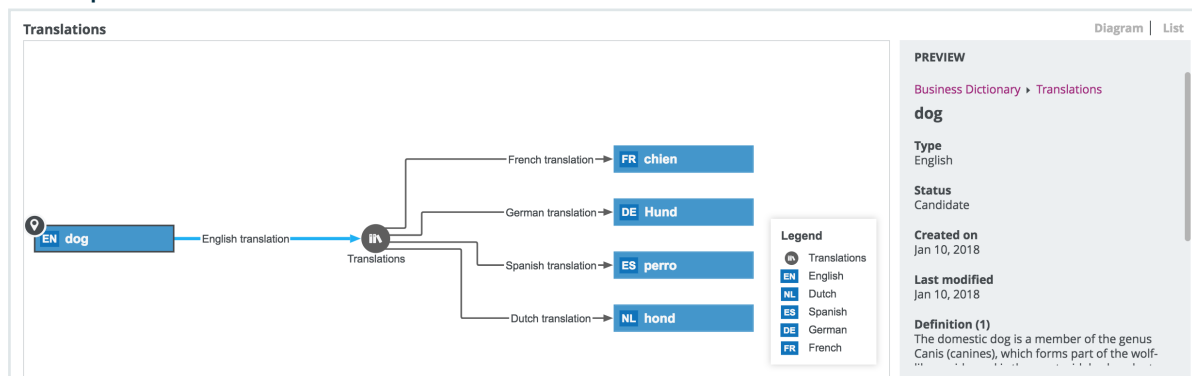
BT Account Status Description
Candidate
Asset Type
 Business Term

BT Account Type Code
Candidate
Asset Type
 Business Term

6

- **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, Colibra 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 Colibra 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. 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.

Requirements and permissions

Note The requirements and permissions for editing an asset depend on the values that you select in the **Domain** and **Type** fields when [creating the asset](#).

- You have a [resource role](#) with the Asset > Update [resource permission](#).

Tip This permission is granted through a resource role that is assigned to you either on the domain or on the community to which the domain belongs (via inheritance). For more information, go to [Responsibilities](#).

- You have a [global role](#) that has the relevant [global permission](#) for the type of asset that you are editing. For example, if you want to update a Business Term asset, you must have a global role that has the **Business Semantics Glossary** global permission. Similarly, if you want to edit a Policy asset, you must have a global role that has the **Policy Manager** global permission.

Tip To view the global permissions for all packaged (out-of-the-box) asset types, go to [Overview of packaged asset types](#).

Steps

1. Open an asset page.
2. Perform one of the following steps:
 - a. Click **Edit**.
 - a. Click **Actions > Edit**.
 - » The **Edit <asset name>** dialog box appears.

3. Enter the required information.

Field	Description
Name	The name of the asset. 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. This field is only available if identical asset names per domain is enabled for this asset type. 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. Click **Edit**.
 - » The **Edit <asset name>** dialog box appears.

3. Enter the required information.

Field	Description
Name	The name of the asset. 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. This field is only available if identical asset names per domain is enabled for this asset type. 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 Platform Self-Hosted 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.

Prerequisites

- You have a [resource role](#) with the Asset > Remove [resource permission](#) for the asset you want to move.
- You have a [resource role](#) with the Asset > Add [resource permission](#) for the domain to which you want to move the asset.

Move a single asset from the asset page

1. Open an asset page.
2. Perform one of the following steps:
 - a. Click **Move**. If you cannot find the **Move** button, click **More** → **Move**.
 - b. Click **Actions** > **Move**.
 - » The **Move <asset name>** dialog box appears.
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. On 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 checkboxes next to the assets you want to move.
3. On 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. Perform one of the following steps:
 - Click **More > Delete**.
 - 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. On 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. On 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. On 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. On 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.

Add a Characteristic	
All	Attributes Relations
Q Search	
Definition	Text
The definition of the business asset. This is the shortest possible description that clearly defines the business asset.	
Descriptive Example	Text
An example of the asset.	
Note	Text
A note.	
synonym of Business Term	Relation
synonym Business Term	Relation
has acronym Acronym	Relation
has code Code Value	Relation
Showing 20 of 20	

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:	- Click All. - Click in the Search field. - Start typing the name of the characteristic that you want to add.

If ...	then ...
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.

Requirements and permissions

Note The requirements and permissions for editing an asset characteristic depend on the values that you select in the **Domain** and **Type** fields when [creating the asset](#).

- You have a [resource role](#) with the Asset > Update [resource permission](#).

Tip This permission is granted through a resource role that is assigned to you either on the domain or on the community to which the domain belongs (via inheritance). For more information, go to [Responsibilities](#).

- You have a [global role](#) that has the relevant [global permission](#) for the type of asset that you are editing characteristics for. For example, if you want to update the characteristics of a Business Term asset, you must have a global role that has the **Business Semantics Glossary** global permission. Similarly, if you want to edit the characteristics for a Policy asset, you must have a global role that has the **Policy Manager** global permission.

Tip To view the global permissions for all packaged (out-of-the-box) asset types, go to [Overview of packaged asset types](#).

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

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**.

About attributes

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

The following table contains examples of 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 shortest possible description that clearly defines the purpose of the 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

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 the 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. Perform one of the following steps:
- Double-click a cell.
 - Hover your cursor over a cell and click .
- » The cell editor appears.
4. Enter the required information.
5. Perform one of the following steps:

If you want to change...	do...
the current row only:	a. Click  .
all visible rows:	a. Click Apply to all visible rows . b. Click  .
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . 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 the 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. Perform one of the following steps:
 - Double-click a cell.
 - Hover your cursor over a cell and click .

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

If you want to change...	do...
the current row only:	a. Click  .
all visible rows:	a. Click Apply to all visible rows . b. Click  .
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . 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 the 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

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

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**.

After you added the relation, it appears on the related assets' pages in a **relation view**.

Add a relation

You can add a **relation** to link two assets.

Prerequisites

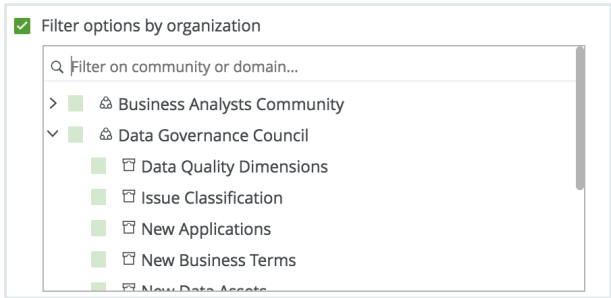
The relation's type is in the relevant **assignment** of the asset's type.

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. If this option is selected, the organization tree appears. You can then filter and select domains and communities. 
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 the 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. Perform one of the following steps:
 - Double-click a cell.
 - Hover your cursor over a cell and click .

» The cell editor appears.

4. Enter one or more assets.
5. Perform one of the following steps:

If you want to change...	do...
the current row only:	a. Click ✓.
all visible rows:	a. Click Apply to all visible rows . b. Click ✓.
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click ✓.

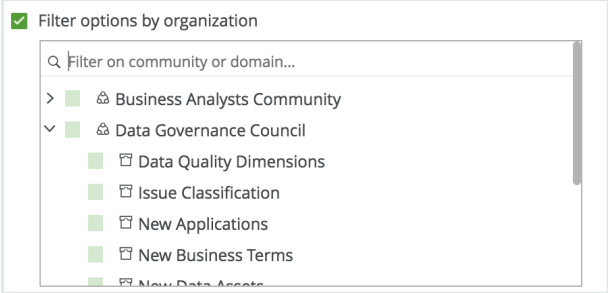
Edit a relation

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. If this option is selected, the organization tree appears. You can then filter and select domains and communities. 
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 the 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. Perform one of the following steps:
 - Double-click a cell.
 - Hover your cursor over a cell and click .

» The cell editor appears.

4. Remove or add one or more assets.
5. Perform one of the following steps:

If you want to change...	do...
the current row only:	a. Click ✓.
all visible rows:	a. Click Apply to all visible rows . b. Click ✓.
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . 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 the table display mode.
2. If you don't see the column of the relation type, add it to the table:
 - a. On 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. Perform one of the following steps:
- Double-click a cell.
 - Hover your cursor over a cell and click .
- » The cell editor appears.
4. Remove one or more assets from the cell.
5. Perform one of the following steps:

If you want to change...	do...
the current row only:	a. Click ✓.
all visible rows:	a. Click Apply to all visible rows . b. Click ✓.
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click ✓.

Complex relations

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

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.

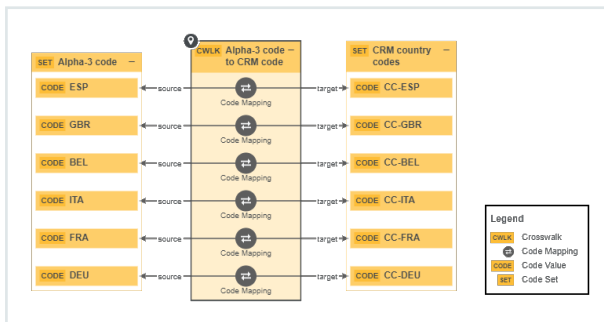
You can **add** a complex relation between assets if the complex relation's type is in the relevant **assignment** of the **asset's type**.

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

After you added the complex relation, it appears on the related assets' pages in a **relation view**.

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.

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**.

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.

1

assigned to *

min. 1 Operating Model - max. 1

Code Mapping

Filter suggested assets by organization

has characteristic *

min. 1 Operating Model - max. 1

Code Value

Filter suggested assets by organization

Optional characteristics

< Back

Cancel

Save

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

Hyperlinks allow you to connect one thing to another to guide people between these two related resources. In Collibra Platform Self-Hosted, 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.

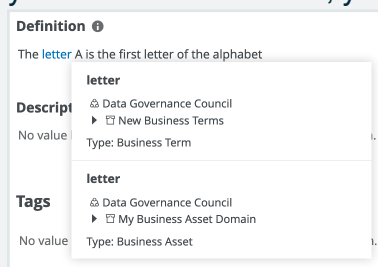
Automatic hyperlinking

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:** Enable or disable automatic hyperlinking in your entire environment in Collibra Console.
- **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. You can configure case-sensitivity for automatic hyperlinking in Collibra Console. Contact [Collibra Support](#) to change case-sensitivity for automatic hyperlinking.

Manual hyperlinking

If you want more control over your hyperlinks then you can use manual [hyperlinks](#) to guide colleagues to or from a specific asset. This is particularly useful if [automatic hyperlinking](#) is

disabled, or if the link text doesn't match the name of the target asset.

Tip You can also manually [create](#) hyperlinks to web addresses.

Disable automatic hyperlinking to a specific asset

[Automatic hyperlinking](#) creates a hyperlink to an asset if its name is mentioned on another asset, for example, in a text attribute. You can disable automatic hyperlinking at the [domain level](#) and the asset level.

Contact [Collibra Support](#) if you want to enable or disable automatic hyperlinking for your entire environment.

You can also [enable or disable automatic hyperlinking](#) for your entire environment in Collibra Console.

An asset may have a common word as its name, for example, "is", "a", "or," or "and." When that happens, you do not want hyperlinks to this asset because it would lead to several useless hyperlinks.

You can still [manually create hyperlinks](#) that target the asset.

Steps

1. Open an asset page.
2. Click **Actions** → **Auto hyperlinks**.
 - » The **Automatic Hyperlinks** dialog box appears.
3. Select the **No Automatic Hyperlink** checkbox.
4. Click **Save**.

What's next?

All automatic hyperlinks to the asset are removed and Collibra no longer creates automatic hyperlinks to the asset. If you again enable automatic hyperlinking to the specific asset, [rebuild](#) the hyperlinks.

Enable automatic hyperlinking in a domain

[Automatic hyperlinking](#) creates a hyperlink to an asset if its name is mentioned on another asset, for example, in a text attribute. This is especially useful for linking to Business Term assets. However, as every asset is a possible target, automatic hyperlinking can lead to an excessive amount of hyperlinks, which can negatively affect performance. Therefore, automatic hyperlinking is disabled by default for all domains. If you want to use this feature, you can enable automatic hyperlinking at the domain level.

Before you begin

Ensure that the automatic hyperlinking setting is enabled in Collibra Console.

Ensure that the automatic hyperlinking setting is enabled. Contact [Collibra Support](#) if it is not enabled.

Steps

1. [Go to the domain page](#) of the domain for which you want to enable automatic hyperlinking.
2. Click **Actions** → **Auto hyperlinks**.
 - » The **Auto hyperlinks** dialog box appears.
3. Clear the **No Automatic Hyperlink** checkbox.
 - » The dialog box closes.

What's next?

[Rebuild the hyperlinks](#) to automatically create hyperlinks to all the assets in the domain.

Delete an automatic hyperlink

Collibra Platform Self-Hosted 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 Platform Self-Hosted can also [create hyperlinks automatically](#).

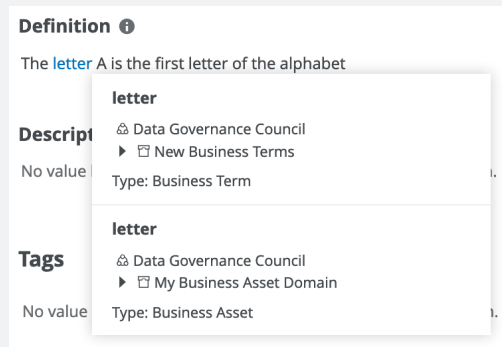
Steps

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.

- 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.



- Click **Save**, to save the hyperlink.
- 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

- Open an asset page.
- Double-click a text attribute or click  to edit the text.
- Select the text to transform into a hyperlink.
- 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. If you don't start the URL with <code>http://</code> or <code>https://</code>, the system will ask if it has to add <code>http://</code>. If you don't add either prefix, Collibra Platform Self-Hosted will consider the URL content an asset. 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. 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 Platform Self-Hosted will consider the URL content an asset. 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. The assets are filtered as you type. Click the asset to which you want to link. 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. • 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 , and then click  **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. 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.

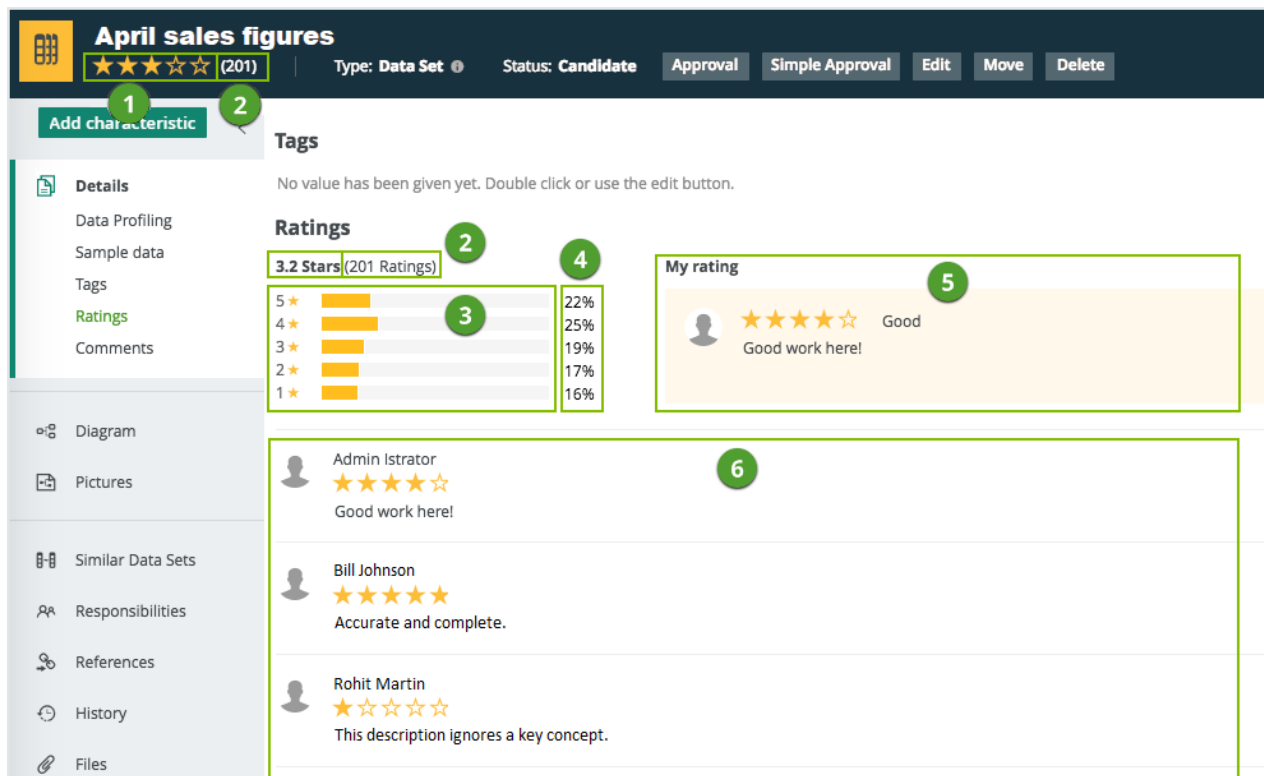
4. Click **Save**.

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.

History				
	Rating ★★★★★☆ This data set is very complete and the data is up-to-date with latest information		Small and medium-sized...	 William Parker 1/10/2018 10:56 PM
	Rating ★★★★★☆ This data set is very complete		Small and medium-sized...	 William Parker 1/10/2018 3:58 PM

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.

All assets ▾					
View for displaying all assets					
>	Delete Move Validate				
	Name ↑	Number of ratings	Average Rating	Status	Asset Type
	11 Data Set	40	★★★★☆	Candidate	Data Set
	1 Data Set	40	★★★★☆	Candidate	Data Set
	2 Data Set	1	★★★☆☆	Candidate	Data Set
	3 Data Set	1	★★★★☆	Candidate	Data Set
	4 Data Set	200	★★★★☆	Candidate	Data Set
	4 Data Set 2	1	★★★★☆	Candidate	Data Set

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 , and then click  **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**.

Tags

In addition to strictly governed metadata, you can use tags to categorize assets. 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 Platform Self-Hosted database, they are not strictly governed by Collibra.

Note

- Tags can be added to only assets.
- Adding, editing, or deleting a tag from an asset does not change the last modified date of the asset.

Benefits

Some of the benefits of tags are as follows:

- You can search for assets with a specific tag by clicking the tag on an [asset page](#) or on the [tags overview page](#).

- You can select the Tag facet on the [Search page](#) to navigate search results.
- You can use tags in filter clauses.
- You can import and export tags.

Tag name characteristics

The characteristics of tag names are as follows:

- Tag names are case sensitive.
For example, you can enter the following tag names: *Car*, *car*. However, tag suggestions are not case sensitive. For example, typing *car* can provide the following suggestions: *Car*, *car*.
- Tag names cannot contain spaces.
- Tag names can contain underscores (_).
- The maximum length of the tag name is 250 characters.

Permissions

The following table contains the permissions that you need to manage tags on the asset and tags overview pages.

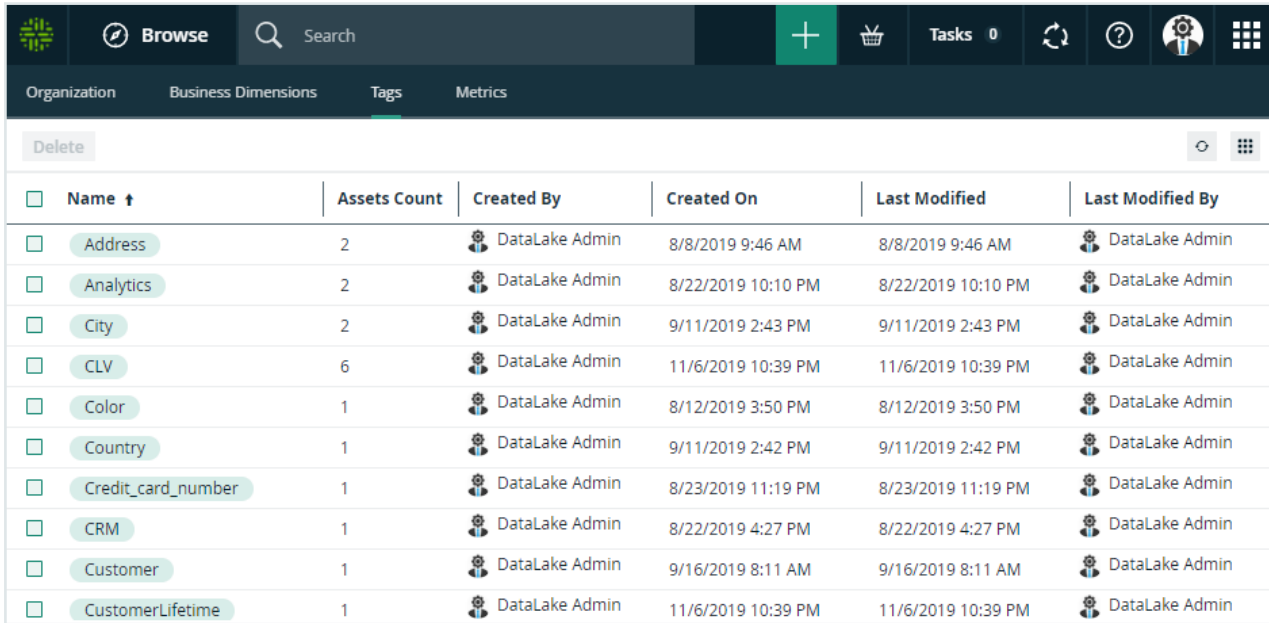
Page	Permission	
Asset	Resource	Asset > Tags > Update: Add, edit, and delete tags. For information about how to grant this permission to a role, go to Enable permission to use tags. Note You can grant this permission to only the role that has the relevant global permission for the associated asset type and has at least the view access to the associated community or domain. For more information, go to Responsibilities.
Tags overview	Global	• Tags > Manage tags: Edit, merge, and delete tags. This permission allows admin and super users to manage all tags. • Tags > View tags: View the tags overview page.

Tags overview page

The tags overview page provides an overview of all the [tags](#) in Collibra Platform Self-Hosted.

With the right [permissions](#), you can view, [delete](#), [edit](#), and [merge](#) tags.

To find this page, open the [application menu](#) and go to **Stewardship** → **Tags**.



☐ Name ↑	Assets Count	Created By	Created On	Last Modified	Last Modified By
☐ Address	2	DataLake Admin	8/8/2019 9:46 AM	8/8/2019 9:46 AM	DataLake Admin
☐ Analytics	2	DataLake Admin	8/22/2019 10:10 PM	8/22/2019 10:10 PM	DataLake Admin
☐ City	2	DataLake Admin	9/11/2019 2:43 PM	9/11/2019 2:43 PM	DataLake Admin
☐ CLV	6	DataLake Admin	11/6/2019 10:39 PM	11/6/2019 10:39 PM	DataLake Admin
☐ Color	1	DataLake Admin	8/12/2019 3:50 PM	8/12/2019 3:50 PM	DataLake Admin
☐ Country	1	DataLake Admin	9/11/2019 2:42 PM	9/11/2019 2:42 PM	DataLake Admin
☐ Credit_card_number	1	DataLake Admin	8/23/2019 11:19 PM	8/23/2019 11:19 PM	DataLake Admin
☐ CRM	1	DataLake Admin	8/22/2019 4:27 PM	8/22/2019 4:27 PM	DataLake Admin
☐ Customer	1	DataLake Admin	9/16/2019 8:11 AM	9/16/2019 8:11 AM	DataLake Admin
☐ CustomerLifetime	1	DataLake Admin	11/6/2019 10:39 PM	11/6/2019 10:39 PM	DataLake Admin

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 , and then click  **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 , and then click  **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 , and then click  **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. 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**.

<

 Overview

 Assets

 Responsibilities

 History

 Files

 Upload a file or drop your attachment here

Download

Delete

☐ File Name	Type	Uploaded by	Uploaded on ▾
☐ All data (1).xlsx	Excel Sheet (xlsx)	 Admin Istrator	6/9/17

1 Attachment

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. You can [edit the file upload settings](#) in Collibra Console.

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. You can [edit the file upload settings](#) in Collibra Console.

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 discuss a community, domain, or asset via comments. For example, if you want to discuss the attributes of an asset or propose related assets, you can do so via comments.

Comments are shown on the **Overview** or **Details** tab of a community, asset, or domain page. Depending on your [permissions](#), you can [add a comment](#), reply to a comment (■), edit a comment (✎), and delete a comment (🗑).

Note

- To add comments, you need the following [resource permission](#): **Comment > Add**
- To edit your or others' comments, you need the following resource permission: **Comment > Update**
- To delete your or others' comments, you need the following resource permission: **Comment > Remove**
- Adding, editing, or deleting a comment does not change the last modified date of the community, domain, or asset.

(Top-level community)

Business Analysts Community

Type: **Community** [Edit](#) [Move](#) [Delete](#)

<

Organization

Overview

Organization

Comments (1)

Responsibilities

Assets

History

Files

Name	Description	Owner	Stakeholders
Business Analysts Community			
Financial Services			
Schemas	Community containing all inge...		
Supply Chain Performance Management			
Tableau Server - Official Demo		Luke O' Reilly	
New Data Sets			

1 (top-level)

Comments

Christina Soucek
@John Fisher, could you make @Anita Morison the Owner of the New Data Sets domain?

a few seconds ago

Add comments

You can add comments to communities, domains, and assets. For example, if you want to discuss the description of an asset, you can do so via comments.

Requirements and permissions

You have the **Comment > Add resource permission** for the community, domain, or asset to which you want to add comments.

Steps

1. Open a community, domain, or asset page.
2. In the left pane, click either **Overview** → **Comments** or **Details** → **Comments**.
3. In the **Comments** field, enter your comment.

Tip You can use the toolbar to:

- Modify the appearance of the comment.
- Add links and images in the comment.
- **Mention** other users in the comment.

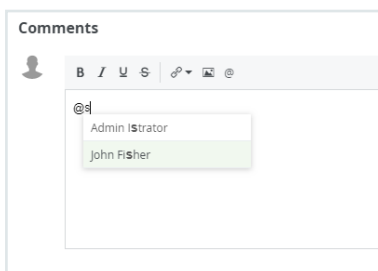
4. Click **Save**.
 - » Your comment is saved.

User mentions

You can draw a user's attention to a comment, community, domain, or asset via the **User mention** option.

Mention a user

To mention a user in a comment, select or enter **@**, and then type the user's first name, last name, or username. As you type a name, matching names appear, even if the typed character is not the first character in a name.



In a user mention, the user is addressed by their first and last names. If the first and last names for a user are not available, their username is used. If, however, the profile of the user is deleted, their name in the mention is replaced with **@Deleted User**.

List of user mentions

To view all the comments in which you are mentioned, [go to your profile page](#), and then, in the tab pane, click **Mentions**.

Mike Jones
Author | mike.jones@collibra.com

Overview
Groups
Responsibilities
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Activities
Mentions

1 **Victoria Duarte Suárez** mentioned you on '**2 Customer Lifetime Value**': **3** 3 minutes ago

@Mike Jones Great definition, the descriptive example is not clear though.

4 [Go to comment >](#)

John Fisher mentioned you on '**Customer Lifetime Value**': 9 minutes ago

@Mike Jones please add a definition and descriptive example of this business ter

[Go to comment >](#)

Item	Description
1	The name of the user who mentioned you in a comment. This can be the full name, first name, last name, or username of the user, depending on which information is available.
2	The name of the resource to which the comment was added.
3	The time when the comment was added.
4	The link to the comment. When you click the link, the resource page is shown with the comment highlighted.

Email notification

When you [mention a user](#), they receive an email message that contains the content of the comment in which they are mentioned and a link to the page containing the comment.

You were mentioned

1

John Fisher

mentioned you on the asset

Customer Lifetime Value:

2

@Mike Jones

please add a definition and descriptive example of this business term

3

Open

See all mentions

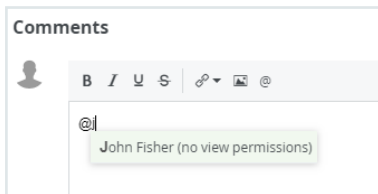
4

5

Item	Description
1	The name of the user who mentioned you in a comment. This can be the full name, first name, last name, or username of the user, depending on which information is available. If you click the name, their profile page in Collibra is shown. You are, however, first prompted to sign in to Collibra.
2	The name of the resource (that is, community, domain, or asset) to which the comment was added. If you click the name, the resource page in Collibra is shown.
3	The content of the comment. If you click your name, your profile page in Collibra is shown.
4	The button to open the comment in Collibra.
5	The button to open the list of all comments in which you are mentioned, in Collibra.

View permission

If you mention a user who does not have the permission to view the resource, a message indicating so appears.



If you are the mentioned user who does not have the permission to view the resource, and if you click the resource link in the [email notification](#), the following message is shown: **Not authorized.**

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 • Joanna Zhou as Owner	• Anita Morrison as Community Manager
Customer Revenue asset	• William Parker as Owner	• Anita Morrison as Community Manager • John Fisher as Business Steward • 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.
- In the **Responsibilities** tab of a user's profile page.
- In the **Responsibilities** tab of a user group page.
- In the **Preview** pane of an asset, for example on an asset page.

Note The preview pane only shows the direct responsibilities.

In a community, domain or asset view

1. Open any view in table or tiles mode.
2. Perform one of the following steps:
 - 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

Tip

- You can also view your own responsibilities.
- Only 300 responsibilities will be displayed at one time, even if more exist in the system.

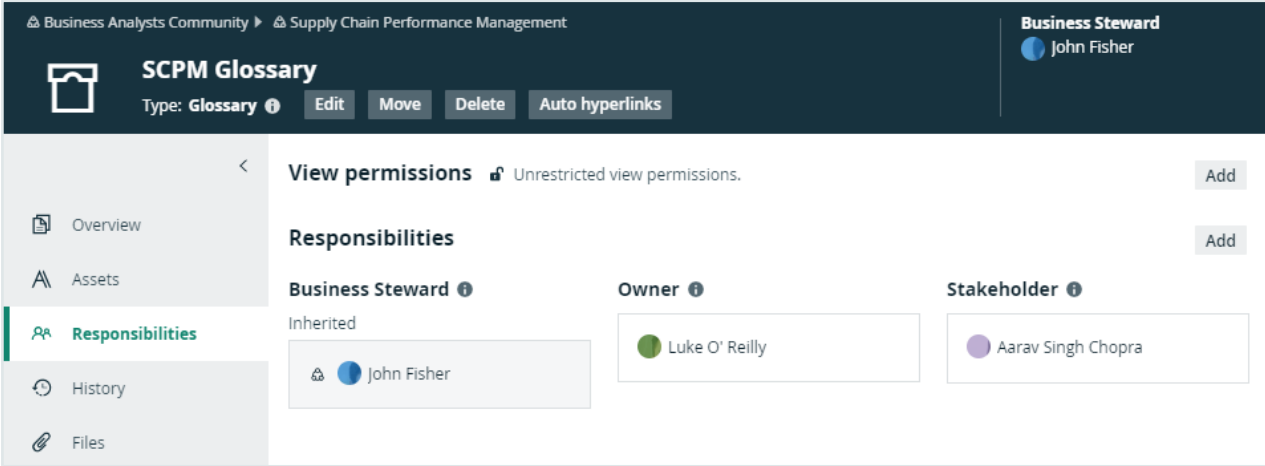
1. [Open](#) a profile page.
2. In the tab pane, click  **Responsibilities**.
 - » The [Responsibilities](#) page appears.

In the Responsibilities tab of a user group

1. Open a group page.
 - a. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
 - b. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
 - c. In the tab pane, click **Users** → **Groups**.
 - » The user group table appears.
2. In the tab pane, click  **Responsibilities**.
 - » The [Responsibilities](#) page appears.

The Responsibilities page

The **Responsibilities** page shows the [view permissions](#) and the [responsibilities](#) of a resource.



Business Analysts Community ► Supply Chain Performance Management

SCPM Glossary
Type: **Glossary**  **Edit** **Move** **Delete** **Auto hyperlinks**

Business Steward
 John Fisher

View permissions  Unrestricted view permissions. **Add**

Responsibilities **Add**

Business Steward  Inherited

 John Fisher

Owner   Luke O' Reilly

Stakeholder   Aarav Singh Chopra

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 Platform Self-Hosted 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 responsibility** 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. Perform one of the following steps:
 - 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. Perform one of the following steps:
 - 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](#):

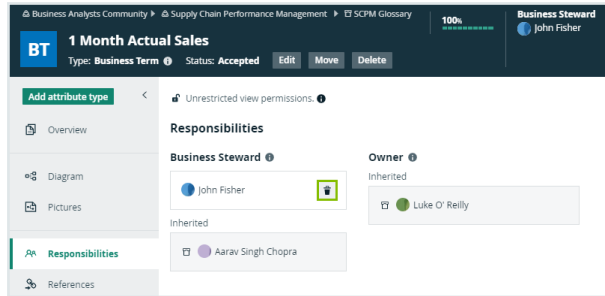
- From the [responsibilities page](#) of a resource.
- From a table.

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. Perform one of the following steps:
 - 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 (such as an asset) and its children. This means that it is view permissions that determine which users can see and work with which resources.

You assign a view permission to [users](#) or [user groups](#) on either a [domain](#) or [community](#) level. Consequently, only these assigned users can see the resources and their children, including the assets. This also includes relations to assets, so if you don't have view permissions for an asset, you also don't see the relations to that asset, for example in [views](#) or on the [asset page](#) of the related assets.

An example of how this works is if User A has view permissions for Community 4 but not Community 6, then User A will only be able to see and work with any resources (including assets) in Community 4. Anything in Community 6 will be inaccessible to User A, unless they are subsequently assigned view permissions.

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](#).

Business Analysts Community ▶ Supply Chain Performance Management

SCPM Glossary
Type: **Glossary** ⓘ **Edit** **Move** **Delete**

Business Steward
John Fisher
admins

< **View permissions** ⓘ Unrestricted view permissions. **Add**

Overview
Assets
Responsibilities
History
Files

Responsibilities **Add**

Business Steward ⓘ
John Fisher

Owner ⓘ
Luke O'Reilly

Inherited
admins

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.

The screenshot shows the 'SCPM Glossary' interface. The top navigation bar includes 'Business Analysts Community' and 'Supply Chain Performance Management'. The user 'John Fisher' is logged in as 'Business Steward'. The left sidebar has links for 'Overview', 'Assets', 'Responsibilities' (selected), 'History', and 'Files'. The main content area is divided into two sections: 'View permissions' and 'Responsibilities'.

View permissions: Shows a list of users with 'Restricted view permissions.' and an 'Add' button. The list includes 'Data Custodians' and 'John Fisher'.

Responsibilities: Shows a list of roles with an 'Add' button. The roles are 'Business Steward' and 'Owner'.

Business Steward: Shows 'John Fisher' as the assigned user.

Owner: Shows 'Luke O' Reilly' as the assigned user, with a red error message 'No view permission'.

Inherited: Shows 'admins' as the inherited user, with a red error message 'No view permission'.

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.

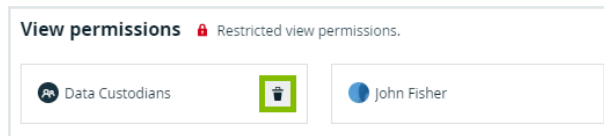
Prerequisites

- 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

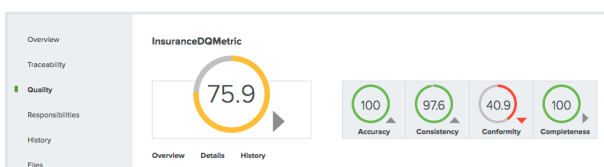
The **Quality** page of an asset makes data quality results of an asset available to the business stakeholders. The dashboard aggregates the following values:

- 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**.

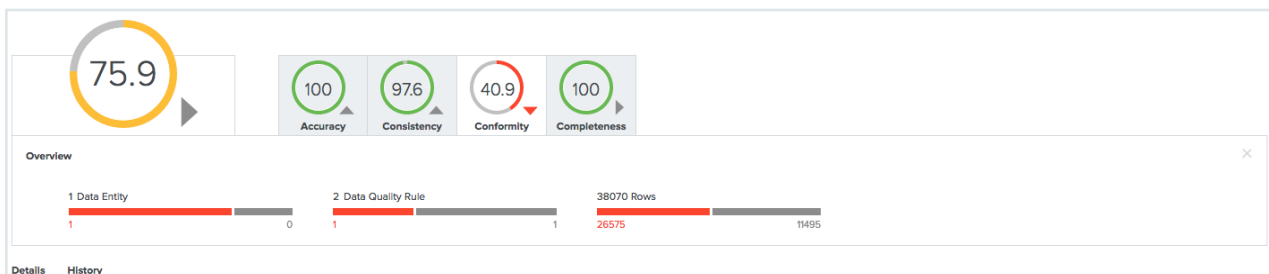
Underneath the top pane, three selection boxes are available. They display an extra overview, details and history pane, respectively.

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.

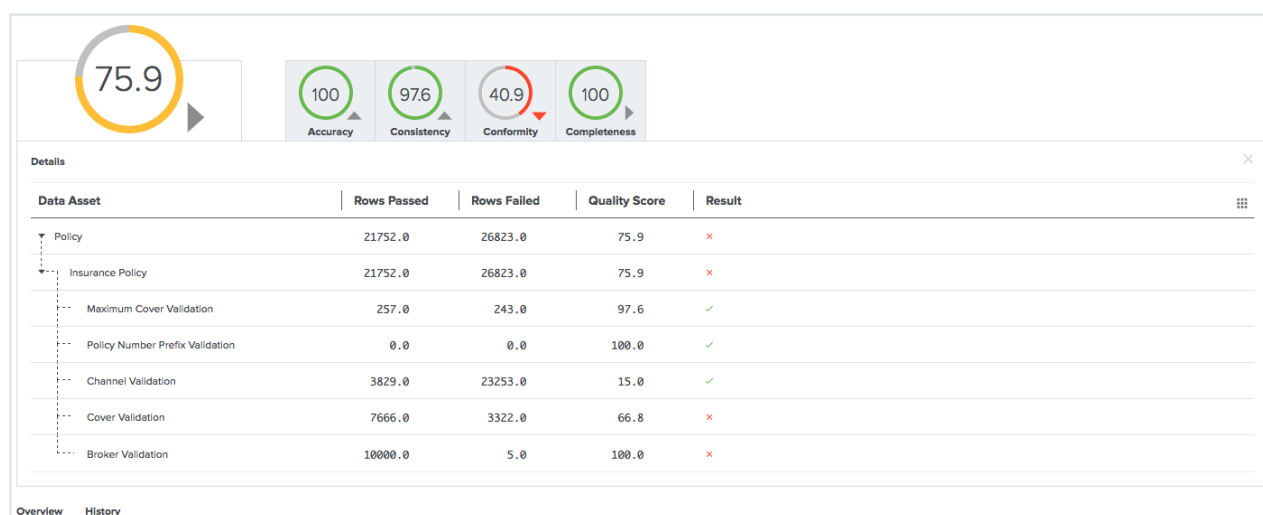


Asset quality details pane

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:

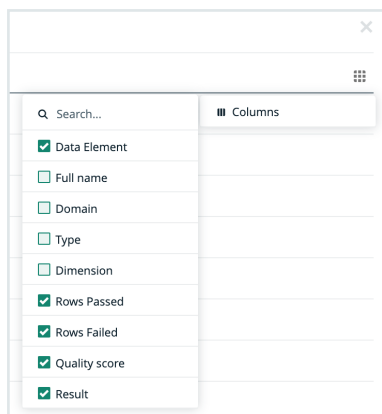
- **Data Asset:** The data asset signifier
- **Rows Passed:** The number of passing rows, aggregated as a sum of the passing rows of the underlying assets
- **Rows Failed:** The number of failing rows, aggregated as a sum of the failing rows of the underlying assets
- **Quality Score:** The score aggregated 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.

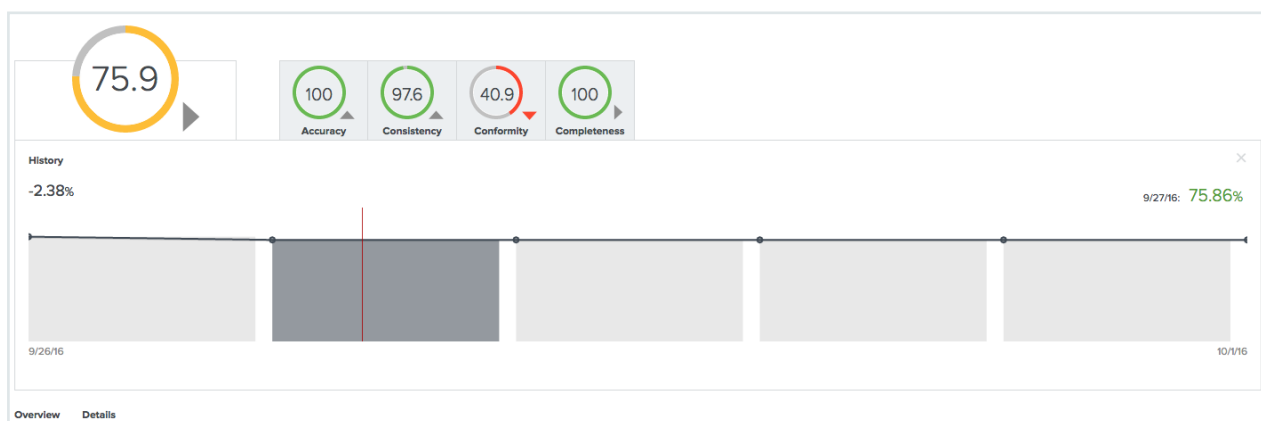


Asset quality history

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](#).

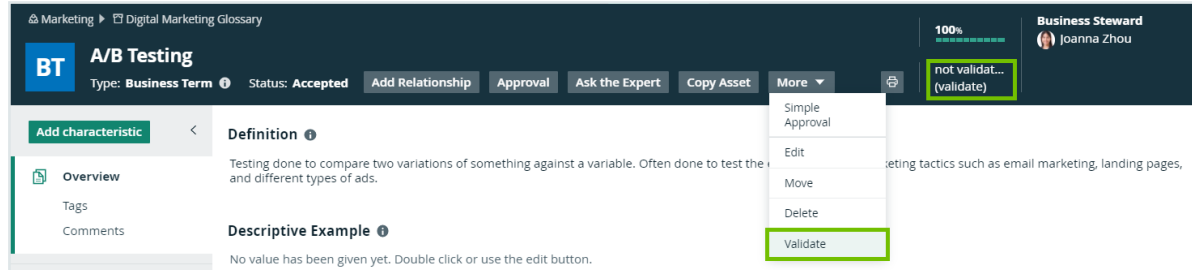
Prerequisites

There are three conditions that need to be met.

- You have a [global role](#) with the Reference Data Manager [global permission](#), for example ReferenceData.
- The [global permission](#) applicable for the asset type.
- You have 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. 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. On 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. On 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.

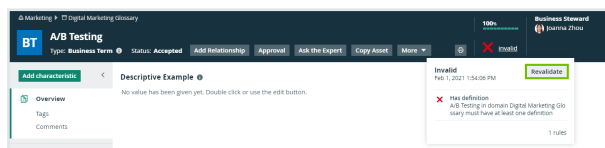
Note You can create a workflow to automatically revalidate assets. To configure validation on certain events, see [Getting started with workflows](#).

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. On 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**.

☐ Name ↑	Definition	Validation Result
☐ A/B Testing	Testing done to compare two variations of something ag...	✖
☐ AdWords	Google's advertising system in which	Invalid Feb 1, 2021 1:57:25 PM ✖ Has definition A/B Testing in domain Digital Marketing Glo ssary must have at least one definition Revalidate
☐ Affiliate Marketing	When a publisher (website with a lo	
☐ API	Application Programming Interfaces	
☐ Attribution	Identifying which part of a marketin	
☐ Audience	The group of specific people a brand	

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

Validation results					
Rules executed					
Result	Asset	Rule	Message	Domain	
✓	Country	KDW VR1		New Business Terms	
✓	Currency Conversion	KDW VR1		New Business Terms	
✓	Customer	KDW VR1		New Business Terms	
✓	Customer Revenue	KDW VR1		New Business Terms	
✓	DDD	KDW VR1		New Business Terms	
✗	DW	KDW VR1	Name should have more than ...	New Business Terms	
✓	DWK	KDW VR1		New Business Terms	
✗	K	KDW VR1	Name should have more than ...	New Business Terms	
✓	KDW	KDW VR1		New Business Terms	
✓	Order	KDW VR1		New Business Terms	
✓	Order Date	KDW VR1		New Business Terms	
✗	W	KDW VR1	Name should have more than ...	New Business Terms	

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- 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

- Open an asset page.
- In the upper right corner, you see ✓ **valid** or ✗ **invalid**.

View the validation result in an asset table

- Open an asset table.
- If you don't see the **Validation Result** column, add it to the table.
More info on adding columns to a table: [Customizing tables](#).
- Click ✓ or ✗.
 - » You can see the validation result of each validation rule.

History in Collibra

Collibra Platform Self-Hosted 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.

The screenshot displays the Collibra interface for a business term named 'customer revenue'. The top navigation bar shows 'Data Governance Council > New Business Terms'. The main header includes the business term name, a star rating (5 stars), and a status of 'Candidate'. Below the header, there are tabs for 'Overview', 'Tags', and 'Comments'. The 'Overview' tab is selected, showing a list of actions performed on the business term. The left sidebar contains navigation options: Overview, Diagram, Pictures, Responsibilities, References, History, and Files. The 'History' tab is selected in the sidebar, displaying a list of actions performed on the business term. The history table includes columns for Action, Who, and a timestamp. The actions listed include 'Attachment', 'Update', 'Simple Approval Process Ended', 'Status Candidate', 'Simple Approval Process Started', 'tag SaaS', 'Definition', 'Comment', 'tag SaaS', 'Rating', 'represents', 'Business Steward', 'Definition', and 'customer revenue'.

Action	Who	from	to
Attachment customer revenue report calculation.xlsx	John Fisher	1/11/2019	2/11/2019 2:01 PM
Update 2 changes	John Fisher		2/11/2019
Simple Approval Process Ended	John Fisher		2/11/2019 2:00 PM
Status Candidate → Accepted	John Fisher		2/11/2019 2:00 PM
Simple Approval Process Started	John Fisher		2/11/2019 2:00 PM
tag SaaS	John Fisher		2/11/2019 1:59 PM
Definition Customer Revenue is the revenue associated with the customer-or-customer-contract.	John Fisher		2/11/2019 1:59 PM
Comment Don't confuse with customer lifetime value!	John Fisher		2/11/2019 1:58 PM
tag SaaS	John Fisher		2/11/2019 1:58 PM
Rating ★★★★★ customer revenue	John Fisher		2/11/2019 1:58 PM
represents represents 35168	John Fisher		2/11/2019 1:58 PM
Business Steward John Fisher	John Fisher		2/11/2019 1:57 PM
Definition Customer Revenue is the revenue associated with the customer or customer contract.	John Fisher		2/11/2019 1:54 PM
customer revenue	John Fisher		2/11/2019 1:54 PM

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.

Data Governance Council > New Business Terms

BT **customer revenue** ★★★★★ (1) Type: Business Term Status: Candidate Add Relationship Approval Ask the Expert Copy Asset More

100% Business Steward John Fisher

Add characteristic

Overview Tags Comments

Diagram Pictures Responsibilities References History Files

2 3 4 5 6

Action	Who	from	to
Select	Select	1/11/2019	2/11/2019
Attachment customer revenue report calculation.xlsx	customer revenue	John Fisher	2/11/2019 2:00 PM
Update	2 changes	John Fisher	2/11/2019
Simple Approval Process Ended	Simple Approval Process	John Fisher	2/11/2019 2:00 PM
Status Candidate Accepted	customer revenue	John Fisher	2/11/2019 2:00 PM
Simple Approval Process Started	Simple Approval Process	John Fisher	2/11/2019 2:00 PM
tag SaaS	customer revenue	John Fisher	2/11/2019 1:59 PM
Definition Customer Revenue is the revenue associated with the customer-or-customer-contract.	customer revenue	John Fisher	2/11/2019 1:59 PM
Comment Don't confuse with customer lifetime value!	customer revenue	John Fisher	2/11/2019 1:58 PM
tag SaaS	customer revenue	John Fisher	2/11/2019 1:58 PM
Rating ★★★★★ customer revenue	customer revenue	John Fisher	2/11/2019 1:58 PM
represents represents 35168	customer revenue	John Fisher	2/11/2019 1:58 PM
Business Steward John Fisher	customer revenue	John Fisher	2/11/2019 1:57 PM
Definition Customer Revenue is the revenue associated with the customer or customer contract.	customer revenue	John Fisher	2/11/2019 1:54 PM
customer revenue	customer revenue	John Fisher	2/11/2019 1:54 PM

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: +: Added information. : Edited information. : Deleted information. : 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.
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: ■ Add ■ Edit ■ Delete The effect of this filter criterion depends on the resource: ■ For assets, this includes action that affect an attribute. ■ For domains, this includes actions affecting the domain itself, but also actions affecting assets in the domain. ■ For communities, this includes actions affecting the community itself, but also actions affecting assets, domains and sub-communities 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. 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. 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:
 - 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
 - Validation result

Requesting access to data via the data basket

The data basket, also called shopping basket or shopping cart, allows users to add multiple assets from Data Marketplace or Data Catalog in a data basket and request access to those assets in bulk.

The data basket feature is optional. It can be [disabled and enabled](#) by an administrator. An administrator can also define which asset types are allowed in the data basket.

The data basket is accessible from the basket icon  in the Main toolbar.

Request access to data via the data basket

The [data basket](#) is a feature that allows you to add assets to a basket and start an access request workflow when you check out the basket.

Steps

1. Add assets to your basket by doing one of the following:

Searching	a. In Collibra Platform Self-Hosted, search for the asset you need and click the name. » The asset page of the asset opens. b. Click Add to Data Basket.
Navigating	a. On the main menu, click , and then click  Catalog. » The Catalog Home opens. b. Navigate to one of the tabs, such as Data Sets and select the check-boxes for the assets that you want to access. c. Click Add to Data Basket
Data Marketplace preview	a. In Data Marketplace, search for the asset you need and click the name. » The asset preview opens. b. Click Add to Basket.

» A message in the upper-right corner indicates that the asset has been added to your basket.

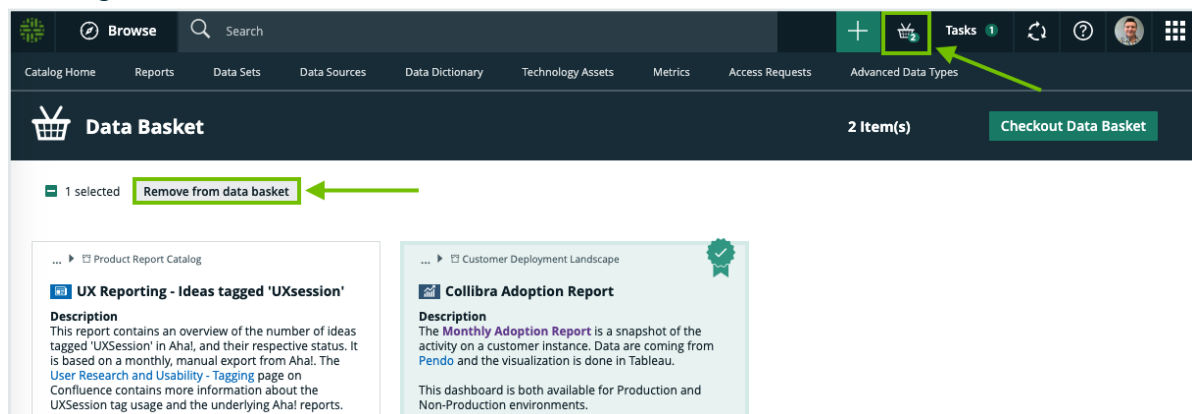
» A [Data Usage asset](#) is created in Collibra Platform Self-Hosted.

2. Open your basket by clicking .

Your data basket opens. It shows all assets you have added to your shopping cart.

3. Validate that you want access to all the assets in the basket.

You can remove assets from the data basket by clicking the relevant tiles, and then clicking **Remove from data basket**.



4. When you are ready, click **Checkout Data Basket**.

» A dialog box appears.

5. Enter the required information and click **Submit**.
6. If the **Add Purpose to the Data Usage** dialog box appears, start typing and select the Purpose asset that describes the business use for which you are requesting access to the data, and then click **Submit**.

Note This dialog box only appears if Data Privacy is installed.

» The out-of-the-box Request Assets Access workflow starts.

The Request Assets Access workflow allows you to request access to assets that are referenced in your Data Basket. All data owners have to approve the request before you can access the assets. For more information about the workflow, go to [Catalog Workflows](#).

» You can view all your requests and their current status on the [Access Requests page](#).

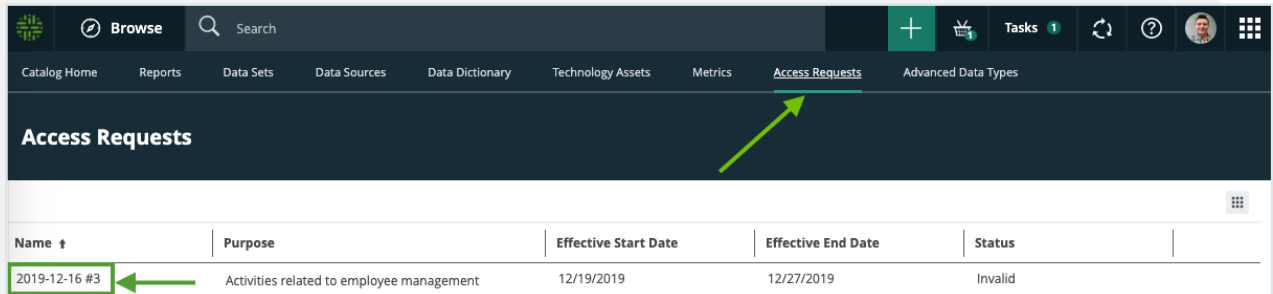
» The [Data Usage asset](#) is renamed with the format YYYY-MM-DD #X, where X is a sequential number, for example 2019-12-16 #3.

About the Data Usage asset

The Data Usage asset is created in the Data Usages domain. The name of the Data Usage asset is "USER_BASKET_" followed by the UUID of the user. The Data Usage asset page shows all of the important information related to the access request including:

- The assets to which access is requested.
- The purpose for requesting access to the data.
- The access start date and end date.

Tip The Data Usages domain is a hidden domain in the Business Analysts Community. This means it doesn't appear in the Collibra Browser, which helps to avoid it being inadvertently deleted. To view the Data Usages domain, go to the Access Requests page and click the name of a Data Usage asset. The Data Usages domain appears in the breadcrumb, on the Data Usage asset page.



Name ↑	Purpose	Effective Start Date	Effective End Date	Status
2019-12-16 #3	Activities related to employee management	12/19/2019	12/27/2019	Invalid

Enable and configure the data basket

The [data basket](#) is a feature that allows you to add assets to a basket and start an access request workflow when you check out the basket.

If the data basket is enabled, users can add assets of the type Data Set, Report, or one of their child [asset types](#) to your basket. These eligible out-of-the-box asset types can be extended with additional asset types.

Important If you add more asset types, make sure to update the [Request Assets Access workflow logic](#).

Before you begin

The [Settings landing page](#) is enabled.

Required permissions

You need the [SysAdmin global role](#).

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Colibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Shopping Basket**.
3. Select the **Show Basket** checkbox.
 - » Extra fields appear.

Note

By default, users can add assets of the type Data Set, Report, or one of their child [asset types](#) to the basket. Therefore, the Report and Data Set asset types are selected in this page by default and cannot be removed.

4. To allow an extra asset type, click **Add**.
5. Select the asset type you want to allow.

All child asset types of a selected asset type are allowed automatically. If you, for example, enable Table assets, then Database View will also be eligible for the shopping basket.

Important

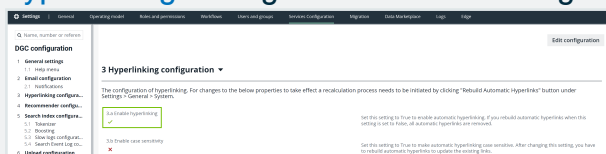
If you added more asset types, make sure to update the [Request Assets Access workflow logic](#). This workflow accepts by default only data sets that contain Column assets as data elements.

6. Click **Save**.
 - » For the allowed asset types:
 - The **Add to Data Basket** button is available in the asset pages.
 - In Data Marketplace, the **Add to Basket** button is available in the [asset previews](#).
 - The **Add to Data Basket** button also appears if you have selected one or more assets with allowed asset types in Data Catalog.
 - » If a user clicks the button, the asset is added to the data basket. For more information, go to [Request access to data](#).

References tab of an asset page

The **References** tab of an asset page shows a table that contains assets in which at least one string attribute or comment contains the name of the asset that you have currently opened.

Note The **References** tab shows the referenced assets only if the **Enable hyperlinking** setting on the service configuration page is enabled.



Business Analysts Community Supply Chain Performance Management SCPM Glossary BT Actuals Type: Business Term Status: Accepted Edit Move Delete Auto hyperlinks 100% Business Steward John Fisher																													
Add characteristic Overview Diagram Pictures Responsibilities References History Files	<table> <thead> <tr> <th>Asset</th><th>Reference Type</th><th>Reference Value</th></tr> </thead> <tbody> <tr> <td>dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 1m_act_sales</td><td>Description</td><td>1 month actuals sales (in 000\$)</td></tr> <tr> <td>dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 3m_act_sales</td><td>Description</td><td>3 month actuals sales (in 000\$)</td></tr> <tr> <td>dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 6m_act_sales</td><td>Description</td><td>6 month actuals sales (in 000\$)</td></tr> <tr> <td>dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 9m_act_sales</td><td>Description</td><td>9 month actuals sales (in 000\$)</td></tr> <tr> <td>dwh-scm-refined > dwh-scm-refined > scpm_refined > 1m_act_sales</td><td>Description</td><td>1 month actuals sales (in 000\$)</td></tr> <tr> <td>dwh-scm-refined > dwh-scm-refined > scpm_refined > 3m_act_sales</td><td>Description</td><td>3 month actuals sales (in 000\$)</td></tr> <tr> <td>dwh-scm-refined > dwh-scm-refined > scpm_refined > 6m_act_sales</td><td>Description</td><td>6 month actuals sales (in 000\$)</td></tr> <tr> <td>dwh-scm-refined > dwh-scm-refined > scpm_refined > 9m_act_sales</td><td>Description</td><td>9 month actuals sales (in 000\$)</td></tr> </tbody> </table>		Asset	Reference Type	Reference Value	dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 1m_act_sales	Description	1 month actuals sales (in 000\$)	dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 3m_act_sales	Description	3 month actuals sales (in 000\$)	dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 6m_act_sales	Description	6 month actuals sales (in 000\$)	dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 9m_act_sales	Description	9 month actuals sales (in 000\$)	dwh-scm-refined > dwh-scm-refined > scpm_refined > 1m_act_sales	Description	1 month actuals sales (in 000\$)	dwh-scm-refined > dwh-scm-refined > scpm_refined > 3m_act_sales	Description	3 month actuals sales (in 000\$)	dwh-scm-refined > dwh-scm-refined > scpm_refined > 6m_act_sales	Description	6 month actuals sales (in 000\$)	dwh-scm-refined > dwh-scm-refined > scpm_refined > 9m_act_sales	Description	9 month actuals sales (in 000\$)
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By default, the table on the **References** tab shows the **Asset**, **Reference Type**, and **Reference Value** columns. You can, however, [add](#) more columns.

The following table describes the columns that are available to be shown on the **References** tab.

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.

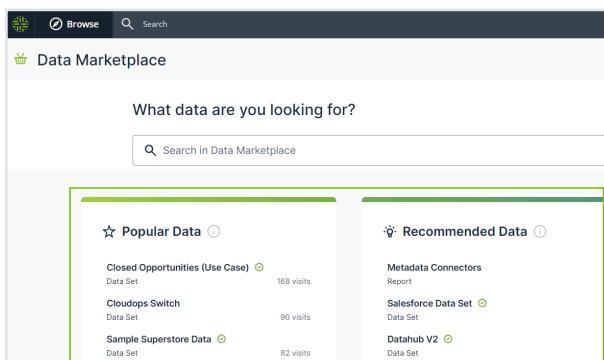
Asset recommender

The asset recommender suggests relevant assets based on the assets that were visited in the past.

The recommendations provided can be based on the overall asset popularity across the organization or targeted for a specific user. Depending on where the recommendations are shown, they can also be categorized and filtered by asset type, domain, or community.

To ensure that the recommendations are based on up-to-date information, the asset recommender is retrained every day. For more information, go to [Asset recommender strategy](#).

Asset recommendations are shown in Collibra for Desktop, [Homepage](#), and [Data Marketplace](#). In the following example, the asset recommender is used to show popular data and recommended data in Data Marketplace.



Important

- The asset recommender is a cloud-only feature. It requires that application usage data is collected for the environment.

- Recommendations are not available in environments with instance names that contain one of the following strings: -qa, beta, -poc, ie-, infra-, docker, training, sandbox.
- Recommendations in new environments will be empty or less meaningful for some time until the asset recommender has collected enough user behavior data.
- If you just started using Collibra as a user, you won't receive any recommendations. You'll receive recommendations after using Collibra and after the daily retraining of the asset recommender.

Asset recommender strategy

The asset recommender is trained on asset visit data. It roughly follows these steps:

1. Data on asset visits—such as which users visited which assets, when, and how often—is collected and processed to assign a score to all asset and visitor combinations. The score reflects the interest of a user in the asset.

Note Asset visits in Collibra platform, Collibra for Desktop, Collibra for Mobile, and Data Marketplace are considered. Visits to the following instance names are not considered:

- Instance names that contain the following strings: -qa, beta, -poc, ie-, infra-, docker, training, sandbox.
- Instance names that do not contain .collibra.com

2. A model is trained to predict all user-asset interest scores. The model learns to generate informative recommendations for assets and users based on the collected data.

Note Certain asset visits are filtered out when the asset recommender is retrained, for example, assets visited by only one user, assets that are visited only once, and asset visits that take less than six seconds.

3. The data collection and model training are triggered daily to ensure that asset recommendations are based on up-to-date information.

Troubleshooting asset recommender

Issue: You do not receive any recommendations where you expect them.

Possible reasons:

- If you just started using Collibra as a user, you won't receive any recommendations. You'll receive recommendations after using Collibra and after the daily retraining of the asset recommender.
- You visited assets, but the visits were filtered out during retraining. In this case, the asset recommender cannot provide recommendations.
- It is possible that no relevant assets can be suggested because of applied asset type, community, or domain filters where the recommendations are shown. For example, assets outside the Data Marketplace scope will not be recommended in the context of Data Marketplace.
- It is possible that no relevant assets can be suggested in the instance.

Importing and exporting

The import and export functionalities in Collibra Platform Self-Hosted 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 Platform Self-Hosted.

By importing, you can create and edit communities, domains, assets, or complex relations and their characteristics such as [attributes](#), [relations](#), [responsibilities](#), and [tags](#) from a [view](#).

Tip

- For importing complex relations using an Excel file, see the knowledge base article on the [Collibra Product Resources site](#).
- If you want to edit a large amount of assets in one go, you can perform an export-import round trip:
 - a. [Create a view](#) that contains all the assets and characteristics that you want to edit.
 - b. [Export the assets from that view](#).
 - c. Edit the exported file.
 - d. [Import the assets](#) back into the same view. Collibra automatically maps the characteristics during the import, implementing your changes.
- 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.

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.

Note

- 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](#) to change the file upload settings. The default maximum file size is 512 MB. You can [edit file upload settings](#) in Collibra Console. The default maximum file size is 10 MB.
- When importing Excel files, you may encounter an error with the file being too large. If this is the case, split the file into multiple smaller files or use CSV.
- Importing data from a large Excel file can consume a lot of memory. To overcome this, you can:
 - Import from CSV instead of Excel.
 - Limit the Excel file to only contain the data you really need.

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 Platform Self-Hosted.

Prerequisites

- You have a [global role](#) that has the **Import global permission**.
- 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.
 - If you want to import responsibilities, **Asset responsibilities support** is enabled in Collibra Console.

Learn more about importing responsibilities.

You can import [responsibilities](#) along with your assets by mapping table headers in your import files to the applicable role in the same way as you map attributes.

To add responsibilities to your input file, provide a user ID or group ID per row for the corresponding role column, for example **Roles > *your_role* > ID**.

To ensure you have the right format for import, [export the asset table](#), ensuring you [add the desired role column](#) to the view first.

Tip You can find the desired IDs in the [Users and groups](#) section of the Collibra Settings.

Import using the new wizard

Tip You can [import responsibilities](#) along with your assets.

1. Open a [view](#).
2. Above the table, to the right, click  → **Assets**.
 - » The **Import** dialog box appears.
3. Drag and drop the file or click **Upload a file** and choose the appropriate Excel or CSV file for upload.
4. If you chose a CSV file:
 - 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.

5. Click **Next**.
6. Manage the mapping of the fields of the import file and your Collibra resources:
 - a. The **Import mapping** dialog box appears and Collibra tries to map the table headers in your import file to Collibra resources, based on the names of the fields and columns.

Import

Map the corresponding table headers from your input file to the Collibra resources and their properties

File: HR Systems.xlsx

1

Automap

2

Clear

4

Table Headers

3

5

Collibra Resources

Asset Id

Full Name

Name

Asset Type

Domain

Domain Type

Community

Status

Asset Id

Full Name

Name

Asset Type

Domain

Domain Type

Community

Status

< Back

Cancel

Next

Number	Field	Description
1	Automap	Button to let Collibra automatically map all table headers in the import file to Collibra resources, based on their names.
2	Clear	Button to remove all mappings.

Number	Field	Description
3	Mapping table	This table enables you to map table headers in the import file to Collibra resources. Each row in the table has a background color to indicate whether the table header is mapped or not. ■ Green: When the table header from the import file is mapped to a Collibra resource the row will be highlighted in green. ■ Red: After clicking the warning about unmapped items these rows will be highlighted in red and moved to a separate section at the bottom of the table. Once a table header in the unmapped section has a mapping selected it will be moved to the green mapped section. You can use the Automap button to automatically map a table header, unless you have already manually changed the mapping. If you manually change a mapping then auto-mapping will not longer override this selection. An individual mapping can be cleared by using the cross icon in the Table Headers column. If a relation type in your file matches with multiple relation types in Collibra then it will not be auto-mapped, meaning you will be required to map this relation type manually. This is to avoid any incorrect mapping.
4	Table Headers	This column contains the field name of the table headers in your file.
5	Collibra Resources	This column shows to which Collibra resource the file field is mapped. If the field is unmapped then there is a drop down list with the available Collibraresources . For relations, a hierarchy is displayed.

- b. Click **Automap** to let Collibra map all previously unmapped columns automatically.
 - c. If required, manually map columns to another resource.
 - d. Click **Next**.
 - » The **Import options** appear.
7. Enter the required information.

Setting	Result
Create new assets if they don't yet exist	If assets do not exist, Collibra creates them when you provide the following information: ◦ The full name. Tip The full name of the assets is a unique identifier in each community. If you map the full name, you don't need to map the name of the assets unless they are different. When you create new assets, their full names automatically become their names, unless you also map their names. ◦ The asset type. Tip If you don't map the asset type, it defaults to Business Asset or a deducted value from a relation. ◦ The domain. Tip If you don't map the domain, it defaults to the current domain. Collibra creates a new domain and top-level community when the following conditions are met: ◦ You mapped the domain, domain type and community. ◦ The new domain names are unique and the new community names are unique in each domain.

Setting	Result
How do you want to handle existing assets from the file?	Choose to either: ◦ Delete existing assets and recreate them again based on the file. ◦ Update existing assets with any new values from the file.
How do you want to handle existing attributes, relations and responsibilities that were mapped?	Choose to either: ◦ Replace all existing values with the ones provided in the file. ◦ Only add new values.
Delete existing assets from the domain that are not in the file.	Collibra deletes existing assets from a domain if they are not in the import file. If an existing domain is referenced in the import file, then any assets from that domain not included in the file are also deleted. This applies to all domains defined for relations as well.
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.

8. Click the **Test Import** button.
 - » The test results appear.
9. If the simulated results match your expectations, click **Import**.

Tip If they don't, click **Back** to change the mapping or import options.

- » The import results appear.
10. Click **Close**.

Import using the old wizard

Important Starting with Collibra version 2023.08, version 2 of the import wizard is enabled by default, while version 1 is no longer available for general use.

Note For the original import wizard, the max file size is restricted to 100 MB.

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 columns from the import file with the Collibra resources, based on the names of the columns and resources.

Import

Map the asset characteristics to the columns in the import file.

View: Default Automap Clear

Characteristic (5 Mapped of 7)	Import Column (10 Not Mapped)
Full Name	Full Name
Name	Name
synonym Business Term	
Full Name	synonym [Business Term] > Full Name
Type	
Domain	synonym [Business Term] > Domain
Domain Type	synonym [Business Term] > Domain Type

Back Next

Number	Field	Description
1	View selector	The view selector allows you to choose a view whose characteristics will appear in the list. Tip You can also choose All characteristics to show all characteristics.
2	Automap	Button to let Collibra automatically map all columns from the file to Collibra resources based on their names.
3	Clear	Button to clear all mapped characteristics in the Import Column .

Number	Field	Description
4	Mapping table	This table enables you to map characteristics of the view to columns of the import file. Each row has a background color to indicate whether a characteristics is mapped or not. ■ Dark green: The characteristic is mapped to a column in the import file. ■ Light green: The relation is mapped partially. This means not all underlying fields are mapped. ■ White: The characteristic is not mapped.
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 when you provide the following information: ◦ The full name. Tip The full name of the assets is a unique identifier in each community. If you map the full name, you don't need to map the name of the assets unless they are different. When you create new assets, their full names automatically become their names, unless you also map their names. ◦ The asset type. ◦ The domain. Collibra creates a new domain and top-level community when the following conditions are met: ◦ You mapped the domain, domain type and community. ◦ The new domain names are unique and the new community names are unique in each domain.
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 attributes?	

Setting	Result
Replace them with new attributes. (=> delete + create)	If attributes exist, Collibra deletes them and creates them again based on the import file. Select this option if you want to update existing, or add new attributes, such as a definition.
Create as new attributes.	If attributes exist, Collibra creates another instance of the attributes based on the import file. 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 existing assets from a domain if they are not in the import file. If an existing domain is referenced in the import file, then any assets from that domain not included in the file are also deleted. This applies to all domains defined for relations as well.
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 the simulated results match your expectations, click **Import**.

Tip If they don'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**.

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.

Prerequisites

- You have a [global role](#) that has the **Import global permission**.
- 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.

Import using the new wizard

1. Open a [view](#).
2. Above the table, to the right, click  → **Complex Relations**.
 - » The **Import** dialog box appears.
3. Drag and drop the file or click **Upload a file** and choose the appropriate Excel file for upload.
4. Click **Next**.
5. Select the **Complex Relation Type** from the drop down list.
6. Manage the mapping of the fields of the import file and your Collibra resources:
 - a. The **Import mapping** dialog box appears and Collibra tries to map the table headers in your import file to Collibra resources, based on the names of the fields and columns.

Import

Choose a complex relation type and then map the corresponding table headers from your input file to the Collibra resources and their properties

File: Complex Relation Types.xlsx

Complex Relation Type: 6
Complex Relation Characteristics

1 Automap
2 Clear

4 Table Headers
3
5 Collibra Resources

ID	Id
Kind	Kind
Min Values	Min Values
Max Values	Max Values
Created on	Created on
Created by	Created by
Last Modified on	Last Modified on
Last Modified by	Last Modified by
UUID	UUID

< Back
Cancel
Next

Field	Description
Automap	Button to let Collibra automatically map all table headers in the import file to Collibra resources, based on their names.
Clear	Button to remove all mappings.

Field	Description
Mapping table	This table enables you to map table headers in the import file to Collibra resources. Each row in the table has a background color to indicate whether the table header is mapped or not. ■ Green: When the table header from the import file is mapped to a Collibra resource the row will be highlighted in green. ■ Red: After clicking the warning about unmapped items these rows will be highlighted in red and moved to a separate section at the bottom of the table. Once a table header in the unmapped section has a mapping selected it will be moved to the green mapped section. You can use the Automap button to automatically map a table header, unless you have already manually changed the mapping. If you manually change a mapping then auto-mapping will not longer override this selection. An individual mapping can be cleared by using the cross icon in the Table Headers column. If a relation type in your file matches with multiple relation types in Collibra then it will not be auto-mapped, meaning you will be required to map this relation type manually. This is to avoid any incorrect mapping.
Table Headers	This column contains the field name of the table headers in your file.
Collibra Resources	This column shows to which Collibra resource the file field is mapped. If the field is unmapped then there is a drop down list with the available Collibraresources . For relations, a hierarchy is displayed.
Complex Relation Type	Select the complex relation type you want to use for mapping.

- b. Click **Automap** to let Collibra map all previously unmapped columns automatically.

- c. If required, manually map columns to another resource.

Note When importing new assets, ensure you provide and map the following information:

- The full name.
- The asset type.

Tip The import wizard can determine the asset type of the related assets based on the asset types of the complex relation.

- The domain.

- d. Click **Next**.

» The **Import options** appear.

7. 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.

8. Click the **Test Import** button.

» The test results appear.

9. If the simulated results match your expectations, click **Import**.

Tip If they don't, click **Back** to change the mapping or import options.

» The import results appear.

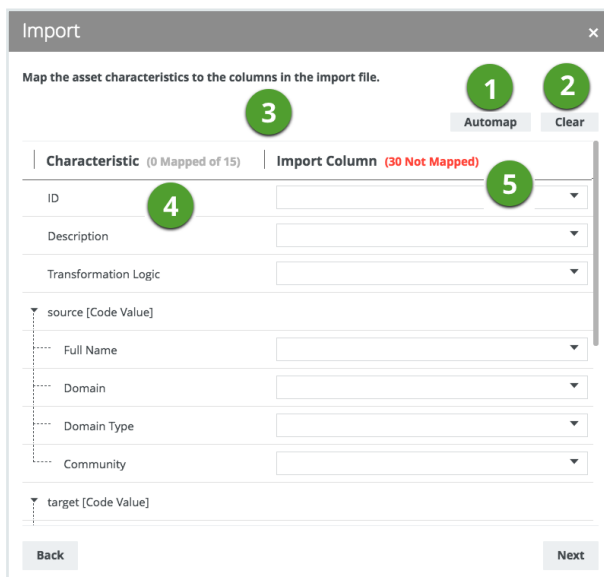
10. Click **Close**.

Import using the old wizard

Important Starting with Collibra version 2023.08, version 2 of the import wizard is enabled by default, while version 1 is no longer available for general use.

Note For the original import wizard, the max file size is restricted to 100 MB.

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 columns from the import file with the Collibra resources, based on the names of the columns and resources.



Number	Field	Description
1	Automap	Button to let Collibra automatically map all columns from the file to Collibra resources based on their names.
2	Clear	Button to clear all mapped characteristics in the Import Column .
3	Mapping table	This table enables you to map characteristics of the view to columns of the import file. Each row has a background color to indicate whether a characteristics is mapped or not. ■ Dark green: The characteristic is mapped to a column in the import file. ■ Light green: The relation is mapped partially. This means not all underlying fields are mapped. ■ 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 the simulated results match your expectations, click **Import**.

Tip If they don'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**.

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.

Version 2 of the import wizard

Starting with Collibra version 2022.11, a new import wizard is available. The new import wizard uses version 2 of the Import API. It offers an improved design with a more intuitive and accurate mapping, clearer import configuration options and better performance. To make the v2 import more robust, reliable and predictable, we have made changes to the requirements for a successful import.

Starting with Collibra version 2023.08, version 2 of the import wizard is enabled by default, while version 1 is no longer available for general use.

Note You can request [Collibra Support](#) to disable this feature and continue using the old wizard until it is completely phased out.

Reviewing your input files

Some of the features that the new import wizard introduces may require you to adapt your input file. Consult the [Differences and guidelines](#) section to see what you need to address.

Overview

Version 2 of the import wizard adds a series of improvements that might require you to adapt your input file.

Interface improvements

- The import wizard shifted the focus from Collibra characteristics to the fields of your file. Your fields are on the left side and allow mapping to the corresponding characteristics in Collibra on the right side. For an export-import round trip your fields are automatically mapped and you no longer need to select a specific view.
- A separate section displays all unmapped fields. It clearly indicates the fields which could not be automatically mapped. Once you map a field, it moves to the mapped section.
- The **Configure Import** dialog box has a new structure and more detailed information about your import options.
- To avoid unintentional changes, the import wizard explains the implications of deleting existing assets from the domain that are not in your import file before proceeding with the import.
- To help you troubleshoot, you can see a detailed table with the errors that happened during your import or test import.

Relations auto-mapping

To improve the automatic mapping for ambiguous relations, which correspond to multiple relations in Collibra, version 2 of the import wizard uses the source element of a relation type in the relation column headers. The header format changes from **role [Target asset type]** to **[Source asset type] role [Target asset type]**, for example **[Business Asset] has acronym [Acronym]**.

Note You can still use existing import templates, but to take advantage of a more accurate mapping, [export](#) the latest format with updated relation column headers.

Asset responsibilities

You can now import asset responsibilities. Because this action has performance implications, it is not enabled by default. You can toggle this feature via the [Asset responsibilities support](#) Collibra Console setting.

Starting workflows after import

You can decide whether to start workflows after a successful import by configuring the **Enable workflows during import** Collibra Console setting. This allows you to start workflows that are configured to run after a certain event, such as adding an asset to a domain, when that event is the result of an import operation.

Important Enabling workflows during import can have a significant impact on performance, based on the import volume. This configuration option is disabled by default.

Note Workflows do not start when using the Import REST API v2.

Handling of missing or unmapped data

To avoid creating undesired results, version 2 of the import wizard avoids making some assumptions for mandatory fields when the import file does not contain such values or you don't map the values during the import process. You should always provide an map values for domains, communities, and asset types to ensure the accuracy of the imported data. However, there are some scenarios where the import wizard can accurately determine how to handle missing or unmapped data.

Communities, domains, and domain types

You should always provide and map values for communities, domains, and domain types even if the import wizard can determine those values.

When you provide and map the asset ID, the import wizard treats the import as an update and does not assume any defaults. It takes the data you have provided and mapped in the import file and updates the assets accordingly.

When you start the import from a community, product, or global view page, and you don't map the asset ID you must provide and map the domain.

Starting with Collibra version 2023.05, when you start the import from a domain and you don't map the asset ID and the domain, the domain defaults to the current domain and any mapped domain types or communities are ignored.

When you start the import from a domain and you don't map the asset ID but you map the domain, the domain does not default to the current domain and any other mapped value is respected.

Asset types

Starting with Collibra version 2023.08, when you create new assets without providing the asset type, the import wizard defaults the asset type to **Business Asset** or a calculated value based on any provided relations.

Scenario	Result
You don't map an asset ID and there are no relations.	The asset type defaults to Business Asset .
You don't map an asset ID and there is one relation.	The asset types for both the source and the target of the relation are determined by the asset types of that relation, for example [Business Asset] has acronym [Acronym] .
You don't map an asset ID and there are multiple relations with the same source asset type.	The asset types for both the source and the target of the relation are determined by the asset types of those relations, for example [Business Asset] has acronym [Acronym] and [Business Asset] utilizes [Technology Asset]. Note Other assets without a relation are also imported with the same asset type as the source asset type.

Scenario	Result
You don't map an asset ID and there are multiple relations with the different source asset types.	The asset type for the source of the relation is not defaulted. The asset type for the target is determined by the target asset types of the relations. Important Because in this scenario the asset type is missing, the import does not complete successfully. Note The asset type of other assets without a relation is also not defaulted.
You map an asset ID and there are relations.	The asset type for the target of the relation is determined by the target asset types of the relations.

Starting with Collibra version 2023.08, when you import complex relations, the import wizard allows you to map the asset type. This means you can import complex relations also between new assets. Additionally, the import wizard can determine the asset type of the related assets based on the asset types of the complex relation.

Missing or partial data

When you explicitly map the community, domain, domain type or asset type for the primary or related assets, all the values are read from the input file. If the mapped columns contain missing data, for example some rows have data and some are empty, the empty values are not automatically defaulted. The exact values from the file, whether they are provided or empty, are used during import. This may result in an import error when values are missing.

Whitespace characters

Except for attributes, version 2 of the import wizard preserves any leading or trailing whitespace characters that your input file might contain.

Tip Ensure your input file does not contain any unwanted whitespace characters.

Differences and guidelines

Scenario	Import wizard v1	Import wizard v2
The asset type is missing or unmapped.	The asset type defaults to Business Asset or is deducted from a relation.	Starting with Collibra version 2023.08, the import defaults to Business Asset or a deducted value from a relation. For the full behavior, see how the import wizard handles missing or unmapped data .
You start the import from a community page but the community is either missing or unmapped.	The import defaults to the current community.	There is no default. You must provide and map the community.
You start the import from a domain page but the domain is either missing or unmapped.	The import defaults to the current domain.	Starting with Collibra version 2023.05, the import defaults to the current domain if the asset ID is not mapped. For the full behavior, see how the import wizard handles missing or unmapped data .
The import file contains partial information for mapped columns.	The import continues with automatically defaulted values.	The exact values from the file, whether they are provided or empty, are used during import. This may result in an import error when values are missing.
Relations are ambiguous and might match multiple relation types.	Ambiguous relations are mapped automatically to the first matching relation type.	When using the original relation format, only relations that are uniquely identified are mapped automatically. You must manually map the ambiguous relations. Tip To take advantage of the improved auto-mapping logic, use the new table header format for relations.

Scenario	Import wizard v1	Import wizard v2
You import responsibilities with your assets.	You cannot import responsibilities.	You can import responsibilities after you enable the Asset responsibilities support Collibra Console setting.
Your import file contains whitespace characters around the content.	The import trims leading or trailing whitespace characters.	Except for attributes, the import respects the original whitespace characters.

Updated input file guidelines

To account for the differences between versions, before you start using version 2 of the import wizard, ensure your input file meets these updated guidelines:

- Provide the asset type.

Note Starting with Collibra version 2023.08, when you create new assets without providing the asset type, the import wizard defaults the asset type to **Business Asset** or a calculated value based on any provided relations.

- Provide the community, domain and domain type.

Note Starting with Collibra version 2023.05, when you start the import from a domain and you don't map the asset ID and the domain, the domain defaults to the current domain and any mapped domain types or communities are ignored.

- Ensure that the mapped columns do not contain missing data as it is not automatically defaulted.
- For an improved and more accurate relation mapping, use the latest file format that contains more details in the relation header.
- Remove any unnecessary leading or trailing spaces.

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.

The export takes into account all relevant properties of a table:

- Filters: determine which assets are exported.
- Columns: determine which information about assets is exported.
- Sorting: determines the order in which the assets are exported.

Note Starting with Colibra version 2023.05, to ensure accuracy, especially when re-importing, exported relations use the following column headers:

- **[Source asset type] role [Target asset type]**, for example **[Business Asset] has acronym [Acronym]**.
- **[Target asset type] corole [Source asset type]**, for example **[Acronym] is acronym for [Business Asset]**.

You can still use existing import templates, but to take advantage of a more accurate mapping, [export](#) the latest format with updated relation column headers.

Export assets

You can export assets from a [view](#). For example, this is useful if you want to create an overview in Excel.

Prerequisites

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

Steps

1. Open a [view](#).
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. By default, your current view is filled in as view to export.
Add the characteristic needed for reimport. (ID, Domain, Community, ...)	Select this option if you want to reimport the export file later. 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. 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. 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. 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. Note This option only appears if you select Excel as the File type.
Characters selector	Select the characters you want to use as: ◦ Separator: The default is ; . ◦ Quote: The default is " . ◦ Escape: The default is \ . Note This option only appears if you select CSV as the File type.

Field	Description
Attach to this resource	Select this option to also save the file as an attachment to the resource you started the export from. Important 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. You can edit the file upload settings in Collibra Console. The export does not complete when the resulting file is larger than the maximum file size. Clear this option to complete the export. Note This option only appears if you start the export from a community or domain.

4. Click **Export**.

» A progress message appears.

» When the export completes, the export file downloads according to the settings of your web browser.

5. Download the file and close the progress message.

Tip If you closed the progress message before you could download the file or you want to download it again, you can find the export file in the **Results** column of the [Activities list](#).

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.

Prerequisites

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

Steps

1. Open a [view](#).
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.
Add the characteristic needed for reimport. (ID, Domain, Community, ...)	Select this option if you want to reimport the export file later. 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. 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. 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. 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. Note This option only appears if you select Excel as the File type.

Field	Description
Characters selector	Select the characters you want to use as: ◦ Separator: The default is ; . ◦ Quote: The default is " . ◦ Escape: The default is \ . Note This option only appears if you select CSV as the File type.
Attach to this resource	Select this option to also save the file as an attachment to the resource you started the export from. Important 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. You can edit the file upload settings in Collibra Console. The export does not complete when the resulting file is larger than the maximum file size. Clear this option to complete the export. Note This option only appears if you start the export from a community or domain.

4. Click **Export**.

» A progress message appears.

» When the export completes, the export file downloads according to the settings of your web browser.

5. Download the file and close the progress message.

Tip If you closed the progress message before you could download the file or you want to download it again, you can find the export file in the **Results** column of the [Activities list](#).

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.

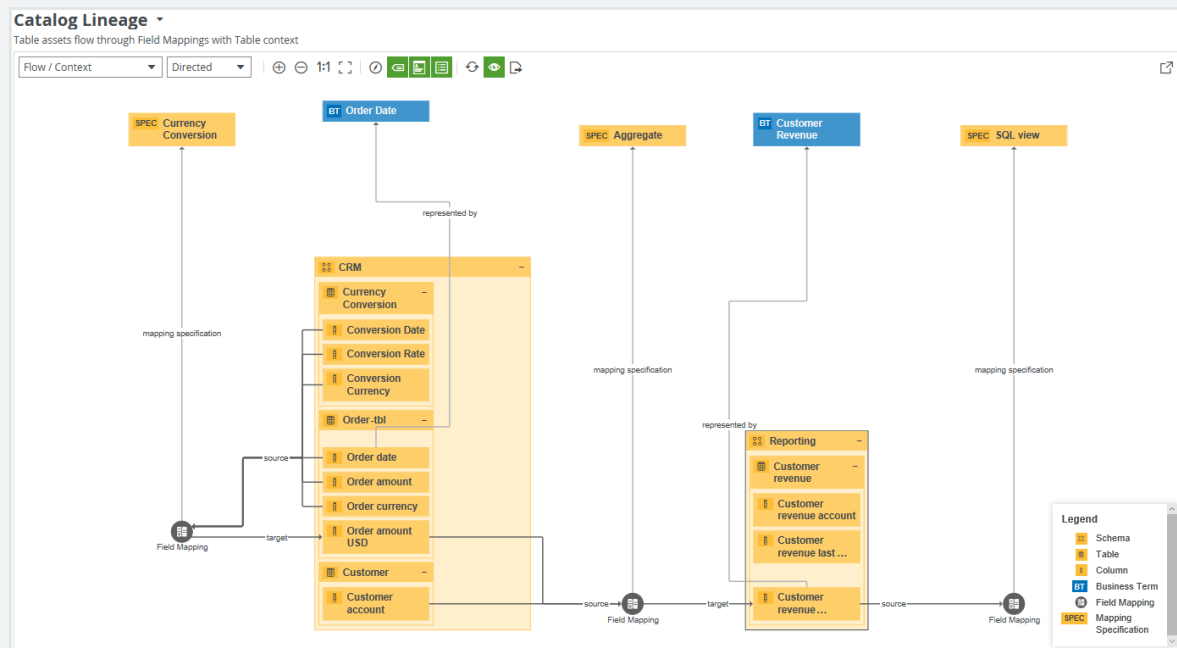
You can find a diagram in the tab pane of every asset page.

You can work with diagrams in the [diagram editor](#), to determine how a diagram is shown. Collibra Platform Self-Hosted 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".
Diagram view	A kind of query that determines which nodes and edges have to be shown in a diagram for a given asset. The diagram view also determines how the nodes and edges are shown. You can define multiple diagram views for the same asset type.

Concept	Description
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]. 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. Note • The node for an asset is depicted by a rectangle. • 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. For example, a Table asset can box multiple Column assets.
Locked node	A collapsed boxing node that cannot be expanded.
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. 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. 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. 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.

Concept	Description
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



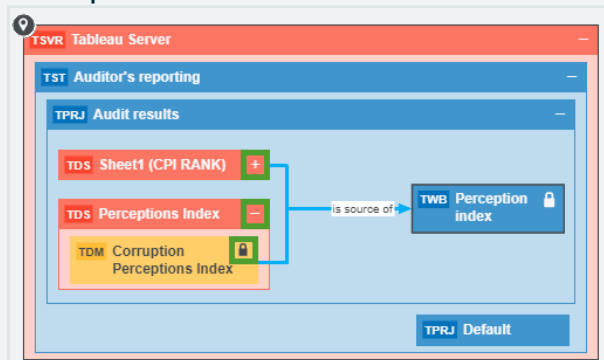
- Boxed and boxing: Many relation types are used to describe a part-whole relation, such as "Tableau Project groups / is grouped by Report". For that reason, you can also represent the relation between those assets as boxing nodes and boxed nodes.

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

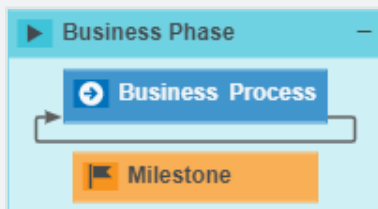
asset types, the result diagram may contain an asset of the child asset type that matches both nodes of the diagram view. Therefore, the asset node is duplicated.

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. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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.

Diagram layout	Description
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. Boxing nodes are not supported in this layout, therefore: • The diagram is completely redrawn. • The explored nodes are removed from the diagram. • The nodes expand or collapse to their initial state. • 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. 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 Platform Self-Hosted 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. 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. This is the default traversal strategy.
Upstream	For the start node, only the incoming edges are traversed and shown. For each node encountered, only the incoming edges are traversed.
Downstream	For the start node, only the outgoing edges are traversed and shown. 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. For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node. 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

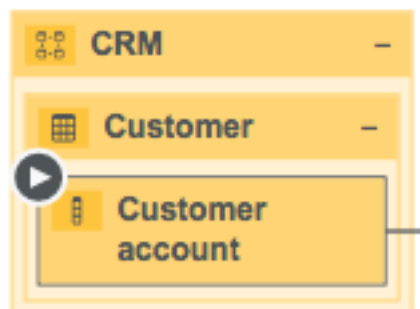
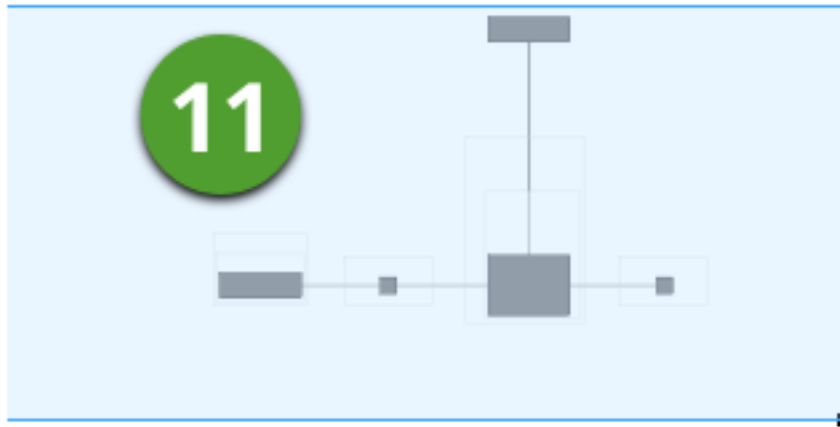
1

Flow / Context ▼

Directed ▼

Business qualifier ▼

5

11

No	Name	Description
1	View title	The name and description of the current diagram view. 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. 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. 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. 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. 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
	Layout	Select a layout . The layout determines the location of nodes and edges, but does not change which nodes and edges are shown.
	Traversal strategy	Select a traversal strategy to change which nodes and edges are shown in the diagram.
	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.

Button	Name	Description
1:1	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 . 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.
	Legend	Show or hide the legend panel containing the explanation of the nodes. The legend explains the color codes and symbols of the items in the diagram. You can move it to anywhere in the diagram. 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. 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. 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.

Button	Name	Description
	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. 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.

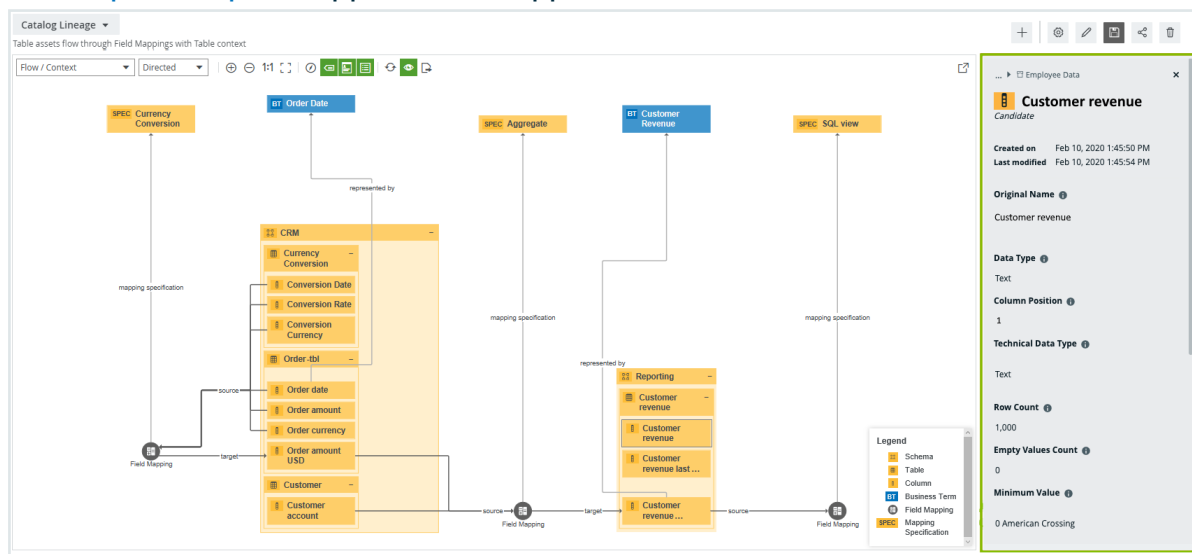
The diagram preview panel

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 - Name of the asset - Asset type code or icon, as described in Edit an asset type's representation. Tip You can hover over the code or icon to view the asset type. - Status - Created on - Last modified - All assigned characteristics - Tags	- All assigned characteristics - Last modified by (user), with date and time - 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

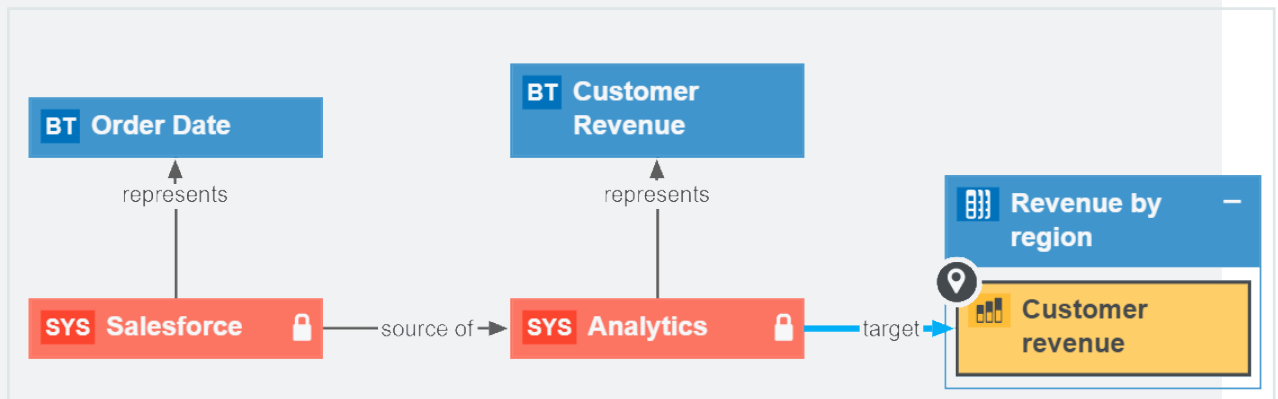
Depending on the diagram view, diagrams can contain a large number of [nodes and edges](#). Opening a diagram with many nodes can take a long time. All nodes and edges are important to render the diagram correctly, but you don't always need to see every single node. Often, the diagram is only used to 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. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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. Boxing nodes are not supported in this layout, therefore: ◦ The diagram is completely redrawn. ◦ The explored nodes are removed from the diagram. ◦ The nodes expand or collapse to their initial state. ◦ Returning to a layout that supports boxing nodes completely redraws the diagram.

Diagram layout	Description
Radial	Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends. 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 Platform Self-Hosted 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. 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. This is the default traversal strategy.
Upstream	For the start node, only the incoming edges are traversed and shown. For each node encountered, only the incoming edges are traversed.
Downstream	For the start node, only the outgoing edges are traversed and shown. 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. For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node. 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:

- [Edit](#) the system-wide maximum flow depth in Collibra Console.
- 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

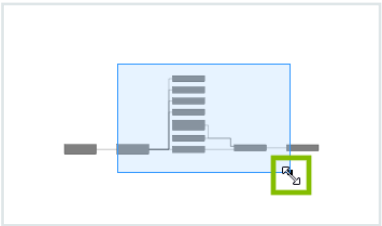
1. [Open](#) a diagram view.
2. In the **Flow depth** field of the [diagram toolbar](#), enter a value between 0 and 99.
3. Click **Save**.

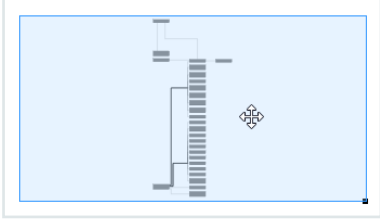
Working with the diagram overview inset

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. Perform one of the following steps:

Action	Descriptions
Zoom in or out by scaling:	- Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow. - Click and hold, then drag the pointer to zoom in or out. 

Action	Descriptions
Navigate in the diagram:	a. Move your mouse pointer over the blue square. The pointer turns into a four-way arrow.  b. Click and hold, then drag the pointer to move the square to what you want to see.

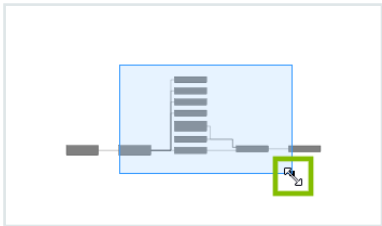
Zoom in or out in the diagram editor

When working with [diagrams](#), you can zoom in or out in different ways.

Steps

1. [Open](#) a diagram.
2. Perform one of the following steps:

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.

Strategy	Description
Zoom in or out by scaling.	a. On the toolbar, click the  button (Overview). 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. b. Move your mouse pointer over the lower right corner of the blue rectangle, until it turns into a sleek slanted arrow.  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  .

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. Clicking Explore in the context menu has the same result.
Incoming	Explore all incoming relations of the selected node. A relation is considered incoming when the selected node is the tail side of the relation type. For example, the relation <i>[Business Term] has code / is code for [Code Value]</i> is incoming for a <i>Code Value</i> .
Outgoing	Explore all outgoing relations of the selected node. A relation is considered outgoing when the selected node is the head side of the relation type. For example, the relation <i>[Business Term] has code / is code for [Code Value]</i> is outgoing for a <i>Business Term</i> .
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 <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> 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 <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> 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 <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

3. Move the node to where you want it and release the mouse button.

Note You cannot save 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.

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. 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.

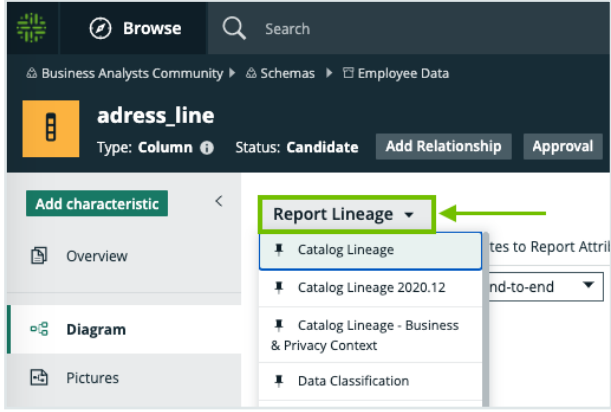
Note

- 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 Colibra 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. Show me where to click. 
Select an unpinned view:	a. Click the current view name and click Show all... at the bottom. 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. 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.

Field	Description												
Layout	Select the layout of your diagram view. <table> <tr> <th>Diagram lay-out</th><th>Description</th></tr> <tr> <td>Flow / Context</td><td> Nodes and edges are shown in a flow and a context region. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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> <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. Boxing nodes are not supported in this layout, therefore: ◦ The diagraphpicture is completely redrawn. ◦ The explored nodes are removed from the diagraphpicture. ◦ The nodes expand or collapse to their initial state. ◦ Returning to a layout that supports boxing nodes completely redraws the diagraphpicture. </td></tr> </table>	Diagram lay-out	Description	Flow / Context	Nodes and edges are shown in a flow and a context region. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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. Boxing nodes are not supported in this layout, therefore: ◦ The diagraphpicture is completely redrawn. ◦ The explored nodes are removed from the diagraphpicture. ◦ The nodes expand or collapse to their initial state. ◦ Returning to a layout that supports boxing nodes completely redraws the diagraphpicture.
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Circular	Nodes and edges are arranged in a circular fashion. Boxing nodes are not supported in this layout, therefore: ◦ The diagraphpicture is completely redrawn. ◦ The explored nodes are removed from the diagraphpicture. ◦ The nodes expand or collapse to their initial state. ◦ Returning to a layout that supports boxing nodes completely redraws the diagraphpicture.												

Field	Description	
	Diagram lay-out	Description
	Radial	Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends. 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.

Field	Description									
Traversal strategy	Indicates which nodes and edges have to be traversed and displayed.									
	<table> <tr> <th>Traversal strategy</th><th>Description</th></tr> <tr> <td>End-to-end</td><td> For the start node, Collibra Platform Self-Hosted 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. 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. 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. For each node encountered, only the incoming edges are traversed. </td></tr> <tr> <td>Downstream</td><td> For the start node, only the outgoing edges are traversed and shown. 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. For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node. Warning This strategy can result in a very large diagram that can take a long time to load. </td></tr> </table>	Traversal strategy	Description	End-to-end	For the start node, Collibra Platform Self-Hosted 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. 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. This is the default traversal strategy.	Upstream	For the start node, only the incoming edges are traversed and shown. For each node encountered, only the incoming edges are traversed.	Downstream	For the start node, only the outgoing edges are traversed and shown. For each node encountered, only the outgoing edges are traversed.	Complete
Traversal strategy	Description									
End-to-end	For the start node, Collibra Platform Self-Hosted 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. 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. This is the default traversal strategy.									
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Downstream	For the start node, only the outgoing edges are traversed and shown. 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. For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node. Warning This strategy can result in a very large diagram that can take a long time to load.									
Overview	Select to show the overview inset in the initial diagram.									
Labels	Select to show the edge and node labels in the initial diagram.									
Legend	Select to show the legend in the initial diagram.									
Preview	Select to show the preview in the initial diagram.									

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. Type <i>0</i> if you always want to show the entire label. The default setting is <i>50</i>.
Max edge label length	Type the maximum number of characters for edge labels. If a label is longer than this value, it is truncated. Type <i>0</i> if you always want to show the entire label. The default setting is <i>30</i>.

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. Tip Click it to collapse and expand this section.
Name	Type a name for the selected node. 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. You can refer to this node by using its ID in the from and to fields of the edge properties form. This ID must be unique in the current diagram view.
Type	Choose an asset type. 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. 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. The drop-down displays all the characteristics that apply. 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. The drop-down displays all the fields that you can show. Tip You can filter the list by starting to type.
Context	Select to place the node in the context region of the diagram. If not selected, the node is placed in the flow region. 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. 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. Tip - Diagrams with locked nodes are also called summary diagrams. - 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. - You can still explore locked nodes to see the boxed nodes.
Edges	This section allows you to add, edit and delete the edges. 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.
Filters	This section allows you to work with filters. Tip Click it to collapse and expand this section.
Filtering by business qualifier	Enable users to filter diagrams by a chosen Business Qualifier asset. This feature is only available if it is enabled in Collibra Console.

Field	Description
<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. The drop-down list shows all available directed relation types.
Role direction	Indicates the direction in which instances of this relation type are traversed. ◦ Selected: The edge is traversed from head to tail. The edge label is the role of the relation type. ◦ 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. 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). 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). Selecting a node that is already in the diagram view adds this edge to that node. 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. You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge. 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). Selecting a node that is already in the diagram view adds this edge to that node. 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. ◦ 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. Example Business Asset is the selected node.  ◦ Boxed: The node on the outgoing side is enclosed by the node on the incoming side. Example Business Asset is the selected node. It is boxed by Employee.  ◦ Boxing: The node on the outgoing side encloses the node on the incoming side. Example Business Asset is the selected node. It is boxing Employee. 
Label	Type a label for the edge. 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. 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.

Field	Description														
Layout	Select the layout of your diagram view. <table> <tr> <th>Diagram lay-out</th><th>Description</th></tr> <tr> <td>Flow / Context</td><td> Nodes and edges are shown in a flow and a context region. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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> <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. Boxing nodes are not supported in this layout, therefore: • The diagraphpicture is completely redrawn. • The explored nodes are removed from the diagraphpicture. • The nodes expand or collapse to their initial state. • Returning to a layout that supports boxing nodes completely redraws the diagraphpicture. </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. Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout. </td></tr> </table>	Diagram lay-out	Description	Flow / Context	Nodes and edges are shown in a flow and a context region. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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. Boxing nodes are not supported in this layout, therefore: • The diagraphpicture is completely redrawn. • The explored nodes are removed from the diagraphpicture. • The nodes expand or collapse to their initial state. • Returning to a layout that supports boxing nodes completely redraws the diagraphpicture.	Radial	Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends. Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.
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Field	Description										
	<table> <tr> <th>Diagram lay-out</th><th>Description</th></tr> <tr> <td>Smart Organic</td><td>Nodes and edges are distributed in a well-balanced manner, with few edge crossings.</td></tr> </table>	Diagram lay-out	Description	Smart Organic	Nodes and edges are distributed in a well-balanced manner, with few edge crossings.						
Diagram lay-out	Description										
Smart Organic	Nodes and edges are distributed in a well-balanced manner, with few edge crossings.										
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Overview	Select to show the overview inset in the initial diagram.										
Labels	Select to show the edge and node labels in the initial diagram.										

Field	Description
Legend	Select to show the legend in the initial diagram.
Preview	Select to show the preview in the initial diagram.
Max node label length	Type the maximum number of characters for node labels. If a label is longer than this value, it is truncated. Type 0 if you always want to show the entire label. 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. Type 0 if you always want to show the entire label. 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. Tip Click it to collapse and expand this section.

Field	Description
Name	Type a name for the selected node. 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. You can refer to this node by using its ID in the from and to fields of the edge properties form. This ID must be unique in the current diagram view.
Type	Choose an asset type. 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. 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. The drop-down displays all the characteristics that apply. 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. The drop-down displays all the fields that you can show. 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. If not selected, the node is placed in the flow region. 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. 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. Tip - Diagrams with locked nodes are also called summary diagrams. - 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. - You can still explore locked nodes to see the boxed nodes.
Edges	This section allows you to add, edit and delete the edges. Tip Click it to collapse and expand this section.
Outgoing	

Field	Description
<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.
Filters	This section allows you to work with filters. Tip Click it to collapse and expand this section.
Filtering by business qualifier	Enable users to filter diagrams by a chosen Business Qualifier asset. 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.

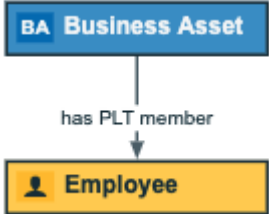
The Edge properties form

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. The drop-down list shows all available directed relation types.

Field	Description
Role direction	Indicates the direction in which instances of this relation type are traversed. • Selected: The edge is traversed from head to tail. The edge label is the role of the relation type. • 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. 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). 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). Selecting a node that is already in the diagram view adds this edge to that node. 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. You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge. 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). Selecting a node that is already in the diagram view adds this edge to that node. 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. 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. Example Business Asset is the selected node.  Boxed: The node on the outgoing side is enclosed by the node on the incoming side. Example Business Asset is the selected node. It is boxed by Employee.  Boxing: The node on the outgoing side encloses the node on the incoming side. Example Business Asset is the selected node. It is boxing Employee. 
Label	Type a label for the edge. 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. 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

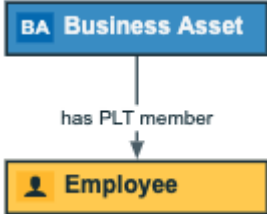
You can add an [edge](#) to a node in a [diagram view](#).

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. Perform one of the following steps:
 - 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. Start typing to reduce the list.
Role direction	Choose in which direction to traverse a relation. 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. 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. Example Business Asset is the selected node.  Boxed: The node on the outgoing side is enclosed by the node on the incoming side. Example Business Asset is the selected node. It is boxed by Employee.  Boxing: The node on the outgoing side encloses the node on the incoming side. Example Business Asset is the selected node. It is boxing Employee. 

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

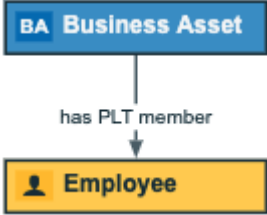
You can edit an [edge](#) of a node in a [diagram view](#).

Steps

1. [Open](#) a diagram view.
2. Click .
 - » The **General properties** form appears.
3. Perform one of the following steps:
 - 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. The drop-down list shows all available directed relation types.
Role direction	Indicates the direction in which instances of this relation type are traversed. ◦ Selected: The edge is traversed from head to tail. The edge label is the role of the relation type. ◦ 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. 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). 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). Selecting a node that is already in the diagram view adds this edge to that node. 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. You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge. 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). Selecting a node that is already in the diagram view adds this edge to that node. 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. ◦ 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. Example Business Asset is the selected node.  ◦ Boxed: The node on the outgoing side is enclosed by the node on the incoming side. Example Business Asset is the selected node. It is boxed by Employee.  ◦ Boxing: The node on the outgoing side encloses the node on the incoming side. Example Business Asset is the selected node. It is boxing Employee. 
Label	Type a label for the edge. 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. 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. Perform one of the following steps:
 - 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. This means that the "context" checkbox is not selected and, therefore, the node is situated in the flow region of the diagram. When the start node is a flow node, the start flow node set is only the start asset.

Terminology	Description
Context node	A diagram node that matches a diagram view node that is marked as context. This means that the "context" checkbox is selected and, therefore, the node is situated in the context region of the diagram. 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. 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 Colibra 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.

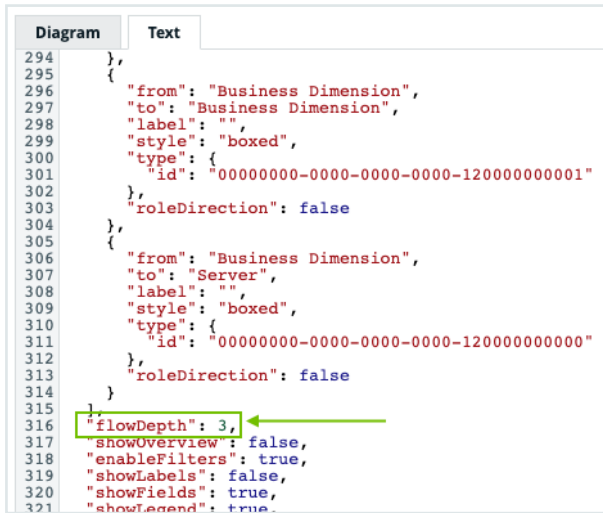
Note The value that you specify in the diagram view supersedes the value in Colibra Console. The default value in the Colibra Console configuration setting is 50.

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.



```

294  },
295  {
296    "from": "Business Dimension",
297    "to": "Business Dimension",
298    "label": "",
299    "style": "boxed",
300    "type": {
301      "id": "00000000-0000-0000-0000-120000000001"
302    },
303    "roleDirection": false
304  },
305  {
306    "from": "Business Dimension",
307    "to": "Server",
308    "label": "",
309    "style": "boxed",
310    "type": {
311      "id": "00000000-0000-0000-0000-120000000000"
312    },
313    "roleDirection": false
314  }
315  ],
316  "flowDepth": 3,
317  "showOverview": false,
318  "enableFilters": true,
319  "showLabels": false,
320  "showFields": true,
321  "showLegend": true

```

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
<pre>"visitStrategy": "directed", "directedIncoming", "directedOutgoing", "completeGraph"</pre>	- Indicates which nodes and edges have to be traversed and displayed. - This setting is optional. - You can choose one of the following values: "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. This is the default setting. For a refinement to this strategy, see also the setting for <code>layoutRegion</code>. "completeGraph": All nodes and edges related to the current asset are displayed, irrespective of the direction in which they were encountered. "directedIncoming": For the start node, Collibra only traverses the incoming 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: incoming relations only. "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

JSON syntax	Description
	relations only in the same direction as how they are encountered: outgoing relations only. Be careful with using <code>completeGraph</code>, this setting can lead to very large diagrams.
<pre>"resultNodeUnicityStrategy": "multipleNodesPerAssetId", "singleNodePerAssetId"</pre>	- Indicates the number of times a node is displayed if it matches multiple nodes in the diagram view. - This setting is optional. - You can pick one of the following values: <pre>"multipleNodesPerAssetId":</pre> 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. <pre>"singleNodePerAssetId":</pre> 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. 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
<pre>"layout": "HierarchyLeftRight", "HierarchyTopBottom", "HierarchyBottomTop", "Circular", "SmartOrganic", "Radial", "Flow/Context"</pre>	• Indicates the layout style of the diagram. • This setting is optional. • You can pick one of the following values: • "HierarchyLeftRight": Nodes and edges are displayed in a flow mostly from left to right. This is the default setting. • "HierarchyTopBottom": Nodes and edges are displayed in a flow mostly from top to bottom. • "HierarchyBottomTop": Nodes and edges are displayed in a flow mostly from bottom to top. • "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. • "SmartOrganic": Nodes and edges are distributed in a well-balanced manner, there are minimal edge crossings. • "Radial": Nodes and edges are displayed with no overlaps, few edge crossings and few bends. • "Flow/Context": Layout style for diagrams with a flow and a context region. See also <code>layoutRegion</code> in the nodes section. Nodes and edges in the flow 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

JSON syntax	Description
	a context node, the from node has to be in the flow region and the to node has to be in the context region.
<code>"showOverview": false, true</code>	- Indicates if the overview is displayed. - This setting is optional. - You can pick one of the following values: <code>false</code>: The overview is not displayed. This is the default setting. <code>true</code>: The overview is displayed.
<code>"showLabels": false, true</code>	- Indicates if the edge and node labels are displayed. - This setting is optional. - You can pick one of the following values: <code>false</code>: The overlays are not displayed. This is the default setting. <code>true</code>: The overlays are displayed.
<code>"showLegend": false, true</code>	- Indicates if the diagram legend is displayed. The legend shows all asset types and complex relation types that occur in the diagram. - This setting is optional. - You can pick one of the following values: <code>false</code>: The legend is not displayed. <code>true</code>: The legend is displayed. This is the default setting.
<code>"showPreview": false, true</code>	- Indicate if the preview pane is displayed by default. The preview pane shows information about the selected node or edge. - This setting is optional. - You can pick one of the following values: <code>false</code>: The legend is not displayed. <code>true</code>: The legend is displayed. This is the default setting.

JSON syntax	Description
<code>"showFields": false, true</code>	- Indicates if the overlays are displayed. - This setting is optional. - You can pick one of the following values: <code>false</code>: The labels are not displayed. <code>true</code>: The labels are displayed. This is the default setting.
<code>"maxNodeLabelLength": 0, <positive integer number></code>	- Indicates the maximum length of the node labels (whether they should be truncated when they are too long). - This setting is optional. - You can provide 0 or a positive integer number as the value: 0: Node labels are not truncated, they are displayed in full length. - The default setting is 50.
<code>"maxEdgeLabelLength": 0, <positive integer number></code>	- Indicates the maximum length of the edge labels. Edge labels are truncated when they are longer. - This setting is optional. - You can provide 0 or a positive integer number as the value: 0: Edge labels are not truncated, they are displayed in full length. - The default value is 30.
<code>"edgeBundling": false, true</code>	- Indicates whether edges of the same type are bundled to reduce clutter. - This setting is optional. - You can pick one of the following values: <code>false</code>: Edges are not bundled. <code>true</code>: Edges are bundled. This is the default setting.

JSON syntax	Description
<code>"webworkersEnabled": false, true</code>	• 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. • This setting is optional. • You can pick one of the following values: ◦ <code>false</code>: Layout-related calculations are not moved to a separate DGC thread of your processor. ◦ <code>true</code>: For large diagrams, layout-related calculations are moved to a separate DGC thread of your processor. This is the default setting.

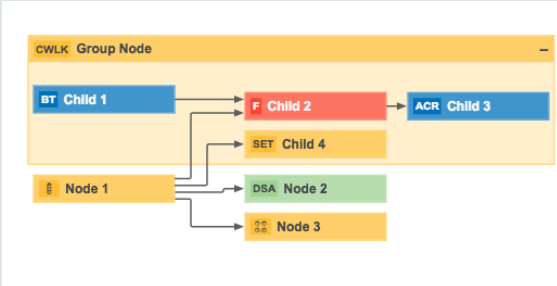
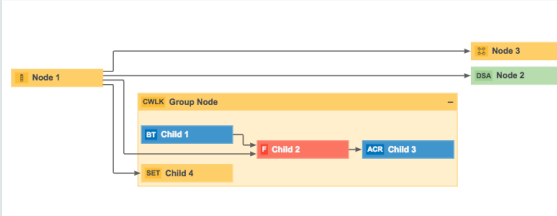
JSON syntax: Layout options

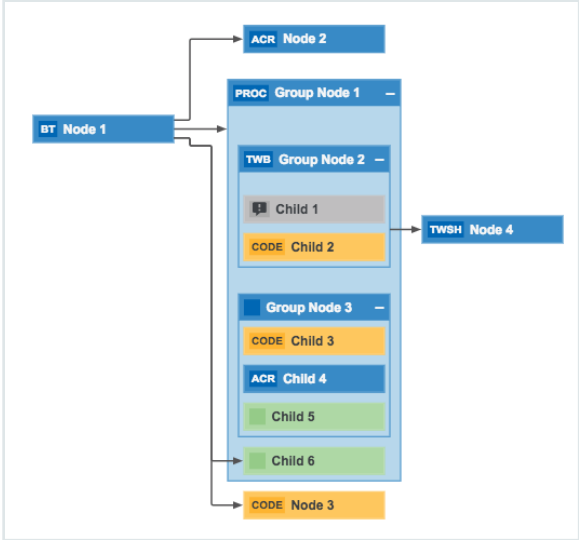
These options determine the layout of hierarchical diagrams.

- **Flow / Context**
- **Hierarchy left - right**
- **Hierarchy top - down**
- **Hierarchy bottom - up**

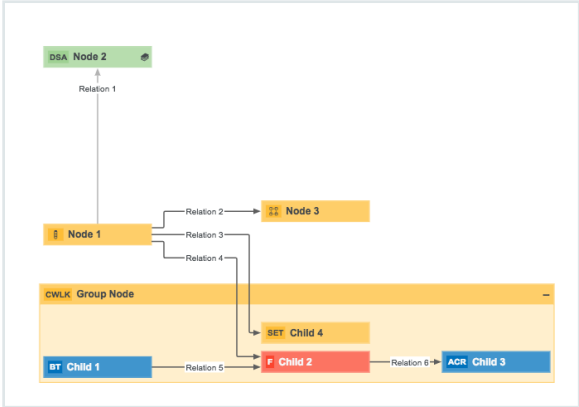
Example

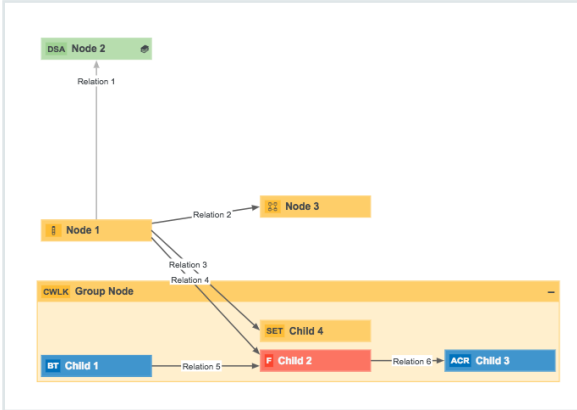
```
"layoutOptions": {  
  "compactGroups": false,  
  "componentArrangementPolicy": "topmost",  
  "edgeBends": true,  
  "edgeBundling": true,  
  "edgeToEdgeDistance": 5,  
  "minimumLayerDistance": "auto",  
  "nodeToEdgeDistance": 5,  
  "orthogonalRouting": true,  
    "preciseNodeHeightCalculation": true,  
    "recursiveGroupLayering": true,  
  "separateLayers": true,  
  "webWorkers": true,  
  "nodePlacer": {  
    "barycenterMode": "auto",  
    "breakLongSegments": "auto",  
    "groupCompactionStrategy": "none",  
    "nodeCompaction": "auto",  
    "straightenEdges": "auto"  
  }  
}
```

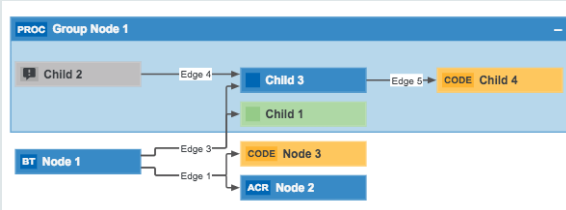
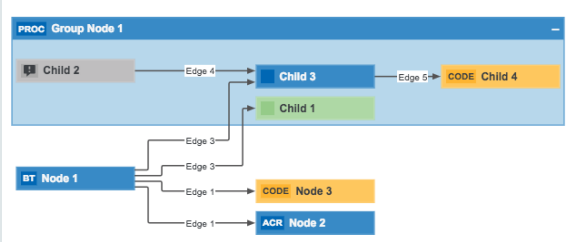
JSON syntax with all default values	Description
<pre>"compactGroups": true // false</pre>	Group compaction reduces the number of node layers without reversing edge directions. The resulting layering tries to keep the layer span of a boxing node at a minimum, while minimizing the overall vertical space. You can choose one of the following values: <code>true</code>: The diagram view uses as few node layers as possible. The layers of a diagram are also used inside a boxing node. Example  <code>false</code>: The diagram view does not try to reduce the number of node layers. This results in separate layers inside a boxing node. Example  Note - This option is only applicable when <code>recursiveGroupLayering</code> is set to <code>true</code>. - This option is optional. - The default value is <code>false</code>. - This option does not affect the loading time of the diagram.

JSON syntax with all default values	Description
<pre>"componentArrangementPolicy": "topmost" // "compact"</pre>	Choose how to arrange boxed nodes that are not connected by the arrow edge with other nodes. This is only applicable to boxed and boxing edges. You can choose one of the following values: • "topmost": Vertically align the boxed nodes with their topmost boxed node inside the boxing node. • Example  • "compact": Put the boxed nodes in different layers to reduce the size of the boxing node. This reduces the overall diagram size. If the diagram layout is Hierarchy left - right or Flow / Context, the height of the diagram will be minimized. If the diagram layout is Hierarchy bottom - up or Hierarchy top - down, the width will be minimized. • Example

JSON syntax with all default values	Description
	The diagram illustrates a hierarchical structure with nested nodes and groups. The root node is "BT Node 1" (blue). It branches into three main components: "PROC Group Node 1" (blue), "ACR Node 2" (blue), and "CODE Node 3" (orange). "PROC Group Node 1" further branches into "TWB Group Node 2" (blue) and "Child 6" (green). "TWB Group Node 2" branches into "Child 1" (grey), "CODE Child 2" (orange), and "Group Node 3" (blue). "Group Node 3" branches into "CODE Child 3" (orange), "ACR Child 4" (blue), and "Child 5" (green). Additionally, "TWB Node 4" (blue) is shown as a separate component connected to "Group Node 3".

JSON syntax with all default values	Description
<code>"edgeBends": true // false</code>	Choose whether edges can be curved and can contain bends. Warning When this option is false, the <code>edgeBundling</code> and <code>orthogonalRouting</code> options are automatically ignored. You can choose one of the following values: <code>true</code>: Enables edge bends. Example  <code>false</code>: Disables edge bends, <code>edgeBundling</code> and <code>orthogonalRouting</code>. 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. Example

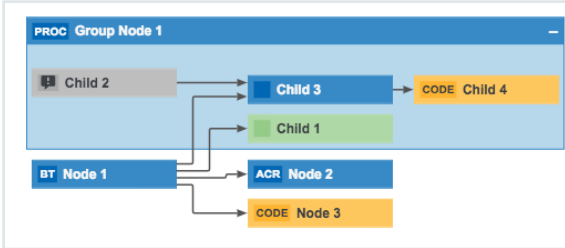
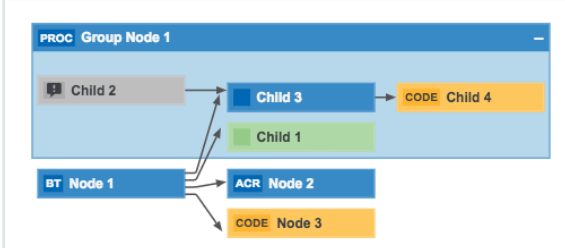
JSON syntax with all default values	Description
	 Note • This option is optional. • The default value is <code>true</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre>"edgeBundling": true // false</pre>	Choose whether arrow edges can be bundled at the source or target node when they represent the same incoming or outgoing relation. Note Only one edge label is displayed for a bundled edge. You can choose one of the following values: <code>true</code>: Enable edge bundling. Example  <code>false</code>: Disable edge bundling. Example  Note - This option is optional. - The default value is <code>true</code>. - Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre>"edgeToEdgeDistance": 5 // "auto"</pre>	Set the minimum distance (in pixels) between two adjacent edges in one layer. This affects the horizontal distance if the diagram layout is: • Hierarchy left - right • Flow / Context, but only for nodes in the flow This affects the vertical distance if the diagram layout is: • Hierarchy top - down • Hierarchy bottom - up • Flow / Context, but only for nodes in the context You can choose one of the following values: • [Any positive integer value]: Use this amount of pixels. • "auto": Let a layouting algorithm automatically set the value. Note • This option is optional. • The default value is 5. • This option does not affect the loading time of the diagram.

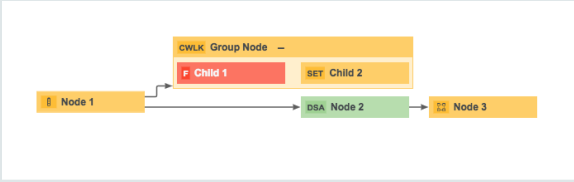
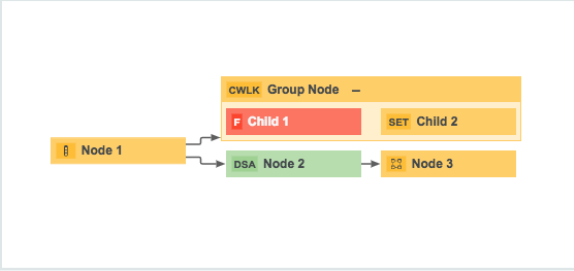
JSON syntax with all default values	Description
<pre>"minimumLayerDistance": 5 // "auto"</pre>	Set the minimum distance (in pixels) between two adjacent layers. This affects the horizontal distance if the diagram layout is: • Hierarchy left - right • Flow / Context, but only for nodes in the flow This affects the vertical distance if the diagram layout is: • Hierarchy top - down • Hierarchy bottom - up • Flow / Context, but only for nodes in the context You can choose one of the following values: • [Any positive integer value]: Use this amount of pixels. • "auto": Let a layouting algorithm automatically set the value. Note • This option is optional. • The default value is <code>auto</code>. • This option does not affect the loading time of the diagram.

JSON syntax with all default values	Description
<pre>"nodeToEdgeDistance": 5 // "auto"</pre>	Set the minimum distance (in pixels) between an edge and an adjacent node in the same layer. This affects the horizontal distance if the diagram layout is: • Hierarchy left - right • Flow / Context, but only for nodes in the flow This affects the vertical distance if the diagram layout is: • Hierarchy top - down • Hierarchy bottom - up • Flow / Context, but only for nodes in the context You can choose one of the following values: • [Any positive integer value]: Use this amount of pixels. • "auto": Let a layouting algorithm automatically set the value. Note • This option is optional. • The default value is 5. • This option does not affect the loading time of the diagram.

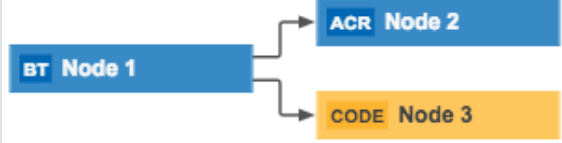
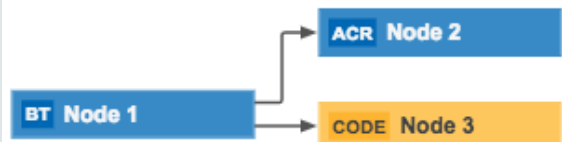
JSON syntax with all default values	Description
<pre>"orthogonalRouting": true // false</pre>	Choose whether or not edges can be routed orthogonally. You can choose one of the following values: <code>true</code>: All edge segments are horizontal or vertical. Example  Example  Note - This option is optional. - The default value is <code>true</code>. - This option does not affect the loading time of the diagram.

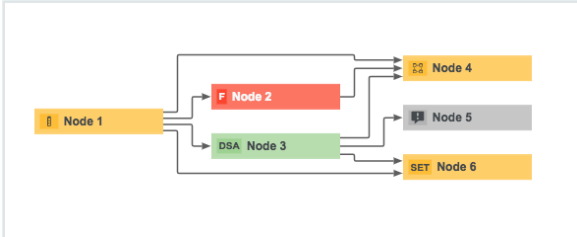
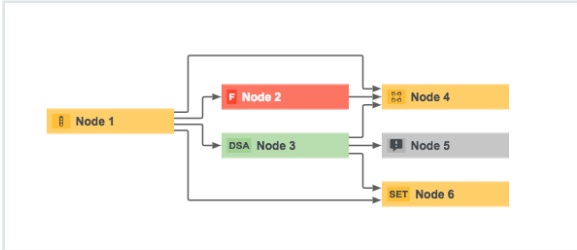
JSON syntax with all default values	Description
<pre>"preciseNodeHeightCalculation": true // false</pre>	Determines the precision with which node heights are rendered to visually accommodate diagram text. • <code>true</code>: Each node is correctly sized to fit its label text. For extremely large diagrams, this can result in significantly longer loading times. • <code>false</code>: 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..." Note • This option is optional. • The default value is <code>true</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.

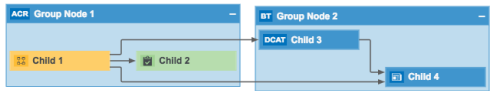
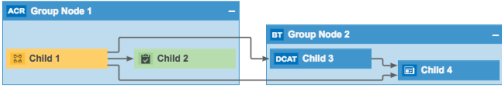
JSON syntax with all default values	Description
<pre>"recursiveGroupLayering": true // false</pre>	Choose whether boxing edges are respected during layering. This option is ignored when the diagram does not contain boxing nodes. Warning Enabling this option may change the diagram flow. Some arrow edges may go in the opposite direction. Otherwise occupying only adjacent layers by boxing nodes wouldn't be possible in some cases. You can choose one of the following values: <code>true</code>: Boxing nodes are layered recursively: Boxed nodes in the same boxing node always occupy adjacent layers. Example <code>false</code>: Group information is ignored during the layering. Example Note - This option is optional. - The default value is <code>true</code>. - Choosing <code>true</code> may lead to an increased loading time of the diagram.

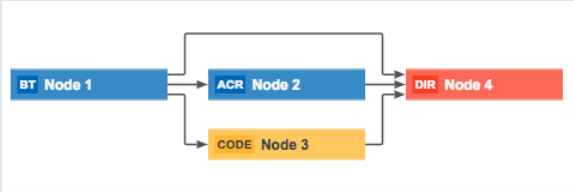
JSON syntax with all default values	Description
<pre>"separateLayers": true // false</pre>	Strictly separate nodes of different layers. In other words, nodes are placed below each other. This prevents big nodes from extending into an adjacent layer. You can choose one of the following values: • <code>true</code>: Layers are separated. Example  • <code>false</code>: Layers are not separated. Example  Note • This option is optional. • The default value is <code>true</code>. • This option does not affect the loading time of the diagram.

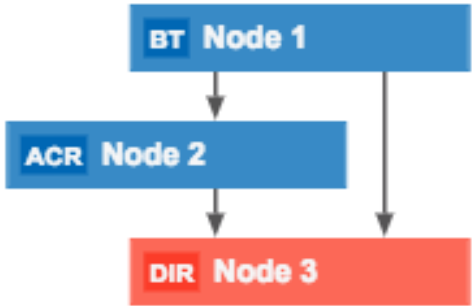
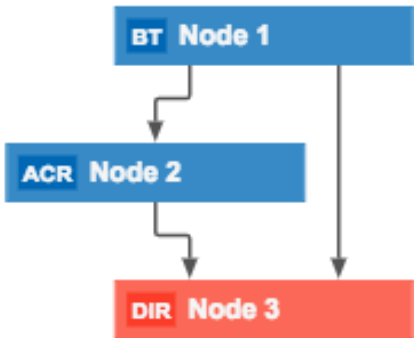
JSON syntax with all default values	Description
<code>"webWorkers": true // false</code>	Choose whether big diagrams should be built in the background thread. You can choose one of the following values: <code>true</code>: Enables multi-thread support for diagram building. Note This makes layout processing faster and less likely to freeze the browser. <code>false</code>: All diagrams are built in the main thread. Note - This option is optional. - The default value is <code>true</code>. - Choosing <code>false</code> may lead to an increased loading time of the diagram.
<code>"nodeplacer"</code>	Use additional options for placing the nodes.

JSON syntax with all default values	Description
<pre>"barycenterMode": true // false // "auto"</pre>	Choose whether the diagram should be as symmetric as possible. This may result in more edge bends. You can choose one of the following values: • <code>true</code>: The diagram is more symmetric but may have more edge bends. Example  • <code>false</code>: The diagram is less symmetric but may have fewer edge bends. Example  • <code>"auto"</code>: The layouting algorithm decides whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data. Note • This option is optional. • The default value is <code>auto</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre> "breakLongSegments": true // false // "auto" </pre>	Choose whether the diagram should break long arrow edges in favor of a more compact layout. You can choose one of the following values: <code>true</code>: Long edges are broken, for a more compact diagram. Example  <code>false</code>: Long edges are not broken. Example  <code>"auto"</code>: The layouting algorithm decides whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data. Note - This option is optional. - The default value is <code>auto</code>. - Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre> "groupCompactionStrategy": "none" // "maximum" </pre>	Choose the strategy for controlling the horizontal compactness of boxing nodes. You can choose one of the following values: • <code>"none"</code>: 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. Example  • <code>"maximum"</code>: Make boxing nodes as narrow as possible. Example  Note • This option is optional. • The default value is <code>none</code>. • Choosing <code>none</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre>"nodeCompaction": true // false // "auto"</pre>	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. You can choose one of the following values: • <code>true</code>: Nodes are placed in a compact style. Note This may result in an increased width. Example  • <code>false</code>: Nodes are not placed in a compact style. Example  • <code>"auto"</code>: The layouting algorithm decides whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data. Note • This option is optional. • The default value is <code>auto</code>. • This option does not affect the loading time of the diagram.

JSON syntax with all default values	Description
<pre> "straightenEdges": true // false // "auto" </pre>	Apply a post-processing step to reduce edge bends. You can choose one of the following values: • <code>true</code>: The post-processing step is applied to reduce edge bends. Example  <pre> graph TD BT1[BT Node 1] --> ACR2[ACR Node 2] BT1 --> DIR3[DIR Node 3] ACR2 --> DIR3 </pre> Warning This may violate some minimum distances specified by the user and the edge distribution may no longer be uniform. • <code>false</code>: Post-processing step is not applied. Example  <pre> graph TD BT1[BT Node 1] --> ACR2[ACR Node 2] BT1 --> DIR3[DIR Node 3] ACR2 --> DIR3 </pre> • <code>"auto"</code>: The layouting algorithm decides whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data.

JSON syntax with all default values	Description
	Note • This option is optional. • The default value is <code>auto</code>. • Choosing <code>true</code> 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
<code>"id": "Business Asset"</code>	• Determines the name of the node. • This setting is mandatory. • 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. • You can refer to this node by using its ID in the <code>"from"</code> and <code>"to"</code> key-value pairs of the edges section.

JSON syntax	Description
<pre>"type": {"id": "00000000-0000-0000-0000-000000011001"}</pre>	• Determines the resource ID of the asset type or the complex relation type. • This setting is mandatory. • You can have multiple nodes with the same <code>Type</code> in one diagram view. • 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.
<pre>"layoutRegion": "flow", "context"</pre>	• 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. • This setting is optional. • You can choose one of the following values: • <code>"flow"</code>: The node is part of the flow. This is the default setting. • <code>"context"</code>: 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.
<pre>"label": "Term"</pre>	• 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. • This setting is optional. • 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.

JSON syntax	Description
<code>"collapsed": false, true</code>	• Indicates if the selected node is collapsed in the initial diagram. • This setting is optional. • You can choose one of the following values: ◦ <code>false</code>: The selected node is a boxing node and the boxed nodes are displayed. ◦ <code>true</code>: The selected node is a boxing node and the boxed nodes are hidden.
<code>"name":</code>	• 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 <code>"fields"</code>.

JSON syntax	Description
<code>"fields":</code>	• Defines which characteristics are shown in the node's overlay. The order of the fields determines the order of the characteristics in the overlay. • This setting is optional. • You can pick one or more of the following values: ◦ <code>"name"</code>: The asset's name, as defined in the <code>"name"</code> setting. ◦ <code>"status"</code>: The asset's status value. ◦ <code>"domain"</code>: The domain in which the asset is located. ◦ <code>"community"</code>: The lowest-level community in which the asset is located. ◦ <code>"assetType"</code>: The asset's type. 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. ◦ <code>"tags"</code>: Any tags that were created for the asset. ◦ <code>"responsibility_<ID>"</code>: 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. ◦ <code>"createdOn"</code>: The date when the asset was created. ◦ <code>"createdBy"</code>: The name of the user who created the asset. ◦ <code>"lastModifiedOn"</code>: The date and time when the asset was last modified. ◦ <code>"lastModifiedBy"</code>: The name of the user who last modified the asset. ◦ <code>"stringAttribute_<ID>"</code>: The overlay is a string attribute type with the ID that you type here. Example: <code>"stringAttribute_00000000-0000-0000-0000-000000000001"</code> ◦ <code>"dateAttribute_<ID>"</code>: The overlay is a date attribute with the ID that you type here. ◦ <code>"numericAttribute_<ID>"</code>: The overlay is a date attribute with the ID that you type here. ◦ <code>"booleanAttribute_<ID>"</code>: The overlay is a boolean attribute with the ID that you type here.

JSON syntax	Description
	◦ "singleValueListAttribute_<ID>": The overlay is a single-selection attribute with the ID that you type here. ◦ "multiValueListattribute_<ID>": The overlay is a multi-selection attribute with the ID that you type here. ◦ "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). ◦ "sourceRelation_<ID>": The overlay is a relation type where the node is a tail asset and has the ID that you type here. ◦ "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. • This setting is mandatory. • You must fill in a node ID ("id") from the nodes section.
"to": "Table Column1"	• Indicates which node is the tail asset. • This setting is mandatory. • You must fill in a node ID ("id") from the nodes section.

JSON syntax	Description
<code>"type": "00000000-0000-0000-0000-000000007038"</code>	- Indicates the ID of the relation type. - This setting is mandatory. - 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: Attribute type. Relation type. Complex relation type.
<code>"roleDirection": true, false</code>	- Determines the direction of the edge; is it the role or co-role. - This setting is mandatory. - You can pick one of the following values: <code>true</code>: The edge is traversed from head to tail. <code>false</code>: The edge is traversed from tail to head.
<code>"style": "arrow", "boxed", "boxing"</code>	- Determines how edges are displayed. - This setting is optional. - You can pick one of the following values: <code>"arrow"</code>: 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. <code>"boxing"</code>: 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. <code>"boxed"</code>: 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.
<code>"label": "Groups"</code>	- Determines the name that is displayed on edges in the diagram. - This setting is optional. - 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 <code>"roleDirection"</code> is <i>true</i>, Collibra uses the role, if it is <i>false</i>, it uses the co-role.

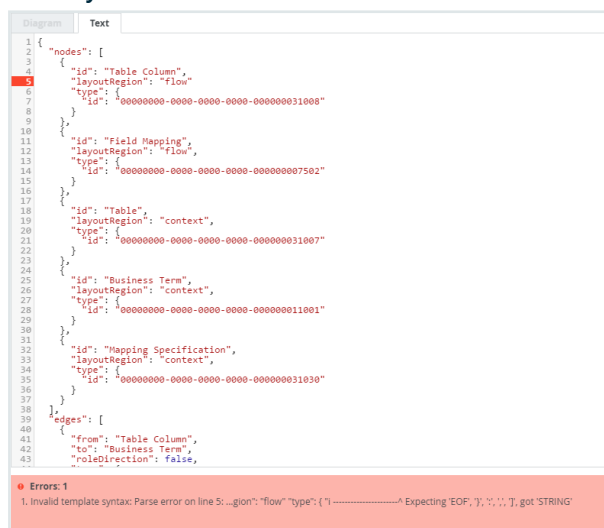
Tips for creating correct diagram views with the diagram view text editor

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 Platform Self-Hosted 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.



The screenshot shows a software interface with two tabs: 'Diagram' and 'Text'. The 'Text' tab is active, displaying a JSON array of edges. The JSON is as follows:

```

29  ],
30  "edges": [
31    {
32      "from": "Data Structure",
33      "to": "Business Asset",
34      "roleDirection": false,
35      "type": {
36        "id": "00000000-0000-0000-0000-000000007038"
37      }
38    },
39    {
40      "from": "Data Structure",
41      "to": "Mapping Specification",
42      "roleDirection": true,
43      "type": {
44        "id": "00000000-0000-0000-0000-000000007028"
45      }
46    },
47    {
48      "from": "Mapping Specification",
49      "to": "Data Structure",
50      "roleDirection": false,
51      "type": {
52        "id": "00000000-0000-0000-0000-000000007029"
53      }
54    },
55    {
56      "from": "Business Assets",
57      "to": "Business Asset",
58      "roleDirection": true,
59      "type": {
60        "id": "00000000-0000-0000-0000-000000007001"
61      }
62    },
63    {
64      "from": "Business Assets",
65      "to": "Business Dimension",
66      "roleDirection": false,
67      "type": {
68        "id": "00000000-0000-0000-0000-000000007007"
69      },
70      "style": "boxed"
71    }
72  ],

```

Below the JSON, an 'Errors: 2' section is highlighted in red, containing the following messages:

1. Edge with index 3 points to an unknown node with ID Business Assets.
2. Edge with index 4 points to an unknown node with ID Business Assets.

- 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 the default view for an asset makes the diagram view the default view for the corresponding asset type and all asset types available in the diagram view. If you have chosen to share the diagram view with a user, group, or everyone, the diagram view will also become the default view for them.

This topic describes how to set a diagram view as the default.

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. 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.

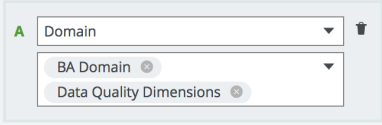
Note Users can enable or disable all filters in the [diagram toolbar](#).

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. Perform one of the following steps:

Action	Description	
Filtering by business qualifier	Collibra version	Action
	2021.01	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.
	2021.02 or newer	In the Filtering by business qualifier drop-down list, select one of the following settings: ◦ Mandatory: The diagram only contains assets or complex relations that match this view node and are qualified by the chosen business qualifier. ◦ Optional: The diagram includes: ▪ Assets or complex relations that match this view node and are qualified by the chosen business qualifier. ▪ Assets or complex relations that match this view node and are not qualified by any business qualifier.
	Note ◦ This feature is only available if it is enabled in Collibra Console. ◦ You can apply filtering by business qualifier to view nodes that represent asset types or complex relation types.	

Action	Description
Add a simple filter	Select a characteristic and enter one or more values. Click Add filter criteria to add more filter criteria. Tip - 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:  reads <i>Domain IN (BA Domain, Data Quality Dimensions)</i> - You cannot use wildcards in the value of a filter clause. - 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.

- 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

- 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": [
    "00000000-0000-0000-0000-0000000031027"
  ],
  "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.

Edit Field Mapping

Name*

Field Mapping

Description

Complex mapping between two or more data fields

Display options

Color*

Custom

Color hex value

#5E5E5E

Symbol

Icon

Icon reference*

Symbol calculation

Preview

Field Mapping

Field Mapping

Relations

+	Role*	Corole	Asset type*	Min.	Max.	
	source		Data Element	1		
+	Role*	Corole	Asset type*	Min.	Max.	
	target		Data Element	1		
+	Role*	Corole	Asset type*	Min.	Max.	
	mapping specification		Mapping Specification	1	1	
+	Role*	Corole	Asset type*	Min.	Max.	
	is qualified by		Business Qualifier	0		

Add relation

Attributes

+	Attribute type	Min.	Max.	
	Description	0	1	

Cancel

Save

Terminology

Term	Description
Business qualifier view	A diagram view with at least one node for which a Filtering by business qualifier option is selected .

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Term	Description
Business qualifier diagram	A diagram for which all of the following conditions are met: • The selected diagram view is a business qualifier view. • Filters are enabled in the diagram toolbar. • 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.
Business qualifier path	An asset has a business qualifier path if either of the following is true: • The asset has at least one relation asset qualified by a Business Qualifier asset. • The asset is a Column, and both: ◦ The Column asset is grouped by a Data Attribute asset. ◦ 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.

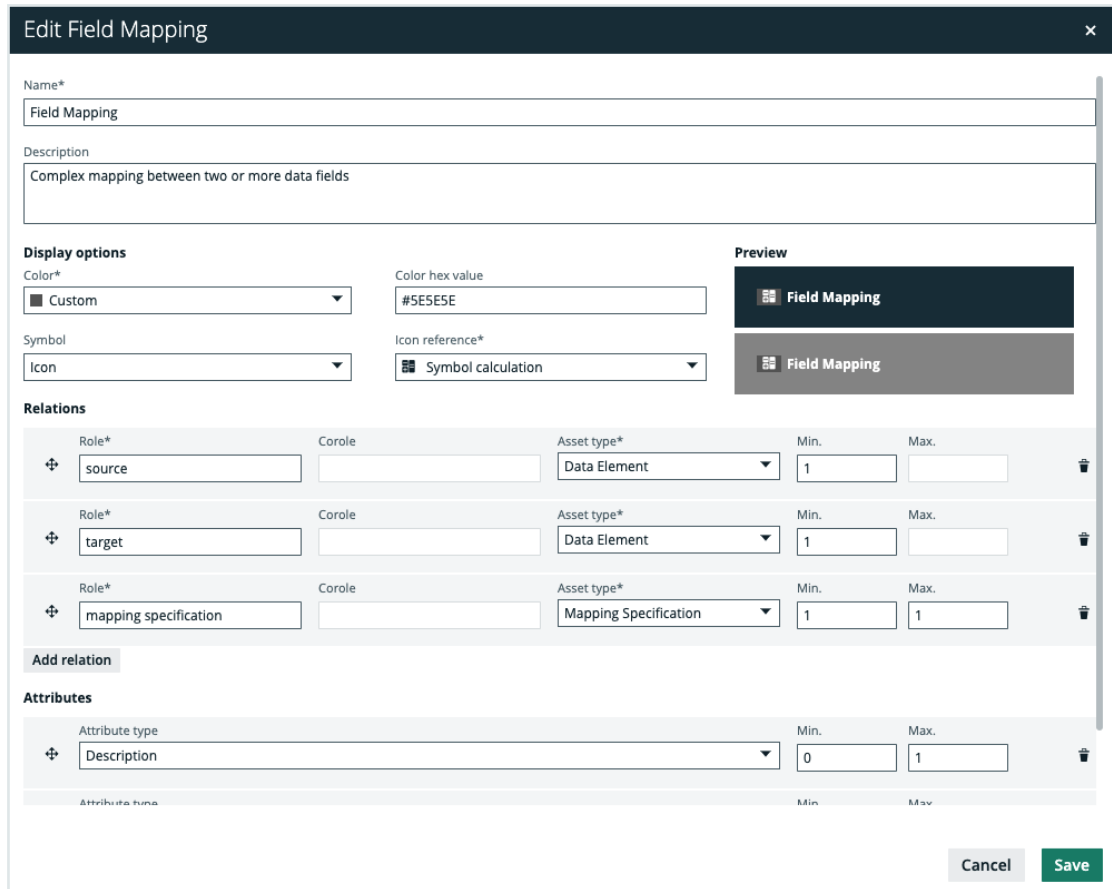
5. In the relevant diagram view, enable the **Filtering by Business Qualifier** option for both the Column asset node and the Field Mapping complex relation node.

Show me an example

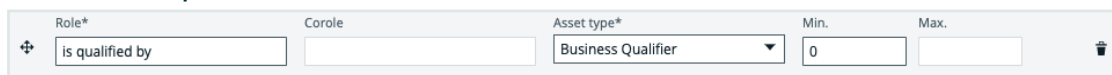
In this example, we are working with the commonly used Field Mapping complex relation type that comes packaged with Collibra Data Intelligence Cloud. As the Field Mapping complex relation type is often used to track the flow of metadata from source column to target column, we also refer in this example 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 , and then click  **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.

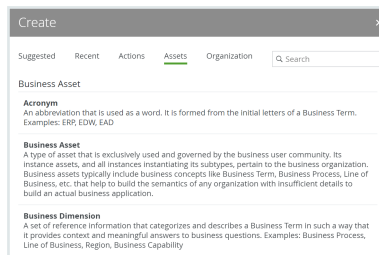


- **Role:** We recommend the value *is qualified by*, but you can enter any text value that suits your needs.
- **Asset type:** Business Qualifier.

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. On the main toolbar, click **+**.
 » 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, <i>Business Qualifier</i> .
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: <i>BQ1</i> .

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 .

col1

represented by Business Asset

No data available

5 suggestion(s) Add

Field Mapping

source	target	mapping specification	
col1, col2	col22	map2	
col1	col11	map1	
col1, col3	col33	map3	

» The **Edit Field Mapping** dialog box appears. Notice that the "is qualified by" relation leg is empty.

Edit Field Mapping

source min. 1 Data Element

col2 col1

☐ Filter suggested assets by organization

target min. 1 Data Element

col22

☐ Filter suggested assets by organization

mapping specification min. 1 Mapping Specification - max. 1

map2

☐ Filter suggested assets by organization

is qualified by min. 0 Business Qualifier

☐ Filter suggested assets by organization

Cancel Next

d. In the **is qualified by** field, add the Business Qualifier asset. In this example, BQ1.

Edit Field Mapping

source min. 1 Data Element

col2 col1

☐ Filter suggested assets by organization

target min. 1 Data Element

col22

☐ Filter suggested assets by organization

mapping specification min. 1 Mapping Specification - max. 1

map2

☐ Filter suggested assets by organization

is qualified by min. 0 Business Qualifier

BQ1

☐ Filter suggested assets by organization

Cancel Next

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.

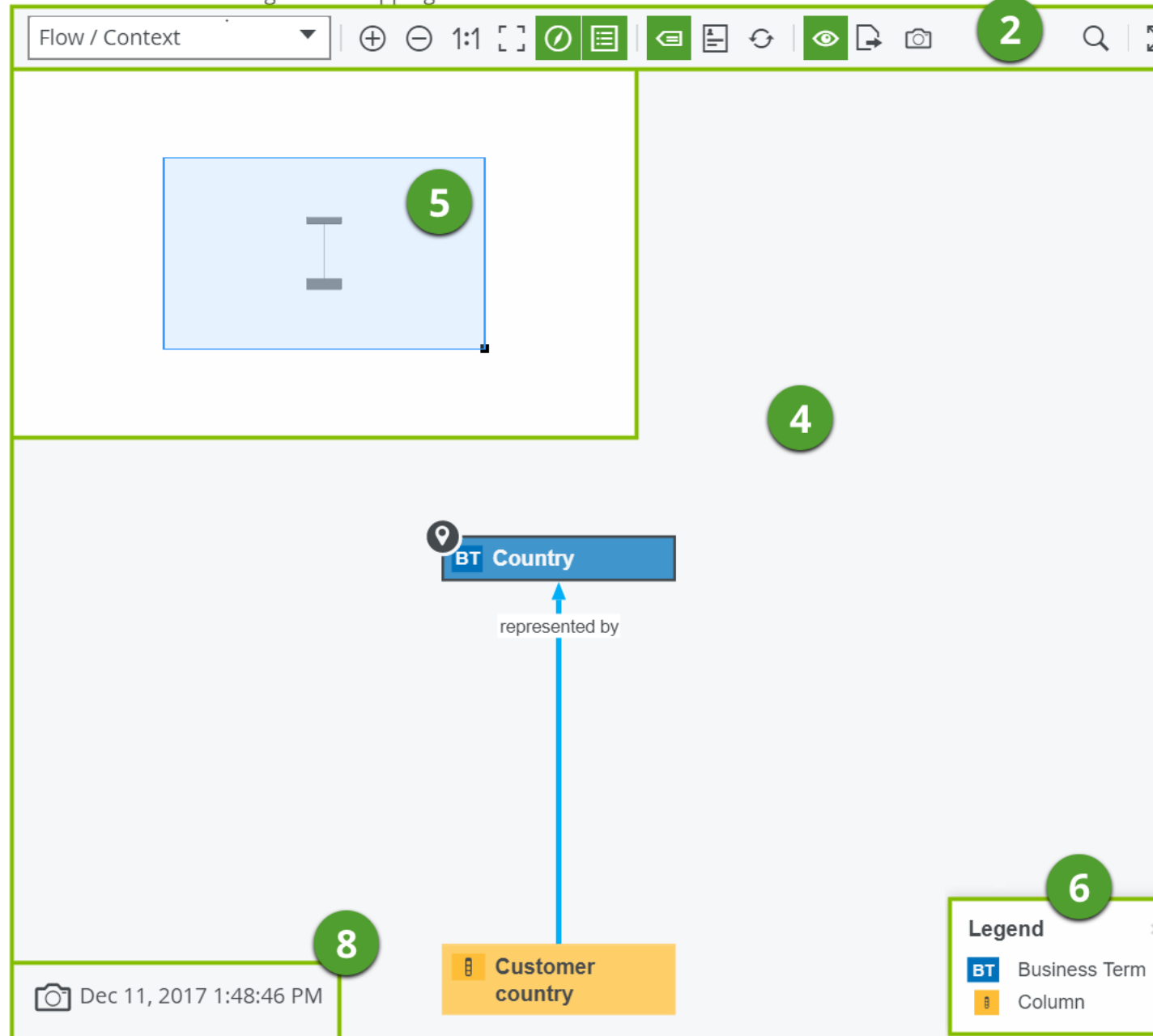
Picture editor

The picture editor allows you to view and edit [pictures](#). You can access the picture editor by [opening a picture](#).

Technical Lineage

1

Table Columns flow through Field Mappings with Table context



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. 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. 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. 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. 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.

Button	Name	Description
	Zoom out	Zoom out from the picture.
1:1	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 . 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.
	Legend	Show or hide the legend panel containing the explanation of the nodes. The legend explains the color codes and symbols of the items in the picture. You can move it to anywhere in the picture. 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. 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. 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.

Button	Name	Description
	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. 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.

Field	Description
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. 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. 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. 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. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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. Boxing nodes are not supported in this layout, therefore: ◦ The picture is completely redrawn. ◦ The explored nodes are removed from the picture. ◦ The nodes expand or collapse to their initial state. ◦ 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. 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. In the flow region, nodes are shown mostly from left to right. 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. If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right. 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. Boxing nodes are not supported in this layout, therefore: • The picture is completely redrawn. • The explored nodes are removed from the picture. • The nodes expand or collapse to their initial state. • 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. 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.

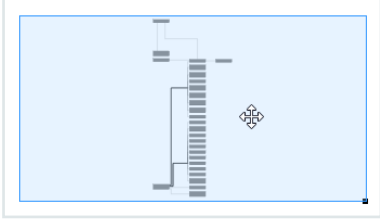
Working with the picture overview inset

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. Perform one of the following steps:

Action	Descriptions
Zoom in or out by scaling:	- Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow. - Click and hold, then drag the pointer to zoom in or out. 

Action	Descriptions
Navigate in the picture:	a. Move your mouse pointer over the blue square. The pointer turns into a four-way arrow.  b. Click and hold, then drag the pointer to move the square to what you want to see.

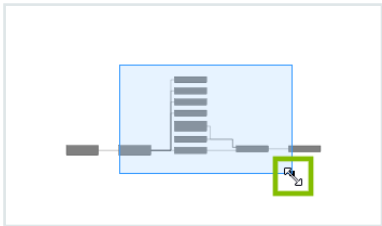
Zoom in or out in the picture editor

When working with [pictures](#), you can zoom in or out in different ways.

Steps

1. [Open](#) a picture.
2. Perform one of the following steps:

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). 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. b. Move your mouse pointer over the lower right corner of the blue rectangle, until it turns into a sleek slanted arrow.  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 <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> 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 <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

3. Move the node to where you want it and release the mouse button.

Note You cannot save 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 <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> 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 Platform Self-Hosted 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

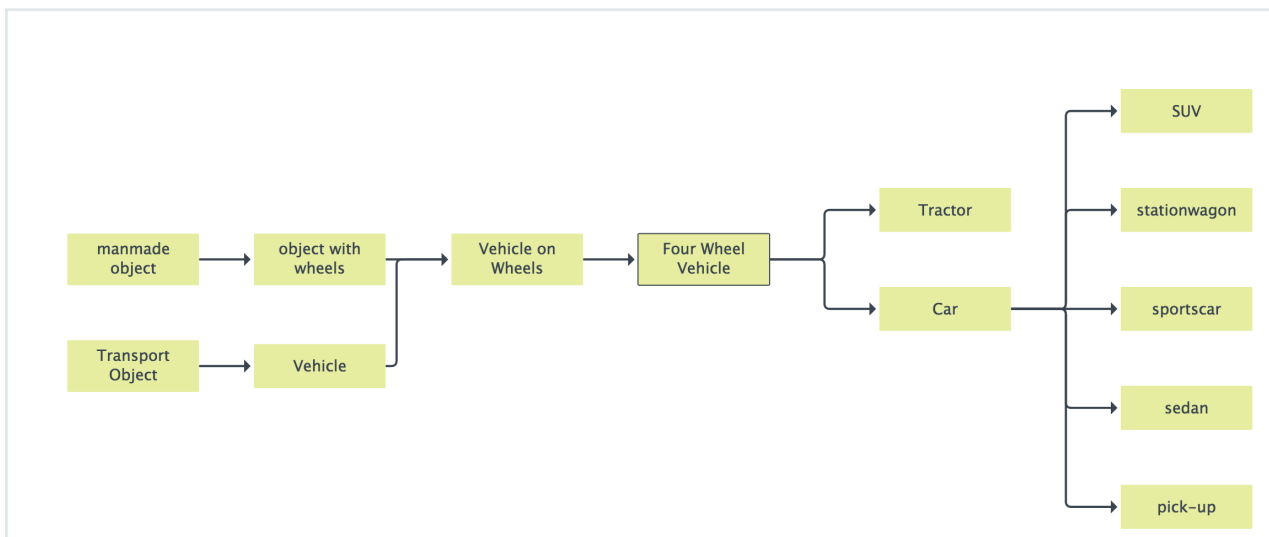
strategy, it is important that you know the difference between incoming and outgoing edges and between flow and context nodes.

From a start node, Colibra 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, Colibra adds all the relations and nodes that are downstream, but not the ones that are upstream.

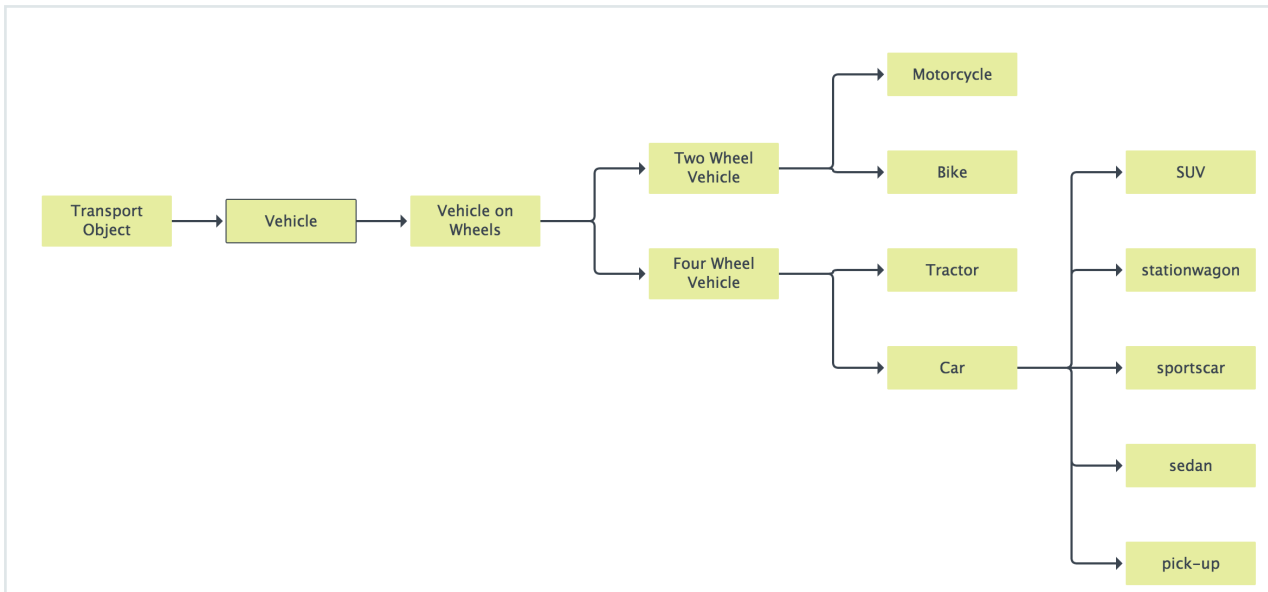
When traversing further upstream, Colibra adds all relations and nodes that are upstream of that node, but not the ones that are downstream.

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.

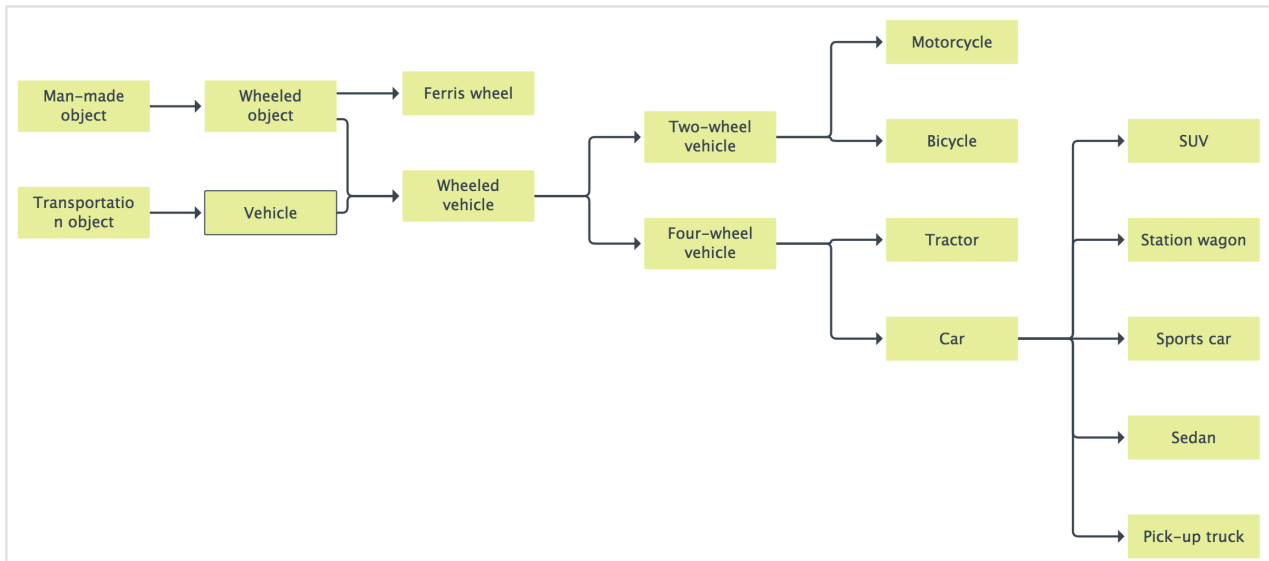


Can I set a different traversal strategy for my diagram view?

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?

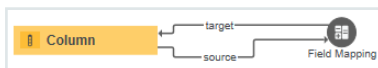
The default traversal strategy ('directed') gives the required results when you depict a set of assets that are related through some kind of (data) flow or dependency. For nodes in the flow section, and the edges between them, you can paraphrase the 'directed' traversal strategy as "keep on walking and 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.

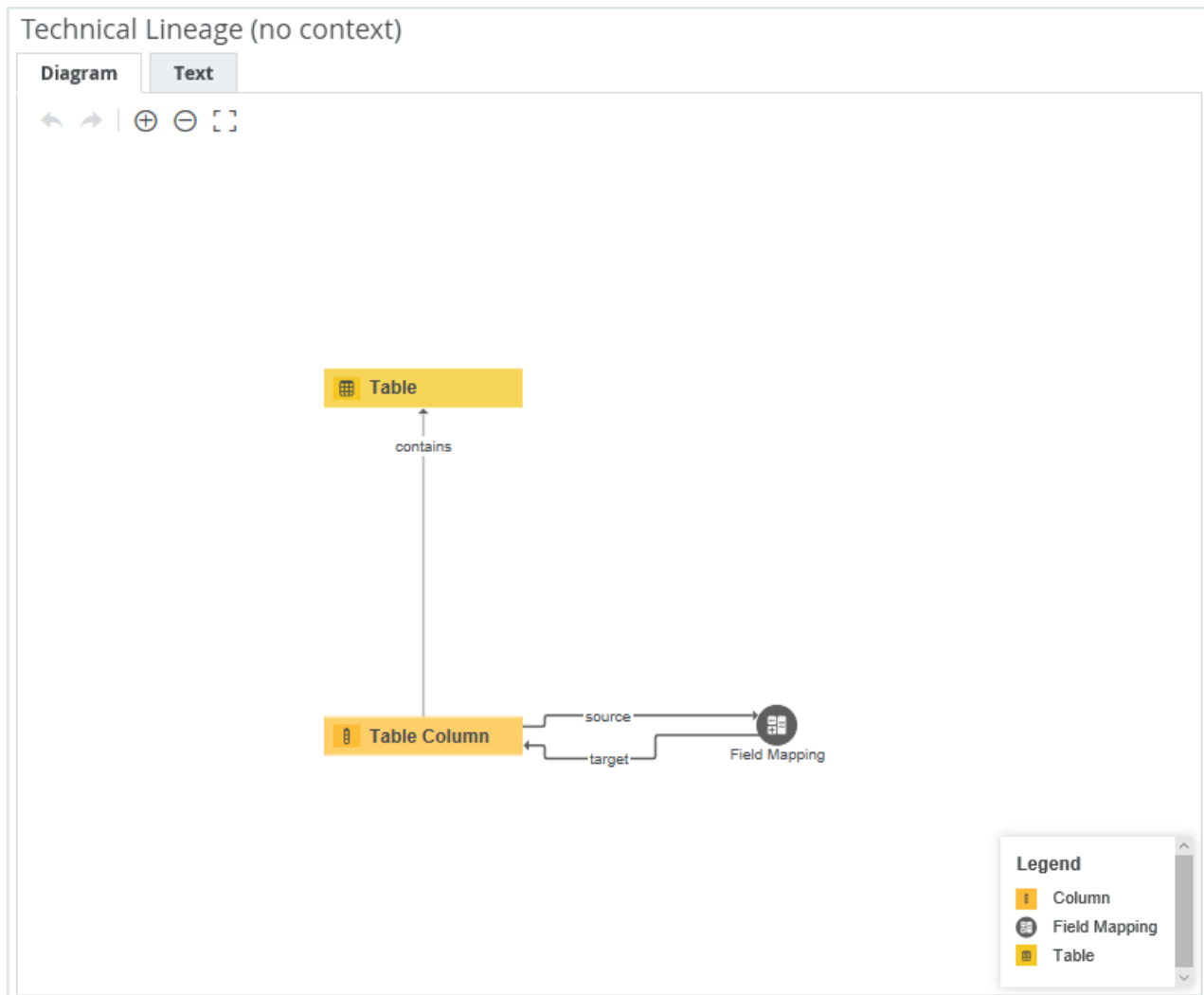
An example diagram for this view is below:



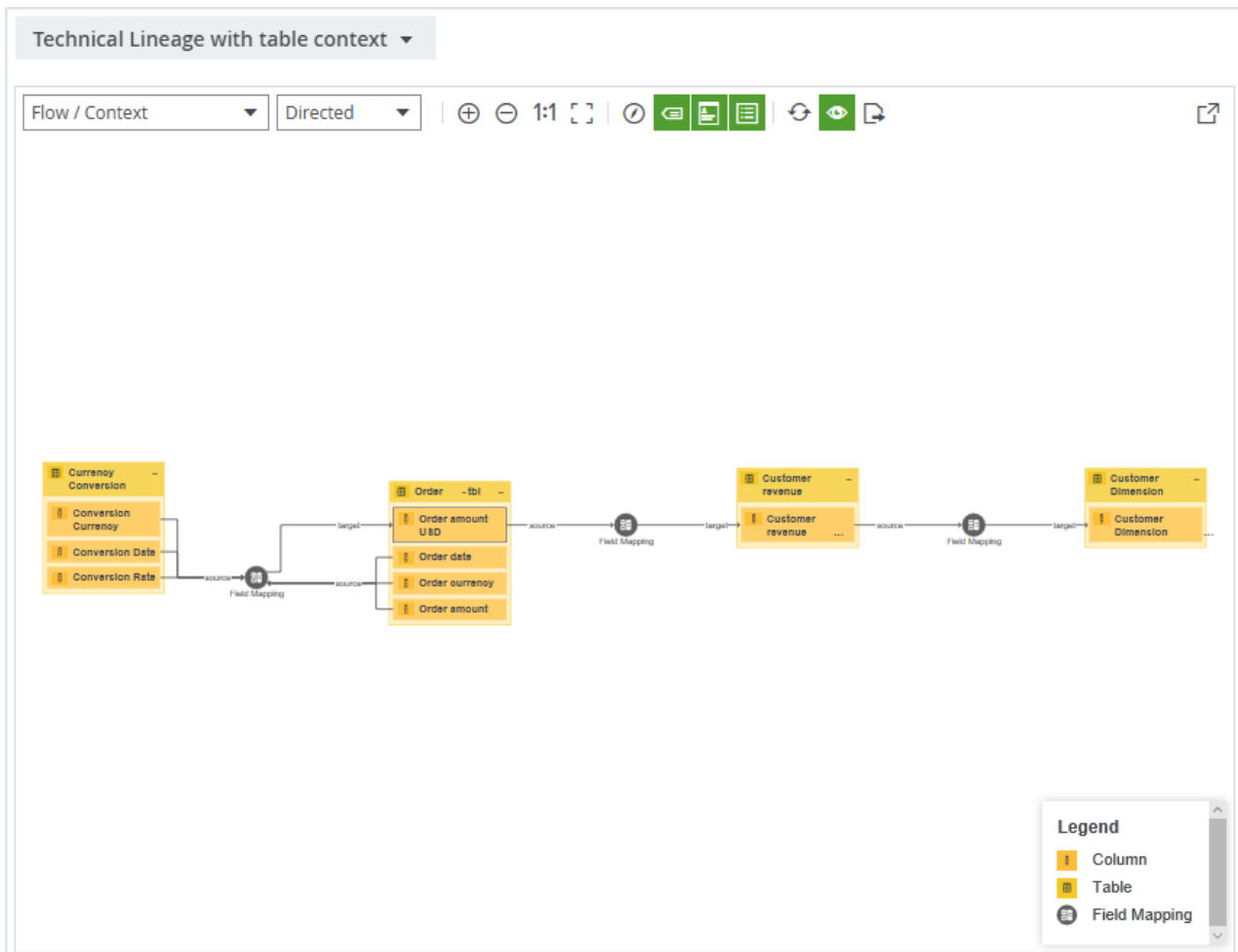
We started from the **Order amount USD** asset.

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.

Operating model

In this section, we describe the structure of the Collibra Platform Self-Hosted data model, how data is related and how you can organize your data.



Collibra building blocks

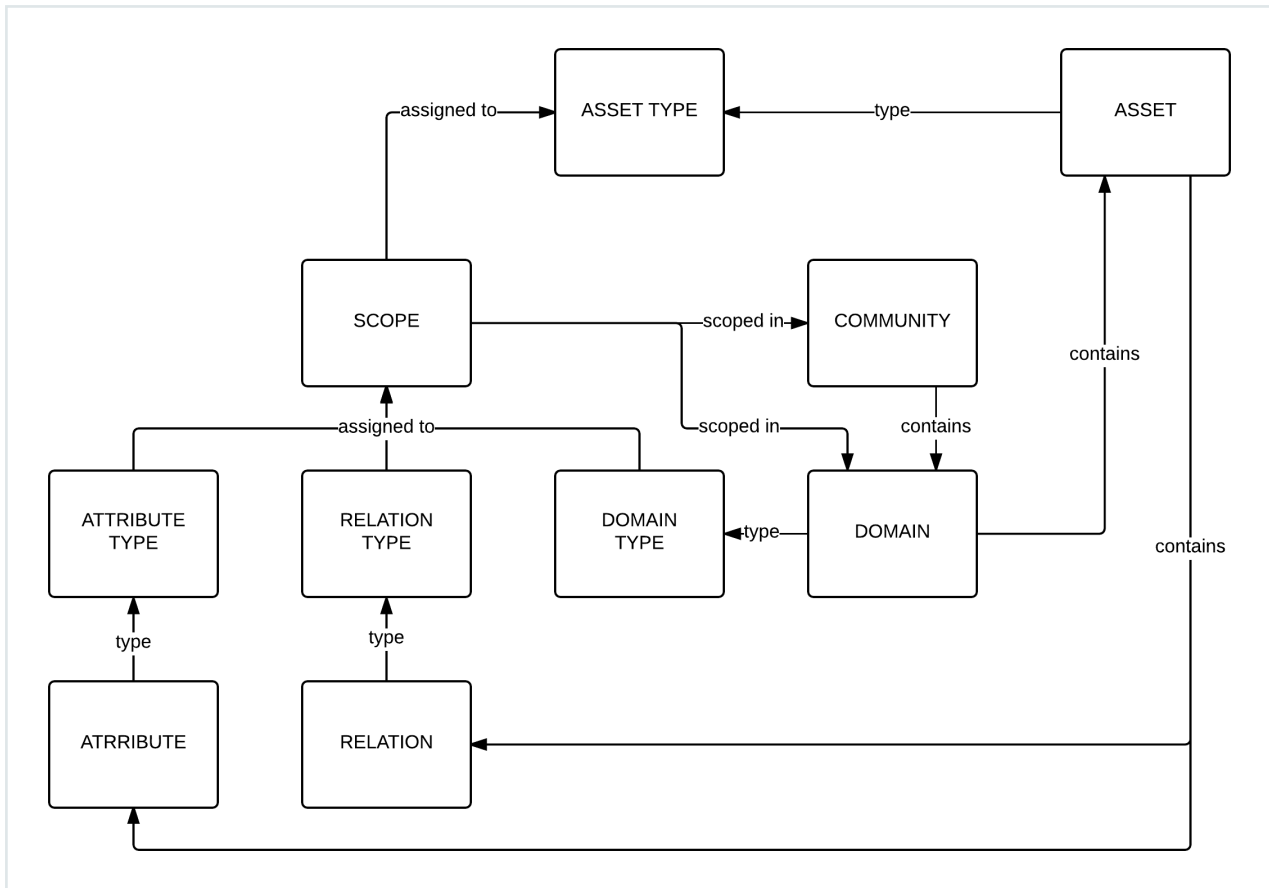
To be able to create a decent data governance model, it is important that you understand the basic building blocks of Collibra Platform Self-Hosted and how they relate to each other.

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. A domain has a unique name within its community. 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. In a scope, you can define amongst others a domain type, attribute types and relation types.
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. Scopes are assigned to asset types.

Concept	Icon	Description
Asset		An asset is the fundamental building block or resource for which you want to capture information. An asset belongs to exactly one domain and has a unique name within that domain. 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. 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. A relation is the instance of exactly one relation type.
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](#).

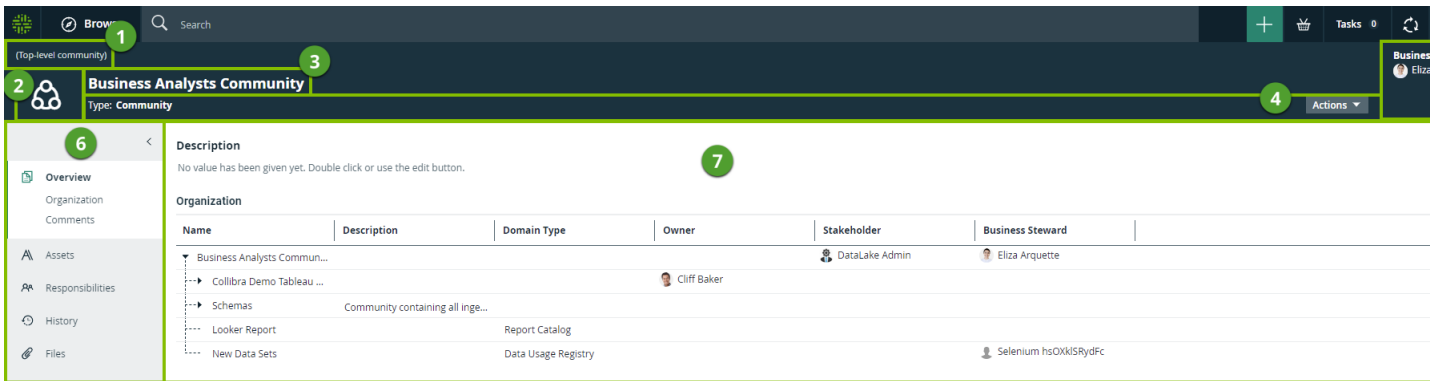
Community name	ID	URL
Business Analysts Community	00000000-0000-0000-0001-000100000001	<your environment>/community/00000000-0000-0000-0001-000100000001
Data Governance Council	bc40c085-352c-4a8c-8ee7-494fe821308e	<your environment>/community/bc40c085-352c-4a8c-8ee7-494fe821308e
Schemas	00000000-0000-0000-0001-000100000002	<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.
4	Resource toolbar	Additional actions, such as editing the community and starting a workflow.
5	Stewards	The stewards of the community. 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.
6	Tab pane	A collapsible pane that allows you to navigate to other pages of the community and add characteristics.

Number	Section	Description
7	Editor	The currently selected page, in this case the Overview page, which contains all the attributes that have been defined for the community. The Organization section contains a simple asset view with all the assets in the domains of the community. 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 more information, go 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. On the main toolbar, click **+**.
 - » 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. 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. Tip You can simultaneously create multiple communities. To do so, after typing the name, press <code>Enter</code>, and then type the next name. Community names must be globally unique. If you enter a name that already exists, it appears in the 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. Click **Actions** → **Edit**.
 - » The **Edit <community name>** dialog box appears.
3. Enter the required information.

Field	Description
Name	The name of the community. 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 cursor 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. 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. 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. 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	00000000-0000-0000-0000-0000000006019	<your environment>/domain/00000000-0000-0000-0000-0000000006019
Issue Classification	Issue Classification	00000000-0000-0000-0000-0000000006011	<your environment>/domain/00000000-0000-0000-0000-0000000006011
New Applications	Technology Asset Domain	00000000-0000-0000-0000-0000000006018	<your environment>/domain/00000000-0000-0000-0000-0000000006018
New Business Terms	Glossary	00000000-0000-0000-0000-0000000006013	<your environment>/domain/00000000-0000-0000-0000-0000000006013
New Data Assets	Data Asset Domain	00000000-0000-0000-0000-0000000006015	<your environment>/domain/00000000-0000-0000-0000-0000000006015
New Policies & Business Rules	Governance Asset Domain	00000000-0000-0000-0000-0000000006016	<your environment>/domain/00000000-0000-0000-0000-0000000006016
New Processes	Business Asset Domain	00000000-0000-0000-0000-0000000006017	domain/00000000-0000-0000-0000-0000000006017
New Reference Data	Codelist	00000000-0000-0000-0000-0000000006014	<your environment>/domain/00000000-0000-0000-0000-0000000006014

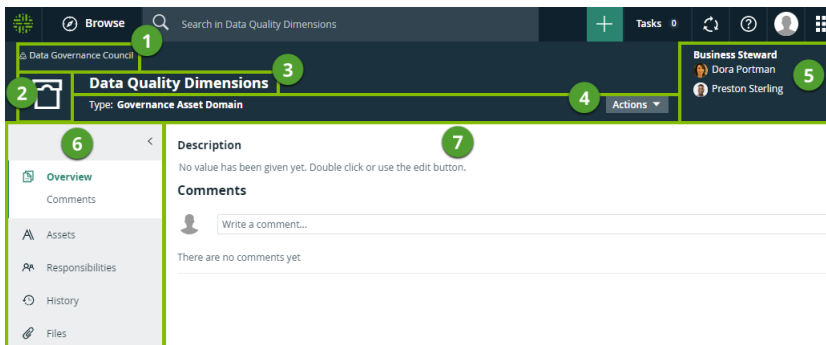
Actions

- [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
1	Breadcrumbs	The breadcrumbs of the current domain.
2	Domain type representation	The icon or abbreviation of the domain type .
3	Domain name	The name of the domain.
4	Resource menu	Additional actions, such as editing the domain and starting a workflow.
5	Stewards	The stewards of the domain. 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
6	Tab pane	A collapsible pane that allows you to navigate to other pages of the domain and add characteristics. • Overview: Contains the description of and comments about a domain. • Assets: Displays the assets in the domain. • Responsibilities: Displays the view permissions and the responsibilities for a domain. • History: Displays which user has done what with this domain. • Files: Contains attachments.
7	Editor	The currently selected page, in this case the Overview page, which contains all the attributes that have been defined for the domain. 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 more information, go the knowledge base article on Collibra Support Portal.

Create a domain

You can create a new [domain](#) in a [community](#).

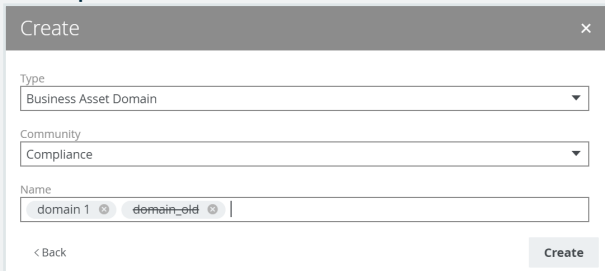
Steps

1. On the main toolbar, click **+**.
 - » 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. 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. Tip You can simultaneously create multiple domains. To do so, after typing the name, press <code>Enter</code>, and then type the next name. Domain names must be unique in their parent community. If you enter a name that already exists, it appears in the strike-through style. Example 

5. Click **Create**.

Edit a domain

You can edit the name and [domain type](#) of a [domain](#) from the domain page or from an organization table.

Edit a domain from the domain page

1. Open a domain page.
2. Click **Actions** → **Edit**.
 - » The **Edit <domain name>** dialog box appears.

3. Enter the required information.

Field	Description
Name	The name of the domain. Domain names must 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 cursor 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. 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. Note Domain names must 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 is shown 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. 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	Description
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.

Asset type	Description
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. Examples: business process, line of business, region
BI Folder	A collection of BI content
Looker Folder	A container that stores Looker Looks, Dashboards and other folders.
MicroStrategy Folder	A collection of MicroStrategy reports and data models.
MicroStrategy Project	A collection of MicroStrategy visualizations, report attributes and tables.
Power BI Capacity	A resource that hosts Power BI Workspaces.
Power BI Folder	A collection of Power BI Report Server Dashboards, Reports and Data Models.
Power BI Workspace	A collection of Power BI Dashboards, Reports and Data Models.
SSRS Folder	A collection of SQL Server Reporting Services and Power BI Report Server Reports and Data Sets.
Tableau Project	Collection of Tableau workbooks and data sources.
Tableau Site	Collection of content (workbooks, data sources, users, ...) that's walled off from any other content on that instance of Tableau Server.
Business Process	A set of activities and tasks that, once completed, produces value to the business. Examples: campaign management, talent recruitment
Data Category	A container for all the business definitions that encompass associated terminology and definitions that an organization is trying to govern. Examples: master data, reference data, transactional data

Asset type	Description
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 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.)
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. Examples: retail, e-commerce, investment management
Business Qualifier	Business Qualifiers qualify certain assets. This can be used as filters in Business Qualifier Diagrams.
Business Term	A word or phrase that describes a concept that is used in a particular branch of business. Examples: customer, person purchase count, loan amount
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. Examples: ERP, EDW, EAD
Measure	An asset type that is used for calculations, such as sum, count, average, minimum or maximum. Examples: net sales, top customers, on-hand inventory
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. Examples: employee turnover, customer attrition, claims denial rate

Asset type	Description
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. Reports can refer to specific periods, events, occurrences or subjects.
BI Report	A visual representation of data or a collection of visualizations.
Looker Dashboard	A collection of Looker tiles with metrics from one or more Looker Looks.
Looker Look	A detailed view of a Looker Data Set, with visualizations of findings and insights.
Looker Query	A query that creates a simple report in a Looker Tile or Looker Look.
Looker Tile	An element that represents data on the Looker Dashboard.
MicroStrategy Dossier	A collection of MicroStrategy chapters and pages.
MicroStrategy Document	A collection of grid and graph reports that can be viewed at the same time, along with images and text.
MicroStrategy Report	A detailed view of a MicroStrategy data model, with visualizations of findings and insights.
Power BI Dashboard	A collection of Power BI tiles with metrics from one or more Reports and Data Models.
Power BI Report	A detailed view of a Power BI Data Model, with visualizations of findings and insights.
Power BI Tile	An element representing data on the Power BI Dashboard.
SSRS KPI	A key performance indicator of SQL Server Reporting Services.
SSRS Report	A detailed view of an SQL Server Reporting Services Data Set, with visualizations of findings and insights.

Asset type	Description
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.
Tableau Worksheet	A worksheet is a single sheet on which you can build views of your data.
Tableau Workbook	Collection of sheets. A sheet can be a worksheet, a dashboard or a story.
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
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. Examples: Product Code Set, Person Gender Code, ISO 3166 Country Code
Code Value	A valid form of representation for an asset, shortened or covert. Examples: • In the Person Gender Code, “male”, “female”, “not known” and “not specified” are represented by the valid code values "1", "2", "0" and "9". • “US” is part of the "ISO 3166 code set" and refers to The United States of America.
Crosswalk	Mapping between two or more code sets.
Data Element	A construct that documents aspects of something abstract, especially one that is essential for business. Examples: person birth date, person address
Column	An atomic unit of data that can be stored in a database table. Examples: FST_NM, EMPID

Asset type	Description
Data Attribute	A specification that defines a property of a data entity. Examples: CustomerBirthDate, EmployeeFirstName
BI Data Attribute	An atomic unit of data that represents a BI report.
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.
MicroStrategy Data Attribute	A column in a MicroStrategy data model.
Power BI Column	A column in a Power BI Data Model.
SSRS Column	A column in an SQL Server Reporting Services Report Data Set.
Tableau Data Attribute	A specification that defines a property of a Tableau data entity. Examples: CustomerBirthDate, EmployeeFirstName.
Field	An atomic unit of data that can be stored in a file. Examples: FirstName, EmpID
Report Attribute	An atomic unit of data that represents a report.
BI Report Attribute	An atomic unit of data that represents a BI report.
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.
MicroStrategy Visualization	A detailed view of a MicroStrategy visualization, with findings and insights.
SSRS Parameter	A column that is part of an SQL Server Reporting Services Data Set and that is used in a KPI.
Tableau Report Attribute	An atomic unit of data that represents a Tableau report. Examples: ExpenseAmount, RiskAmount

Asset type	Description
Data Set	A collection of related sets of data assets that are data elements or composed of data elements. Example: Customer Contact information
BI Data Set	A collection of data that is used for BI report creation
Looker Data Set	A collection of data that is used to define Looker Dimensions and Measures.
SSRS Data Model	A collection of data that is used to create an SQL Server Reporting Services Report.
Data structure	A logical grouping (through whole-part relation) of data elements. Example: cfPerson is a data structure that contains the cfBirthDate, cfPersonFullName data elements.
Data Entity	A unit of data that can be classified and can have a stated relationship to other units of data. Examples: Customer, Employee
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.
MicroStrategy Data Entity	A detailed view of a MicroStrategy visualization, with findings and insights.
Power BI Table	A table in a Power BI Data Model.
SSRS Table	A table in an SQL Server Reporting Services Report Data Set.
Tableau Data Entity	An abstraction from the physical implementation of database tables, used for Tableau report creation.
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. Examples: customer subject area model, event subject area model

Asset type	Description
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. Examples: Customer Subject area model, Event Subject area model
MicroStrategy Data Model	A collection of data that is used to create MicroStrategy reports.
Power BI Data Flow	A collection of tables that are created and managed in workspaces in the Power BI service.
Power BI Data Mart	A self-service analytics solutions, enabling users to store and explore data that is loaded in a fully managed database.
Power BI Data Model	A collection of data that is used to create a Power BI report.
Tableau Data Model	An abstraction from the physical implementation of database, schema, file, etc., used for Tableau report creation.
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.
Table	An implementation of data entities in columns and rows, in a given database system. It is the basic structure of a relational database. Examples: Account_tbl, CUST_ADDR
Database View	A Database View is a virtual table based on the result-set of an SQL statement.
Data Usage	An asset that clearly documents how the data can be used between data produces and consumers for specific purpose Example: Sales growth information that is available to share for read-only requirements
Foreign Key	Asset type used to model the Primary key - Foreign key relations in relational databases.

Asset type	Description
Mapping Specification	Mapping between two or more data structures.
Dataplex Lake	A lake is a centralized repository for managing enterprise data across the organization. This asset type has been added in preparation of the Dataplex integration. The metamodel can change based on feedback from the upcoming Dataplex integration Beta testing.
Dataplex Zone	A zone represents a logical group of related assets within a Dataplex lake. This asset type has been added in preparation of the Dataplex integration. The metamodel can change based on feedback from the upcoming Dataplex integration Beta testing.
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.
Assessment Review	An asset of this type is created when an assessment is conducted on an asset and submitted for review.
Data Quality Dimension	Represents criteria that are relevant for assessing quality and categorizes different aspects of how data quality is measured. Examples: accuracy, completeness, consistency
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. Examples: Sales growth information that is available only to the Risk team for generating internal reports.
Issue Category	Allows you to categorize Issue type assets to help with organization and reporting. Example: You want to differentiate between types of issues, such as a Duplication issue or a Completeness issue.
Policy	A statement of intent that is set by a council and is implemented by a set of standards. Example: Personal information must be adequately protected.

Asset type	Description
Standard	Consists of specific low-level mandatory controls that help enforce and support the policy. Example: All personal information is encrypted with a specific encryption type.
Rule	Defines or constrains some aspect of specific business data categories. It is intended to control or influence the behavior of the business. Example: Every customer must have a unique identifier.
Business Rule	Defines or constrains some aspect of specific business data. It is intended to control or influence the behavior of business data. Example: Customer numbers have to be unique.
Data Quality Metric	An implementation of data quality rules in a selected physical database system using a particular data quality tool. 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 Quality Rule	A specification that defines which actions are required to measure the quality level of a data element for its intended use. Example: SSN must be a unique 9-digit identification number for 100% of US personal accounts for tax processing.
Validation Rule	A rule that describes a criterion to which content in DGC has to comply.
Issue	The parent asset type of all issues.
Data Issue	A problem related to issue management, also referred to as "issue".
Technology Asset	A piece of information technology (hardware, software, database, software platform) that helps an organization to run a business application. Examples: Database, File
Database	A collection of data that is systematically organized or structured, to make it is easy to create, update and query the information. Examples: Ora_DGC_V45, SalesDB2020

Asset type	Description
File Container	An asset type that represents a Cloud File Container.
Directory	A collection of data that is treated by a computer as a unit, for the purposes of input and output.
GCS Bucket	An asset type that represents an Google Cloud Storage bucket which is a logical unit of storage containing Google Cloud Storage objects.
S3 Bucket	An asset type that represents an Amazon S3 Bucket, which is a logical unit of storage containing Amazon S3 Objects.
File Group	A collection of physical files which together represent a single logical file.
Server	A computer program or device that supports other computer programs and their users
BI Server	A visual analytics platform for creating and storing visualizations.
Looker Tenant	A platform to create Looker Dashboards and rich visualizations.
MicroStrategy Server	A visual analytics platform for creating and storing MicroStrategy reports and data models.
Power BI Server	A visual analytics platform for creating and storing Power BI Reports and Data Models.
SSRS Server	A visual analytics platform for creating and storing SQL Server Reporting Services and Power BI Report Server Reports and Data Sets.
Tableau Server	A visual analytics platform for creating interactive dashboards and rich visualisations
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. Examples: CRM, ERP, EDW
BI Data Source	The link between a BI System and an external system.

Asset type	Description
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.
File Storage	An asset type that represents a Cloud File Storage bucket.
GCS File System	An asset type that represents a Google Cloud Storage file system.
S3 File System	Amazon S3 (Simple Storage Service) file system abstraction.
GCP Project	An asset type representing a Google Cloud Platform Project. This asset type has been added in preparation of the Dataplex integration. The metamodel can change based on feedback from the upcoming Dataplex integration Beta testing.

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 , and then click  **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. You can add more than one type by pressing <code>Enter</code>. 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 Platform Self-Hosted.

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 , and then click  **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. Note The name of the asset type must be unique.
Allow identical asset names per domain	Select to enable identical asset names per domain. Clear to disable identical asset names per domain.
Enable ratings	Select to allow users to rate assets. 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. For a list of colors and their hexadecimal values, see ColorHexa.
Symbol	A graphical representation for assets of this type. You can choose one of the following values: ◦ None: No graphical representation is used for assets of this type. ◦ 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. ◦ 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.

Field	Description
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. 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. This field is only displayed if you have selected Icon in the Symbol field.
Preview	Displays two previews of your asset type configuration. ◦ The left preview is the title bar on an asset page. ◦ 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 Platform Self-Hosted. 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 , and then click  **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. For a list of colors and their hexadecimal values, see ColorHexa .
Symbol	A graphical representation for assets of this type. You can choose one of the following values: ◦ None: No graphical representation is used for assets of this type. ◦ 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. ◦ 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. 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. This field is only displayed if you have selected Icon in the Symbol field.
Preview	Displays two previews of your asset type configuration. ◦ The left preview is the title bar on an asset page. ◦ 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 , and then click  **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. 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 , and then click  **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 . 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 , and then click  **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 , and then click  **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 , and then click  **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 Platform Self-Hosted.



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 Platform Self-Hosted, 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.

Note Self-relation types are now divided in the assignment table with the head and tail appearing on separate lines.

For an interactive overview of asset type whose assignments have changed visit the [online documentation](#).

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.
- The minimum and 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.

- The asset type filter, if the characteristic is a relation type.

You can use the asset type filter to restrict the asset types that you can use as the target of this relation type.

Example The MicroStrategy Report Attribute asset type has an assignment line containing the "Report Attribute contained in / contains Report" relation type. Instead of allowing any asset of the Report type or its children, you can use the asset type filter to restrict it to only assets of the MicroStrategy Report type.

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 Platform Self-Hosted. 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 , and then click  **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. » The Add Global Assignment dialog box appears. b. Click Add global assignment. » The asset type no longer inherits the assignments of its parent asset types. Note Each asset type can only have one global assignment.
Scoped assignment	a. In the tab pane, click Add assignment. » The Select scope for this assignment dialog box appears. b. Select a scope. Note You can only add one scope at a time. c. Click Add assignment. » The settings of the global assignment are copied into the selected scope. 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 , and then click  **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. Perform one of the following steps:

Component	Steps						
Characteristics	Assign one or more characteristic types to the asset type. a. Above the table, to the right, click Edit. b. Above the table, to the right, click Add characteristic. » The Add a Characteristic dialog box appears. c. 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. d. If required, set the Asset Type Filter to restrict the relation type target available to a sub-set of assets. e. If required, edit the minimum or maximum number of occurrences of the characteristic. <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Option</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Min.</td><td> The minimum number of occurrences of the characteristic. Set this option to <i>1</i> 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. Leave this option empty if you don't want a limit to the maximum number of occurrences. </td></tr> </tbody> </table> f. Above the table, to the right, click Save. » You can now add the characteristic to the assets of this type.	Option	Description	Min.	The minimum number of occurrences of the characteristic. Set this option to <i>1</i> 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. Leave this option empty if you don't want a limit to the maximum number of occurrences.
Option	Description						
Min.	The minimum number of occurrences of the characteristic. Set this option to <i>1</i> 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. Leave this option empty if you don't want a limit to the maximum number of occurrences.						
Domain types	Assign one or more domain types to the asset type. a. In the tab pane, click Domain Types. » The domain type table appears. b. Above the table, to the right, click Edit. c. In the domain types overview, select the domain types to assign the selected asset type to. d. Click Save.						

Component	Steps
Statuses	Assign one or more statuses to the asset type. - In the tab pane, click Statuses. - Above the table, to the right, click Edit. - Above the table, to the right, click Add. - 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. - Click Save.
Articulation	Assign one or more articulation rules.
Data quality rules	Assign one or more data quality rules. - In the tab pane, click Data quality rules. - Above the table, to the right, click Edit. - Above the table, to the right, click Add. » The Add data quality rule dialog box appears. - 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. - Click Save.
Validation rules	Assign one or more validation rules to the asset type. - In the tab pane, click Validation rules. » The Asset type - Validation rules editor appears. - Above the table, to the right, click Edit. - Above the table, to the right, click Add. » The Add validation rule dialog box appears. - Click a validation rule. » The validation rule appears at the bottom of the list of validation rules. If required, change the order. - 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 Platform Self-Hosted.

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 , and then click  **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.

Restrict relations for an assignment

You can restrict the target asset types that are available for an assigned relation type to one of its child asset types. This allows you to limit the possible assets available for relations of that type to assets of the selected type and its descendants. By reducing the list of available asset types, you can reduce potential confusion and incorrect relations, without having to create new relation types with more restrictive heads and tails.

Important When selecting an asset in the Asset Type Filter, the available relations are restricted to assets of that type and any of its descendants.

Steps

1. Open an asset type.
 - a. On the main menu, click , and then click  **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. In the **Asset Type Filter** field, select the asset type from which you want to start the restriction.
5. Above the table, to the right, click **Save**.

Limitations

There are some functionality that does not work with the assignment relation restriction, as they look at the relation definition instead.

The areas where these relation restrictions will not work are:

- Asset table views
- Asset hierarchy tables
- Data Quality Rule (legacy)

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 , and then click  **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, set the **Asset Type Filter** to restrict the relation type target available to a sub-set of assets.
 7. If required, edit the minimum or maximum number of occurrences of the characteristic.

Option	Description
Min.	The minimum number of occurrences of the characteristic. Set this option to <i>1</i> 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. Leave this option empty if you don't want a limit to the maximum number of occurrences.

8. Above the table, to the right, click **Save**.
 - » You can now **add** the characteristic to the assets of this type.

Note If you ingest assets via Edge then the max cardinality must be set to at least 1.

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 , and then click  **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 , and then click  **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 , and then click  **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 , and then click  **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.

Overview of characteristic types

Characteristic types is a generic term for [attribute types](#), [relation types](#) and [complex relation types](#).

Attribute types

An attribute type defines the class of information that an [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](#).

About attribute types

An attribute type defines the class of information that an [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 examples of 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 shortest possible description that clearly defines the purpose of the 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

Attribute type	Description of the attribute	Example of an attribute
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. 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. 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. The more digits in the number, before or after the decimal separator, the more likely a rounding issue will occur.

Field	Description
Only integers. (..., -2, -1, 0, 1, 2, ...)	Checkbox to only allow integer numbers. 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. The more digits in the number, before or after the decimal separator, the more likely a rounding issue will occur.
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.

Note An attribute can contain up to 1500 characters.

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. You can [add](#) an attribute to an asset if the [attribute's type](#) is in the relevant [assignment](#) of the [asset's type](#).

The table below contains all out-of-the-box [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
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

Type	Description	Assigned to asset type	Kind
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
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 Model	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
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 Colibra 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

Type	Description	Assigned to asset type	Kind
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 shortest possible description that clearly defines the purpose of the 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 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, Tableau Workbook,	Text

Type	Description	Assigned to asset type	Kind
		Technology Asset, Validation Rule, Workflow Definition, Dataplex Lake	
Description From Source System	The description from the source system of the asset.	Table, Column, Database, Schema	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
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

Type	Description	Assigned to asset type	Kind
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
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
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

Type	Description	Assigned to asset type	Kind
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
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 Deferrability	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 database in which this data is referenced and described.	Table	String
Glue Table Name	The name of the AWS Glue table in which this data is referenced and described.	Table	String
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

Type	Description	Assigned to asset type	Kind
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
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
Labels	The user-defined labels in Dataplex.	Dataplex Zone, Dataplex Lake	Text
Lake Id	The Id of the Dataplex lake.	Dataplex Lake	Text
Lake Status	Current state of the Dataplex lake.	Dataplex Lake	Text
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

Type	Description	Assigned to asset type	Kind
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
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, Dataplex Zone, Dataplex Lake	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
Measurement	The measurement of the asset.	Business Rule, Data Quality Rule, Governance Asset, Issue Category, Policy, Rule	Numeric

Type	Description	Assigned to asset type	Kind
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
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
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

Type	Description	Assigned to asset type	Kind
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
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 Project, Tableau Data Model, Tableau Workbook, Tableau Dashboard	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

Type	Description	Assigned to asset type	Kind
Profiled Row Count	The number of rows from the data set that were selected for profiling.		Numeric
Profiling Information	Provides additional information related to the status of the profiling results.	Table	Text
Project Id	A globally unique identifier for your Google Cloud Platform project.	GCP Project	Text
Project Number	An automatically generated unique identifier for the Google Cloud Platform project.	GCP Project	Number
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
Role	Relationship name from head to tail.		Text

Type	Description	Assigned to asset type	Kind
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
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
Source Tags	The tags assigned to the asset in the source system. For more information, go to Register a data source via Edge.	Schema, Table, Database View, Column	Text
Standard Deviation	The statistical standard deviation of values (numeric only)	Column	Numeric

Type	Description	Assigned to asset type	Kind
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
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

Type	Description	Assigned to asset type	Kind
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
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, Tableau Dashboard, Tableau Workbook, Tableau Worksheet	Numeric
Weighting Factor	A factor by which some quantity is multiplied in order to make it comparable with others.		Numeric
Zone Name	The relative resource name of a Dataplex zone in the following format: projects/{project_number}/locations/{location_id}/lakes/{lake_id}/zones/{zone_id}.	Dataplex Zone	Text

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 , and then click  **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. The name of the attribute type must be globally unique. Tip You can simultaneously create multiple objects. To do so, after typing the name, press <code>Enter</code>, and then type the next name. If you enter a name that already exists, it appears in the 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. 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. 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. The more digits in the number, before or after the decimal separator, the more likely a rounding issue will occur.

Field	Description
Only integers. (..., -2, -1, 0, 1, 2, ...)	Checkbox to only allow integer numbers. 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. The more digits in the number, before or after the decimal separator, the more likely a rounding issue will occur.
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 , and then click  **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 , and then click  **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**.

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 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.
Role	The description of the relation type going from the head asset to the tail asset.

Element	Description
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.	

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 out-of-the-box 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 out-of-the-box 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

Head	Role	Co-role	Tail
BI Data Model	contains	is part of	BI Data Attribute
BI Data Model	is source for	sources	BI Data Model
BI Folder	assembles	is assembled in	BI Folder
BI Folder	contains	contained in	Data Asset
BI Report	contains	contained in	BI Data Model
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
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

Head	Role	Co-role	Tail
Data Asset	contained in	contains	BI Folder
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 Asset	is source for	sources	BI Report
Data Asset	represents	is represented by	Table
Data Attribute	used in	uses	Report
Data Category	categorizes	is categorized by	Data Asset
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 Element	targets	sources	Data Element
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
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

Head	Role	Co-role	Tail
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	is part of	Directory
Directory	contains	is part of	File Group
File	contains	is part of	Table
File Container	contains	is contained in	File
File Container	contains	is part of	File Container
File Group	contains	is part of	Table
File Storage	contains	is part of	File Container
Governance Asset	groups	is grouped by	Governance Asset
Governance Asset	resolves	resolved by	Issue
Governance Asset	violated by	violates	Issue
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

Head	Role	Co-role	Tail
Report	uses	used in	Data Attribute
Report	uses	used in	Report
Report Attribute	contained in	contains	Report
Report Attribute	is source for	is target of	Report Attribute
Report Attribute	sourced from	is source of	Data Attribute
Role Type	is responsible for	is responsibility of	Asset
Rule	is implemented by	implements	Business Rule
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
Table	is part of	contains	Database
Tableau Site	assembles	is assembled in	Tableau Project
Tableau Workbook	contains	contained in	Tableau Data Model
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

Head	Role	Co-role	Tail
Technology Asset	system of use for	system of use	Data Asset

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 , and then click  **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*.

The screenshot shows a 'Create relation type' dialog box. It has a title bar with the text 'Create relation type' and a close button (X). The dialog contains the following fields:

- Role***: A text input field containing the value 'is part of'.
- Head***: A dropdown menu with 'Data Element' selected.
- Tail***: A dropdown menu with 'Data Structure' selected.
- Co-role***: A text input field containing the value 'contains'.
- Description**: A large text area for entering a description.

At the bottom right of the dialog are two buttons: 'Cancel' and 'Create'.

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 , and then click  **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 , and then click  **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 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 relation types

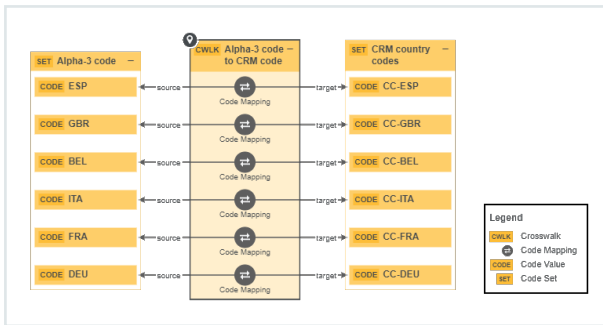
A **complex relation** is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The **complex relation's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

The 'Create complex relation type' dialog box is shown. The 'Name' field is 'Code Mapping'. The 'Description' field is 'Complex mapping between two or more code values'. The 'Display options' section includes 'Color free value' (set to #E6E6E6) and 'Icon' (set to Network transmission). The 'Relations' section lists three roles: 'source', 'target', and 'crosswalk'. Each role has a 'Corrole' field, an 'Asset Type' dropdown, and 'Min' and 'Max' cardinality fields. The 'Attributes' section lists two attribute types: 'Description' and 'Transformation Logic'. Each attribute type has an 'Attribute Type' dropdown and 'Min' and 'Max' cardinality fields. The 'Add relation' and 'Add attribute' buttons are visible. The 'Cancel' and 'Save' buttons are at the bottom right.

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.

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 out-of-the-box **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:-)	- Description (0:1) - Transformation Logic (0:1)	- Code Value - Crosswalk
		Target - Code Value (1:-)		
		Crosswalk - Crosswalk (1: 1)		
Data Usage	Data Usage	Uses - Data Asset (1:-)	- Description (0:1) - Materiality (0:1)	
		Used in - Business Asset (1:-)		
		Governed by - Rule (1:-)		
Fact Type		Head - Asset (1: 1)	- Role (1:-) - Co-role (1:-)	
		Tail - Asset (1: 1)		

Name	Description	Relation types	Attribute types	Assigned asset types
Field Mapping	Complex mapping between two or more data fields	Source - Data Element (1:-)	- Description (0:1) - Transformation Logic (0:1)	- Column - Data Attribute - Data Element - Field - Mapping Specification - Report Attribute
		Target - Data Element (1:-)		
		Mapping specification - Mapping Specification (1: 1)		
Foreign Key Mapping	Complex mapping between two columns representing a primary key and a foreign key	Constrains - Column (1: 1)	Key sequence (1:1)	- Column - Foreign Key
		References - Column (1: 1)		
		Is part of - Foreign Key (1: 1)		

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 , and then click  **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. 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. For a list of colors and their hexadecimal values, see ColorHexa.
Symbol	A graphical representation for complex relations of this type. You can choose one of the following values: ◦ None: No graphical representation is used for complex relations of this type. ◦ 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. ◦ 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. 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 complex relations of this type. This icon is also displayed in the legend of diagrams. 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: ◦ The left preview is the title bar on a complex relation page. ◦ The right preview is a diagram node.
Relations	The relation types of the complex relation type. 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. The complex relation is always the tail of the complex relation type.
Min.	The minimum amount of relations of this type. 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 , and then click  **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. Note The name of the complex relation type must be globally unique.

Field	Description
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. For a list of colors and their hexadecimal values, see ColorHexa.
Symbol	A graphical representation for complex relations of this type. You can choose one of the following values: ◦ None: No graphical representation is used for complex relations of this type. ◦ 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. ◦ 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. 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. 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: ◦ The left preview is the title bar on a complex relation page. ◦ The right preview is a diagram node.

Field	Description
Relations	The relation types of the complex relation type. 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 . The complex relation is always the tail of the complex relation type.
Min.	The minimum amount of relations of this type. 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**.

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 , and then click  **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.
Hierarchies	Codelist ▶ Hierarchies	A Code list with a hierarchical structure in its Code Values

Type	Type	Description
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	
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.

Type	Type	Description
Policy Domain	Data Governance Domain ▸ Policy Domain	A set of policies 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 , and then click  **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. You can enter more than one value at a time. To do this, press <i>Enter</i> 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 , and then click  **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 cursor 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 , and then click  **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 , and then click  **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. The technical stewards are granting the requested access. The reviewer is appointing an assignee to resolve an issue.	An asset is accepted at the end of the Approval and Simple Approval workflows. 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. 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 .
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.

Status	Description	Use
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. The initial status of a data usage asset.	Reviewers can reject invalid issues during the Issue Management workflow . 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.
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 assignee'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 .

Status	Description	Use
Under Review	The stakeholders are reviewing an asset. 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. 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 Platform Self-Hosted 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 , and then click  **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 , and then click  **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 cursor 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 , and then click  **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 Condition Value field (which will be either a status or characteristic) 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, doesn't apply the rule more than once.
- The Score and Score 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 score 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 Characteristic	Condition Value Definition	Score Increase by	Score Value 33
2	Condition Status	Condition Value Candidate	Score Sets to	Score Value 0
3	Condition Status	Condition Value In progress	Score Sets to	Score Value 10
4	Condition Status	Condition Value Under review	Score Sets to	Score Value 50
5	Condition Status	Condition Value Reviewed	Score Sets to	Score Value 80
6	Condition Status	Condition Value Accepted	Score Sets to	Score Value 100
7	Condition Characteristic	Condition Value Note	Score Increase by	Score Value 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 , and then click  **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 score rules**.
The default scope is **Global assignment**.
3. Above the table, to the right, click **Edit Model**.
4. Above the table, to the right, click **Add an Articulation Score 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. ◦ Status set to: The score depends on a specific status of an asset. ◦ Characteristic added: The score depends on a specific characteristic of an asset.
Condition Value	The specific characteristic or status that an asset must have for the rule to apply.
Score	The impact on the score if an asset meets the condition and status or characteristic. ◦ increase score by: Adds a value to the articulation score ◦ sets score to: Sets the articulation score to a specific value. As a consequence, the previous score and the previous rules are discarded.
Score 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:

Condition	Condition Value	Score
Attribute 	Certified 	increase

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 , and then click  **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 score rules**.
3. Above the table, to the right, click **Edit Model**.

4. Enter the required information.

Field	Description
Condition	The condition of the articulation rule that determines when the rule applies. ◦ Status set to: The score depends on a specific status of an asset. ◦ Characteristic added: The score depends on a specific characteristic of an asset.
Condition Value	The specific characteristic or status that an asset must have for the rule to apply.
Score	The impact on the score if an asset meets the condition and status or characteristic. ◦ increase score by: Adds a value to the articulation score ◦ sets score to: Sets the articulation score to a specific value. As a consequence, the previous score and the previous rules are discarded.
Score 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

- Open the scope of an asset type.
 - On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
 - Click **Operating Model**.
 - » The [operating model settings](#) appear on the **Asset types** tab page.
 - Click the name of an asset type.
- In the tab pane, click <name of the scope>, then click **Articulation score rules**.
- Above the table, to the right, click **Edit Model**.
- Click  next to the rule that you want to delete.
- Click **Save**.

Asset data quality

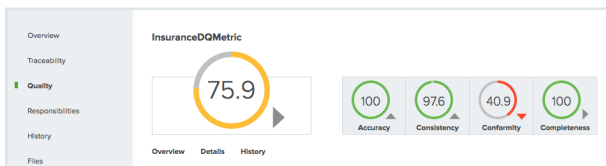
The **Quality** page of an asset makes data quality results of an asset available to the business stakeholders. The dashboard aggregates the following values:

- 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**.

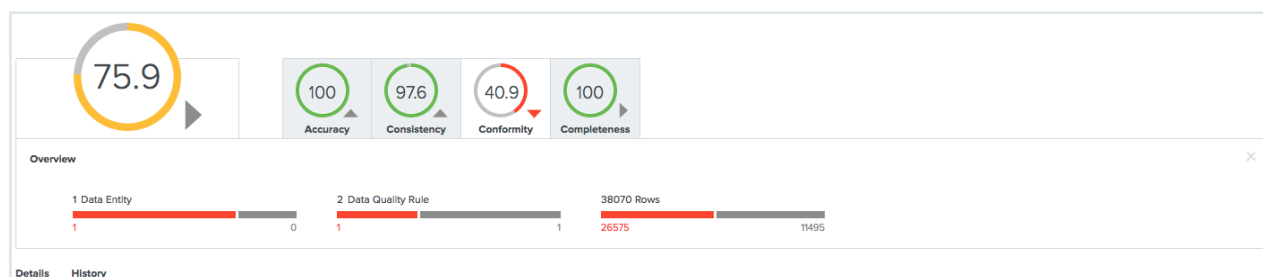
Underneath the top pane, three selection boxes are available. They display an extra overview, details and history pane, respectively.

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.



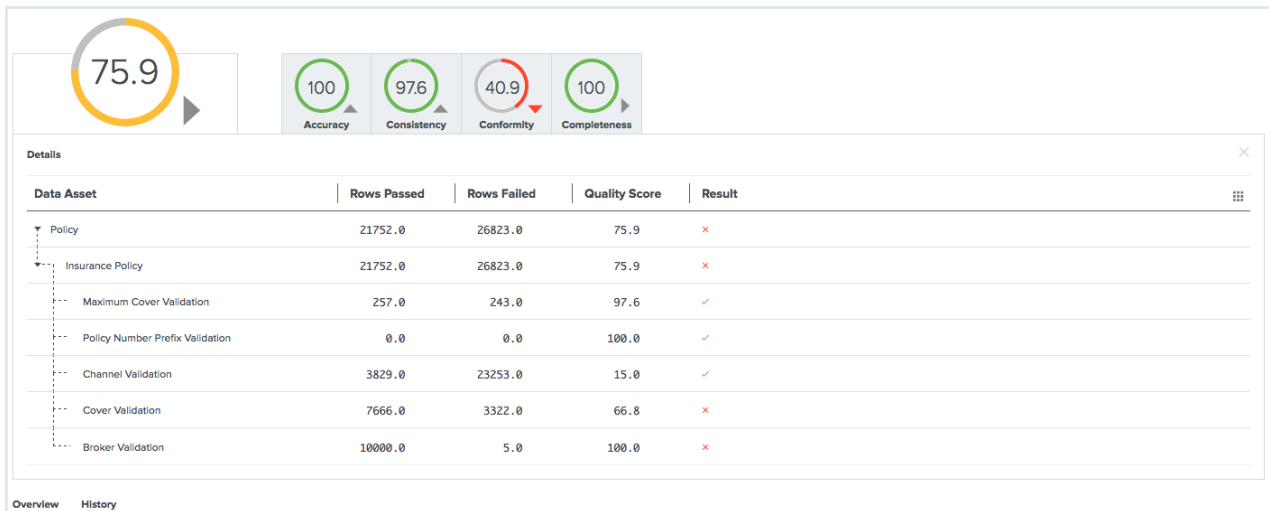
Asset quality details pane

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

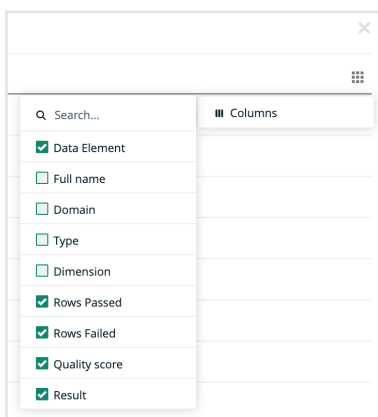
- **Result** (failing or passing): The aggregated result as a logical conjunction of the results of the underlying assets.



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.

Edit data quality rule

Name*
Default Insurance data quality rule for business term

Description

Aggregation Path

Path*
Business Asset represents Data Asset > Asset governed by Governance Asset
Construct the path through which you want to calculate your aggregated scores.

Categorization*
classified by Data Quality Dimension
We can categorize all Rule elements based on a relation type. You will have the ability to see subcores on the asset types based on these categories.

Metrics

Metric	Description	Operation
Metric: Result	Description: The result.	Operation: Logical AND
Metric: Rows Passed	Description: The amount of rows that passed the rule.	Operation: Total
Metric: Rows Failed	Description: The amount of rows that failed the rule.	Operation: Total
Metric: Passing Fraction	Description: The % of rows or entities that have passed the rule.	Operation: Average

Add Metric

Cancel Save

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

- On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
- Click **Operating Model**.
 - » The [operating model settings](#) appear on the **Asset types** tab page.
- In the tab pane, click **Data quality rules**.
- Above the table, to the right, click **Add**.

5. 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. 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. This section contains a couple of metrics that are fixed for each metrics group: ◦ 'Rows Failed', operation 'Total': aggregated sum of failing rows ◦ 'Rows Passed', operation 'Total' aggregated sum of passing rows ◦ 'Passing Fraction', operation 'Average': aggregated average of the passing fraction (quality score) ◦ 'Result', operation 'Logical AND': aggregated logical and of the result: failing or passing You can add extra metrics and their corresponding operation by clicking Add Metric.

6. Click **Save**.

Edit 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 , and then click  **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 **Data quality rules**.
4. Click  in the row of your data quality rule.
5. 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. 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. This section contains a couple of metrics that are fixed for each metrics group: ◦ 'Rows Failed', operation 'Total': aggregated sum of failing rows ◦ 'Rows Passed', operation 'Total' aggregated sum of passing rows ◦ 'Passing Fraction', operation 'Average': aggregated average of the passing fraction (quality score) ◦ 'Result', operation 'Logical AND': aggregated logical and of the result: failing or passing You can add extra metrics and their corresponding operation by clicking Add Metric.

6. 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 the product for which you want to create an asset, for example **Business Glossary**.
2. On the main toolbar, click **+**.
 - » The **Create** dialog box appears.
3. On the **Assets** tab, click **Validation Rule**.
 - » The **Create Asset** dialog box appears.
4. Enter the required information.

Field	Description
Type	The asset type of the asset that you are creating.
Domain	The domain to which the asset will belong. Tip Ensure that the domain type of the selected domain is assigned to the selected asset type.
Name	A name to identify the asset. Tip You can simultaneously create multiple assets. To do so, after typing the name, press Enter, and then type the next name. Depending on the settings, asset names may need to be unique in their domain. If you enter a name that already exists, it appears in the strike-through style.

5. Click **Create**.

- » A message stating that one or more assets are created appears in the upper-right corner of the page.

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. On the action toolbar, click **Delete**.
 - » The **Delete assets** dialog box appears.
4. Click **Yes**.

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 , and then click  **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 , and then click  **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](#).

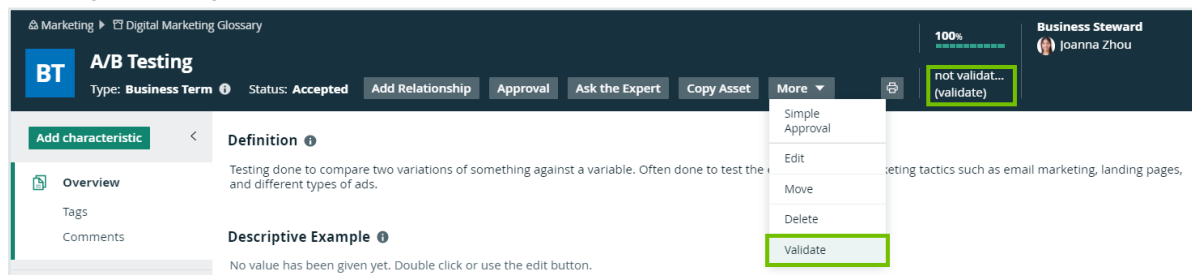
Prerequisites

There are three conditions that need to be met.

- You have a [global role](#) with the Reference Data Manager [global permission](#), for example ReferenceData.
- The [global permission](#) applicable for the asset type.
- You have 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. 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. On 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. On 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](#).

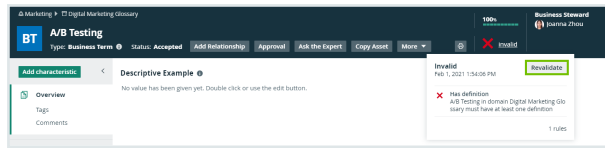
Prerequisites

- 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. On 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**.

☐ Name ↑	Definition	Validation Result
☐ A/B Testing	Testing done to compare two variations of something ag...	Invalid Feb 1, 2021 1:57:25 PM ✕
☐ AdWords	Google's advertising system in which	
☐ Affiliate Marketing	When a publisher (website with a lo	
☐ API	Application Programming Interfaces	
☐ Attribution	Identifying which part of a marketin	
☐ Audience	The group of specific people a brand	

Invalid
Feb 1, 2021 1:57:25 PM

✕ **Has definition**
A/B Testing in domain Digital Marketing Glo
ssary must have at least one definition

1 rules

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

Validation results					
Rules executed					
Result	Asset	Rule	Message	Domain	
✓	Country	KDW VR1		New Business Terms	
✓	Currency Conversion	KDW VR1		New Business Terms	
✓	Customer	KDW VR1		New Business Terms	
✓	Customer Revenue	KDW VR1		New Business Terms	
✓	DDD	KDW VR1		New Business Terms	
✗	DW	KDW VR1	Name should have more than ...	New Business Terms	
✓	DWK	KDW VR1		New Business Terms	
✗	K	KDW VR1	Name should have more than ...	New Business Terms	
✓	KDW	KDW VR1		New Business Terms	
✓	Order	KDW VR1		New Business Terms	
✓	Order Date	KDW VR1		New Business Terms	
✗	W	KDW VR1	Name should have more than ...	New Business Terms	

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 Platform Self-Hosted.

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 {
  isEmpty(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,\
              '00000000-0000-0000-0000-0000000011001')
  }
  then {
    isEmpty(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, '00000000-0000-0000-0000-0000000011001')  
}
```

Then-section

The **then**-section contains the pure validation logic. More information: [Validation logic](#).

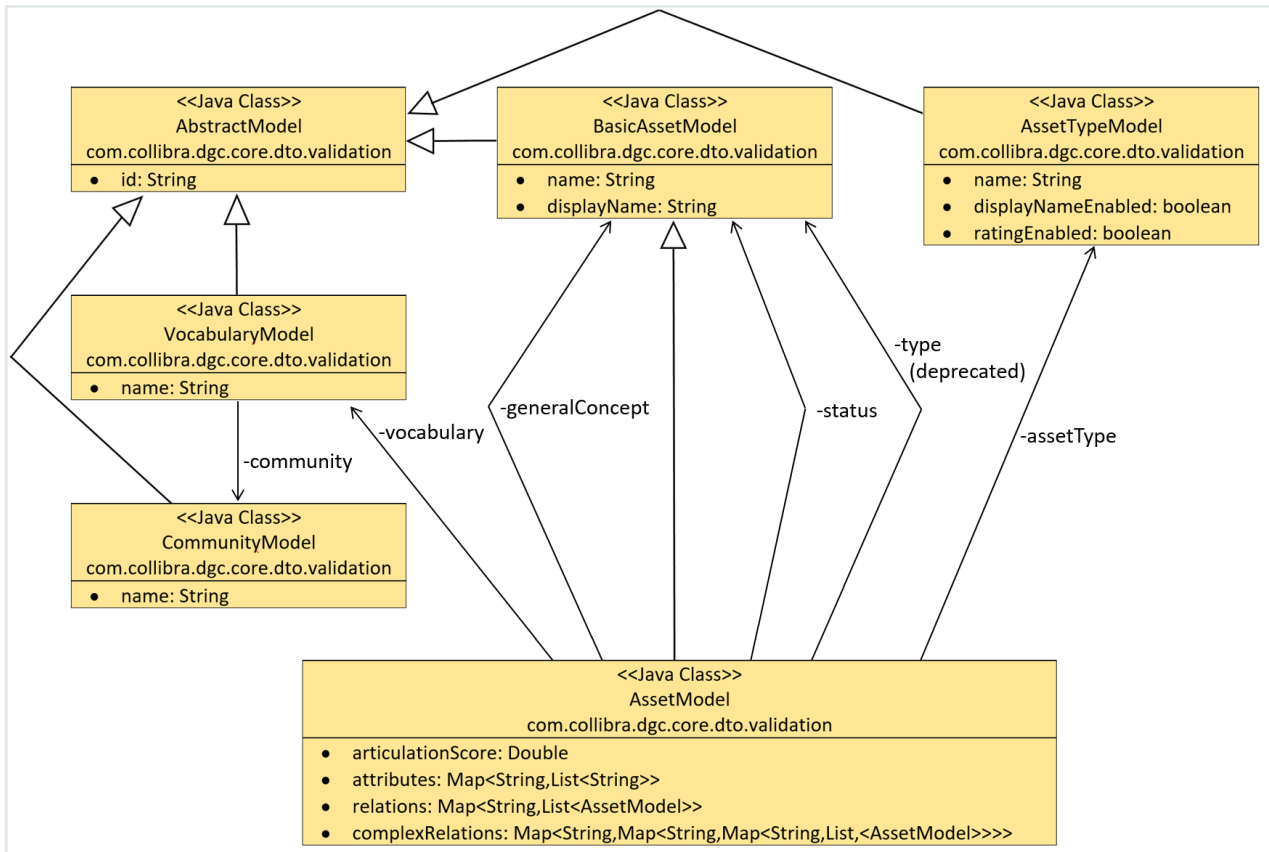
Asset model

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 workflows 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).
signifier	Identical to name but only available for the BasicAssetModel. Note This field is deprecated.
displayName	The name of the resource. All resources have this property (community, vocabulary and asset).

Field	Explanation
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 . 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.
vocabulary.community.name	The name of the community of the asset.
generalConcept	The general concept of the asset. Note This field is deprecated.
generalConcept.id	The ID of the general concept. Note This field is deprecated.

Field	Explanation
generalConcept.name	The name of the general concept. Note This field is deprecated.
generalConcept.signifier	Identical to generalConcept.name . 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' .
attributes['00000000-0000-0000-0000-00000000202']	Identical to attributes.'Definition' , but using the resource ID of the Definition attribute type.
attributes.'00000000-0000-0000-0000-00000000202'.first()	The first attribute value within the list of all the Definition attributes.
attributes.'00000000-0000-0000-0000-00000000202'?.first()	Identical to attributes.'00000000-0000-0000-0000-00000000202'.first() , but null-safe. Tip <code>?.</code> is the null-safe getter of Groovy. You cannot combine the <code>?.</code> with the <code>[...]</code> 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.

Field	Explanation
<code>attributes['Definition'][1]</code>	The second Definition attribute value of the asset. 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
<code>relations['Related To']</code>	The list of target assets of all Related To relations.
<code>relations['Related To']?.first().name</code>	The name of the first target asset using the Related To relation in a null-safe way. Tip <code>? .</code> is the null-safe getter of Groovy. You cannot combine the <code>? .</code> with the <code>[. . .]</code> 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
<code>complexRelations.<complexRelationType (Name/Id)>.<firstrelationname>.<secondrelationname></code>	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
<code>complexRelations.CRT.up.right</code>	The list of the complex relations from up to right .
<code>complexRelations['CRT']['up']['right']</code>	Identical to complexRelations.CRT.up.right .
<code>complexRelations.'CRT'?.up?.right</code>	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. Tip <code>?.</code> is the null-safe getter of Groovy. You cannot combine the <code>?.</code> with the <code>[...]</code> 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.
<code>complexRelations['1'].down.up</code>	The list of the complex relations from down to up .

Asset type model

Field	Description
<code>name</code>	The full name of the asset type .

Field	Description
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.
signifier	Identical to name but only available for the BasicAssetModel. 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 {
  isEmpty(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...
<code>isEmpty (value)</code>	A value is empty, null or does not contain any element.
<code>isNotEmpty (value)</code>	A value is not empty.
<code>isEqual (value1, value2)</code>	A value is the same as a second value.
<code>isNotEqual (value1, value2)</code>	A value is not the same as a second value.
<code>isIn (value, Collection)</code>	A value is part of a collection.
<code>areIn (Collection values, Collection collection)</code>	A collection is part of another collection.

The function...	checks whether...
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.
isFalse (value)	A value is false, empty or null according to the Groovy truth. Examples: • <code>isFalse (something): returns true if something is false.</code> • <code>isFalse (something): returns false if something is true.</code> • <code>isFalse (false): returns true.</code> • <code>isFalse (null): returns true.</code>
isTrue (value)	A value is true, empty or null according to the Groovy truth. Examples: • <code>isTrue (something): returns false if something is false.</code> • <code>isTrue (something): returns true if something is true.</code> • <code>isTrue (false): returns false.</code> • <code>isTrue (null): returns true.</code>
isUnique (Collection, Closure)	All values in a collection are unique. Examples: • <code>isUnique ([1, 2, 3]): will evaluate to true.</code> • <code>isUnique ([1, 2, 3, 1]): will evaluate to false.</code> Examples: The closure <code>{it % 2}</code> allows only one even and one odd element in the list. • <code>isUnique ([3, 4], {it % 2}): will evaluate to true.</code> • <code>isUnique ([1, 3, 4], {it % 2}): will evaluate to false, because both 1 and 3 are odd.</code>

The function...	checks whether...
validate (value)	A value is a valid function, accepting any closure that is capable of returning true or false. 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.

The function...	checks whether the value...
<code>isEmpty (value)</code>	Is not empty.
<code>startsWith (value, prefix)</code>	Starts with <code>prefix</code> .
<code>contains (value, substring)</code>	Contains the given substring.
<code>endsWith (value, suffix)</code>	Ends with the given suffix.
<code>isLengthBetween (value, minLength, maxLength)</code>	Has a length between the specified range. Note The range is inclusive. For example <code>isLengthBetween ('Hello', 2, 6)</code> is true.
<code>isLengthLess (value, maxLength)</code>	Has a length less than the specified length.
<code>isLengthMore (value, minLength)</code>	Has a length longer than the specified length.
<code>isLengthEq (value, length)</code>	Has the specified string length.
<code>isAlpha (value)</code>	Contains only alphabetical characters. Note This is done through the regular expression <code>[a-zA-Z]+</code>.
<code>isAlphaSpace (value)</code>	Contains only alphabetical characters and spaces.
<code>isAlphanum (value)</code>	Contains only alphabetical characters and digits.
<code>isAlphanumSpace (value)</code>	Contains only alphabetical characters, digits, and spaces.

The function...	checks whether the value...
matches (value, regular expression)	Matches the specified regular expression. A regular expression has to be placed between two forward slashes (/). Examples: • <code>matches ("stream", /str.*/)</code> checks whether <code>stream</code> matches the pattern <code>str.*</code>, which will result to <code>true</code>. • <code>matches ("stream", /srl.*/):</code> checks whether <code>stream</code> matches the pattern <code>srl.*</code> which results to <code>false</code>.

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.
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
<pre>Long toTimestamp(String dateConstant) { LocalDateTime.of(LocalDate.from(DateTimeFormatter.ISO_LOCAL_ DATE.parse(dateConstant)), LocalTime.of(0, 0, 0)).atOffset(ZoneOffset.UTC).toInstant().toEpochMilli() }</pre>	Converts a date constant to a timestamp. • @param dateConstant: the date in yyyy-MM-dd format. • @return: the timestamp of the dateConstant.
<pre>String toDateConstant(Long timestamp) { Instant.ofEpochMilli(timestamp).atOffset(ZoneOffset.UTC) .format(DateTimeFormatter.ISO_LOCAL_DATE) }</pre>	Converts a timestamp to a date string in yyyy-MM-dd format. • @param timestamp: the timestamp to convert. • @return: the string representation of the timestamp.

Implementation	Purpose
<pre>String toDateConstant(Long timestamp, String pattern) { Instant.ofEpochMilli(timestamp).atOffset(ZoneOffset.UTC) .format(DateTimeFormatter.ofPattern(pattern, ValidationConfig.getInstance().getLocale())) }</pre>	Converts a timestamp to a string using the given pattern. • @param timestamp: the timestamp to convert. • @param pattern: the pattern to use for conversion. For example: <i>yyyy-MM-dd</i>. • @return: the string representation of the timestamp in the given pattern representation.
<pre>String now() { Instant.now().atOffset(ZoneOffset.UTC).format(DateTimeFormatter.ISO_LOCAL_DATE) }</pre>	Returns the current date string in <i>yyyy-MM-dd</i> format. • @return: the current date in <i>yyyy-MM-dd</i> 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.

The function...	checks whether a timestamp is...
isLess (Timestamp, Date)	Smaller than the date.
isLessEq (Timestamp, Date)	Smaller than or equal to the date.
isGreater (Timestamp, Date)	Greater than the date.
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 {
  ((isEmpty (name) && isEqual (name, 'doesnotequal2', message:
    'shouldfail'))\
  || isEqual (name, 'doesnotequal')) && isEmpty (id)
}
```

Multi-line expression:

```
rule {
  allOf {
    anyOf {
      allOf {
        condition { isEmpty (name) }
        condition { isEqual (name, 'doesnotequal2', message:\
'shouldfail') }
      }
      condition { isEqual (name, 'doesnotequal') }
    }
    condition { isEmpty (id) }
  }
}
```

Hybrid expression:

```

rule {
    allOf {
        anyOf {
            condition { isEmpty (name) && isEqual (name, \
                'doesnotequal2', message: 'shouldfail') }
            condition { isEqual (name, 'doesnotequal') }
        }
        condition { isEmpty (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. 2. Add them up. 3. Show the result.
{String a -> isEmpty (a) }	1. Define a variable of the type <code>String</code>. 2. Apply the validation function <code>isEmpty</code> on it. More info: isEmpty (value).
{isEmpty (it)}	1. Apply the validation function <code>isEmpty</code> on any variable that has <code>it</code> as its name. More info: isEmpty (value). 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
<code>mylist.first()</code>	The first value in the list <code>mylist</code> .
<code>mylist.last()</code>	The last value from the list <code>mylist</code> .
<code>mylist[1]</code>	The second element from the list <code>mylist</code>. The number is the index of the value you want to retrieve from the list. Note The first element has index zero. As a consequence, <code>mylist.first()</code> is equivalent to <code>mylist.[0]</code>.
<code>mylist.get(1)</code>	The second element from the list <code>my list</code> . It is very similar to the example above.
<code>mylist?.get(1)</code>	The second element from the list. However, this syntax is null-safe. <code>?.</code> is the null-safe getter of Groovy. You cannot combine the <code>?.</code> with the <code>[...]</code> 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
<code>isIn ('expectedTargetName', relations ['Is Related To']* .name)</code>	Check whether <code>expectedTargetName</code> is in the list of all names of the target assets. The <code>* .</code> operator applies the <code>.name</code> on every target asset and creates a new list.
<code>isEvery (relations ['Is Related To']* .name, {targetName -> startsWith (targetName, 'S')})</code>	This will check that every target asset related to the current asset has a name that starts with <code>S</code> .

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
<code>isEqual (attributes ['Description'].first(), 'myvalue')</code>	Retrieve the first element from list of <code>Descriptions</code> and compare this to <code>myvalue</code> .
<code>isEqual (attributes ['Description'], ['myvalue'])</code>	Check whether the list of <code>Descriptions</code> is equal to the given list <code>['myvalue']</code> . This is identical to the first example, but has as a side effect that if there is more than one occurrence of the <code>Description</code> attribute, the comparison will return false. As a consequence, it validates that there is exactly one <code>Description</code> attribute.

Validation script examples

These are examples of real validation scripts of [validation rules](#).

- An asset must have at least one definition.

```
rule {
  isEmpty (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 {
    isEmpty (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 {
    isEmpty (relatedTo)
  }
  then {
    isEmpty (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 { isEmpty (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.toInteger()}}
  }
  when {
    isEmpty (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 {
    isEmpty (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 Platform Self-Hosted 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 Platform Self-Hosted.



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	Action Required warning	Warning to indicate that this scope currently does not contain any communities or domains.
5	Expanded scope tile	Scope tile that is expanded, showing the metadata about the scope, such as the description.
6	Scope action buttons	Buttons to edit or delete the scope, and to collapse the scope tile.
7	Organization by Scope section	Section that contains an overview of communities and domains, and shows to which scope each community and domain belongs.
8	Search	You can search in either the Organization or Belongs to Scope columns.
9	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 , and then click  **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

- Open the Scopes page.
 - On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
 - In the **Operating model** section, click **Scopes**.
 - » The [Scopes page](#) opens.

- If required, edit the name and description of a scope:

- Click  in the tile of the scope.
 - » The **Edit Scope** dialog box appears.
- Enter the required information.

Field	Description
Name	The name of the scope.
Description	The description of the scope, for example to add extra details.

- Click **Save**.
- If required, add communities and domains to or remove them from a scope in the **Organization by Scope** section:
 - In the row of a community or domain, click  in the **Belongs To Scope** column.
 - » The cell editor appears.
 - Type the name of the scope, or use the drop-down menu ▼.
 - 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 , and then click  **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](#).



Homepage

The Collibra Homepage is the default page that appears when you sign in to Collibra Platform Self-Hosted or when you click  on any page in Collibra. The Homepage guides you within Collibra by showing information that is relevant to you, such as your dashboards, the most viewed assets, and the recommended assets. The Homepage also allows you to perform a search, for example, for a community, domain, or asset.

The Homepage changes how you find or [access](#) your dashboards. You can access all your dashboards on the **Dashboards** card on the Homepage or on the **Dashboards** tab in the [Browse](#) pane.

If you are an administrator, you can [define](#) the headings and the content shown in each section of the Homepage and thus create a Homepage that can meet user needs.

Note

- In Collibra 2022.11 or newer, the Homepage is enabled by default.
- In Collibra environments upgraded from 2022.10 or older to 2022.11 or newer, the Homepage is available but disabled by default.
- In Collibra environments upgraded from 2022.11 to a newer version, the previous status of the Homepage (enabled or disabled) is retained.
- For information about how to enable or disable the Homepage, go to [Enable or disable the Homepage](#).
- If you are an administrator, the **Edit Page** button is shown on the Homepage to enable you to [customize](#) the Homepage.

Collibra Data Intelligence Cloud

Edit Page

Welcome, Admin!

Collibra Data Intelligence Cloud is where you can work together to find and understand trusted data from across your organization.



What are you looking for?

Search Collibra

Where would you like to go?

Dashboards

- Catalog Dashboard**
- Collaborating with Privacy Journey**
- Dashboard**
The default dashboard.
- Data Intelligence User Journey**
Showing the user journey path of the data intelligenc...
- Data Maturity Report**
- Home**
Easily find, understand, trust and access the data yo...

Show All

Most Viewed Assets ⓘ

Direct Marketing Business Process	17 visits
CustomerChurnReporting Table	11 visits
Customer Analytics  Data Set	10 visits
DimPromotion Table	10 visits
A/B Testing Business Term	7 visits

Show More

Recommended Assets ⓘ


Recommends assets based on what each person has searched for and visited.

551

Enable or disable the Homepage

Note

- In Collibra 2022.11 or newer, the Homepage is enabled by default.
- In Collibra environments upgraded from 2022.10 or older to 2022.11 or newer, the Homepage is available but disabled by default.
- In Collibra environments upgraded from 2022.11 to a newer version, the previous status of the Homepage (enabled or disabled) is retained.

Requirements and permissions

- You have the **ADMIN** or **SUPER** role in Collibra Console.
- You have the **SUPER** role in Collibra Console.
- You have the **ADMIN** or **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. 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**.
3. Go to the **Homepage** section.

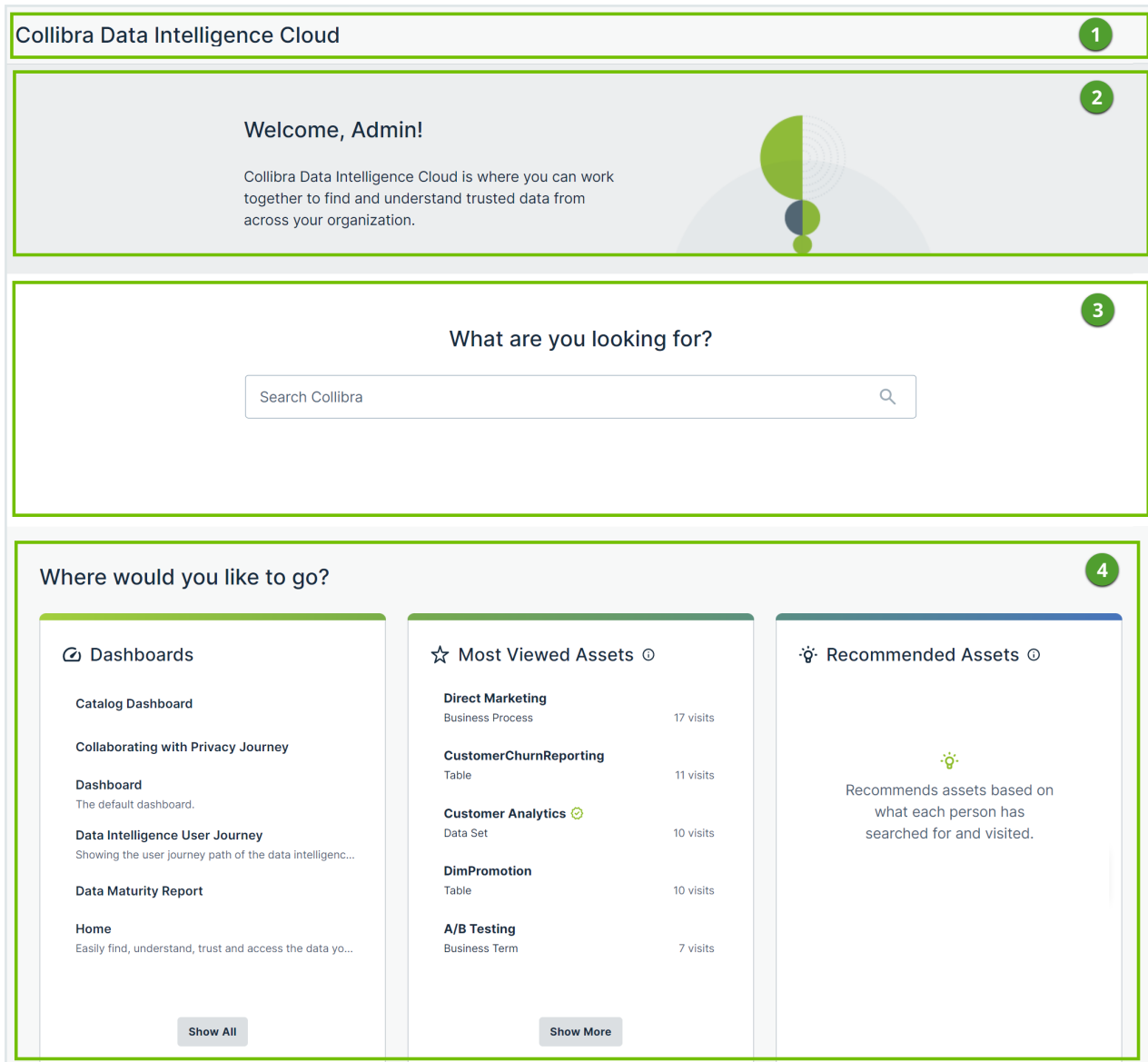
4. Select the required value.

Value	Description
✓ True	Enables the Homepage. When you sign in to Collibra, the Homepage is shown. The Homepage replaces your default dashboard .
✗ False (default)	Disables the Homepage. When you sign in to Collibra, your default dashboard is shown, instead of the Homepage.

5. Click **Save all**.

Homepage overview

The following table describes the sections that are shown on the Homepage.



No.	Description
1	Contains the title.
2	Contains an introduction.
3	Allows you to perform a search, directing you to the global search results page.

No.	Description
4	Helps you to find content and perform your daily activities. Depending on how the Homepage is customized, this section can contain any three of the following cards: • Dashboards: A list of dashboards that you can access. • My Quick Links: A list of links to the pages that you can quickly access. You can add, edit, rearrange, and delete quick links. • My Tasks: A list of tasks that are assigned to you. • Most Viewed Assets: A list of assets that your colleagues viewed the most in the last 30 days. • Recommended Assets: A list of assets that you might like based on your search history and the assets that you previously viewed. Note The Most Viewed Assets and Recommended Assets cards are not supported on an on-premises environment.

Edit the Homepage

You can customize the Homepage for the users of Collibra by providing relevant and contextual content.

This topic describes how to edit the Homepage, including how to preview and publish it.

Note When you edit the Homepage, your changes are automatically saved each time that you click outside the section where you made the changes.

Requirements and permissions

You have a [global role](#) that has the **System administration** [global permission](#).

Steps

1. Go to the Homepage.

Tip The Homepage appears when you sign in to Collibra Platform Self-Hosted. You can also go to the Homepage from any page by clicking .

2. In the upper-right corner of the page, click **Edit Page**.
 - » The Homepage opens in the editor mode.

Tip If another administrator has edited or is editing the Homepage, a message indicating so is shown on the Homepage. For example, **Draft saved 8 minutes ago by John**. You can, however, still edit the Homepage.

3. Edit the sections as needed.
How to edit the sections

Edit Page
Not edited or published by anyone
Close Editor
Preview
Publish

Collibra Data Intelligence Cloud
1

Welcome, {Name}! ⓘ

Collibra Data Intelligence Cloud is where you can work together to find and understand trusted data from across your organization.

2

What are you looking for?

Search Collibra

3

Where would you like to go?

Dashboards
Provides links to your organization's dashboards.

Most Viewed Assets
Shows assets that people in your organization have visited the most.

Recommended Assets
Recommended assets based on what each person has searched for and visited.

My Tasks
Shows and provides links to each person's tasks.

My Quick Links
Lets each person create links to the places they want to get to quickly.

Hover over the cards to drag and drop. See live card content when you Preview and Publish.

4

No.	Description
1	Enter a title for the Homepage.

No.	Description
2	◦ In the first box, enter a greeting. If you want the first name of a user to be shown in the greeting, enter <i>{Name}</i>. For example, if you enter <i>Hello {Name}</i>, when a user named Jane Doe signs in, the following greeting is shown to her: Hello Jane. If the user does not have a first name, the username is shown. ◦ In the second box, enter an introduction. ◦ Add an image. How to add an image i. Hover your pointer over the current image, and then click Add Content. » The Add Content dialog box appears. ii. Enter the required information. ■ Add Image by Link: The link to the image that you want to be shown. If you leave this field blank, the default Collibra Homepage image will be shown. ■ Alt text: A meaningful description of the image. If the image fails to load, this description is shown in place of the image. The description also helps screen-reading tools to describe the image. iii. Click Save.
3	◦ In the first box, enter a heading that indicates that users can perform a search, for example, <i>What are you looking for?</i> ◦ In the second box, enter the text that you want to be shown in the search field to guide users, for example, <i>Search Collibra</i>.
4	◦ In the box, enter a heading that indicates that users can find content, for example, <i>Where would you like to go?</i> ◦ The top subsection that is located below the box contains the selected cards, which will be shown to users. The bottom subsection contains the available cards, which you can choose to show to users. To move a card from one subsection to another, drag the card and drop it to where you want it in the subsection. While a total of five cards are available, a maximum of three cards can be shown to users. Tip On the My Quick Links card, you can add, edit, rearrange, and delete quick links.

Tip

- If you want to pause editing the Homepage or want to publish the edited Homepage later, click **Close Editor**. This action saves all the changes that you made to the Homepage and shows the last published Homepage in the view mode.
- If you want to discard all the changes that you made to the Homepage, click , and then click **Delete Draft**. You can then continue to make new changes to the Homepage.
- If you want to restore the Collibra version of the Homepage, which is the original version, click **Restore Collibra Version**, and then click **Publish**.

4. Optional: Click **Preview**.

- » A preview of the Homepage is shown.

Tip If you want to make more changes to the Homepage, click **Back to Editor**.

5. To publish the Homepage, click **Publish**.

- » The edited Homepage is published to all the users.

Add a quick link

You can add up to six links to the **My Quick Links** card on the Homepage. The links that you add to the card are shown only to you.

Steps

1. Go to the Homepage.

Tip The Homepage appears when you sign in to Collibra Platform Self-Hosted. You can also go to the Homepage from any page by clicking .

2. On the **My Quick Links** card, click **Add a Quick Link**.

- » The **Add a Quick Link** dialog box appears.

3. Enter the required information.

Field	Description
URL	Enter the address of the web page that you want to be able to quickly access from the My Quick Links card.
Text to Display	Enter the text that you want to show in place of the address on the My Quick Links card.
Open in New Tab	◦ If you want the web page to open in the same browser tab, clear the checkbox. ◦ If you want the web page to open in a new browser tab, select the checkbox.

4. Click **Save**.
 - » The link is shown on the **My Quick Links** card.

Tip You can [edit](#), [rearrange](#), or [delete](#) the quick link.

Edit a quick link

You can edit the links on the **My Quick Links** card on the Homepage.

Steps

1. Go to the Homepage.

Tip The Homepage appears when you sign in to Collibra Platform Self-Hosted. You can also go to the Homepage from any page by clicking .

2. On the **My Quick Links** card, click **Edit**.
3. Click  next to the link that you want to edit.
 - » The **Edit Quick Link** dialog box appears.

4. Enter the required information.

Field	Description
URL	Enter the address of the web page that you want to be able to quickly access from the My Quick Links card.
Text to Display	Enter the text that you want to show in place of the address on the My Quick Links card.
Open in New Tab	◦ If you want the web page to open in the same browser tab, clear the checkbox. ◦ If you want the web page to open in a new browser tab, select the checkbox.

5. Click **Save**.
6. On the **My Quick Links** card, click **Save**.
 - » The edited link is shown on the **My Quick Links** card.

Tip You can [rearrange](#) or [delete](#) the quick link.

Rearrange a quick link

You can change the position of the links on the **My Quick Links** card on the [Homepage](#).

Steps

1. Go to the Homepage.

Tip The Homepage appears when you sign in to Collibra Platform Self-Hosted. You can also go to the Homepage from any page by clicking .

2. On the **My Quick Links** card, click **Edit**.
3. Hover your pointer over the link whose position you want to change.
4. Drag  to the position where you want the link to be shown.
5. Click **Save**.
 - » The link is rearranged.

Delete a quick link

You can delete the links on the **My Quick Links** card on the [Homepage](#).

Steps

1. Go to the Homepage.

Tip The Homepage appears when you sign in to Collibra Platform Self-Hosted. You can also go to the Homepage from any page by clicking .

2. On the **My Quick Links** card, click **Edit**.
3. Click  next to the links that you want to delete.
4. Click **Save**.
 - » The links are no longer shown on the **My Quick Links** card.

Insights FAQ

Can I use Insights Data Access on Azure or any other platform?

Insights Data Access is currently supported only on AWS or GCP. It is not available on Azure or other platforms. You can, however, use any software compatible with Parquet files to process the data or generate reports.

Can I generate Insights Data Access reports for any date range?

Daily snapshots are retained for a maximum of 31 days. After that period, only end-of-month reports will be available.

Do I need to pay to use Insights Data Access?

Yes. Insights Data Access is not a free, out-of-the-box product in your Collibra environment.

Can I pass multiple dates into the API?

Insights Data Access provides daily snapshots for the specified date, which means you can access data for only one specific day. These snapshots are a representation of how your Collibra environment appeared on that specific day. There is no data for weeks or months available to download.

Can I change the frequency rate?

No.

Can I change the refresh time?

No.

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. Dashboards cannot be assigned to a community or any other resource.

Important

- The topics in this section assume that the [Homepage](#) is disabled. For more information, go to [Access a dashboard](#).
- In Collibra 2022.11 or newer, the Homepage is enabled by default. In Collibra environments upgraded from 2022.10 or older to 2022.11 or newer, the Homepage is available but disabled by default. In Collibra environments upgraded from 2022.11 to a newer version, the previous status of the Homepage (enabled or disabled) is retained.

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.

Permission	With this global permission, you can
Manage and share anyone's Views, Dashboards, Search filters	• Create dashboards or copy existing ones. • Edit the properties of any dashboard. • Share any dashboard. • Delete any dashboard.

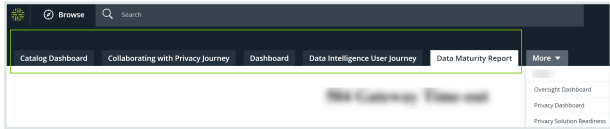
Access a dashboard

The way in which you can access a dashboard depends on if the [Homepage](#) is [enabled](#) or [disabled](#).

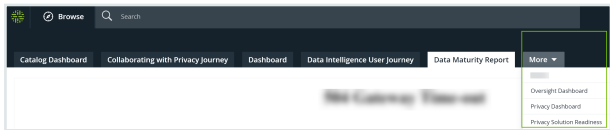
With the Homepage disabled

If the Homepage is disabled, you can access a dashboard on the page that is shown either when you sign in to Collibra or when you click . This page contains the following:

- The dashboard tab bar, which shows up to five [pinned](#) dashboards in alphabetical order.



- The **More** menu, which shows all the remaining dashboards.

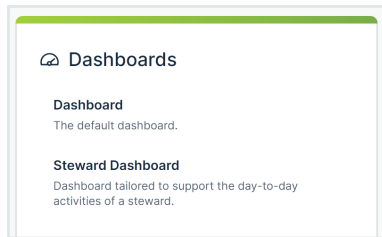


Note The [default dashboard](#) is opened by default.

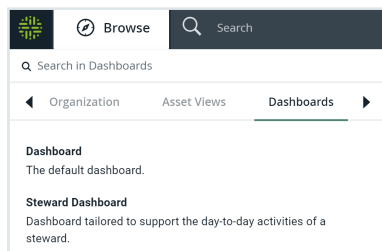
With the Homepage enabled

If the Homepage is enabled, you can access a dashboard via the following:

- The **Dashboards** card on the [Homepage](#).



- The **Dashboards** tab in the [Browse](#) pane.



Create a dashboard

You can create a [dashboard](#), and then [add](#) and [edit](#) widgets to suit your needs.

Tip You can create as many dashboards as you want without affecting the performance of Collibra.

Requirements and permissions

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.

Field	Description
Name	The name of the dashboard.
Description	A description of the dashboard.
Layout	The layout of the dashboard. Select the number of columns for the dashboard.
Pin	Select this checkbox if you want to pin the dashboard. Tip Up to five pinned dashboards are shown on the dashboard tab bar in alphabetical order.

4. Click **Save**.

What's next?

Add [widgets](#) to the 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: ◦ Public: All users. ◦ Private: Only you. ◦ Share with specific roles, groups & users: ▪ Roles: Only the selected roles. ▪ Groups: Only the selected groups. ▪ Users: Only the selected users.
Promote	Options that determine how and where the dashboard appears: ◦ Default: As the first page when you sign in to Collibra. ◦ 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](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).

- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit properties**.
4. Enter the required information.

Field	Description
Name	The name of the dashboard.
Description	A description of the dashboard.
Layout	The layout of the dashboard. Select the number of columns for the dashboard.
Pin	Select this checkbox if you want to pin the dashboard. Tip Up to five pinned dashboards are shown on the dashboard tab bar in alphabetical order.

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](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Delete**.
4. Click **Yes**.

Dashboard widgets

A dashboard widget is an individual pane in a [dashboard](#). 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 start a workflow.

Widgets

The following table describes the packaged widgets.

Widget	Description
Bar Chart	Asset or task metrics depicted in a bar chart.
Browser	A hierarchy of communities, subcommunities, and domains.
Collibra Insights	Dashboard reports.
Counters	Asset or task metrics depicted by a graphic element with the total count.
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.
Search	A search field by which users can search for resources.
Text	A message.
To Do	An overview of open tasks and issues.

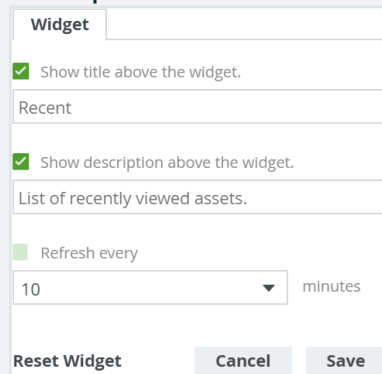
Widget	Description
Workflow	A collection of workflow buttons by which users can start workflows.

Widget tab

Each widget has a specific tab named **Widget** for configuring and editing the widget. The following table describes the common fields shown on the **Widget** tab.

Field	Description
Show title above the widget	• True: The default title is shown above the widget. You can also enter your own title. • False: The title is not shown.
Show description above the widget	• True: The default description is shown above the widget. You can also enter your own description. • False: The description is not shown.
Refresh every	• True: The counter is refreshed according to the refresh rate that you select. • False: The counter is not automatically refreshed.

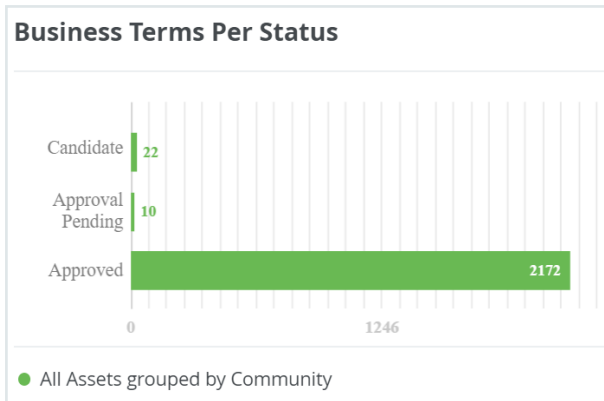
Example



The screenshot shows a configuration window for a widget. At the top, there's a tab labeled 'Widget'. Below it, there are three sections, each with a checked checkbox and a text input field. The first section is 'Show title above the widget.' with the input 'Recent'. The second section is 'Show description above the widget.' with the input 'List of recently viewed assets.'. The third section is 'Refresh every' with a dropdown menu set to '10' and the unit 'minutes'. At the bottom, there are three buttons: 'Reset Widget', 'Cancel', and 'Save'.

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](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit widgets**.
4. If required, [add](#) a **Bar Chart** widget to a dashboard.
5. On 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).

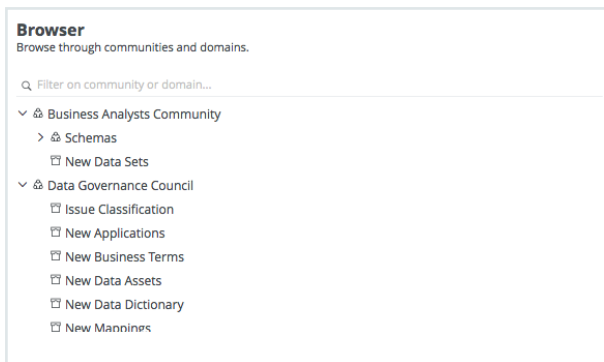
If necessary, select a graph type.

13. Click **Save & Apply**.

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.

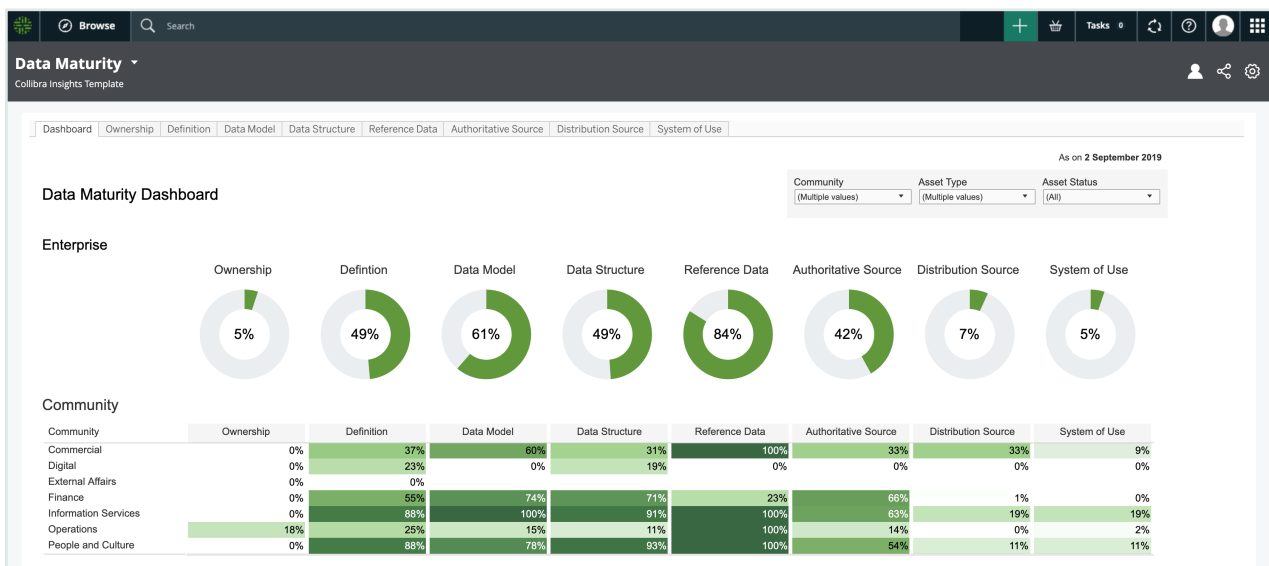


This widget has no specific configuration settings. Like all other widgets, common configuration settings are available via the [Widgets tab](#).

Tip You can also click the company logo at the top left-hand corner, to [Access a community, domain, asset view, or dashboard](#) via the Organization Browser.

Collibra Insights widget

The Collibra Insights widget is a reporting widget that you can use to show a dashboard report on a dashboard, such as Privacy Risk Readiness, Data Maturity Dashboard, or Process Register, or any report from a webpage.



Note Before configuring dashboard reports, you must set up Insights Data Access. You can then configure dashboard reports via the Collibra Data Intelligence Cloud settings or generate the dashboard reports via a URL from tools such as Tableau Online, Power BI, Qlik, or ThoughtSpot. Insights Data Access is not a free, out-of-the-box product. For more information, go to Insights Data Access.

Important Whether or not a third-party webpage can be embedded is determined by the security settings of the third party.

Configure the Collibra Insights widget

Requirements and permissions

- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **Manage shared Views, Dashboard and Search Filter** global permission.
- Insights Data Access is set up.

Steps

1. [Access](#) the dashboard for which you want to configure the Collibra Insights widget.
2. On the dashboard bar, click  → **Edit widgets**.
3. If required, [add](#) the **Collibra Insights** widget to the dashboard.
4. On the widget, click .
5. On the **Report** tab, either select the dashboard report that you want to be shown on the widget or click **Enter a URL** to add a report.
6. If you clicked **Enter a URL**:
 - a. In the **Enter a URL to view** field, enter the address of the webpage that contains the report that you want to be shown on the widget.

- b. To securely show the report, select the **Run in sandbox** checkbox.

Warning We recommend that you select the **Run in sandbox** checkbox to reduce security risks.

7. On the **Widget** tab, [enter](#) the required information.
8. Click **Save**.
9. Click **Close & save edits**.

Counters widget

The **Counters** widget shows the count statistics on your dashboard and the Metrics pages of the Collibra applications. It provides information such as the number of assets in your environment or the number of open tasks or issues.

When configuring the **Counters** widget, you can choose from a predefined list of templates. These templates determine the count statistics that are computed. The following table describes the templates.

Template	Description
Applications	Number of Technology Assets.
Approved Assets	Number of assets whose status is Accepted .
Assets	Number of assets.
Assets Created Past Day	Number of assets created in the last day (24 hours).
Assets Created Past Month	Number of assets created in the last month (28 days).
Assets Created Past Week	Number of assets created in the last week (7 days).
Business Terms	Number of Business Term assets.
Code Values	Number of Code Value assets.

Template	Description
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.
Files	Number of File assets.
Governance Assets	Number of Governance assets.
Issues Resolved Past Day	Number of Issue assets whose status became Resolved within the last day (24 hours). Note This counter does not show how many Issue assets were set to Resolved in the last 24 hours. 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 Colibra Console. Increasing the frequency of the counts may negatively impact performance.
Issues Resolved Past Week	Number of Issue assets whose status became Resolved within the last week (7 days). Note This counter does not show how many Issue assets were set to Resolved in the last 7 days. 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 Colibra Console. Increasing the frequency of the counts may negatively impact performance.
KPIs	Number of Key Performance Indicators.
My Open Tasks	Number of unfinished tasks for the user. Note Unfinished is the status of the task, as documented in the workflow.

Template	Description
New Issues	Number of Issue assets whose status is New .
Open Issues	Number of unresolved Issue assets. Unresolved Issue assets can have the following statuses: • New • Under Review • Accepted • Invalid • In Progress • Resolution Pending • Pending
Open Tasks	Number of unfinished tasks for all users. 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.
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.

Template	Description
Tableau Views	Number of Tableau View assets.
Tableau Workbooks	Number of Tableau Workbook assets.
Tables	Number of Table assets.
Task Duration	Sum of all task durations.
Users	Number of user sessions that are currently active. Note This number may be greater than the number of active licenses assigned to your organization, because every user may have more than once active session.

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](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit widgets**.
4. If required, [add](#) a **Counters** widget to a dashboard.
5. On 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

Tab	Field	Description
Counters	Existing counter or Add Counter	Do one of the following: - Click Add Counter, to add a new counter. - Expand the section of an existing counter, to edit its current configuration. 
	Template	Select the template of the count statistic you want to show.
	Warning Level and Danger Level	Optionally, enter the values that represent your warning and danger thresholds, respectively. 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
	URL	Optionally, specify a URL to be accessed if a user clicks the counter. The URL must lead to a page in your Collibra environment. The webpage will open in the active browser window.

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.

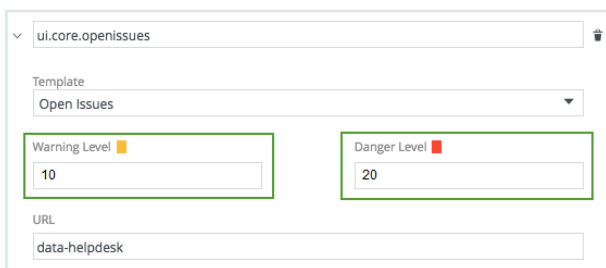
Note The threshold settings are designed for use with the following issue-related templates:

- New Issues
- Open Issues
- Issues resolved past day
- Issues resolved pas week

Example

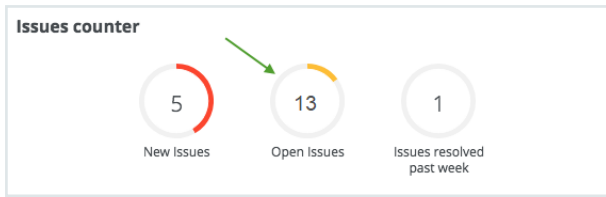
Let's say that your organization has established that 20 open issues (meaning Issue assets with a status other than "Resolved") exceeds its risk appetite. To give this visibility within the appropriate community of Collibra users, you [add](#) the Counters widget to the dashboard, and [configure](#) 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 screenshot shows the configuration interface for a widget. At the top, there is a dropdown menu with the text 'ui.core.openissues' and a trash icon. Below this is a 'Template' dropdown menu with 'Open Issues' selected. The main configuration area contains two side-by-side input fields: 'Warning Level' with a yellow square icon and the value '10', and 'Danger Level' with a red square icon and the value '20'. Both input fields are highlighted with green borders. At the bottom, there is a 'URL' field with the text 'data-helpdesk'.

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.

Embedded Webpage widget

If you are an administrator, you can use the **Embedded Webpage** widget to embed a webpage on your dashboard by using an iframe.

Important Whether or not a third-party webpage can be embedded is determined by the security settings of the third party.

Warning To reduce security risks, ensure that the **Run in sandbox** checkbox is selected when [configuring](#) the **Embedded Webpage** widget.

Install the Embedded Webpage widget

The **Embedded Webpage** widget is not packaged with Collibra. You can download and install the widget from [Collibra Marketplace](#).

Before you begin

Ensure that you can access your Collibra server.

Steps

1. Go to the [Embedded Webpage widget on Collibra Marketplace](#).
2. If required, sign in:
 - a. In the upper-right corner of the page, click **Login > Sign In**.
 - b. Enter your credentials.
 - c. Click **Sign In**.
3. Click **Package**.
4. Click **Accept & Download**.
5. Save the ZIP file containing the widget on your computer.
6. Extract the ZIP file.
7. Go to the `/dgc/modules` directory in your Collibra data directory.
8. Move the extracted content of the ZIP file into the `/dgc/modules` directory.

Note Ensure that the `iframe` folder is directly under the `/dgc/modules` directory.

9. Restart the environment to apply your changes. For more information, go to [Stop an environment and Start an environment](#).

Configure the Embedded Webpage widget

You can embed a [webpage](#) in a widget on a [dashboard](#).

Requirements and permissions

- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **Manage shared Views, Dashboard and Search Filter** global permission.

Before you begin

[Install](#) the **Embedded Webpage** widget.

Steps

1. Access the dashboard for which you want to configure the **Embedded Webpage** widget.
2. On the dashboard bar, click  → **Edit widgets**.
3. If required, [add](#) the **Embedded Webpage** widget to the dashboard.
4. On the widget, click .
5. Enter the required information.

Field	Description
The URL of the webpage to embed	The address of the webpage that you want to show on the dashboard.
Run in sandbox	Running the webpage in the sandbox mode ensures the following: ◦ The webpage will not run potentially harmful scripts. ◦ The webpage blocks APIs in the frame. ◦ The webpage cannot access your files and systems.  Warning To reduce security risks, we recommend that you leave the Run in sandbox selected.

6. Click **Save**.
7. Click **Close & save edits**.

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.

Most Viewed	
1	Accuracy Data Quality Dimensions
2	postg postg
3	Duplication Data Quality Dimensions
4	amazon domi amazon domi
5	col8 amazon domi
6	a New Business Terms
7	country amazon domi
8	price amazon domi
9	Completeness Data Quality Dimensions
10	aaa > ee Movie Metadata-kopia

Configure the Most Viewed widget

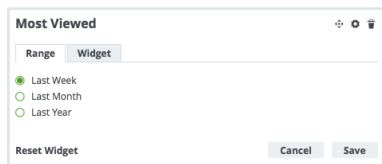
You can configure the widget to show the ten most viewed assets over the last week, month or year.

Prerequisites

- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit widgets**.
4. If required, [add](#) a **Most Viewed** widget to a dashboard.
5. On 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.

Recent		
price		
amazon domi		17 m ago
Duplication		
Data Quality Dimensions		17 m ago
country		
amazon domi		19 m ago
price		
amazon domi		20 m ago
Consistency		
Data Quality Dimensions		21 m ago
Completeness		
Data Quality Dimensions		21 m ago
col8		
amazon domi		21 m ago
whole_number_string_80		
amazon domi		22 m ago
aaa > ee		
Movie Metadata-kopia		22 m ago
a		
New Business Terms		28 m ago

This widget has no specific configuration settings. Like all other widgets, common configuration settings are available via the [Widgets tab](#).

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.

Search
⚙️ ⚙️ 🗑️

Find assets, domains, communities, users...

🔍

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

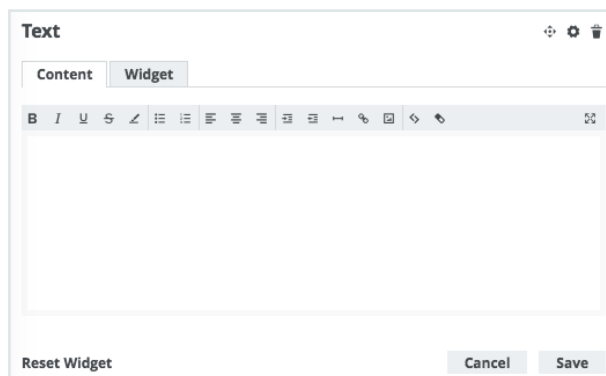
You can configure the Text widget to post a free-text message on the dashboard.

Prerequisites

- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit widgets**.
4. If required, [add](#) a **Text** widget to a dashboard.
5. On 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 more information, go the knowledge base article on [Collibra Support Portal](#).

7. Click **Save**.

Supported HTML tags

The following are the HTML tags you can use to format your text in the [Text widget](#).

a	b	big	blockquote	br	cite
code	col	colgroup	dd	div	dl
dt	em	font	h1	h2	h3
h4	h5	h6	hr	iframe	img

li	map	noscript	ol	p	pre
samp	small	span	strong	sub	sup
table	tbody	td	tfoot	th	thead
tr	ul	u			

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.

To Do
 Get a list of all tasks/issues or just the ones assigned to you

 **Tasks**

Issues 

Due Date ▼

Rejected Definition
7 months ago

For **Chat Log Data Standard**
 Correct the definition after it was rejected by System.

Assign Technical steward
in 14 days

For **All Data-2**
 Please assign a Technical Steward to the domain.

Assign Technical steward
in 21 days

For **Worldwide-co2-emissions3**
 Please assign a Technical Steward to the domain.

Assign Technical steward
in 21 days

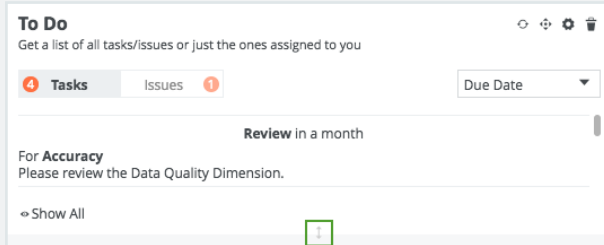
For **Worldwide-co2-emissions 2**
 Please assign a Technical Steward to the domain.

Assign Technical steward
in 21 days

For **Global-migration 2**
 Please assign a Technical Steward to the domain.

[Show All](#)

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:

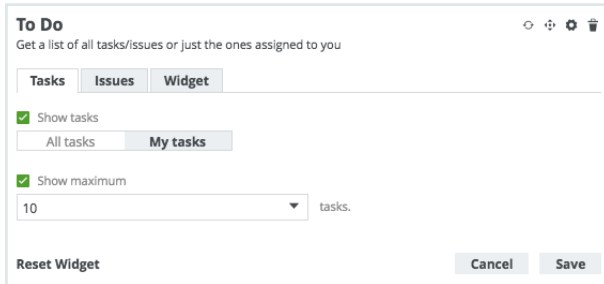
- Only tasks that are assigned to you and open issues that you have created.
- All open tasks and issues across your Colibra environment.

Prerequisites

- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit widgets**.
4. If required, **add** a **To Do** widget to a dashboard.
5. On the widget, click .
6. Enter the required information.



To Do
Get a list of all tasks/issues or just the ones assigned to you

Tasks Issues Widget

☒ Show tasks
All tasks My tasks

☒ Show maximum
10 tasks.

Reset Widget Cancel Save

Tab	Field	Explanation
Tasks	Show tasks	◦ True: Show tasks in the widget. In this case, specify whether to show all tasks or only tasks assigned to you. ◦ False: Tasks are not shown in the widget.
	Show maximum	◦ True: Limit the number of tasks shown in the widget. In this case, specify the maximum number of tasks that can be shown. Possible values are: 5, 10, 15, 20, 25, 50 or 100. ◦ False: There is no limit to the number of tasks that can be shown.
Issues	Show issues	◦ True: Show issues in the widget. In this case, specify whether to show all open issues or only open issues that you created. ◦ False: Issues are not shown in the widget.
	Show maximum	◦ True: Limit the number of issues shown in the widget. In this case, specify the maximum number of issues that can be shown. Possible values are: 5, 10, 15, 20, 25, 50 or 100. ◦ False: There is no limit to the number of issues that can be shown.

7. Click **Save**.
8. Click **Close & save edits**.

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

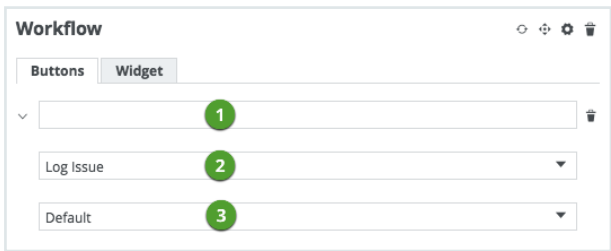
You can add and configure buttons for any enabled workflow.

Prerequisites

- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit widgets**.
4. If required, [add](#) a **Workflow** widget to a dashboard.
5. On 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: ◦ Default: gray ◦ Danger: red ◦ Info: gray ◦ Success: green ◦ Warning: yellow Note This field only determines the color of the button. It has no bearing on the workflow.

7. Click **Save**.

Add a widget to a dashboard

You can add widgets to curate information-rich dashboards.

Requirements and permissions

- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **Manage shared Views, Dashboard and Search Filter** global permission.

Steps

1. [Access](#) the dashboard to which you want to add a widget.
2. On the dashboard bar, click  → **Edit widgets**.
3. Drag the required widget to the dashboard.

Tip You can browse through the widgets by using the page numbers.



Bar Chart
Chart representing asset or task metrics.



Search
Find assets, domains, communities, users...

1 2 3 ⓘ Select a widget and drag it onto the board to add it.

4. [Edit the widget](#) as required.
5. 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](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **Manage shared Views, Dashboard and Search Filter** global permission.

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.

Requirements and permissions

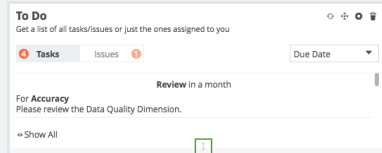
- If you want to manage your own dashboard: You have a [global role](#) that has the **Manage your own Views, Dashboards, Search filters** [global permission](#).
- If you want to manage another user's dashboard: You have a global role that has the **Manage shared Views, Dashboard and Search Filter** global permission.

Steps

1. [Access](#) the dashboard containing the widget that you want to edit.
2. On the dashboard bar, click  → **Edit widgets**.
3. Edit the content of the widget as required.

Tip

- Not every widget has the same tabs.
- The **Widget tab** is the same for each widget. The configuration of the **Widget tab** defines how the widget is shown on the dashboard.
- You can vertically resize a dashboard widget by using the bi-directional arrow located at the bottom of the widget.



4. Click **Save**.

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** that has the **Manage your own Views, Dashboards, Search filters** **global permission**.
- If you want to manage another user's dashboard: You have a global role that has the **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  → **Edit widgets**.
4. On the widget, click .
5. Click **Delete** to confirm.
6. Click **Close & save edits**.

Data Helpdesk

With the Data Helpdesk application of Collibra Platform Self-Hosted, 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

¹A 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.
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.

Name	Description
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Platform Self-Hosted.
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. 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 Colibra 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. 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.
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. 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.

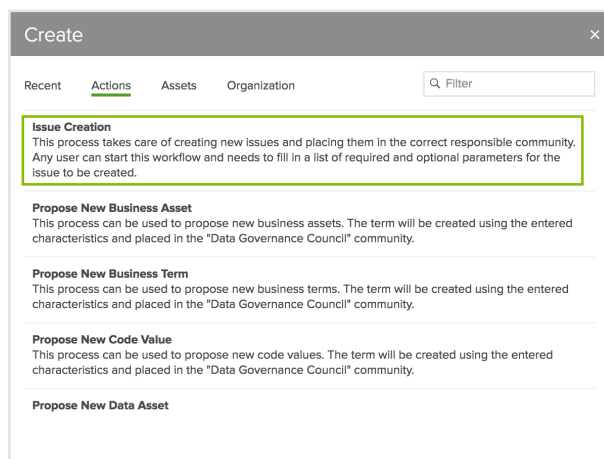
Before you begin

Ensure the workflows outlined in [Packaged metamodel for the Data Helpdesk](#) are enabled and up-to-date in your Collibra platform.

If they are not available or are not the latest versions, download them from [Product Resources](#) and [deploy](#) them in your platform.

Steps

1. On the main toolbar, click **+**.
» 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. For additional details, see [I don't see a workflow in the global create](#).

4. Enter the required information in the **Log Issue** dialog box.

The 'Log Issue' dialog box is shown with the following fields and values:

- Title:** A text input field with a cursor.
- Description:** A rich text editor with a toolbar and placeholder text 'Click here and start typing..'
- Priority:** A dropdown menu set to 'Normal'.
- Responsible Community:** A dropdown menu set to 'Data Governance Council'.
- Relevant Assets:** A text input field with placeholder text 'Type something here and confirm using enter.' and a list of suggestions below it.
- Issue Classification:** A text input field with placeholder text 'Select business asset.'
- Create Issue:** A button at the bottom right.

- **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. The possible values, listed in order of importance from high to low, are:
 - 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.

The 'Relevant Assets' list contains the following items:

- 11. Data management strategy (DMS) is specified and shared with relevant stakeholders
- 11.3. The DMS includes an established mechanism for approval

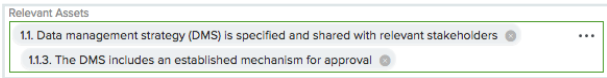
Click next to a related asset to remove it from the list.

5. Click **Create Issue**.

What's next?

The data issue is created and the [Issue Management](#) workflow starts automatically. 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. 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 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.  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, go to the [Managing workflows](#) section.

Note It is possible that your Collibra Platform Self-Hosted administrator has renamed the Issue Management workflow.

Accepting or rejecting a data issue

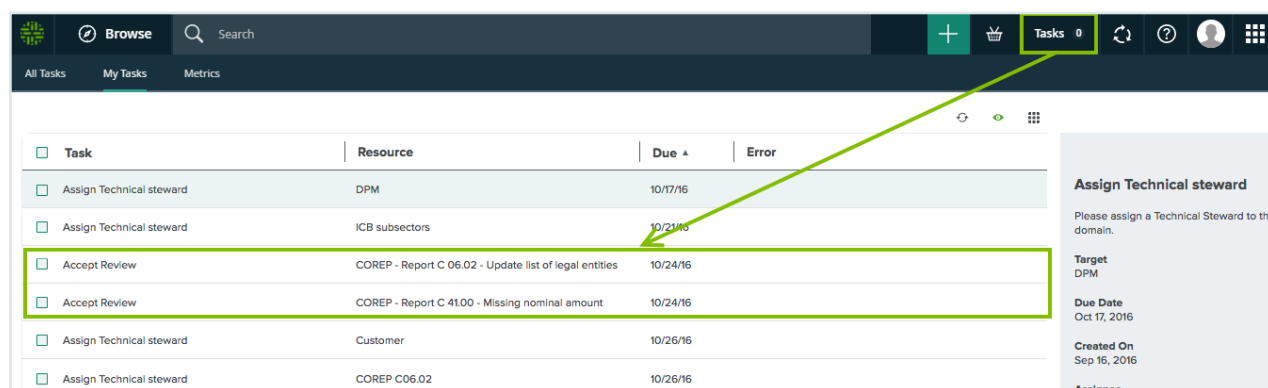
When the issue management workflow is started, tasks are assigned to the users that are defined in the workflow. These are by default the issue stewards. This workflow task has to be completed before a predefined deadline, if not, the issue is escalated to the issue manager who will set a reviewer manually.

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.



Task	Resource	Due	Error
☐ Assign Technical steward	DPM	10/17/16	
☐ Assign Technical steward	ICB subsectors	10/21/16	
☐ Accept Review	COREP - Report C 06.02 - Update list of legal entities	10/24/16	
☐ Accept Review	COREP - Report C 41.00 - Missing nominal amount	10/24/16	
☐ Assign Technical steward	Customer	10/26/16	
☐ Assign Technical steward	COREP C06.02	10/26/16	

Assign Technical steward

Please assign a Technical Steward to the domain.

Target
DPM

Due Date
Oct 17, 2016

Created On
Sep 16, 2016

Assignee

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.

The screenshot shows a sidebar titled "Open tasks (1/1)" with a close button (X). Inside, it displays "Due: 1/11/2021" and a menu icon. The main heading is "Accept Review" with the question "Do you want to review this issue?". Below this, it says "Related to" and shows a card for "Data Issue". At the bottom, there are two buttons: "Accept" (light gray) and "Reject" (green).

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.

The screenshot shows a sidebar titled "Open tasks (1/1)" with a close button (X). Inside, it displays "Due: 1/11/2021" and a menu icon. The main heading is "Reassign Reviewer" with the instruction "Assign a new reviewer for this issue.". Below this, it says "Related to" and shows a card for "Data Issue". There are three input fields: "User" (with placeholder "Type something here and confirm using enter. ..."), "Group" (with placeholder "Type something here and confirm using enter. ..."), and "Role" (with a dropdown menu showing "Select role in community" and "Select community."). At the bottom right, there is a green "Submit" button.

- **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.

Open tasks (1/1)

Due: 1/11/2021

Approval

Please verify if the proposed solution is acceptable. If not, please reject and provide a reason.

Related to

[Data Issue](#)

What is your reason for approving/rejecting?

Paragraph

Reject Approve

1. In the task bar, click the **Approve/Reject** button.

Approval Please verify if the proposed solution is acceptable. If not, please reject and provide a reason. Approve/Reject More

» The **Approval** dialog box appears.

2. In the dialog box, provide a reason for your action.

Approval

Please verify if the proposed solution is acceptable. If not, please reject and provide a reason.

What is your reason for approving/rejecting?

Paragraph B I U A Text Color Background Color Bulleted List Numbered List Indent Outdent Decrease Indent Increase Indent

Reject Approve

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.

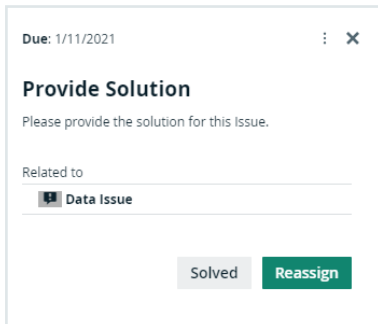
Provide a solution

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**.



Due: 1/11/2021

Provide Solution

Please provide the solution for this Issue.

Related to

 Data Issue

Solved Reassign

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.

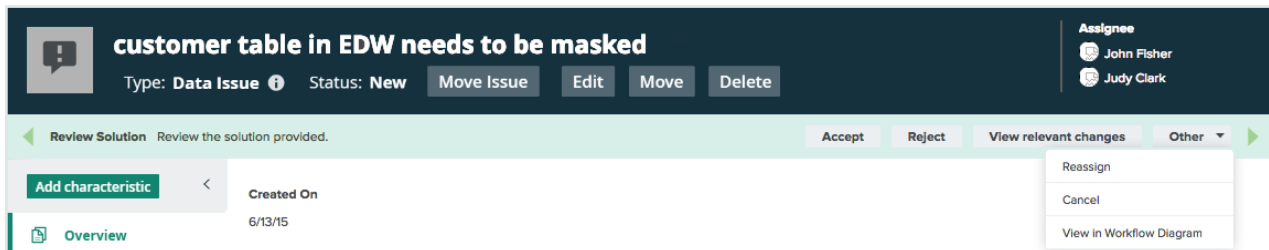
To resolve an issue with a related asset, you need the correct rights in the community as assignee.

You can link the issue with a governance asset as follows:

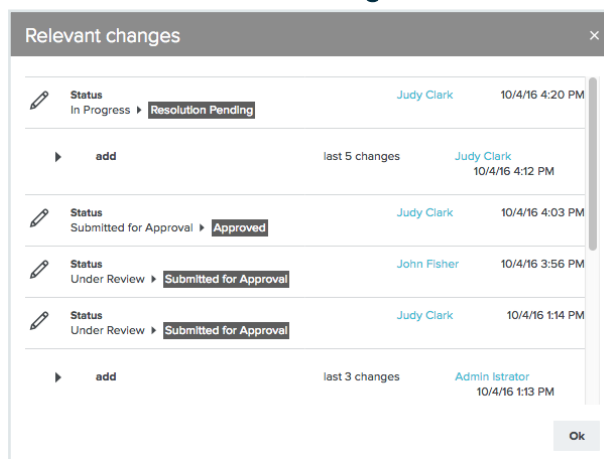
1. On the issue page, click **Characteristic**.
2. Click the **Relations** tab.
3. Choose the **Resolved by** relation.
4. Enter the resolving governance assets in the dialog box, optionally set a **Start Date** and **End Date**.
5. Click **Save**.
6. The relation appears in the **resolved by Governance 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

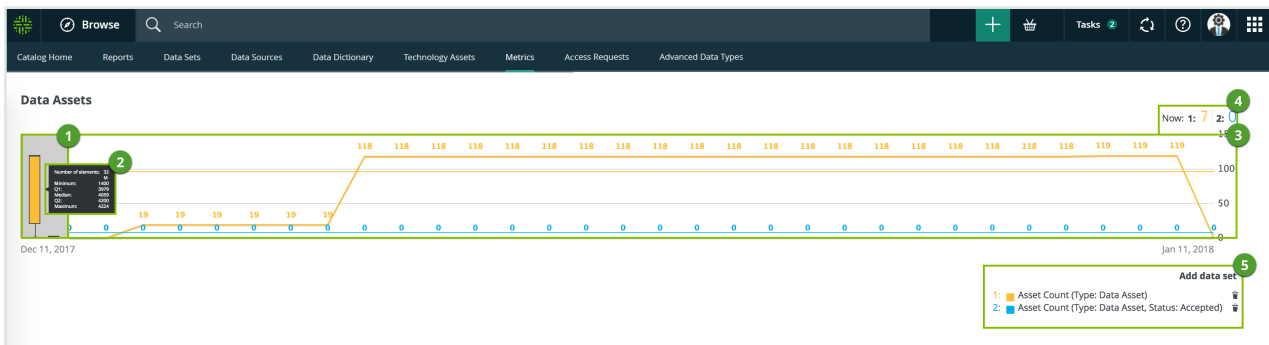
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

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

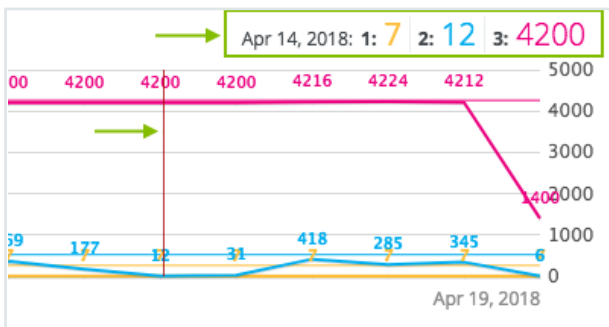
Note On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with **data sets** in the true context of CollibraData Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.

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. The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values.

Number	Element	Description
2	Data set details	More details about the graph. 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. Tip You can edit the time range of the graph.
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. 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. You can restrict the count results via the following additional filters: ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Collibra Platform Self-Hosted application. ◦ 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. You can restrict the count results via the following additional filters: ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	A daily count of workflow tasks that have been changed. You can restrict the count results via the following additional filters: ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Domain Count	A daily count of the domains with relevant assets (either data or technology assets) that have been viewed. You can restrict the count results via the following additional filters: ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.

Filter setting	Description
License Available	A daily count of Collibra licenses that have been available to users. This is calculated by subtracting the licenses in use from the total licenses your organization has. You can restrict the count results via the following additional filters: ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
License Usage	A daily count of Collibra licenses in use by all users in your organization. You can restrict the count results via the following additional filters: ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	A daily count of Collibra asset page hits. You can restrict the count results via the following additional filters: ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.
Task Count	A daily count of workflow tasks carried out. ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Task Duration	A daily count of workflow task duration. You can restrict the count results via the following additional filters: ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

5. Click **Save data set**.

Edit a data set of a metrics graph

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

Steps

1. Open the product for which you want to create an asset, for example **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.

1:  Asset Count (Type: Data Asset)	
2:  Asset Count (Type: Data Asset, Status: Accepted)	

- » 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. Depending on the filter type that you select, different fields become available.

Filter setting	Description
Active Users	A daily count of the active users to have viewed the relevant assets. You can restrict the count results via the following additional filters: ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Collibra Platform Self-Hosted application. ◦ Role: Limit the results to active users that have been assigned a specific role.
Asset Count	A daily count of the relevant assets (either data or technology assets) that have been viewed. You can restrict the count results via the following additional filters: ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	A daily count of workflow tasks that have been changed. You can restrict the count results via the following additional filters: ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	A daily count of the domains with relevant assets (either data or technology assets) that have been viewed. You can restrict the count results via the following additional filters: ◦ Type: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	A daily count of Collibra licenses that have been available to users. This is calculated by subtracting the licenses in use from the total licenses your organization has. You can restrict the count results via the following additional filters: ◦ License: Limit the results to a specific type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
License Usage	A daily count of Collibra licenses in use by all users in your organization. You can restrict the count results via the following additional filters: ◦ License: Limit the results to active users with a specific license type. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	A daily count of Collibra asset page hits. You can restrict the count results via the following additional filters: ◦ Community: Limit the results to a specific community. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	A daily count of workflow tasks carried out. ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	A daily count of workflow task duration. You can restrict the count results via the following additional filters: ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count Operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

5. Click **Save data set**.

» The updated data set is shown in the graph.

Edit the time range of a metrics graph

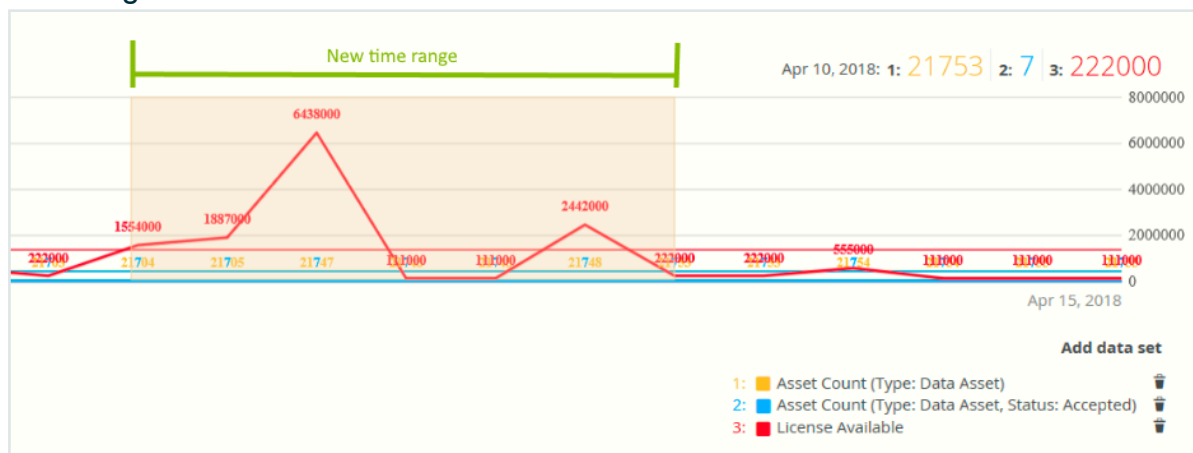
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

There are two ways to edit the time range:

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

Click and drag in the graph

1. Open the product for which you want to create an asset, for example **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.

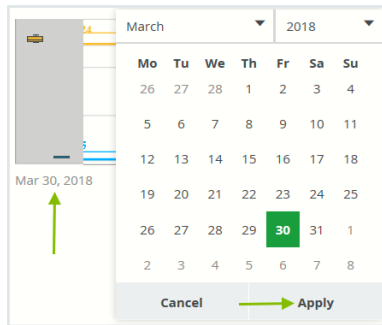


5. Release the mouse button.
 - » The graph is adjusted to the new time range.

Select the dates for the graph

1. Open the product for which you want to create an asset, for example **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.

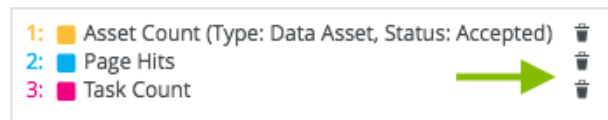
Remove a data set from a metrics graph

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

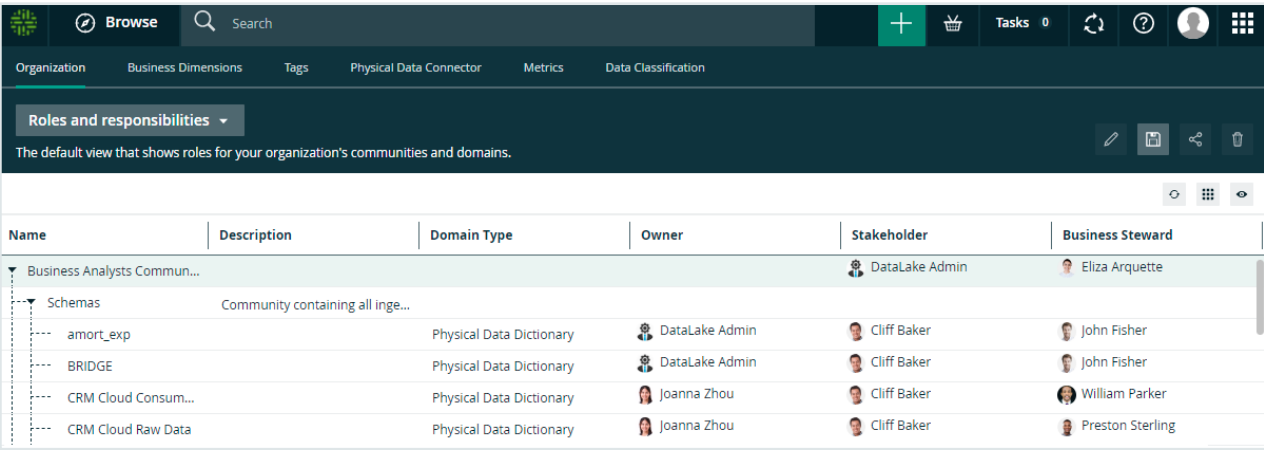
1. Open the product for which you want to create an asset, for example **Business Glossary**.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click on  next to the data set you want to delete.



» 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.



The screenshot shows the Collibra Data Stewardship application interface. At the top, there is a navigation bar with tabs for 'Organization', 'Business Dimensions', 'Tags', 'Physical Data Connector', 'Metrics', and 'Data Classification'. Below this, a dropdown menu is set to 'Roles and responsibilities'. The main content area displays a table with columns: Name, Description, Domain Type, Owner, Stakeholder, and Business Steward. The table lists various roles and responsibilities, including 'Business Analysts Commun...', 'Schemas', 'amort_exp', 'BRIDGE', 'CRM Cloud Consum...', and 'CRM Cloud Raw Data'. Each row shows the domain type (Physical Data Dictionary), the owner (DataLake Admin or Joanna Zhou), the stakeholder (Cliff Baker), and the business steward (John Fisher, William Parker, or Preston Sterling).

Name	Description	Domain Type	Owner	Stakeholder	Business Steward
Business Analysts Commun...				DataLake Admin	Eliza Arquette
Schemas	Community containing all inge...				
amort_exp		Physical Data Dictionary	DataLake Admin	Cliff Baker	John Fisher
BRIDGE		Physical Data Dictionary	DataLake Admin	Cliff Baker	John Fisher
CRM Cloud Consum...		Physical Data Dictionary	Joanna Zhou	Cliff Baker	William Parker
CRM Cloud Raw Data		Physical Data Dictionary	Joanna Zhou	Cliff Baker	Preston Sterling

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 Platform Self-Hosted.
Physical Data Connector	Contains a table with high-level database information.

Page	Description
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 Platform Self-Hosted 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.

You can see a detailed explanation of the out-of-the-box workflows that are included with Collibra Platform Self-Hosted in the [Workflows documentation](#).

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Start an asset workflow from an asset page	628
Start an asset workflow from an asset table or set of tiles	628
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Start a global workflow

If you want to start a workflow that is not linked to an asset, follow these steps:

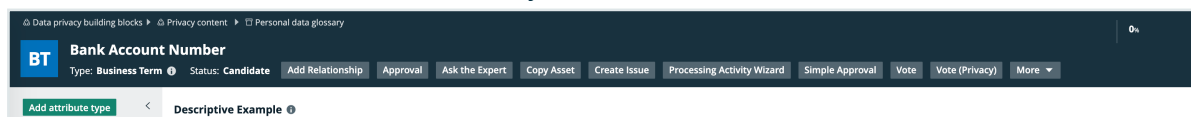
1. Go to a dashboard.
 - If the dashboard does not have the workflow widget and you have the right permissions, you can add it yourself, see [Add a widget to a dashboard](#).
 - If you are not logged in and the guest user access is enabled for the workflow, you have to provide some identification and 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.

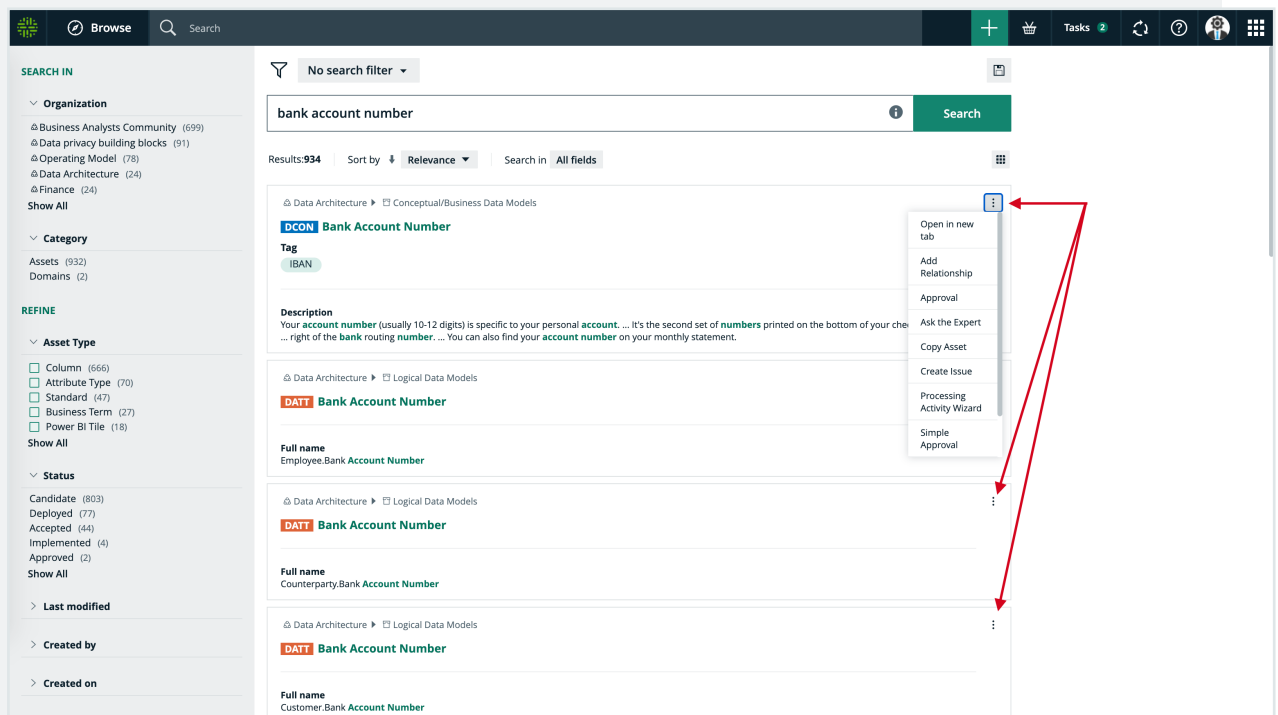
Start an asset workflow from an asset table or set of tiles

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:

The screenshot shows a web application interface for task management. At the top, there is a navigation bar with a 'Browse' button and a search field. Below this, a sub-navigation bar contains 'All Tasks', 'My Tasks', and 'My Overdue Tasks' tabs, with 'My Tasks' being the active tab. A green circle with the number '1' is placed over the 'My Tasks' tab. Below the tabs, there is a 'Select' button with a green circle and the number '2' next to it. To the right of the 'Select' button is a table with columns: 'Name', 'Description', 'Related Resource', and 'Due Date'. The table contains one row with the following data: 'Approval', 'Please vote for the approval of the Acronym. If you reject, please provide', 'GDPR', and '2/8/2021'. A green circle with the number '3' is placed over the table. To the right of the table is a sidebar with a green circle and the number '4' next to it. The sidebar contains a 'Due: 2/8/2021' label, a title 'Approval', a description 'Please vote for the approval of the Acronym. If you reject, please provide a reason for doing so.', a 'Related to' section with a link 'ACR GDPR', a text area for 'What is your reason for approving/rejecting?', and a rich text editor with a 'Paragraph' dropdown and various formatting options. At the bottom of the sidebar are 'Reject' and 'Approve' buttons. A green circle with the number '5' is placed over the 'Approve' button. At the bottom right of the table, it says '1 Task'.

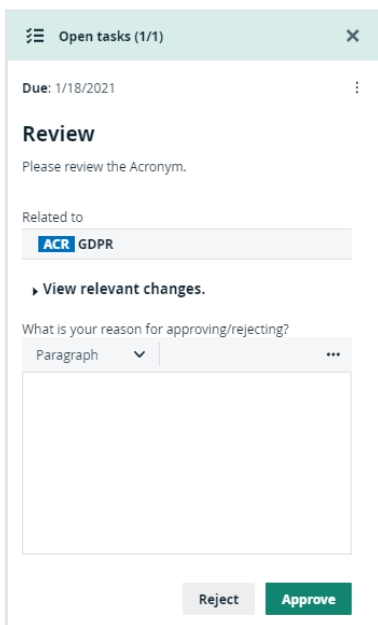
Element	Name	Description
1	Tasks submenu	Contains the following pages: • All Tasks: Shows all the tasks for which you have permission to view. • My Tasks: Shows all the tasks that have been assigned to you. • My Overdue Tasks: Shows the tasks that have been assigned to you that are past their due date.
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:



The screenshot shows a sidebar panel titled "Open tasks (1/1)" with a close button (X). Inside the panel, it displays "Due: 1/18/2021". The task title is "Review" with the instruction "Please review the Acronym." Below this, it says "Related to" followed by a tag "ACR GDPR". There is a link "View relevant changes." and a question "What is your reason for approving/rejecting?". Below the question is a text input area with a "Paragraph" label and a dropdown menu. At the bottom of the panel are two buttons: "Reject" and "Approve".

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.

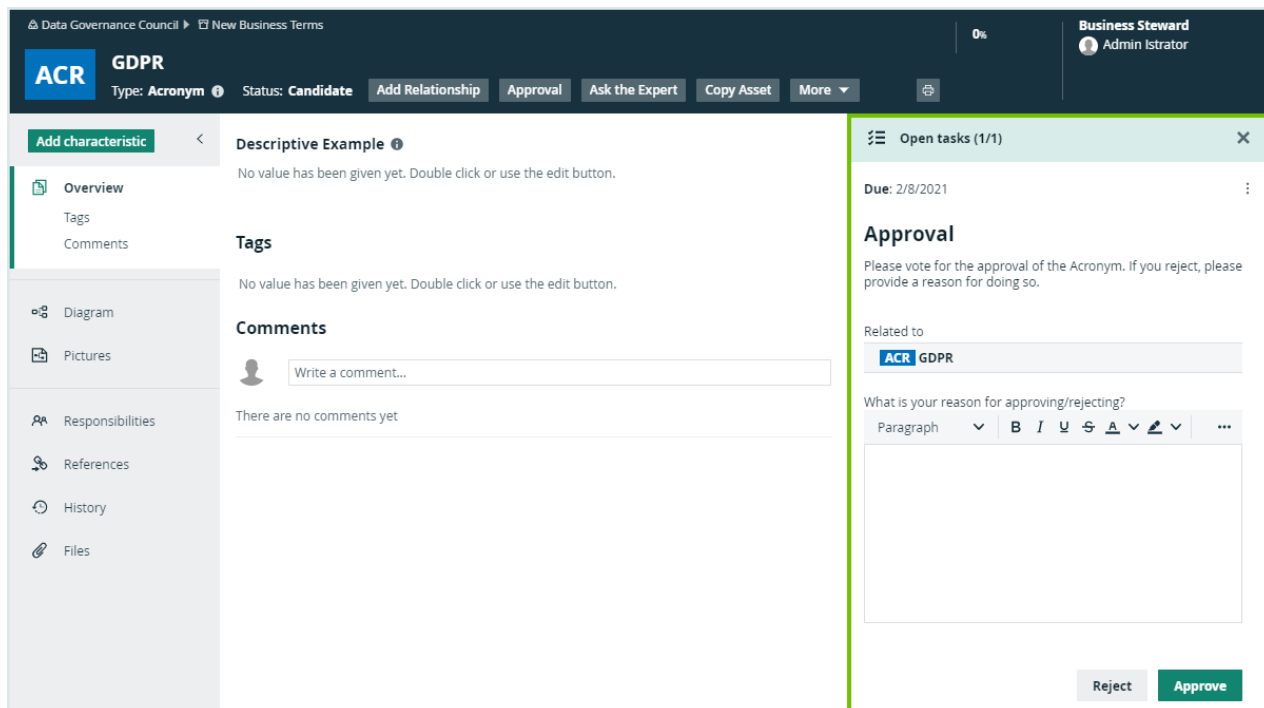
If you have more than one consecutive task assigned to you, each subsequent task is displayed immediately after the previous one is completed. This is especially useful in situations where a workflow is designed with multiple forms, one after the other, or a when you have more than one role for a resource.

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.

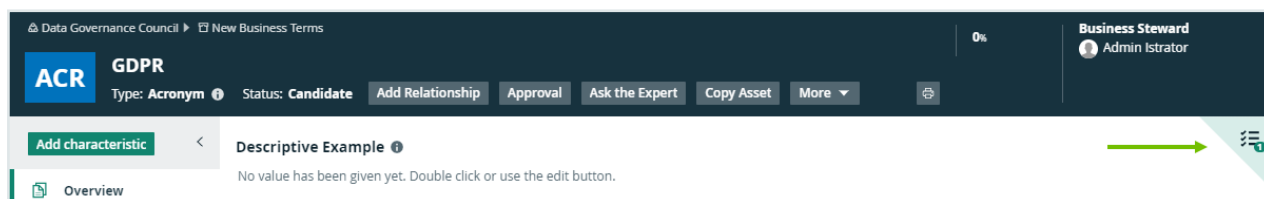
For an example of a complete workflow, see [Tasks in the Issue Management workflow](#).

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, a table contains all of your active tasks.

To complete tasks from here, use one of the following options:

- When you select one of the rows from the table, the task sidebar displays information about the selected task. Click one of the available buttons to complete the task.

Due: 2/27/2023

Accept Review

Do you want to review this issue?

Related to

New issue

Accept Reject

- When you select a check box in front of a task, the actions that are possible for that task appear above the table. Click one of the available buttons to complete the task.

All Tasks	My Tasks	My Overdue Tasks
Cancel selection	1 / 4	Cancel Accept Reject
Name		
☐	Rejected Definition	
☒	Accept Review	
☐	User task	
☐	User task	

- When you select the check boxes of multiple tasks, only the common actions that are possible for the selected tasks appear above the table. Click one of the available buttons to complete multiple tasks at once.

All Tasks	My Tasks	My Overdue Tasks
Cancel selection	3 / 4	Cancel
Name		
☐	Rejected Definition	
☒	Accept Review	
☒	User task	
☒	User task	

Note Although different tasks have similarly named buttons, the actions they perform might be different. In such cases, those buttons are not available above the table.

Note When there are no common actions for the selected tasks, only the **Cancel** button is available.

- When you select the check boxes of multiple tasks and you must fill in a form to complete the tasks:
 - If the tasks are of the same type, you can complete the form and submit the same information for the selected tasks.
 - If the tasks are different, the task sidebar displays the number of tasks that are not qualified and you can only complete the qualifying tasks.

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 when that task is assigned to you or you have a role that allows for this action:

Task sidebar enabled

1. [View the task](#) you want to reassign.
2. In the upper-right corner of the task sidebar, click  → **Reassign**.
3. Enter the required information.
4. Click **Reassign task**.
 - » The workflow continues with the new set of users as candidates for the task.

Note If the task expects one of the newly assigned users to change an attribute, for example, that user needs the permission to do so.

Task sidebar disabled

1. [View the task](#) you want to reassign.
2. Start the reassignment:
 - From the resource the task is for, at the end of the task bar, click **More** → **Reassign**.
 - From the **Tasks** menu, at the bottom of the preview pane, click **Reassign**.
3. Enter the required information in the **Reassign task** dialog box.
4. Click **Reassign**.
 - » The workflow continues with the new set of users as candidates for the task.

Note If the task expects one of the newly assigned users to change an attribute, for example, that user needs the permission to do so.

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 AI

Collibra AI brings automated features that help you accelerate the discovery, curation, governance, and visualization of your data.

Where can you find Collibra AI in Collibra?

- [Asset recommender](#)
- [Data similarity \(Beta\)](#)

Data similarity (Beta)

Data similarity is a feature that proposes similar assets. This can be useful for data consumers to find other relevant assets.

Note

This feature is in [Beta testing](#) and is powered by Collibra AI.

About data similarity (Beta)

Data similarity is a feature that proposes similar assets. This can be useful for data consumers to find other relevant assets.

Currently, this feature is available in Data Marketplace to [show similar Table assets](#).

The screenshot shows a web interface for a data catalog. The main header is 'barcelona_weekends' with a close button (X). Below it, there's a navigation bar with 'Table', 'Status: Candidate', and icons for a list and a share. The main content area has tabs: 'Overview', 'Columns (21)', 'Details', 'Similar Data (5) Beta', and 'Actions (1)'. The 'Similar Data' tab is active, showing a list of similar tables. The first entry is 'barcelona_weekends-or' with a similarity score of 90%. Below it, the path is 'Regression_DK_202311 / Connection_1 > postgres > data-similarity'. The second entry is also 'barcelona_weekends-or' with a similarity score of 86.7%. A tooltip explains: 'The total similarity score of this table compared to the current table is 86.7%. We compared the table name (100%), column names (100%), and column data contents (81%)'. The third entry is partially visible as 'barcelona_weekends sample'. At the bottom, there are links for 'Go to Asset Details' and 'Add to Basket'.

Tip

This feature is powered by Collibra AI. To calculate the data similarity between tables, Collibra AI compares the tables and their columns, and calculates a similarity score. This similarity score indicates how similar assets are.

Important

- Data similarity is a cloud-only Edge feature that must be [enabled](#). It is not certified for FedRAMP.
- This feature is in [Beta testing](#).

How is the table similarity score calculated?

The table similarity score indicates the similarity between two tables and ranges from 0 (not similar) to 100 (very similar). The score combines three metrics:

- Table name similarity: This metric compares the table names.
- Column name similarity: This metric compares all column names. It checks how many columns have a similarly named column, and how similar the names are.
- Column content similarity: This metric compares the data in all columns. It checks how many columns have similar content.

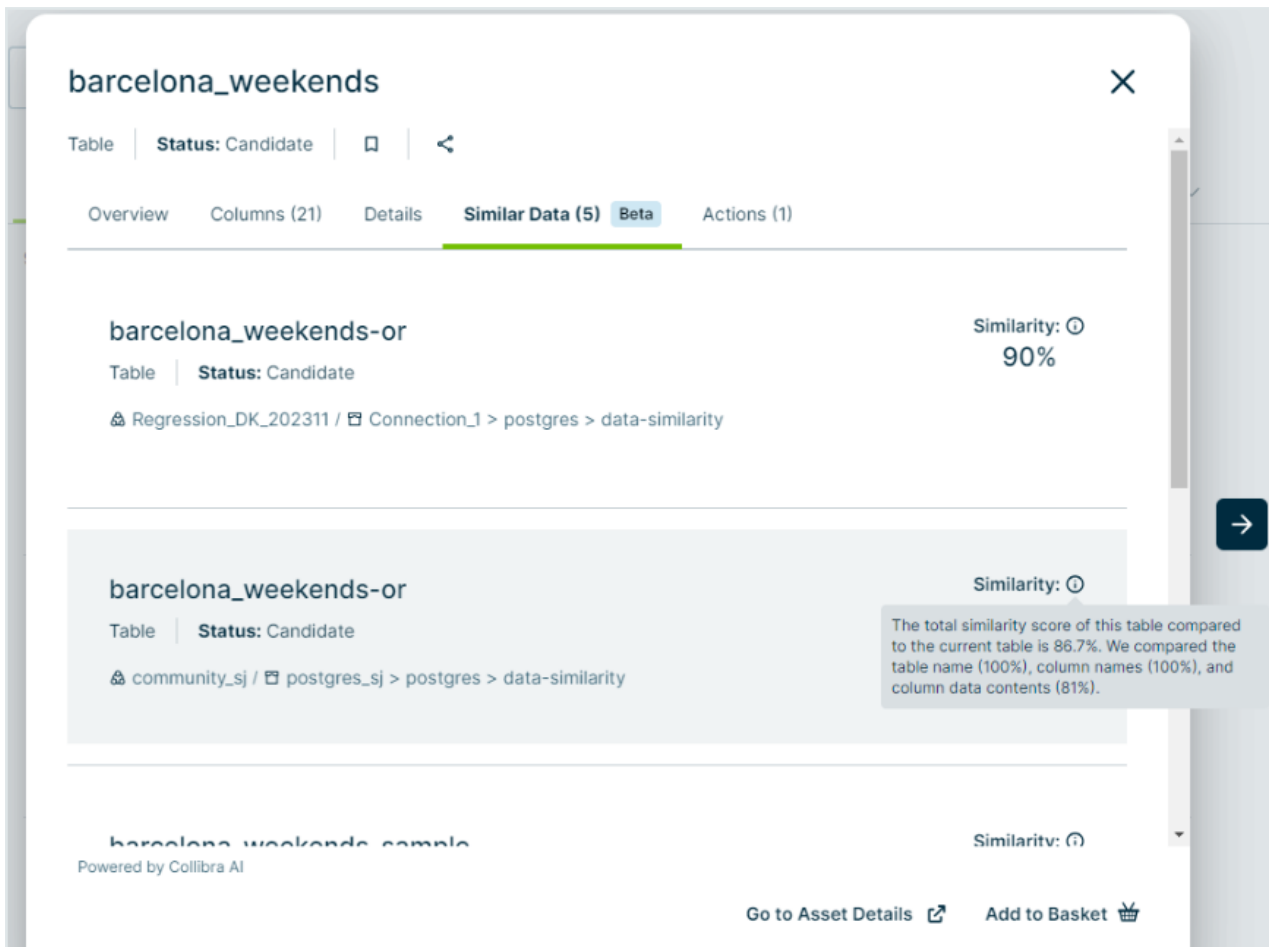
Once the metric scores are known, the following formula is used:

```
total_similarity = (0.10 * table_name_similarity + 0.20 * column_names_similarity + 0.70 * column_content_similarity) * 100
```

Note We compare only tables and columns that have been profiled. For more information, go to [Enable and calculate data similarity](#).

Data similarity in Data Marketplace

If the [data similarity feature is enabled](#) in your environment, the **Similar Data (Beta)** tab is shown in Table asset previews. The tab is shown only if tables with a similarity score higher than 50% exist for the table. Up to five Table assets are shown.



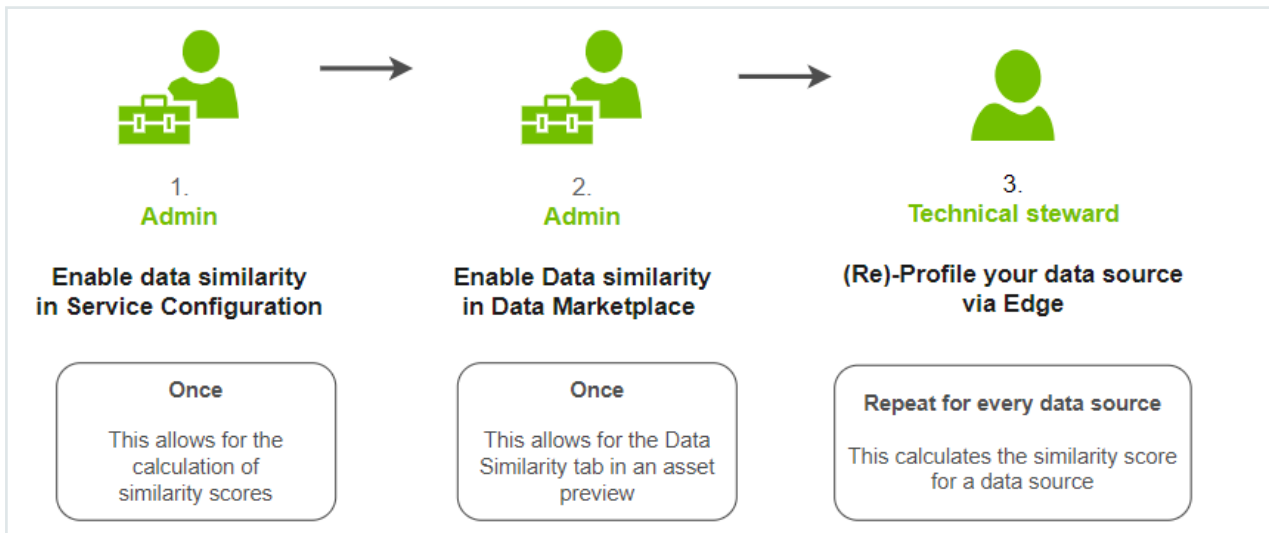
FAQ on data similarity

- Which data is used for similarity comparisons?
Currently, Colibra AI compares only profiled tables and columns.
- Where can you see similarity?
Currently, this feature is available only in Data Marketplace for Table asset comparison. Similar Table assets are shown in the **Similar Data (Beta)** tab.
- How does data similarity work?
During data profiling, we use privacy enhancing technologies such as irreversible hashes to summarize your table and column data on Edge. Colibra AI only uses a subset of the actual data, maximum 10,000 rows, to create these hashes. These summaries are stored in Colibra. When you open a Table preview in Data Marketplace, the summaries are used to find similar data assets.
If you want to know more, reach out to your Customer Success Manager.

- Does data similarity use Generative AI or Large Language Models (LLMs)?
No, data similarity does not use generative AI or LLMs.

Enable and calculate data similarity

To show similar assets, data similarity must be enabled in your environment and similarity scores must be calculated for your data.



Tip Even if data similarity is enabled in your environment, you can specify that you [don't want to calculate similarity scores](#) for a data source.

Before you begin

Important

- Data similarity is a cloud-only feature and is not certified for FedRAMP.
 - This feature is in [Beta testing](#).
- You are using Edge.
 - [Data Marketplace is enabled](#).

Steps

Step	More details
1 In the Service Configuration settings, enable the Calculate Data Similarity (Beta) profiling setting. » Data similarity scores can be calculated when you profile a data source via Edge.	Show how Prerequisites • You have the ADMIN or SUPER role in Collibra Console. • You have the SUPER role in Collibra Console. • You have the ADMIN or 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. 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. 3. Go to the Data profiling section. 4. In the Data profiling section, enable the Calculate Data Similarity (Beta) setting. 5. Click Save all.

Step	More details
2 In the Colibra settings, enable the Data Similarity (Beta) setting for Data Marketplace. » If, for the Table asset, some assets have a similarity score higher than 50%, the Similar Data tab is visible in the Data Marketplace asset preview.	Show how Before you begin The Settings landing page is enabled. Required permissions You are an administrator in Data Marketplace. Steps 1. On the main menu, click , and then click  Settings. » The Colibra settings page opens. 2. In the Data Marketplace section, click Extra Options. 3. Select the Show Similar Data checkbox. 4. Click Save.
3 Register a data source via Edge and profile the data. » Similarity scores are calculated for the profiled Table assets.	Important If you don't want to calculate similarity scores for a data source during profiling, you can deactivate the calculation via the profiling capability configuration. In the capability, add the following parameter in the Other section: • Name: data-similarity • Type: Text • Encryption: Not encrypted (plain text) • Value: false

What's next?

If a data consumer in Data Marketplace opens a [Table asset preview](#), and similar assets are available for this table, the **Similar Data** tab is shown.

Collibra settings

The settings of Collibra Platform Self-Hosted 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. You can [enable and disable this Settings landing page](#) in Collibra Console. Contact [Collibra Support](#) if you want to enable or disable this Settings landing page.

Settings

- General**
 - System | Activities | Language
- Operating model**

The operating model describes the structure of the instance data in your environment. For example, asset types and domain types.

 - Asset types | Domain types | Attributes | Relations | Complex relations | Statuses | Data quality rules | Scopes
- Roles and permissions**

Permissions determine which users can access which products and the actions they can do on resources. Users are granted permissions via roles and responsibilities.

 - Global roles | Resource roles | Global Permissions | Resource Permission
- Workflows**

Workflows define processes and manage their execution. They coordinate tasks that are done automatically, or by users. This allows you to streamline business processes and make collaborative decisions in a guided and controlled way.

 - Definitions | Instances
- Users and groups**

User accounts grant people secure access to Collibra Platform. User groups facilitate sharing permissions and responsibilities across groups of users.

 - Users | Groups
- Migration**

Migration allows an Administrator to export parts of the Operating Model from one Collibra instance, and import it into another Collibra instance, while retaining the resource IDs

 - Export | Import

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: • Rebuild the search index. • Rebuild automatic hyperlinks. • Upgrade the activity history.
Activities	This tab page contains a table with all activities started by all users. It also shows more information about each activity, for example the creation date, name, status, start, finish and result.
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 Platform Self-Hosted can automatically create hyperlinks between assets. However, if those hyperlinks are outdated, you can rebuild them.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.

2. Click **General**.
3. On the **System** tab, in the **Automatic Hyperlinks** section, click **Rebuild Automatic Hyperlinks**.

Rebuild the search index

After you edit any search settings, you need to rebuild the search index so that the existing search index is updated.

This topic describes how to rebuild the search index from Collibra Platform Self-Hosted.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **General**.
3. On the **System** tab, in the **Search** section, click **Rebuild Search Index**.

Note The rebuild process can take some time depending on the number of assets. During this period, the search function is unavailable unless the [Uninterrupted Search setting](#) is enabled.

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 Platform Self-Hosted. To view the activity history, you need to upgrade the activity history.

Note

- The backup you restore needs to contain history data. This is one of the options when [creating](#) a backup.
- You need to upgrade the activity history only once. Subsequent upgrades do not require you to perform this task again.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **General**.
3. On the **System** tab, at the bottom of the page, click **Upgrade History**.
 - » 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 view the status of the history upgrade by » [viewing](#)» your activities.

Interface text languages

The interface text of Collibra Platform Self-Hosted 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.

Note From version 2022.11 onwards, Collibra takes the default language of your browser into account to select the interface text language of some sections. Collibra now also has translations of some interface text available out of the box. Consequently, you can no longer edit that interface text, nor translate it into unsupported languages. This includes the interface text of Usage Analytics, Data Marketplace and the Homepage.

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
- From version 2022.11 onwards, Collibra already has translations of some interface text strings available out of the box. Consequently, you can no longer edit those interface text strings, nor translate them into unsupported languages.

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. Example <code>Activities.ActivitiesTable.status.error</code> = Error
Equal sign	An equal sign between spaces (=). Example <code>TextEditor.edit</code> = Edit
A piece of interface text	The interface text is the actual piece of text in the user interface. Example <code>COMMENT_ADDED</code> = 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 (<code>{0}</code>). Example <code>PASSWORD_TOO_SHORT</code> = The password must be at least <code>{0}</code> characters long.
Markup (optional)	Interface text may contain HTML tags to format text or to create hyperlinks in a piece of interface text. Example <code>core.header.expired</code> = Your password has expired!<code>
</code>Please change your password <code></code>here<code></code>.

Edit or translate interface text

You can edit or translate the **interface text** of the Collibra Platform Self-Hosted 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 Collibra structure 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.
- From version 2022.11 onwards, Collibra takes the default language of your browser into account to select the interface text language of some sections. Collibra now also has translations of some interface text available out of the box. Consequently, you can no longer edit that interface text, nor translate it into unsupported languages. This includes the interface text of Usage Analytics, Data Marketplace and the Homepage.

Prerequisites

- You have a [global role](#) that has the **System administration global permission**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **General**.
3. In the tab pane, click **Language**.

- At the top of the editor, choose the interface language.



- » 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.

- Edit or translate the interface text, or paste the content from your translation file.
- Click **Save**.

Reset interface text

To restore defaults from the language settings page you will need to override your changes with the default interface text.

- On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
- Click **General**.
- In the tab pane, click **Language**.

4. Click **Load Defaults**.
5. 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 Platform Self-Hosted.

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](#).

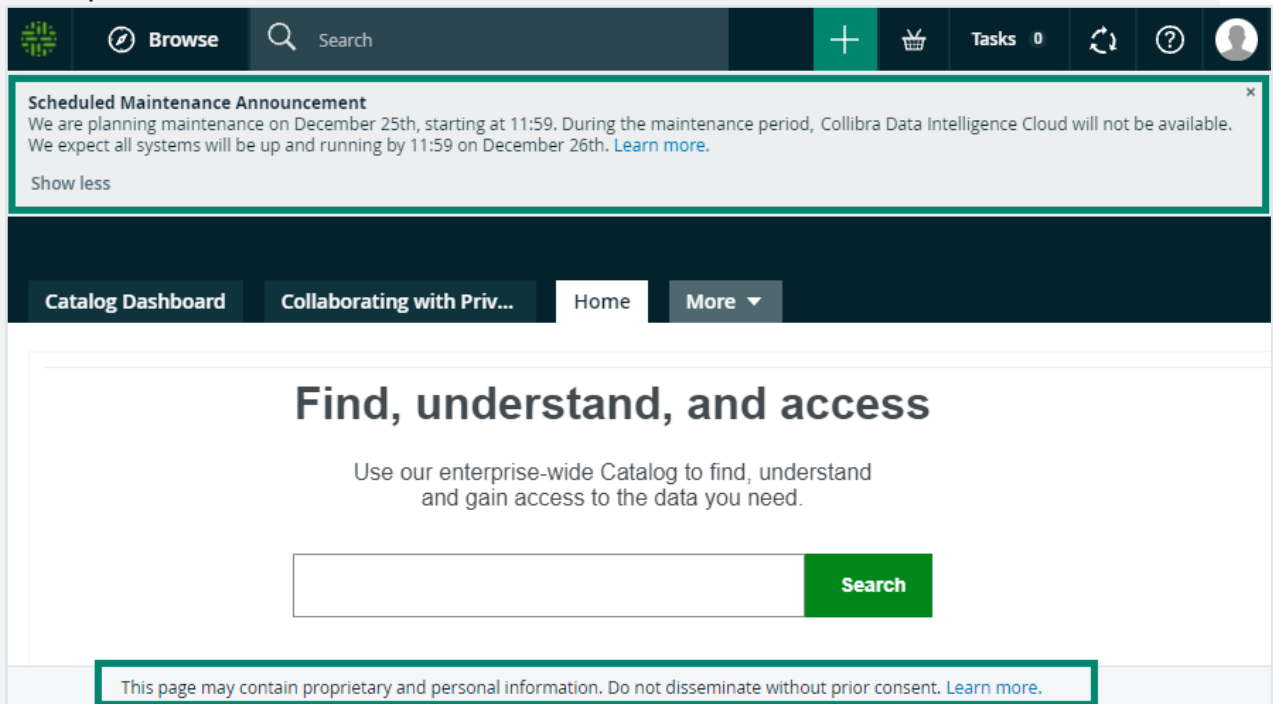
Top Banner

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 , and then click  **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 , and then click  **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 , and then click  **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 .

Tab page	What you can do
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 .

Used in

The **Used in** feature allows you to explore where the item is used in the operating model.

1. Go to **Settings** → **Operating model**.
2. Select the area you want to explore, such as **Asset Type** or **Domains Types**.
3. In the table, select the item you wish to find out where its used.
4. Click the **Used in** button in the top right-corner.

Note For scopes the **Used in** feature is under the scope title, not in the top right-corner.

You can then discover the other asset types, complex relation types and so on that the item is used in.

Expected results

What you can search for depends on the page you are searching in.

Tab page	What you can search
Asset types	See a list of the following for the attribute: • Relation types definition (as head/tail) • Complex relation type (as target of relation) • Restriction of assignment line

Tab page	What you can search
Domain types	See a list of the asset type assignments where this domain type is used.
Attributes	See a list of the following for the attribute: • Asset type assigned characteristics • Asset type articulation score rules • Complex relation types • DQ rules
Relations	See a list of the following for the relation: • Asset type assigned characteristics • DQ rules
Complex relations	See a list of the asset type assignments where this complex relation is used.
Statuses	See a list of the following for the status: • Asset type assigned statuses • Asset type articulation score rules
Data quality rules	See a list of the asset type assignments where this DQ rule is used.
Scopes	See a list of the asset types where this scope is used.

Roles and permissions settings page

On the **Roles and permissions** settings page of the [Colibra 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 Colibra 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 per- missions	This tab page allows you to view global permissions , and add or remove global permissions to or from global roles.
Resource per- missions	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 Platform Self-Hosted, 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 per- mission type	Description
Read-only permission	A read-only permission is a permission for which a read-only license or higher is required.

Resource permission type	Description
Standard permission	A standard permission is a permission for which a standard 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 out-of-the-box global role, see the online version of this documentation.

Note Users with roles that have permissions with Read-only required licenses that start or participate in workflows count towards the Standard [effective licenses](#) for the month the workflow participation occurs in.

Global permission	Description	Required license
Assessments	The Assessments global permission contains a global permission that allows users to view and manage all assessments.	
Administration	The Assessments > Administration global permission allows users to view and manage all assessments.	Read-only
Catalog	The Catalog global permission contains global permissions that allow users to use advanced features of Data Catalog.	

Global permission	Description	Required license
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.	Standard
Remove	The Catalog > Advanced Data Type > Remove global permission allows users to delete advanced data types.	Standard
Update	The Catalog > Advanced Data Type > Update global permission allows users to edit advanced data types.	Standard
Register Profiling Information	The Catalog > Register Profiling Information global permission allows API users to enable data profiling when registering a data source.	Standard
Technical Lineage	The Catalog > Technical Lineage global permission allows users to see the technical lineage of a data source.	Read-only
Classification	The Classification permission group contains global permissions that allow users to use the new classification method (Beta) via Edge sites.	
Data Classes	The Classification > Data Classes permission group contains global permissions that allow users to manage data classes in the new classification method (Beta).	
Edge	The Edge global permission contains global permissions that allow users to install and manage Edge sites. 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 contains global permissions related to Insights Data Access and Usage Analytics.	

Global permission	Description	Required license
Download the Insights reporting data	The Insights > Download the Insights reporting data global permission allows users to download the data from the Insights Data Access API (formerly called <i>Reporting Data Layer</i>).	Standard
View Insights reports	The Insights > View Insights reports global permission allows users to access the dashboard widgets .	Read-only
View Usage Analytics Summary	The Insights > View Usage Analytics Summary global permission allows users to access the Usage Analytics dashboard, excluding the detailed usage data.	Read-only
View Usage Analytics reports	The Insights > View Usage Analytics reports global permission allows users to access the Usage Analytics dashboard, including the detailed usage data, and also download the data.	Read-only
Product Rights	The Product Rights permission group contains global permissions that allow users to access Colibra applications.	
Assessments	The Product Rights > Assessments global permission allows users to access Colibra Assessments.	Read-only
Business Semantics Glossary	The Product Rights > Business Semantics Glossary global permission allows users to access the Business Glossary application.	Read-only
Catalog	The Product Rights > Catalog global permission allows users to access the Data Catalog application.	Read-only
Data Dictionary	The Product Rights > Data Dictionary global permission allows users to access the Data Dictionary application.	Read-only
Data Helpdesk	The Product Rights > Data Helpdesk global permission allows users to access the Data Helpdesk application.	Read-only
Data Marketplace	The Product Rights > Data Marketplace global permission allows users to access the Data Marketplace application.	Read-only

Global permission	Description	Required license
Data Stewardship Manager	The Product Rights > Data Stewardship Manager global permission allows users to access the Data Stewardship application.	Read-only
Policy Manager	The Product Rights > Policy Manager global permission allows users to access the Policy Manager application.	Read-only
Privacy	The Product Rights > Privacy global permission allows users to access the Privacy landing page .	Read-only
Protect	Go to Protect global roles and permissions.	Read-only
Reference Data Manager	The Product Rights > Reference Data Manager global permission allows users to access the Reference Data application.	Read-only
System Administration	The Product Rights > System Administration global permission allows users to manage all sections of the Colibra Settings, including the general settings, the operating model , roles, permissions, users, groups and workflows.	Standard
User Administration	The Product Rights > User Administration global permission allows users to manage users and groups.	Standard
Workflow Administration	The Product Rights > Workflow Administration global permission allows users to access the Workflow tab page of the Colibra Settings.	Standard
Workflow Designer access	The Product Rights > Workflow Designer access global permission allows users to access the Workflow Designer application from the Colibra menu. Note This permission becomes available after you enable the Allow access to the Workflow Designer Colibra configuration setting.	Read-only
Protect	Go to Protect global roles and permissions.	

Global permission	Description	Required license
Resources	The Resources permission group contains global permissions that allow users to see and manage assets, domains and communities.	
Export	The Resources > Export global permission allows users to export assets or complex relations and their characteristics.	Read-only
Import	The Resources > Import global permission allows users to import assets or complex relations. Users that have a role with this permission can also create or edit communities and domains that are related to the imported assets.	Read-only
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. Note This permission does not include the Export and Import permissions.	Standard
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.	Standard
View tags	The Tags > View tags global permission allows users to see the Tags Overview page in the Data Stewardship application.	Read-only
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 .	Read-only
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.	Standard
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.	Read-only
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.	Read-only
Workflow	The Workflow permission group contains global permissions that allow users to manage workflows.	
Use workflow message events	The Workflow > Use workflow message events global permission allows users to pass message events to the workflow engine via an API call. Note This is used for API users.	Read-only
View all running tasks	The Workflow > View all running tasks global permission allows users to see ongoing tasks that are assigned to other users in the All Tasks tab on the tasks page.	Standard

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 out-of-the-box resource role, go to the online version of this documentation.

Note Users with roles that have permissions with Read-only required licenses that start or participate in workflows count towards the Standard [effective licenses](#) for the month the workflow participation occurs in.

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.	Standard
Remove	The Asset > Remove resource permission allows users to delete assets.	Standard
Update	The Asset > Update resource permission allows users to edit assets. Note This only refers to the asset name and automatic hyperlinking.	Standard
Update Status	The Asset > Update Status resource permission allows users to change the status of assets.	Standard
Update Type	The Asset > Update Type resource permission allows users to change the asset type of assets.	Standard
Attribute	The Asset > Attribute permission group allow users to work with attributes of assets.	

Resource permission	Description	Required license
Add	The Asset > Attribute > Add resource permission allows users to add characteristics to assets. Tip If you want to use images and attachments in attributes of assets, you also need the Attachment > Add permission.	Standard
Remove	The Asset > Attribute > Remove resource permission allows users to remove characteristics from assets.	Standard
Update	The Asset > Attribute > Update resource permission allows users to edit characteristics of assets. Tip If you want to use images and attachments in attributes of assets, you also need the Attachment > Add permission.	Standard
Data	The Asset > Data permission group allow users to work with data from data sources.	
Access Data	The Asset > Data > Access Data resource permission allows users to create Tableau provision files.	Read-only
View Samples	The Asset > Data > View Samples resource permission allows users to see sample data of data sources.	Read-only
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.	Standard
Remove	The Asset > Responsibilities > Remove resource permission allows users to delete responsibilities from assets.	Standard
Update	The Asset > Responsibilities > Update resource permission allows users to edit responsibilities of assets.	Standard
Tags	The Asset > Tags permission group allow users to work with tags.	

Resource permission	Description	Required license
Update	The Asset > Tags > Update resource permission allows users to edit and delete tags on asset pages and asset tables.	Read-only
Attachment	The Attachment permission group allow users to manage attachments.	
Add	The Attachment > Add resource permission allows users to add attachments to resources.	Read-only
Remove	The Attachment > Remove resource permission allows users to remove attachments from resources.	Read-only
Update	The Attachment > Update resource permission allows users to edit attachments of resources.	Read-only
Comment	The Comment permission group allow users to work with comments.	
Add	The Comment > Add resource permission allows users to add comments to resources. Tip If you want to use images and attachments in comments, you also need the Attachment > Add permission.	Read-only
Remove	The Comment > Remove resource permission allows users to delete comments (own and others') from resources.	Standard
Update	The Comment > Update resource permission allows users to edit comments (own and others') on resources. Tip If you want to use images and attachments in comments, you also need the Attachment > Add permission.	Standard
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. Tip If you want to use images and attachments in the description of communities, you also need the Attachment > Add permission.	Standard
Configure external system	The Community > Configure external system resource permission allows users to set up connections to external data sources.	Standard
Remove	The Community > Remove resource permission allows users to delete communities.	Standard
Update	The Community > Update resource permission allows users to edit communities. Tip If you want to use images and attachments in the description of communities, you also need the Attachment > Add permission.	Standard
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.	Standard
Remove	The Community > Responsibilities > Remove resource permission allows users to delete responsibilities from communities.	Standard
Update	The Community > Responsibilities > Update resource permission allows users to edit responsibilities of communities.	Standard
Domain	The Domain permission group allow users to manage domains.	

Resource permission	Description	Required license
Add	The Domain > Add resource permission allows users to create and edit domains. Tip If you want to use images and attachments in the description of domains, you also need the Attachment > Add permission.	Standard
Remove	The Domain > Remove resource permission allows users to delete domains.	Standard
Update	The Domain > Update resource permission allows users to edit domains. Tip If you want to use images and attachments in the description of domains, you also need the Attachment > Add permission.	Standard
Responsibilities	The Domain > Responsibilities permission group allow users to manage the responsibilities of domains.	
Add	The Domain > Responsibilities > Add resource permission allows users to create responsibilities for domains.	Standard
Remove	The Domain > Responsibilities > Remove resource permission allows users to delete responsibilities from domains.	Standard
Update	The Domain > Responsibilities > Update resource permission allows users to edit responsibilities of domains.	Standard
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.	Read-only
Remove	The Rating > Remove resource permission allows users to delete other users' ratings.	Standard
Update	The Rating > Update resource permission allows users to edit other users' ratings	Standard

Resource permission	Description	Required license
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.	Standard
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.	Standard
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 for the related asset. Note It does not give you permission to cancel or reassign tasks, as this is determined by the workflow definition.	Standard

Enable permission to use tags

To enable the permission to use tags, follow these steps:

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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.

Name ▾	Assignee	Business Steward	Owner
Tags	✓	✕	✓
Update	✓	✕	✓

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 ☰, and then click ⚙️ **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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.

Name ▾	Assignee	Business Steward	Owner
Tags	✓	✕	✓
Update	✓	✕	✓

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 Platform Self-Hosted 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 Collibra Assessments.
Assessments Admin	A user who can view both private and public assessments, and also edit the permissions of any assessment.
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.
Data Marketplace	A user who can access the Data Marketplace application.
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.

Global role	Description
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.
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 Platform Self-Hosted. 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.
Export	A user who can export assets or complex relations and their characteristics.
Glossary	A user who can access the Business Glossary application. 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.
Import	A user who can import assets or complex relations. Users with this role can also create or edit communities and domains that are related to the imported assets.
Insights	A user who can access Insights Data Access and Usage Analytics.
Policy Manager	A user who can access the Policy Manager application, which is a collection of all governance assets.

Global role	Description
Privacy User	A user who can access the Privacy landing page. Note Data Privacy is a paid product.
Protect Admin, Protect Author, Protect Manager, Protect Reader	Go to Protect global roles and permissions.
ReferenceData	A user who can access the reference data accelerator. Users with this role are typically allowed to: • Access all reference data functionality and workflows concerning code proposal, code approval and code mapping. • Define and manage the crosswalk, code value and codes set asset types and their subtypes. • Define and manage complex relation types such as code mapping.
Sysadmin	A user who can configure and manage Colibra Platform Self-Hosted. Users with this role are typically allowed to: • Access and modify the  Settings. • 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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. 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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. On 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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.
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.

Resource role	Description
Data Analyst Level 1	This role is assigned to a user on a data 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 data 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.
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

- On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
- Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** tab page.
- In the tab pane, click **Roles**→**Resource**.
 - » The overview of resource roles appears.
- Above the table, to the right, click **Add**.
 - » The **Resource Role Creation** dialog box appears.
- Enter the required information.

Field	Description
Name	Type a name for the role.
Description	Type a description for the role.

- 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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. On 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** 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 • Joanna Zhou as Owner	• Anita Morrison as Community Manager
Customer Revenue asset	• William Parker as Owner	• Anita Morrison as Community Manager • John Fisher as Business Steward • 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.
- In the **Responsibilities** tab of a user's profile page.

- In the **Responsibilities** tab of a user group page.
- In the **Preview** pane of an asset, for example on an asset page.

Note The preview pane only shows the direct responsibilities.

In a community, domain or asset view

1. Open any view in table or tiles mode.
2. Perform one of the following steps:
 - 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

Tip

- You can also view your own responsibilities.
- Only 300 responsibilities will be displayed at one time, even if more exist in the system.

1. [Open](#) a profile page.
2. In the tab pane, click  **Responsibilities**.
 - » The [Responsibilities](#) page appears.

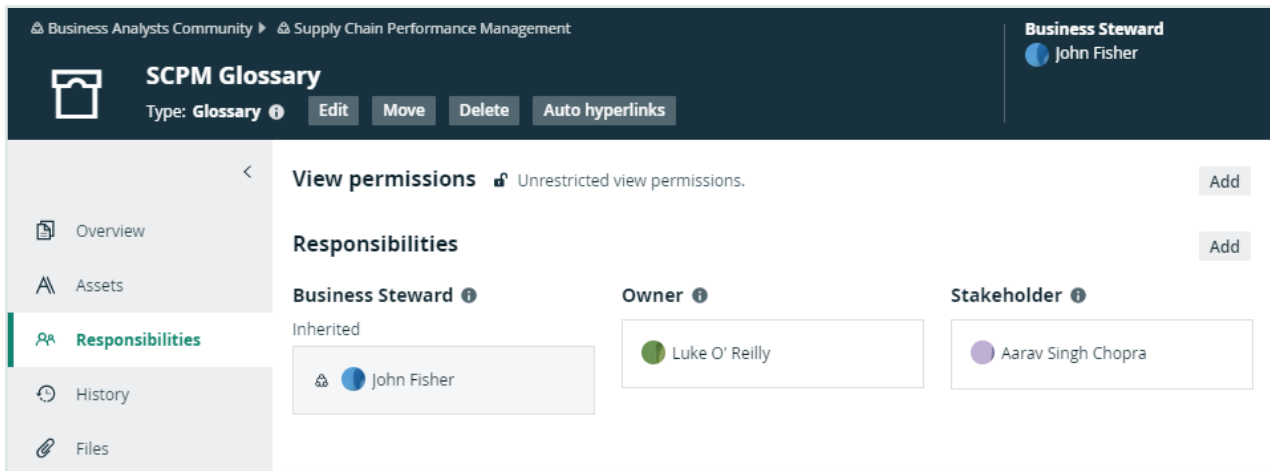
In the **Responsibilities** tab of a user group

1. Open a group page.
 - a. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
 - b. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.

- c. In the tab pane, click **Users** → **Groups**.
 - » The user group table appears.
2. In the tab pane, click  **Responsibilities**.
 - » The **Responsibilities** page appears.

The Responsibilities page

The **Responsibilities** page shows the [view permissions](#) and the [responsibilities](#) of a resource.



The screenshot shows the SCPM Glossary interface. The top navigation bar includes 'Business Analysts Community' and 'Supply Chain Performance Management'. The user is logged in as 'Business Steward John Fisher'. The main content area is titled 'SCPM Glossary' and shows the 'Responsibilities' tab selected. The left sidebar contains links to Overview, Assets, Responsibilities, History, and Files. The main content area displays the 'View permissions' section with 'Unrestricted view permissions' and an 'Add' button. Below this is the 'Responsibilities' section, which is currently empty, with an 'Add' button. The 'Business Steward' is listed as 'John Fisher' (Inherited). The 'Owner' is 'Luke O'Reilly' and the 'Stakeholder' is 'Aarav Singh Chopra'. There are 'Add' buttons for each of these roles.

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 Platform Self-Hosted 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 responsibility** 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. Perform one of the following steps:
 - 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. Perform one of the following steps:
 - 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

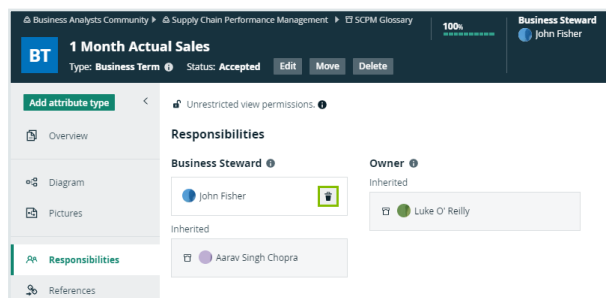
You can delete a [responsibility](#):

- 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. Perform one of the following steps:
 - 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 Platform Self-Hosted is used to automate processes. Collibra comes with many [out-of-the-box 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.

Out-of-the-box workflow deployments

In general, when you start your Collibra Platform Self-Hosted environment, all missing out-of-the-box (OOTB) 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.
 - Download the updated workflows from the [Community Downloads page](#):
 - i. Select your Collibra version.
 - ii. In the **Out-of-the-box workflows** section:
 - Select **OOTB-workflows-dgc.zip** to download versions of the workflows that you can deploy directly to your Collibra environment.
 - Select **OOTB-workflows-designer.zip** to download versions of the workflows that you can import into Workflow Designer.
 - iii. Customize the workflows if necessary.
 - iv. [Deploy](#) the workflows 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 you restart the environment.

Workflow engine upgrade

In Collibra Platform Self-Hosted 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 Platform Self-Hosted 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 **out-of-the-box 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 Platform Self-Hosted.

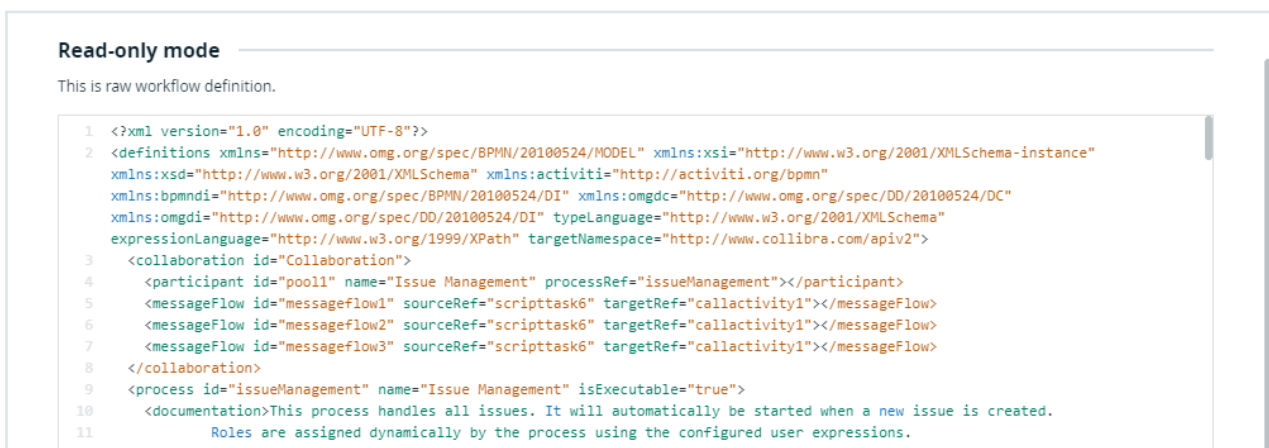
You must have the Sysadmin global role or a global role that has at least the Workflow Administration global permission to access this page:

1. On the main menu, click , and then click  **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 export the workflow definition as BPMN and edit it, follow the procedures described in the [Edit an out-of-the-box workflow](#) section of the Workflows documentation.

Important If the workflow was created using the Workflow Designer, edit the workflow in the Workflow Designer and [deploy](#) the new version to your environment.

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 or exported Workflow Designer app to Collibra Platform Self-Hosted.

You can upload a workflow in ***.bpmn**, ***.bpmn20.xml** and zip 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 , and then click  **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

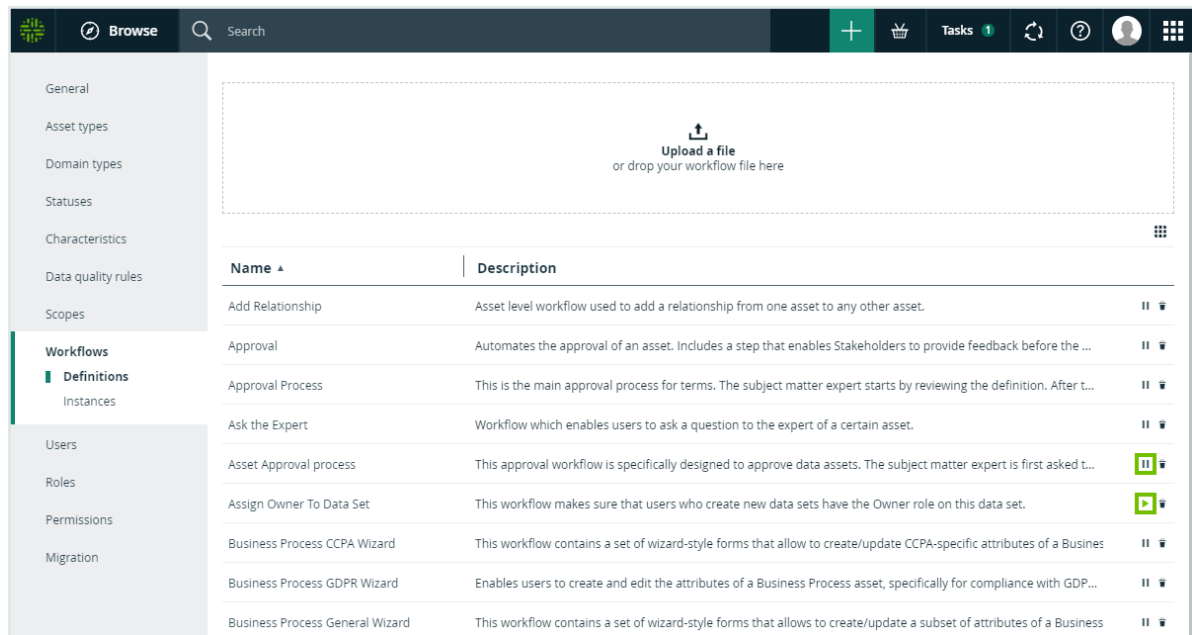
You can enable or disable workflows from the workflow definitions table or from the individual workflow definition pages.

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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the tab pane, click **Workflows** → **Definitions**.

- 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

- On the main menu, click ☰, and then click ⚙️ **Settings**.
 - » The [Collibra settings page](#) opens.
- In the tab pane, click **Workflows** → **Definitions**.
- Click the workflow you want to enable or disable.
- 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

Approval Process

Type: **Workflow Definition** Status: **Enabled**

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 Platform Self-Hosted.
- **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 Platform Self-Hosted.

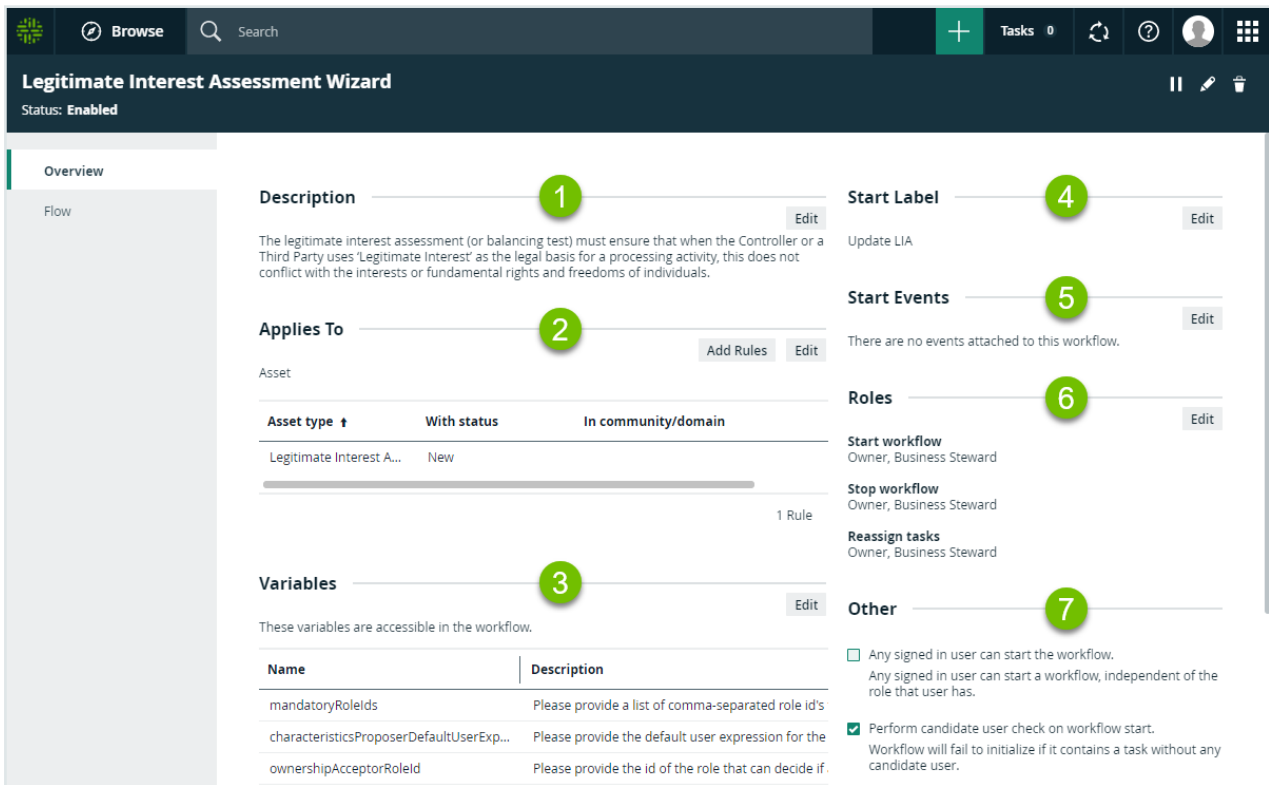
When you decide how to configure your Collibra workflows, consider that the workflow events mechanism is not designed for mass import. Avoid triggering workflows as a result of an import operation because it has the potential of impacting the performance of your environment. If you must use workflows 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 , and then click  **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.



Legitimate Interest Assessment Wizard
Status: Enabled

Overview

Flow

Description 1 Edit

The legitimate interest assessment (or balancing test) must ensure that when the Controller or a Third Party uses 'Legitimate Interest' as the legal basis for a processing activity, this does not conflict with the interests or fundamental rights and freedoms of individuals.

Applies To 2 Add Rules Edit

Asset

Asset type ↑	With status	In community/domain
Legitimate Interest A...	New	

1 Rule

Variables 3 Edit

These variables are accessible in the workflow.

Name	Description
mandatoryRoleIds	Please provide a list of comma-separated role id's
characteristicsProposerDefaultUserExp...	Please provide the default user expression for the
ownershipAcceptorRoleId	Please provide the id of the role that can decide if

Start Label 4 Edit

Update LIA

Start Events 5 Edit

There are no events attached to this workflow.

Roles 6 Edit

Start workflow
Owner, Business Steward

Stop workflow
Owner, Business Steward

Reassign tasks
Owner, Business Steward

Other 7

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

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

Description

The description is a brief overview of the workflow.

Click **Edit** to edit the description.

Note Uploading a workflow with a modified description does not update this field.

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.

The screenshot shows a dialog box titled 'Applies To' with a sub-dialog 'Add'. The main dialog has a table with the following data:

Asset Type	Restricted to community/domain, status
Business Term	(New)
Data Asset	> Business Analysts Community (Candidate)

The 'Add' sub-dialog has the following fields:

- Type: Business Rule
- in domain community: New Policies & Business Rules
- with status: Candidate

Buttons: Cancel, Save

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** check box selected (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.
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. Note Manually starting a workflow configured with this option also triggers the workflow.

Setting	Description
Workflow Canceled	The workflow starts when a workflow is manually canceled. 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. Note The packaged Escalation Process workflow is configured to start with this option.
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.
Comment 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.

Setting	Description
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.
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. 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. You can then use this information to contact the user again, if needed. Note • This option overrides any roles that are specified in the Roles section. • If you select this option, you cannot select the Any signed in user can start the workflow option.
Any signed in user can start the workflow.	Indicates that any user who is signed in can start the workflow. Note • This option overrides any roles that are specified in the Roles section. • If you select this option, you cannot select the Any guest user can start the workflow option.

Setting	Description
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 Platform Self-Hosted user. If you select this option and there is at least one task that cannot be assigned to a user, the workflow does not start and you see an error message. If you clear this option and there is at least one task that cannot be assigned to a user, the workflow starts and progresses up to the last user task before the task that cannot be assigned. You see an error message and you can either fulfill the requirements so that the task can be assigned or cancel the workflow.
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. If selected, you can only start the workflow 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.	Allows you to start the workflow from the global + Create button. Note This option is only valid for workflows where the scope is set to Global.

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. 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. You can then use this information to contact the user again, if needed. Note • This option overrides any roles that are specified in the Roles section. • If you select this option, you cannot select the Any signed in user can start the workflow option.
Any signed in user can start the workflow.	Indicates that any user who is signed in can start the workflow. Note • This option overrides any roles that are specified in the Roles section. • If you select this option, you cannot select the Any guest user can start the workflow option.
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 Platform Self-Hosted user. If you select this option and there is at least one task that cannot be assigned to a user, the workflow does not start and you see an error message. If you clear this option and there is at least one task that cannot be assigned to a user, the workflow starts and progresses up to the last user task before the task that cannot be assigned. You see an error message and you can either fulfill the requirements so that the task can be assigned or cancel the workflow.

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.
	If selected, you can only start the workflow 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.
Show in global create.	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.
	Allows you to start the workflow from the global + Create button.
	Note This option is only valid for workflows where the scope is set to Global.

Out-of-the-box 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.

Variable	Description
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.
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 Data Privacy customers: 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 , and then click  **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.

Note When you change the scope of the workflow, the restriction rules are removed.

a. Click **Add**.

» A dialog box appears.

Asset Type	Restricted to community/domain, status
Business Term	(New)
Data Asset	> Business Analysts Community (Candidate)

Type: Business Rule

in domain community New Policies & Business Rules

with status Candidate

Cancel Save

b. Provide one or more **Types**.

In this example, you enter the **Business Rule** asset type.

Tip Select **Asset** to associate the workflow with all asset types.

- c. Click **domain** or **community**, and then provide the domains or communities to which the asset types belong.
- d. Select the status of the assets to which the workflow will apply.
This setting is not applicable when you are applying the workflow to communities, domains or global.
- e. Click **Save**.
» 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.

Note The restrictions use the logical OR function.
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:	- Click . - Change the option. - 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

- On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
- Click **Workflows**.
 - » The [Workflows](#) settings page appears on the **Definitions** tab page.
- 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 , and then click  **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 , and then click  **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 , and then click  **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 Platform Self-Hosted.

Collibra Platform Self-Hosted 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 Platform Self-Hosted 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 Platform Self-Hosted through a user account. The actions that a user can perform in Collibra depend on their [license type](#), [global roles](#), and [responsibilities](#).

Tip Users can be added to [user groups](#) for efficient assignment of [roles](#) and [responsibilities](#) to multiple users simultaneously.

Username requirements

All usernames within Collibra need to comply with our username requirements.

Collibra username requirements

- General requirements:
 - Uniqueness: Duplicate usernames are not allowed, regardless of their capitalization
- Example** `usernamecase` and `UserNameCase` are considered duplicates.
- No leading or trailing spaces
 - No empty usernames
 - Maximum of 255 characters
- Character limitations: Usernames may contain only the characters in the following Unicode categories:
 - Letter
 - Number
 - Symbol
 - Punctuation
 - Non-spacing marks

User types

The type of a user depends on their [license type](#).

User type	Description
Read-only user	A user who has a read-only license .
Standard user	A user who has a standard license .

User statuses

The status of a user determines whether they can sign in or not.

User status	Description
Enabled	A user who can sign in to Collibra. The license of this user contributes to the maximum number of licenses if the user has an active password status.

User status	Description
Disabled	A user who cannot sign in to Collibra. The license of this user does not contribute to the maximum number of licenses.

Password statuses

Password status	Description
Active	A user who has a password.
Inactive	A user who does not have a password. This is typically a temporary status that occurs only immediately after creating a user. When a password is created for the user, the password status becomes active and cannot be then reverted to inactive.

Out-of-the-box users

Collibra contains out-of-the-box users, which are used to manage various aspects of Collibra.

Default name	Resource ID	License	Purpose
Admin Istrator	00000000-0000-0000-0000-000000900002	Standard	Admin Istrator is the default administrator who configures Collibra when it is installed.
System User	00000000-0000-0000-0000-000000900001	Standard	System User is a fixed user who performs system-level functions and triggers certain processes in Collibra. This user cannot be modified or deleted.

Admin Istrator allows you to perform the initial user creation and configuration. Therefore, you can delete this account if you have at least one other user who has the **Sysadmin** global role.

Create a user

You can create one or more [users](#) in one go. At the same time, you can add the user(s) to [user groups](#).

Prerequisites

You have a [global role](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
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 Platform Self-Hosted. Collibra username requirements - General requirements: - Uniqueness: Duplicate usernames are not allowed, regardless of their capitalization Example <code>usernamecase</code> and <code>UserNameCase</code> are considered duplicates. - No leading or trailing spaces - No empty usernames - Maximum of 255 characters - Character limitations: Usernames may contain only the characters in the following Unicode categories: - Letter - Number - Symbol - Punctuation - 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. Note A user needs access to at least one of the basic Collibra applications: Business Glossary, Reference Data, Data Stewardship or System administration. You can grant access by assigning one of the global roles that provide the required permissions to the users.

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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. [Open](#) a user's profile page.
2. Perform one of the following steps:
 - [Edit](#) the account settings.
 - [Edit](#) the contact information.
 - [Edit](#) the email notifications.
 - [Edit](#) the user details.

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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Set or reset a user password from the user table

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
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. 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.
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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
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 the account of a [user](#).

Requirements and permissions

You have a [global role](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
3. In the row containing the name of the user whose account you want to disable, click .
 - » The user account is disabled and the icon changes into .

Delete a user

You can delete one or more [users](#) in one go.

Prerequisites

You have a [global role](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
3. Perform one of the following steps:

If you want to...	Follow these steps
Delete a single user	a. In the row of the user that you want to delete, click . » The Delete user dialog box appears. b. Click Delete user.
Delete more than one user	a. Select the check boxes in front of the users that you want to delete. b. On the action toolbar, click Delete. » The Delete <number> users dialog box appears. 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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **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

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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
3. If required, add the column **Online**.
 - a. On 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 Platform Self-Hosted, 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.
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. 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. 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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
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. Tip You can simultaneously create multiple user groups. To do so, after typing the name, press <code>Enter</code>, and then type the next name. User group names must be globally unique. If you enter a name that already exists, it appears in the 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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Open a user group page from the settings

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Add a user to a user group from the user table

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
3. Perform one of the following steps:
 - 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 delete a user from one or more user groups.
- From the user group page.
Do this if you want to delete multiple users from a single user group.
- From the user's profile page.

Prerequisites

You have a [global role](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Remove a user from a user group from the user table

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
3. Perform one of the following steps:
 - 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. Perform one of the following steps:

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 . » 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. b. On the action toolbar, click Remove. » 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. Perform one of the following steps:

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 . » 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. b. On the action toolbar, click Remove. » 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](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
3. In the tab pane, click **Users** → **Groups**.

» The user group table appears.

4. Perform one of the following steps:

If you want to...	Follow these steps
Delete a single group	- In the row of the group that you want to delete, click . » The Delete group dialog box appears. - Click Delete group.
Delete one or more groups	- Select the check boxes in front of the groups that you want to delete. - On the action toolbar, click Delete. » The Delete <number> groups dialog box appears. - Click Delete <number> groups.

LDAP user and group management

The Collibra Console administrator can integrate Collibra Platform Self-Hosted 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 Platform Self-Hosted.

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 Platform Self-Hosted manually.

Prerequisites

You have a [global role](#) that has the **User Administration** or **System Administration** [global permission](#), for example, **Sysadmin**.

Synchronize LDAP users from the **Settings** page

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **General**.
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 , and then click  **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 usernames are not allowed, regardless of their capitalization

Example `usernamecase` and `UserNameCase` are considered duplicates.

- No leading or trailing spaces
- No empty usernames
- Maximum of 255 characters
- Character limitations: Usernames may contain only the characters in the following Unicode categories:
 - Letter
 - Number
 - Symbol
 - Punctuation
 - Non-spacing marks

Profile page

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

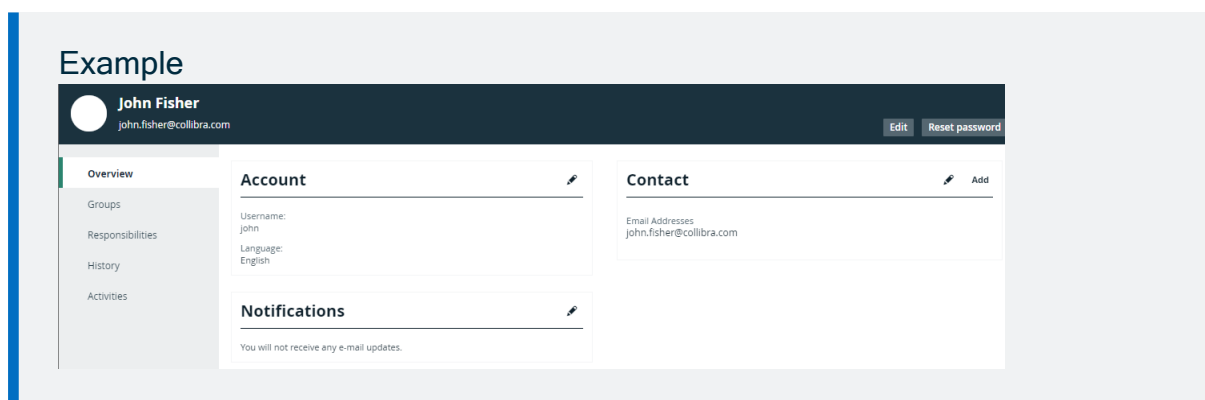
You can always see all information on your own profile page. On the profile pages of other users, you see basic information such as their name and contact information. If you have a [global role](#) with the User Administration or the System Administration [global permission](#), for example Sysadmin, you can see all information for all users.

Full profile page

The view bar contains important information about the user, such as the name, license type, required license type and email address. It contains buttons to [edit the user's name](#) and [reset the password](#).

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 groups of which the user is a member and, with the right permissions, 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. Only 300 responsibilities will be displayed at one time, even if more exist in the system.
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.



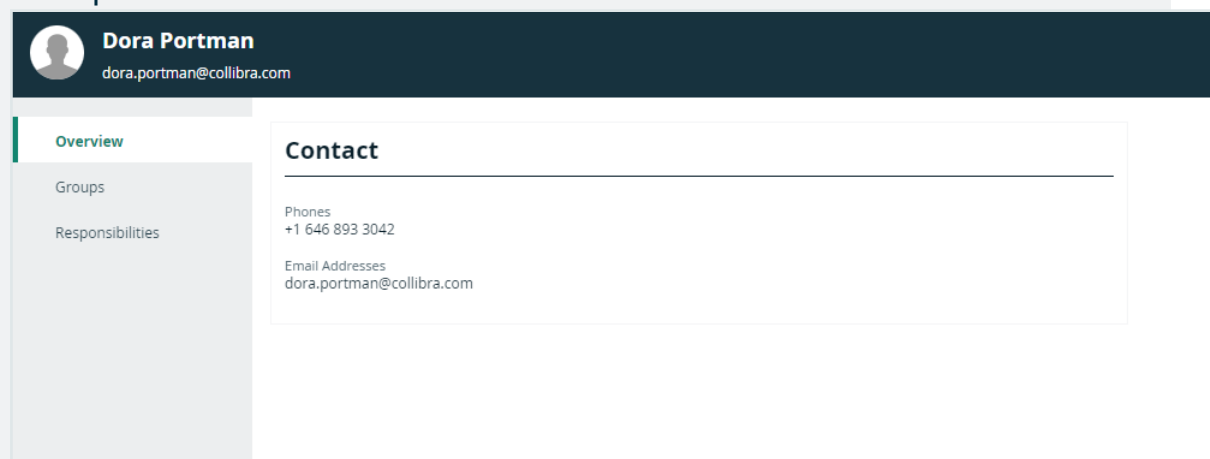
Basic profile page

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

The profile page contains the following tab pages:

Tab page	Description
Overview	The overview page contains the user's contact information.
Groups	The groups page contains the groups of which the user is a member.
Responsibilities	The responsibilities page contains the responsibilities that are assigned to the user. Only 300 responsibilities will be displayed at one time, even if more exist in the system.

Example



Open a profile page

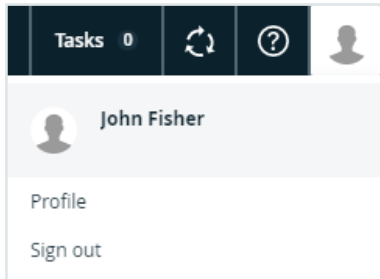
As a regular user, you can open your own profile page. Administrators can open everybody's profile page.

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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
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 Colibra, such as the registration mail and notifications.

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. Collibra username requirements - General requirements: - Uniqueness: Duplicate usernames are not allowed, regardless of their capitalization Example <code>usernamecase</code> and <code>UserNameCase</code> are considered duplicates. - No leading or trailing spaces - No empty usernames - Maximum of 255 characters - Character limitations: Usernames may contain only the characters in the following Unicode categories: - Letter - Number - Symbol - Punctuation - Non-spacing marks
Application Language	Choose the interface language. As an administrator, you can add or edit interface languages. Note From version 2022.11 onwards, Collibra takes the default language of your browser into account to select the interface text language of some sections. Collibra now also has translations of some interface text available out of the box. Consequently, you can no longer edit that interface text, nor translate it into unsupported languages. This includes the interface text of Usage Analytics, Data Marketplace and the Homepage.

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. Perform one of the following steps:
 - 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 , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.

3. Perform one of the following steps:
 - 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. 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 product notification settings

You can edit the product notification settings on your [profile page](#), where you can choose the types of notifications you'd like to receive, including:

- Scheduled maintenance
- Critical incidents
- Upcoming Collibra events
- Product sentiment surveys
- Product announcements (such as new offering and breaking changes)
- Research opportunities (to improve the product)

Note These settings control in-app notifications only.

Prerequisites

You have enabled [application usage data](#) in Collibra Console.

Collect Application Usage Data is enabled. Contact [Collibra Support](#) if this is not the case.

Steps

1. Click your avatar, then **Profile**.
 - » Your [profile page](#) appears.
2. In the **Product Notifications** section, select or clear the check box for each type of notification.

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
Read-only	A Read-only license is the basic license type. It allows a user to: • View resources. • Collaborate using social features such as comments, tags and ratings. Note It does not allow users to create, edit or delete resources. You can view which global and resource permissions require a Read-only license, in  Settings.

License type	Description
Standard	A Standard license is the enhanced license type. It allows a user to perform all actions that require Read-only permissions, and create, view, edit and delete resources, such as: • Create, edit and delete assets. • Create, edit and delete communities, domains and responsibilities. • Create and share (anyone's) application, community and domain views. • Create and share (anyone's) dashboards. • Bulk import assets through Excel, CSV or API (Connect). • Manage and participate in workflows. • Edit the operating model, for example create, edit and delete asset types. • Manage users, user groups, roles and permissions. You can see which global and resource permissions require a Standard license, in Collibra  Settings.

The maximum number of licenses 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

As a Collibra customer, you may install on self-owned and controlled computers, run, access or otherwise interact with authorized production, backup, test and development instances of the Collibra software in accordance with the documentation, by up to the number of users indicated in each Order ("Standard Users", hereafter referred to as "User") and for which Collibra provides license keys.

Users will be determined on a named user basis rather than on a concurrent user or shared user basis. Each user account shall be assigned to, and Collibra customers shall cause it to be used exclusively by, a single individual, for example without the creation of generic or shared user accounts. 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. You may reassign a user account where the person initially assigned such account has left the company or changed job assignments to a new role where use of the Collibra software is not part of such role responsibilities. However, you may not share or pool a user account's access among multiple individuals to allow for temporary use by multiple users, rather, purchase additional users as required.

Note There is currently a [known issue](#) with Edge only system users consuming a Standard license. We will allow all customers to exceed the license agreement for such Edge only users until this known issue has been fixed.

License assignment

License assignment is an automatic process. You cannot assign licenses individually. Instead, Collibra calculates the required license type for each user:

1. A required license is calculated based on the permissions assigned to the roles the user has, either directly or through the groups the user belongs.
2. An effective license is calculated based on the required license and whether the user participates in workflow activities.

Required licenses

The required license is the maximum license type of any permission included in a role that the user has. If none of the permissions require a Standard license, the required license of the user is Read-only.

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](#)

Effective licenses

The effective licenses are the number of Standard licenses currently in use:

- All of the required licenses.
- Additional workflow participation licenses for the current month.

Workflow participation

When a user that does not consume a Standard license participates in or starts a workflow, they retain their Read-only license but are counted against a Standard license for the current calendar month. This number is then reset at the start of the following calendar month.

Tip You can see when a user last took part in a workflow if [you add the column, Latest workflow participation](#) to the [users table](#).

Example Users with a Read-only license are counted for that specific calendar month's effective licenses when they have participated in a workflow during that calendar month. For example, if a Read-only user has only participated in a workflow in September, then they are not counted for October, or any other month, as long as they don't participate in any other workflows.

Example During the month, the effective license count grows as workflow participation is carried out by users with a Read-only required license. The number listed for effective license at the end of the month is then captured and reset at the start of the following month. For example, the effective number is 200 at the start of September, then there are 20 Read-only users with workflow participation by mid September: there are now 220 effective licenses in use. If another 30 new Read-only users participate in workflows by the end of September, the number is 250 at the end of the month. On the first day of October, the number of effective licenses resets to 200 and begins to increase again as users with a Read-only require license start participating in workflow activities.

Actions

An administrator can [view the available number of licenses per license type](#).

View used licenses

As an administrator, you can view how many [licenses](#) of each type are currently in use.

Note The information in this table is, by default, refreshed nightly.

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. Click **Users and groups**.
 - » The **Users** tab showing the [user and group settings](#) appears.
 - » The number of Standard licenses by workflow participation & permissions (**Effective**) and the number of Standard licenses by permissions only (**Required**) are shown above the user table.
3. If required, you can export these numbers by clicking .
 - » A CSV file will download.

Note You can [add the column](#), **Latest workflow participation** to see when a user last took part in a workflow, as this participation will require a Standard license.

1	2	3	4	5	6
Standard Licenses	Effective	11 /1000	Required	11 /1000	

Number	Description
1	Standard License refers to the type of license. User with the Standard license can create, edit and delete resource as well as participate in workflows. See the User licenses page for details.
2	The Effective licenses are the number of Standard licenses in use both by permission and by workflow participation. See the User licenses page for details.
3	The number of licenses in use versus the number of available license.
4	The Required licenses are the number of Standard licenses in use by permission only. See the User licenses page for details.
5	The number of licenses in use versus the number of available license.
6	Use this icon to export a CSV file with the monthly totals for Effective and Required licenses.

Note There is currently a [known issue](#) with Edge only system users consuming a Standard license. We will allow all customers to exceed the license agreement for such Edge only users until this known issue has been fixed.

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 , and then click  **Settings**.
 - » The [Colibra settings page](#) opens.
2. Click **Roles and permissions**.
 - » The [roles and permissions settings](#) appear on the **Global roles** tab page.
3. Do one of the following:
 - In the tab pane, click **Global Permissions**, to view the global permissions and their required license type.
 - In the tab pane, click **Resource Permissions**, to view the resource permissions and their required license type.
 - » The required license type is shown in the column **Required license**.

Standard license consumption

A Standard license in Colibra allows the holder to interact with the platform more, performing more tasks and activities than someone with a Read-only license can.

Note There is currently a [known issue](#) with Edge only system users consuming a Standard license. We will allow all customers to exceed the license agreement for such Edge only users until this known issue has been fixed.

Occupying a standard license seat

Each individual [permission](#) in Colibra requires either a Standard or a Read-only license. This applies to both [global](#) and [resource](#) permissions. Which license a given permission requires is visible under **Settings** → **Global Permissions** or **Settings** → **Resource Permissions**.

A [role](#) corresponds to a set of permissions, if the role contains at least one permission that requires a Standard license, then the role requires a Standard license.

The aggregate license requirement for each role is visible under **Settings** → **Global Roles** or **Settings** → **Resource Roles**.

Roles are [assigned to users](#), either directly or through a [group](#). If the user has at least one role that requires a Standard license, then the user is occupying a license seat. This is known as the user's required license.

[Global roles](#) are assigned in **Settings** → **Global Roles** and [resource roles](#) are assigned on community, domain or asset level (referred to as assigned [responsibilities](#)).

With the 2021 license model, a user with a Read-only required license participating in a [workflow](#) during a given calendar month will also effectively occupy a Standard license until the end of that month. This is known as the user's effective license.

Verify why a specific user requires a Standard license

If you want to check why a certain user is being counted as occupying a Standard license you can follow these steps:

Global roles

1. Go to **Settings** → **Users and Groups**.
2. Find the user that requires a Standard license and click on their name.
3. On the user's profile page click the **Groups** tab to see the list of groups the user belongs to.
4. In a separate browser, go to **Settings** → **Global roles**.
5. Each listed role indicates whether it requires a Standard or Read-only license.
6. Now verify if the user or one of their groups is assigned to a global role that requires a Standard license
 - » 1st browser show the user's **Groups** tab.
 - » 2nd browser shows the **Global Roles** page.



Joanna Zhou
joanna.zhou@colibra.com

Overview

Remove

Groups

Responsibilities

History

Activities

☐ Name ↕

☐ Product Demo Personas

Global roles	Name	Description	Required license	Members
Resource roles	AI Modular Data Classification	Allows usage of AI Modular Data Classification functionality.	Standard	AI Modular Data Classification API User
Global Permissions	Assessments	Allows usage of Assessments functionality.	Read-only	Everyone
Resource Permission	Asset Data Admin		Read-only	Product Demo Personas, DataLake Admin
	Catalog		Read-only	Product Demo Personas, DataLake Admin
	Catalog Author		Standard	DataLake Admin
	Data Dictionary		Read-only	Product Demo Personas, DataLake Admin
	DataSteward	Allows usage of Data Stewardship Manager functionality.	Read-only	Product Demo Personas, DataLake Admin
	DataSteward Author		Standard	DataLake Admin
	Edge Integration Engineer	Allows managing connectors and integration capabilities.	Standard	
	Edge Management API	Allows usage of the edge management API.	Standard	MDL Service API User, Catalog Service API User
	Edge manager	Allows creating and deleting Edge sites.	Standard	
	Edge site	Allows connection from Edge sites.	Standard	
	Edge site administrator	Allows downloading Edge site installers.	Standard	

Resource roles

1. Go to **Settings** → **Users and Groups**.
2. Find the user that requires a Standard license and click on their name.
3. On the user's profile page click the **Responsibilities** tab and verify if the user has a role that requires a Standard license.
4. In a separate browser, go to **Settings** → **Resource roles**.
5. Each listed role indicates whether it requires a Standard or Read-only license.
6. Now verify if the user or one of their responsibilities is assigned to a resource role that requires a Standard license.
 - » 1st browser show the user's **Responsibilities** tab.
 - » 2nd browser shows the **Resource Roles** page.

The screenshot displays the Collibra user interface for a user named Jeanine Zhou. The interface is divided into several sections: Overview, Responsibilities, Policy, and Roles. The Roles section is currently selected, showing a list of roles assigned to the user. The roles are categorized into Global roles, Resource roles, Global Permissions, and Resource Permissions. The table below lists the roles and their details.

Global roles	Name	Description	Required Item...	Resource ID
Resource roles	Assigned	A resource role who is assigned to complete a task. www.google.com	Standard	00000000-0000-0000-0000-000000000001
Global Permissions	Business Steward	A user who is involved in daily business-related decisions about h...	Standard	00000000-0000-0000-0000-000000000016
Resource Permissions	Business User	A user with responsibility over a domain, subject or process that is...	Standard	c0c00000-0010-0010-0000-000000000002
	Chief Data Officer	A high level decision maker who is responsible for enterprise wide...	Read only	00000000-0000-0000-0000-000000000007
	CISO	A Chief Information Security Officer (CISO) is the senior-level exec...	Standard	c0c00000-0000-0000-0000-000000000009
	Community Manager	A user who serves as a liaison to all different roles and groups. St...	Standard	00000000-0000-0000-0000-000000000015
	Council Member	A user who is a representative from business and technical data st...	Read only	00000000-0000-0000-0000-000000000009
	Data Analyst Level 1	The role of Data analyst level 1 is assigned to a user on a data etc...	Standard	00000000-0000-0000-0000-000000000001
	Data Analyst Level 2	The role of Data analyst level 2 is assigned to a user on a data etc...	Read only	00000000-0000-0000-0000-000000000002
	Data Category Manager		Read only	00000000-0000-0000-0000-000000000006
	Data Custodian	A resource role, a user who collects and holds information on beh...	Standard	00000000-0000-0000-0000-000000000001
	Data Protection Officer	A Data Protection Officer (DPO) is an enterprise security leader...	Standard	c0c00000-0000-0000-0000-000000000008
	Data Steward	A data steward is a role within an organization responsible...	Standard	c0c00000-0010-0010-0000-000000000003

Update a Standard license to a Read-only license

If you want to update a user from a Standard license to a Read-only license, you need to remove any roles and permissions that require a Standard license.

You can do this using the steps indicated above for verifying why a specific user requires a Standard license.

Note For customers that have SSO enabled, depending on the configuration of the system, removing a user from a group may require a change in the connected LDAP system.

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.

The settings detailed on this page apply to the relevant version of Collibra Platform Self-Hosted. For on-premises installations, you will need to reference the [compatibility table](#), to see which version of Collibra Data Intelligence Cloud is equivalent to the version of Collibra Data Governance Center you are using.

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. You first have to [enable services configuration in the Collibra settings](#). Contact [Collibra Support](#) if you want to use this section.

The Collibra configuration includes the following options:

General settings

The general settings of Collibra Platform Self-Hosted.

Setting	Description
Default locale (Requires restart)	The default locale for new users. It has to contain a language code and may contain a country code. • The language has to be an ISO language code. • The country has to be an ISO country code. Examples: <i>pl</i>, <i>en_US</i>, <i>nl_BE</i>.
Enable view rights	• ✓ True (default): The view permissions feature is enabled. • ✗ 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. • ✗ False: Hide the asset type of the target asset. The default value is <code>true</code>.

Help Menu

The configuration of the Help menu in Collibra Platform Self-Hosted.

Setting	Description
Links	The list of links in the help menu.

Setting	Description
Menu item name	The name of the menu item as it will appear in Collibra Platform Self-Hosted'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.
Show admin only	✓ True: The menu item is only visible to users with the Sysadmin role. ✗ 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. Keep in mind that these emails are only workflow emails and have nothing to do with the notification schedule. If you create an invalid Cron pattern, Collibra Platform Self-Hosted stops responding.
Template map	The location of template emails.
From address	The email address used as the sender of all outgoing emails. Contact Collibra Support to change the From address, see also Email configuration.

Setting	Description
Email address change notification This setting is only available for the ADMIN role.	If you change the email address to which notifications are sent, notification of the change is sent to the old email address.

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. 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. ✗ 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.

Hyperlinking configuration

The configuration of automatic hyperlinks. When you change a setting, you have to [rebuild the hyperlinks](#).

Setting	Description
Enable hyper-linking	✓ True: Hyperlinks are created automatically. ✗ False (default): Hyperlinks are not created automatically. For more information about automatic hyperlinks, see Hyperlinking. Warning If you enable this setting, the performance of Collibra can decrease.
Enable case sensitivity	✓ True: Hyperlinks are case-sensitive. ✗ False (default): Hyperlinks are not case-sensitive. 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 use this setting to exclude particular asset types so that not all the assets are potential targets for automatic hyperlinking. Each time you enter an asset type ID in a field, a new field appears for you to add another ID. To exclude multiple asset types, use separate fields, instead of entering multiple IDs in a single field separated by commas. Excluding assets reduces the amount of hyperlinks, which improves performance. Tip We recommend that you exclude technical asset types such as Column, Field, Table, Code Value, and Code Set. Note If you edit this setting, you have to reindex Collibra.

Recommender configuration

The configuration of the recommender.

We recommend not to change the default values of this configuration.

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. ✗ 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. 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. This percentage is expressed by a decimal where 1,00 equals 100%. Example 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.
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. This percentage is expressed by a decimal where 1,00 equals 100%.

Setting	impacts	Description
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. 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. 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. 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. Possible values: • <i>CERTIFIED</i>: Data sets that are certified are considered more relevant. • <i>POPULARITY</i>: The number of visits to the data set page.
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. Possible values: • <i>BASELINE</i> • <i>USER_MEAN</i> • <i>IICF</i> (Item-Item Collaborative Filtering) • <i>SLOPE_ONE</i> • <i>WEIGHTED_SLOPE_ONE</i>

Setting	Impacts	Description
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. 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, Colibra Platform Self-Hosted 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 if: ◦ The query contains a tilde (~). ◦ The query ends with a quotation mark ("). Note This applies only to queries via the user interface. A wildcard is not added automatically for REST API queries. ✗ False: A wildcard is not added to the search query.
Maximum batch size	The amount of resources that are scanned in a single operation for the search query. • Default value: 5,000 • Maximum value: 30,000
Maximum batch size for relations	The maximum batch size for relations reindex. • Default value: 500 • Minimum value: 50 • Maximum value: 10,000

Setting	Description
Stop words (Requires restart)	A list of stop words that are ignored as tokens for the index. The default list of English stop words includes the following: 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 If you do not create your own list of stop words, the default list is used. If you create your own list of stop words, you need to: 1. Reindex Colibra Platform Self-Hosted. 2. Restart the environment to apply your changes. For more information, go to Stop an environment and Start an environment.
Relation-based search	• ✓ True (default in new environments): The Data Marketplace search considers certain assets and relation types between assets. 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. Example A column named Order is included in a data set named Customer. If the relation-based search is enabled and you search for Order in Data Marketplace, then the data set Customer appears in the search results because the data set contains this column. Tip For more information about this feature and the default relation types, go to Filtering and searching based on relations in Data Marketplace. • ✗ False: The Data Marketplace search results do not consider relations. After you enable this setting, you must reindex Data Marketplace relations or reindex Colibra completely. Note In new Colibra environments, this setting is enabled by default. In upgraded Colibra environments, the previous status of this setting is retained.

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 determines how the search text is split. The Type field must contain either Standard (default) or Character. • Standard: The Standard tokenizer is a method of splitting the search text into individual terms and is based on a default set of characters. This tokenizer follows the word break rules from the Unicode Text Segmentation algorithm. • Character: The Character tokenizer allows you to customize when you want a search text to be split into individual terms. For more information, go to When and how to use the character tokenizer.
Parameter map	A list of characters that the Character tokenizer allows. If you entered <i>Character</i> in the Type field, you must add a parameter map. To add a parameter map: - Click Add. » The Add map option dialog box appears. - In the Field key field, enter the following value: <i>allowedCharacters</i> - In the Field value field, enter the set of characters that you want the tokenizer to allow. For more information, go to When and how to use the character tokenizer.

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.

Setting	Description
User group	The boost factor of user groups.
Name	The boost factor of names.
Comment	The boost factor of comments.
Tag	The boost factor of tags.
Attribute boost map	The boost factor of attribute types. • Field key: The attribute type ID. • 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. • ✗ False: Use the regular search order, taking into account boost factors.
Asset boost map	The boost factor of asset types. • Field key: The asset type ID. • Field value: The boost factor of the asset type.
Partial exact match enabled	Enables partial exact matching while searching for multi word phrases. • ✓ True (default): For multi-word search text, the search engine considers the exact match percentage with the resource name, when ordering the results. Example You enter search text "scheduled maintenance". Two example assets are ordered as follows: - An asset named "daily scheduled maintenance", as two of the three words (66%) match exactly. - An asset named "daily scheduled maintenance revised", as two of the four words (50%) match exactly. • ✗ 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. If the value is set to 0 (zero), all index queries are logged. 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. If the value is set to 0 (zero), all fetch queries are logged. Changes to this setting require a full reindex of your Collibra Data Intelligence Cloud environment.

5.4 Search Event Log configuration

The configuration of indexing.

Setting	Description
Automatic relation indexing	This setting keeps Data Marketplace up to date if relations between assets are created, updated, or removed. Example If the relation between asset A and asset B changes and this relation is used in relation-based filters or relation-based search, then the Data Marketplace search considers this change. ✓ True: Automatically index certain relation type changes between assets so that the relation information remains consistent between Collibra and Data Marketplace. The relation types that are considered are the relation paths used by relation-based search and filters. If such a relation type between assets changes, the change is reflected in the search index after some time. Tip For more information about this feature and the default relation types, go to Filtering and searching based on relations in Data Marketplace. Note Collibra does not automatically reindex relations between assets for relation paths that end with an attribute. You need to manually reindex the relations. You, for example, created a path that ends with an attribute: Table A contains Column B with attribute Privacy. If you have a column with attribute Privacy and value "sensitive data", a user searching for "sensitive data" can find Table A based on the relation path. However, changes to the attribute value will not be picked up automatically during automatic reindexing. ✗ False (default): Changes to relations are not automatically indexed. This can cause inconsistencies between Collibra and Data Marketplace. You can, however, manually reindex Data Marketplace relations.

Upload configuration

The configuration of the file upload service.

The file upload restrictions apply to the following actions in Collibra:

- [Importing and exporting assets and complex relations.](#)
- Uploading [attachments](#).
- Importing and exporting CMA files in the [Migration feature](#).

Setting	Description
Max file size	The maximum file size in bytes for uploads. • For cloud environments, the default value is 512 MB or 536,870,912 bytes. This value cannot be changed. • For on-premises environments, the default is 10 MB or 10,485,760 bytes.
Max per day	The maximum number of uploads per user per day. • For cloud environments, the default value is 1,235,465 uploads. This value cannot be changed. • For on-premises environments, the default is 150 uploads.
Accepted content types	The MIME type names of the files you want to allow for uploads. For example, type <i>application/pdf</i> for PDF files.
Restricted content types	Content types in MIME type format that cannot be uploaded. Restricted content types take precedence over an accepted content types: • application/vnd.ms-excel.addin.macroenabled.12 • application/vnd.ms-excel.sheet.binary.macroenabled.12 • application/vnd.ms-excel.sheet.macroenabled.12 • application/vnd.ms-excel.template.macroenabled.12 • application/vnd.ms-powerpoint.addin.macroenabled.12 • application/vnd.ms-powerpoint.presentation.macroenabled.12 • application/vnd.ms-powerpoint.slide.macroenabled.12 • application/vnd.ms-powerpoint.slideshow.macroenabled.12 • application/vnd.ms-powerpoint.template.macroenabled.12 • application/vnd.ms-word.document.macroenabled.12 • application/vnd.ms-word.template.macroenabled.12

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. The default value is <i>10</i>.														
Buffer flush time	The maximum amount of time in milliseconds to keep statistic entries in memory before saving them in the database. The default values is <i>10,000</i>.														
Cron map	List of statistics, listed by their Cron name, and a Cron interval. These are the default values: <table> <tr> <th>Field key</th><th>Field value</th></tr> <tr> <td>workflow-task</td><td>0 59 23 * * ?</td></tr> <tr> <td>active-users</td><td>0 0/15 * * * ?</td></tr> <tr> <td>term-count</td><td>0 59 23 * * ?</td></tr> <tr> <td>vocabulary-count</td><td>0 59 23 * * ?</td></tr> <tr> <td>page-hit</td><td>0 0 * * * ?</td></tr> <tr> <td>task-count</td><td>0 0 * * * ?</td></tr> </table> If you create an invalid Cron pattern, Colibra Platform Self-Hosted stops responding.	Field key	Field value	workflow-task	0 59 23 * * ?	active-users	0 0/15 * * * ?	term-count	0 59 23 * * ?	vocabulary-count	0 59 23 * * ?	page-hit	0 0 * * * ?	task-count	0 0 * * * ?
Field key	Field value														
workflow-task	0 59 23 * * ?														
active-users	0 0/15 * * * ?														
term-count	0 59 23 * * ?														
vocabulary-count	0 59 23 * * ?														
page-hit	0 0 * * * ?														
task-count	0 0 * * * ?														

Import configuration

The configuration for imports.

Setting	Description
Enable workflows during import	✓ True: Allow starting workflows upon importing assets. ✗ False (default): Do not allow to start workflows upon importing assets.

Setting	Description
Asset responsibilities support	✓ True: Enable importing responsibilities at asset level. ✗ False (default): Disable importing responsibilities at asset level. Warning Setting specific responsibilities on a large number of resources will affect the performance and stability of the system.
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. The default and maximum value is <i>100</i>.
Temporary data location	The location of the temporary files used by the import job. The default value is <i>FILE</i>.

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. Lower values reduce the burden on memory. Higher values require more memory, but may slightly increase the speed of the export. The default value is <i>5,000</i>.

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. Lower values reduce the burden on memory. Higher values require more memory, but may slightly increase the speed of the export. 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. ✗ 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. Lower values reduce the burden on memory. Higher values require more memory, but may slightly increase the speed of the export. 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. ✗ False (default): API call logging is disabled.
Maximum number of log entries (Requires restart)	The maximum number of API calls to store in the database. Once this number is reached, the oldest records are overwritten. The default value is 1,000,000.
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.

System metrics

The configuration of metric collection.

Setting	Description
Enable (Requires restart)	✓ True (default): Metric collection is enabled. ✗ False: Metric collection is disabled.
Enable JVM metrics (Requires restart)	✓ True (default): JVM metric collection is enabled. ✗ False: JVM metric collection is disabled.
Enable advanced metrics (Requires restart)	✓ True: Advanced metrics collection is enabled. Enabling this option has a negative impact on the performance of your environment. ✗ False (default): Advanced metrics collection is disabled.

Setting	Description
Enable minimal monitoring (Requires restart)	✓ True: Monitoring of the metrics is enabled. ✗ False (default): Monitoring of the metrics is disabled.

API configuration

The configuration of API settings.

Setting	Description
Enable maximum paging limit	✓ True (default for new environments): The maximum paging limit is set to 1,000 data elements per API call. Note Once the maximum paging limit has been enabled, it cannot be disabled. ✗ False : There is no maximum paging limit per API calls. We recommend you enable the maximum paging limit, as too many data elements per API call can cause your environment to crash.

Security configuration

The configuration of security.

Setting	Description
X-Frame options (Requires restart)	The content of the HTTP-header <code>X-Frame-Options</code> . 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. ✗ False (default): A user can open multiple sessions.

Setting	Description
Office research guest access	✓ True: The Office research integration is always allowed guest access via REST, regardless of the general Guest access setting. ✗ False (default): The general Guest access setting is kept. Note Currently, The Office research integration is only available when Collibra Platform Self-Hosted is publicly available, which is why this override setting is necessary.
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. ✓ True: Potentially dangerous HTML elements are removed from text attributes when you save the text field. ✗ False (default): No HTML elements are removed from text attributes when you save the text field. Note If you enable this setting, the following HTML elements are deleted when you save: • script (including JavaScript) • svg • frame • frameset • iframe • any event handlers
Guest access This setting requires the SUPER role.	✓ True: Anyone that can access the URL, has viewing rights to the system. ✗ 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. ✗ False (default): Schema fields are hidden during an introspection.

Setting	Description
Enable schema introspection for Public GraphQL APIs (Requires restart)	✓ True (default): Schema fields are shown when using introspection for public APIs. ✗ False: Schema fields are hidden when using introspection.
Enable customer validation functions	✓ True (default): Groovy scripts with custom validation functions can be loaded. ✗ 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. ✗ 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. ✗ 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. The default value is 500. You can set it to 0 to disable paging. 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.

Setting	Description
Group page size	The page size that is used when retrieving groups. You can set it to 0 to disable paging. 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. The default value is 120,000. You can set it to 0 to disable the time limit. Tip - If you get Time limit Exceeded error messages, increase the default value or check why the LDAP search takes too long. - 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. ✗ False: The synchronization job is disabled.
Sync job cron	The schedule to perform an LDAP synchronization (CRON). The default value for this setting is daily at midnight. If you create an invalid Cron pattern, Collibra Platform Self-Hosted stops responding.
User field mapping	The configuration mapping of all the user fields. This determines which LDAP field is mapped 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.

Setting	Description
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. • The language has to be an ISO language code. • The country has to be an ISO country code. Examples: <i>pl</i>, <i>en_US</i>, <i>nl_BE</i>.
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.
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 Messenger	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.

Setting	Description
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.
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.

Setting	Description
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 <i>UNKNOWN</i> 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.
Servers	The Collibra parameters to map with your LDAP server parameters.
	The URL or IP address to the LDAP server, for example <i>ldap://ldap.yourcompany.com:389</i> or <i>ldaps://ldap.yourcompany.com:636</i> .
	The DN of the administrator user that is used for authentication, for example <i>admin</i> .
	The password of the administrator user.
	The base DN for when you are working with relative DNs. This base DN is used for all LDAP look-ups.
	The base DN of where the LDAP users for Collibra are located. If a base has been specified, it is used as a prefix for this user base. Subtree search is used, so all DNs located below are searched for matching users.
	The filter that specifies which users can authenticate in the application. By default, all the objects found in the user base are selected, including the root.

Setting	Description
	The filter that specifies which users are imported by the synchronization job. The users have to be the same as, or a subset of, the Authentication user LDAP filter. If you provide no value for this setting, the same filter as specified for the Authentication user LDAP filter setting is used. That allows you to synchronize only the users that have to have access to the application, even if they have not logged in yet. Users in the Authentication user LDAP filter are synchronized each time they authenticate and are only available after the first sign-in to the application. This is the default setting.
	The authentication mechanism for authenticating users on the LDAP servers.
	• ✓ True: The LDAP context is destroyed immediately. When using TLS, some servers require the connection to be shut down by the client before the LDAP context is destroyed. • ✗ False (default): The LDAP context is not destroyed immediately.
	Specifies what to do with referrals. Possible values: Note If you are experiencing slow searches on Microsoft Active Directory with the <i>follow</i> value for the Referral setting, try using the Global Catalog as Active Directory domain controller. The Global Catalog enables searching for Active Directory objects in any domain in the forest without the need for subordinate referrals. This can dramatically speed up searching. However, the Global Catalog only contains a subset of the attributes of an object. This solution is only viable if the attributes requested for the search results are stored in the global catalog. Note that the Global Catalog is accessible on port 3268/3269, not the standard 389/636 LDAP ports.
	The base DN of where all the groups are located. If a base has been specified, that base is used as the prefix for this group base.
	The LDAP filter to which each group has to comply to be synchronized.
Batch synchronization	The synchronization of the users with the LDAP server happens in batches.
Batch size	The number of users in each batch. If a batch fails, none of the users in that batch is updated and the user names are listed in the DGC service log. Other batches are processed as normal. After processing all batches, Collibra disables users that are no longer in LDAP, unless one or more batches failed. Set the value to 0 to disable batch processing.

Password

The configuration of passwords.

Setting	Description
Minimum length (Requires restart)	The minimum length of passwords. The default minimum length is 12.
Maximum length (Requires restart)	The maximum length of passwords. The default maximum length is 1,024.
Digits required (Requires restart)	✓ True (default): Passwords have to contain one or more digits. ✗ False: Passwords do not have to contain digits.
Non alpha-numeric required (Requires restart)	✓ True (default): Passwords have to contain one or more non-alphanumeric (special) characters. ✗ 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. ✗ 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. ✗ False: Passwords do not have to contain lower-case characters.
Username disallowed (Requires restart)	✓ True (default): Passwords cannot be the username. ✗ False: Passwords can be the username.
Expiration interval (months)	The number of months before users have to change their passwords. Set it to 0 if users never have to change their passwords. The default interval is 6 months.

Setting	Description
Allowed login failures	The number of consecutive failed login attempts that are allowed before the user account is disabled. Set it to <i>0</i> for unlimited attempts. The default is 3 login failures.
No reuse count	The number of previous passwords users cannot reuse. The default is <i>1</i>: the user cannot change his password to what it currently is. Set this to <i>0</i> to allow using the same password.
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. The default value is 60 minutes. 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. A locked-out account does not mean that your account is disabled.

REST

The security configuration of the REST interface.

Setting	Description
Limited CSRF	This option offers limited security, so we recommend upgrading to the Enhanced CSRF. ✓ True: The validity of a request is checked with a CSRF token. ✗ False (default): The validity of a request is not checked with a CSRF token.

Setting	Description
Enhanced CSRF	If enabled, Collibra will check the validity of the request using a Spring Security CSRF token. ✓ True: The validity of a request is checked with a CSRF token. ✗ 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. ✗ 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. ✗ 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, <i>JKS</i> or <i>PKCS12</i> .
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, <i>JKS</i> or <i>PKCS12</i> .

SSO

The configuration of Single Sign-On (SSO) authentication.

Setting	Description
Mode	The SSO mode of Collibra. The possible values are: • SAML_ATTRIBUTES • SAML_LDAP • SSO_HEADER • SSO_HEADER_LDAP • DISABLED
Header	The name of the header to be checked. The contents of this header is used for the search query, which is <i>SSO_HEADER = username</i>. The value of the actual query depends on DN and possibly Attribute.
DN	If the SSO mode is SSO_HEADER_LDAP or SAML_LDAP, this field determines whether the distinguished name (DN) or attribute is used: • ✓ True: The header has to contain the distinguished name (DN) of the user in the LDAP. • ✗ False (default): The header has to contain the value of Attribute. 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. If the above criteria are met, the LDAP has to contain this value. Example If Attribute is <i>FirstName</i>, 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 • ✓ True: User accounts are not created automatically. • ✗ False (default): User accounts are created automatically.

Setting	Description
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. ✓ True: Users cannot access the Collibra signin page. ✗ 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. Note A metadata file can describe multiple entity IDs, make sure to use in the entity ID from the correct metadata file.
Attribute fields	The mappings of attributes in the SAML response. The values are used as keys to look for in the SAML response. 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. This attribute is optional. The value can be empty.
Last name	The mapping for the user's last name. This attribute is optional. The value can be empty.
Email	The mapping for the user's email address. This attribute is optional for existing users, but mandatory for new users. 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.

Setting	Description
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. If passing groups in this attribute, you must set Groups DGC Managed to <i>False</i>.
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.
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.

Setting	Description
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.
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 <i>UNKNOWN</i> will be used.
Male value	The value for male users.
Female value	The value for female users.

Setting	Description
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). This option is only relevant if Mode is <code>SAML_ATTRIBUTES</code>. ✓ 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. ✗ 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.
Service Provider Entity ID	Field that determines the value of the <code>Entity ID</code> parameter in the service provider metadata returned by Collibra. The default value is empty, in which case Collibra uses the value of the <code>Base URL</code> field. Enter a custom value if the base URL does not match the <code>audience</code> configured in your SAML identity provider. Warning The value of the <code>audience</code> restriction in the SAML response has to be exactly the same as the value of this field. Note SSO does not work if the <code>Service Provider Entity ID</code> field contains the base URL with trailing forward slash (for example <code>www.collibra.com/</code>), and the <code>audience</code> of your IDP contains the base URL without a trailing forward slash (for example <code>www.collibra.com</code>). 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. ✗ False (default): Authentication request don't have to be signed.
Force authn	✓ True (default): The SP authentication request forces re-authentication. ✗ False: The SP authentication request does not force re-authentication.

Setting	Description
Force passive	✓ True: The reauthentication has to happen in the background. ✗ False (default): The reauthentication does not have to happen in the background. This is only relevant if Force authn is <i>True</i>.
Name ID	Name ID that is used in the SP authentication. The default value is <i>urn:oasis:names:tc:SAML:2.0:nameid-format:persistent</i>. The Name ID value is mandatory.
Name ID allow create	✓ True (default): The IDP can create a name ID to fulfill the SP authentication request. ✗ 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. ✗ 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. ✗ 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. Possible values: <i>minimum</i> <i>maximum</i> <i>better</i> <i>exact</i> (default value) For more information about the comparison type values, refer to the SAML specifications.

Setting	Description
Reference list	The list of class references in the requested authentication context. You can separate list items with the pipe character (). 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 (). For more information about this list, refer to the SAML specifications.
Response decryption mode	Enable the support for encrypted SAML responses. • DISABLED: Collibra only accepts plain-text SAML responses. • OPTIONAL: Collibra can handle both encrypted and plain-text SAML responses. • FORCED: Collibra only accepts encrypted SAML responses. 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. 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. • ☐ 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. The escape character will be added to fields that start with one of the following characters: • equation: = • plus: + • minus: - • at-sign: @ 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. 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. Leave blank if the authorization server does not provide a media type parameter. 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. Leave blank to accept all digital signature algorithms.

Setting	Description
JWT Issuer	The accepted issuer coming in the iss JWT claim. Leave blank if the authorization server does not provide an issuer claim.
JWT Audience	A comma-separated list of accepted audience values for the aud claim. 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. 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. Defaults to the standard subject claim, sub. Change this setting only if your authorization server has other means of identifying the principal, for example, a client_id claim. 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. Differences smaller than the given amount are ignored when performing time comparisons for token validation. 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 '{connectSrcWI}' placeholder.
font-src whitelist	The 'font-src' whitelist. To use this whitelist in a security header, use the '{fontSrcWI}' placeholder.
frame-src whitelist	The 'frame-src' whitelist. To use this whitelist in a security header, use the '{frameSrcWI}' placeholder.

Option	Description
img-src whitelist	The 'img-src' whitelist. To use this whitelist in a security header, use the '{imgSrcWI}' placeholder.
script-src whitelist	The 'script-src' whitelist. To use this whitelist in a security header, use the '{scriptSrcWI}' placeholder.
style-src whitelist	The 'style-src' whitelist. To use this whitelist in a security header, use the '{styleSrcWI}' placeholder.
frame-ancestors whitelist	The 'frame-ancestors' whitelist. To use this whitelist in a security header, use the '{frameAncestorsWI}' placeholder.
Tableau frame-ancestors whitelist	The tableau 'frame-ancestors' whitelist. To use this whitelist in a security header, use the '{tableauFrameAncestorsWI}' 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. ✗ False (default): Don't show a disclaimer.
Disclaimer message	The disclaimer message that is shown after signing in. If you leave this field empty, there is a default message. 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.
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, <i>INDEX</i> and <i>SEQUENCE</i> .
AWS regions restriction	A list of AWS regions Data Catalog is allowed to connect to. For example, <i>eu-west-3</i> and <i>us-east-2</i>. For a list of all AWS locations, see the AWS documentation. • If you want to allow Collibra to make a connection to any AWS region, leave the field empty. • 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: <code>collibra_catalog_<Asset Id>_<Domain Id></code> For example: <code>collibra_catalog_d3174a88-5ffe-4d50-8fbe-7bf0832ec3af_5d198ce9-4e56-4d0e-a885-58204da50741</code> • 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. Use this option to limit the number of API calls per second to prevent throttling errors from the AWS API.

Setting	Description
Database registration via Edge	An option to enable database registration via Edge. ✓ True: Register a data source via Edge. ✗ False: Register a data source via Jobserver only. Note Enabling data source registration via Edge does not prevent you from registering a data source via Jobserver as well.
Collibra Data Quality & Observability Synchronization UI via DQ Connector on Edge	An option to enable the Data Quality extraction interface in Collibra ✓ True: The Quality extraction tab is available on the configuration page of a database asset ✗ False (default): The Quality extraction tab is not available and as such, it is not possible to extract and synchronize data quality information. You can only enable Collibra Data Quality & Observability synchronization if you also enabled Database registration via Edge.
Google Cloud Storage synchronization via Edge	An option to enable Google Cloud Storage file system registration and synchronization via Edge. ✓ True: You can register and synchronize a Google Cloud Storage file system via Edge. ✗ False: You can't register a Google Cloud Storage file system via Edge.
Amazon S3 synchronization via Edge	An option to enable Amazon S3 file system registration and synchronization via Edge. ✓ True: You can register and synchronize an Amazon S3 file system via Edge. ✗ False: You can only register an Amazon S3 file system via Jobserver. 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. For more information, see Working with Amazon S3.

Setting	Description
Databricks Unity Catalog synchronization via Edge	An option to enable the integration of Databricks Unity Catalog via Edge. ✓ True: You can register and synchronize Databricks Unity Catalog via Edge. ✗ False: You cannot integrate Databricks Unity Catalog. Set this option to True.

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. The name is a freely chosen name but it is recommended to only use alphanumeric characters and dashes, for example Jobserver-1. You will have to use this name as the ID of the gateway and in the address of this configuration.
Protocol	The protocol that is used for the communication between the Data Governance Center service and the Jobserver service. 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. 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.

Setting	Description
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

Profiling must be executed again after a change in this section.

Setting	Description
Maximum number of samples	The maximum number of samples you want to collect for a data source. The default value is 100. The maximum value is 1,000. This setting is specific to sample data .
Maximum value length	The maximum length of a value extracted during profiling or sampling. Additional characters are trimmed.
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.

Setting	Description
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. 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 (Jobserver)	An option to anonymize sensitive data. ✓ 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. ✗ False (default): No content is removed or replaced by a random hash value. Tip For anonymization via Edge, see setting "Anonymize Edge profiling results for all data types".
Database profiling via Edge	An option to enable profiling and classifying of synchronized metadata via Edge instead of Jobserver. ✓ True: Profiling and classification via Edge. ✗ False: Profile via Jobserver and classify via the Data Classification Platform. Note You can enable Database profiling via Edge only if you also enabled Database registration via Edge.
Maximum duration of a profiling Edge job	The maximum time duration, in minutes, that a profiling Edge job can run before Data Profiling stops the job. The default value is 20,160 minutes, 2 days. You can increase this limit to a maximum of 4 days.

Setting	Description
Parallel database profiling via Edge	The maximum number of schemas that Edge can profile at the same time. By default, the value of this setting is 4. This means Edge processes four profiling jobs at a time. This can have a huge positive impact on the performance of the profiling activity. You can increase this number to a maximum of 16. Note • If you increase this number to more than four jobs, make sure that your Edge site resources are aligned with the extra requests it will receive. • If you decrease this number and the running number of jobs exceeds the limit, no job will be canceled. Instead, there won't be any room to schedule a new job until at least one running job is completed. Example The parallel schema profiling via Edge setting is set to 4. • For 1 database that contains 3 schemas, we will process all 3 schemas at the same time. • For 2 databases that contain 4 schemas in total, we will process all 4 schemas at the same time. • For 1 database that contains 8 schemas, we will start with 4 schemas and then proceed to the next ones as soon as a job is completed.
Anonymize Edge profiling results for all data types	Enable this option to anonymize all Edge profiling results stored in Collibra. • ✓ True: Profiling results via Edge are anonymized for all columns. • ✗ False (default): Profiling results via Edge are anonymized only for columns with the Text or Geo data type.
Calculate Data Similarity (Beta)	Enables the data similarity feature in your environment. • ✓ True: Extra algorithms can run during profiling via Edge allowing the calculation of data similarity scores. The data similarity scores are currently used in Data Marketplace to show similar Table assets. • ✗ False: (default): The beta feature is not enabled.

Beta features

The configuration of features in beta state.

Setting	Description
Tableau provisioning enabled	✓ True: Provisioning to Tableau is enabled. ✗ 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. Default value is 4, set to 0 if there is no limit.
Task sidebar	✓ True (default): Workflow tasks appear in the sidebar on both resource pages and 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. ✗ False : 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 (default): Show the new Settings landing page in your Collibra environment. ✗ False : Use the classic Settings page in your Collibra environment.
Allow access to the Workflow Designer	✓ True: Enable the Workflow Designer accessglobal permission which allows access to the Workflow Designer, a visual tool for creating process definitions. ✗ False (default): Disable the Workflow Designer access global permission.
Frontend enabled This setting requires the SUPER role.	✓ True: Enable the frontend (shell) in the application. This will be served under the /apps/ and select other endpoints if enabled. Enabling this option results in some new designs and may be required for new applications. ✗ False (default): Disable the frontend (shell) in the application.
Shell asset page enabled	✓ True: Enable the new asset page layout in the user interface. ✗ False (default): Disable the new asset page layout in the user interface.

Setting	Description
Unified Classification enabled	Enables the new Unified Data Classification method on Edge. ✓ True: The environment uses the new classification method, Unified Data Classification. This has an impact on the available data classes, the required capabilities, and the way you classify data. Note All existing data classes and classifications become unavailable. Tip A migration process will be available in a future release. This process will transfer all old data classes and classifications to the Unified Data Classification method. Old transferred data classes will need to be updated to include classification rules to work with the new automatic data classification method. ✗ False: (default): The beta feature is not enabled. If you deactivate the setting, you revert back to your previous data classification setup and the previously defined data classes and classifications become available again.
Collections	Enable this setting to activate the use of collections in Data Marketplace. ✓ True: Collections can be used in Data Marketplace. - Users can add an asset to a collection from an asset preview in Data Marketplace. They can also remove an asset from a collection from the asset preview. - Users can access and manage all their collections from an overview page via their avatar → Collections. ✗ False: (default): The beta feature is not enabled. - When disabled, collections are not accessible via the UI. - Existing collections are not removed.

Setting	Description
Uninterrupted Search	✓ True: The search function remains available and the current data is available for search, while the search index is rebuilding in the background. Search results, however, may not be up to date until the rebuild is complete. After the rebuild is complete, all new data and changes to the existing data become available for search. ✗ False (default): The search function becomes temporarily unavailable when the search index is rebuilding. Important If you enable or disable this setting, you need to rebuild the search index for the change to take effect.

Setting	Description
Throttling enabled This setting requires the SUPER role.	✓ True: REST API v1 throttling is enabled. ✗ False (default): REST API v1 throttling is disabled.
Number of requests This setting requires the SUPER role.	The number of allowed request for the configured number of seconds.
Number of seconds This setting requires the SUPER role.	The number of seconds during which the configured number of requests can be performed.
Setting	Description
Throttling enabled This setting requires the SUPER role.	✓ True: REST API v2 throttling is enabled. ✗ False (default): REST API v2 throttling is disabled.
Number of requests This setting requires the SUPER role.	The number of allowed request for the configured number of seconds.

Setting	Description
Number of seconds This setting requires the SUPER role.	The number of seconds during which the configured number of requests can be performed.
Setting	Description
Throttling enabled This setting requires the SUPER role.	✓ True: GraphQL throttling is enabled. ✗ False (default): GraphQL throttling is disabled.
Number of requests This setting requires the SUPER role.	The number of allowed request for the configured number of seconds.
Number of seconds This setting requires the SUPER role.	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. ✗ False (default): Disable limiting the number of root elements as result of a Graph query.
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). 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. The default value is 100,000. 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.
Maximum number of nodes that can be requested with the graph query API in a single page	The maximum number of both root and children nodes that can be requested through Output API in a single data page. If the value is outside of the allowed range an exception is thrown. The default value is 1 million.

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). 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. Example A value of <i>600</i> means that if a table hasn't loaded within 600 seconds, the task is canceled and a timeout error is shown. 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. ✗ 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. The default value is 3, the minimum is 1, the maximum is 9. This setting is only relevant if Multi-column sorting on tables is <i>True</i>.

Inherited responsibilities

Setting	Description
Enable Inherited Responsibilities	✓ True: Shows both direct and inherited responsibilities when filtering or displaying assets in table and tile views. ✗ False (default): Shows only direct responsibilities when filtering or displaying assets in table and tile views. Note - This setting affects only asset views and tile sets. It does not affect the Responsibilities tab of asset pages. - If this setting is set to True, opening a table or tile view may take longer depending on factors such as asset count, selected columns, and applied filters.

Purge configuration

The configuration of the automatic purging of data from the repository database. Purging means to delete data of a specified age. This helps to keep your data relevant and keep the database from growing infinitely.

Setting	Description
Purge schedule (Requires restart)	A Cron expression specifying the timing and frequency of purge cycles. The default scheduled time is 002 * *, which equates to 02:00 every day. If you create an invalid Cron pattern, Colibra Platform Self-Hosted stops responding.
Maximum time for each purge cycle (Requires restart)	Maximum amount of time (in seconds) allowed for each purge cycle. The default value is 7,200, which is two hours. Any qualifying data that is not purged in the allowed time will be addressed in a subsequent purge cycle, which picks up where the previous cycle left off.
List of data elements and age at which each will be purged (Requires restart)	The data elements that will be purged at the specified age, in a key-value format: • The data elements to be purged (Field key). Possible data elements: ◦ Statistics: Data that has been used to calculate data quality. ◦ Authentication events: Data about authentication in your environment. ◦ Validation results: Information about data validation. ◦ Jobs: Data about all jobs that are created in your environment. ◦ Workflows: Data about completed workflow instances and tasks. ◦ License usage: Data about how licenses are used in your environment. • The age (in months) at which each individual data element will be purged (Field value).
Enable removal of orphaned tags (Requires restart)	Option to enable the automatic deletion of tags that are not assigned to any assets. • ✓ True (default): Orphan tags are deleted according to the timing and frequency that you specify. • ✗ False: Orphan tags are not deleted.
Orphaned tags removal schedule (Requires restart)	A Cron expression specifying the timing and frequency of the deletion of orphan tags. The default scheduled time is 001 * *, which equates to 01:00 every day. If you create an invalid Cron pattern, Colibra Platform Self-Hosted stops responding.

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. ✗ False (default): Do not use Collibra's data classification technology are not accepted.

Classification thresholds

Setting	Description
Enable automatic classification acceptance and rejection	✓ True: The automatic acceptance and rejection of data classification suggestions is active. ✗ False (default): Data classification suggestions are not automatically accepted or rejected. Tip Start using the Automatic Data Classification tool by manually accepting and rejecting the data classification suggestions. Only activate the automatic acceptance and rejection feature if you are comfortable with the results the tool provides.

Setting	Description
Automatic acceptance threshold	The percentage from which data classification suggestions must be accepted automatically. If you set this value to 75, then the classification suggestions with a confidence level of 75% or higher are automatically accepted. If multiple classification suggestions meet the threshold condition for a column, the classification suggestion with the highest confidence level percentage is accepted automatically if this classification suggestion is the only one to have that confidence level percentage. Example You set the automatic acceptance threshold to 85%. You classify a table with 2 columns. - For column A, three classification suggestions are possible, one with confidence level 93%, one with 92%, and one with 90%. - For column B, two classification suggestions are possible. Their confidence level is the same, 86%. The results of the automatic acceptance will be: - For column A, the classification suggestion with 93% will be accepted automatically. - For column B, nothing is done, both suggestions will be visible. The default acceptance threshold is 90.
Automatic rejection threshold	The percentage from which data classification suggestions must be rejected automatically. If you set this value to 49, then all data classification suggestions with a confidence level of 49% or lower are automatically rejected. The default rejection threshold is 10.

Note If the acceptance threshold and rejection threshold are set to the same value, and a data classification suggestion has this confidence level percentage, the classification suggestion will be rejected.

Reporting

For more information about these settings, go to [Insights Data Access](#).

Setting	Description
Cloud Provider	Cloud provider - AWS or GCP
Customer GUID	The GUID of your Collibra environment. Note This field is configured by Collibra Cloud Ops.
Insights download bucket name	The name of the AWS S3 bucket in which your reporting data is stored. Note This field is configured by Collibra Cloud Ops.
Insights AWS S3 Region	The AWS S3 region in which your data is processed. Note This field is configured by Collibra Cloud Ops.
Insights zip location pattern	A pattern with the format <code>"/zip/insights_%s.zip"</code>, where <code>"%s"</code> is replaced by the Collibra Insights snapshot date. Note This field is configured by Collibra Cloud Ops.
Tableau report URL pattern	The Tableau URL pattern, which should contain <code>{reportName}</code>. 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 Usage Analytics 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. ✗ False: Catalog experience is disabled.
Catalog Experience Titlebar theme	The theme for the Catalog experience. You can choose between the LIGHT and DARK. 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. The value must be a positive integer and cannot be greater than 3,600 (one hour). The default value is 300. Example A value of <i>300</i> 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. The value must be a positive integer and cannot be greater than 100,000. The default value is 10,000. Example A value of <i>10,000</i> 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.

Setting	Description
Size limit for the frontend	The maximum number of visible nodes plus edges that can be shown on the page. The value must be a positive integer and cannot be greater than 10,000. The default value is 2,000. 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. The value must be an integer between 1 and 100. The default value is 50. Note • If the maximum flow depth is specified in the selected diagram view, that value supersedes the maximum you specify here. • You can also manually adjust the flow depth in the diagram.
Diagrams Business Qualifier Filter (*)	• ✓ True: Users can filter diagrams by a specified Business Qualifier asset. • ✗ False (default): Users are unable to filter diagrams by Business Qualifier.

Everywhere Desktop configuration

These settings determine some of the ways in which Collibra for Desktop interacts with Collibra Data Intelligence Cloud.

Note These settings are only applied in Collibra for Desktop if you have Collibra 2021.01 or newer in combination with Collibra for Desktop 1.2.1 and newer.

Setting	Description
Default search filter	The filter that is applied, by default, to search results. The value must be the UUID of the filter. To find the UUID, open the Collibra environment and click in the Search box. Click the name of a search filter. In the address bar you will see the UUID of the filter. Note Specifying a default search filter in the application will override the default filter that you specify here.
Custom Search box placeholder	Placeholder text that appears in the Search field before a user enters search text. The default text is "Search in Collibra".
Shortcut Search	Enable or disable the use of a keyboard shortcut to search for selected text in Collibra Platform Self-Hosted from within your browser or another application. ✓ True (default): Users can use the keyboard shortcut you specify in the following setting to search in Collibra Everywhere. ✗ False: Keyboard shortcut is disabled.
Custom Shortcut Search	The keyboard shortcut to search for selected text in Collibra Platform Self-Hosted from within your browser or another application. Tip The keyboard shortcut has to be a combination of Control, Alt or Shift with one letter or number. On macOS you can also use the Command key. Note - To make available the keyboard shortcut, you have to enable the feature in the previous setting. Specifying a keyboard shortcut in the application will override the shortcut that you specify here.

Setting	Description
Enable Auto Hyperlinking	Option to enable automatic hyperlinking within Collibra for Desktop. With this option enabled, the name of an asset automatically becomes a hyperlink when you fill out a text attribute. This option only works if the Enable hyperlinking option in Collibra Console is also enabled.
Enable Workflows	Option to enable workflows in Collibra Everywhere. This allows you to complete tasks or start a workflow in the app. The available workflows depend on the ones that you add to the Global workflows and Asset workflow configuration.
Recommender	The Recommender helps users by suggesting relevant business assets and data sets, based on certain relation types and the past actions of similar users. ✓ True: Recommender is enabled. ✗ False (default): Recommender is disabled. This feature only works if Analytics is enabled. You can enable Analytics in section 1 General of the DGC service configuration.
Auto-updater	Option to automatically upgrade Collibra Everywhere when a new version is available. ✓ True (default): Collibra Everywhere is automatically upgraded when a new version is available. ✗ False: You need to manually upgrade Collibra Everywhere when a new version is available. Note If you enable automatic updates, you have to whitelist the S3 bucket <code>collibra-otg-desktop-installers</code> in the region <code>eu-west-1</code>.
Allow User Configuration	Option to allow users to edit personal settings in Collibra Everywhere. ✓ True (default): Users can edit personal settings. ✗ False: Users cannot edit personal settings.

Setting	Description
Global workflows	The list of workflows that is available in the app's main menu. Enter the UUIDs of the workflows. An example workflow could be "Create issue".
Asset workflow	The list of workflows that is available on an asset page in the app. Enter the UUIDs of the workflows. An example workflow could be "Ask the expert".
No search result workflows	The workflows that are available if there are no search results found. Enter the UUIDs of the workflows. An example workflow could be "Propose new business term".
Enable autostart	Option to automatically start Collibra for Desktop when signing in to your operating system. ✓ True: The app starts automatically when signing in to your operating system. ✗ False (default): The app does not start automatically. If you have set this option in the Collibra for Desktop settings, this option is neglected.

Everywhere Mobile configuration

These settings determine some of the ways in which Collibra for Mobile interacts with Collibra Data Intelligence Cloud.

Setting	Description
Default search filter	The filter that is applied, by default, to your search results. The value must be the UUID of the filter. This filter overrules any search filter that is set in the app. To find the UUID, open the Collibra environment and click in the Search box. Click the name of a search filter. In the address bar you will see the UUID of the filter.
Custom Search box placeholder	The text that is shown in the search box of Collibra for Mobile before a user enters search text.

Setting	Description
Enable Workflows	Option to enable workflows in Collibra for Mobile. This allows you to complete tasks or start a workflow in the app. The available workflows depend on the ones that you add to the Global workflows and Asset workflow configuration.
Global workflows	The list of workflows that is available in the app's main menu. Enter the UUIDs of the workflows. An example workflow could be "Create issue".
Asset workflow	The list of workflows that is available on an asset page in the app. Enter the UUIDs of the workflows. An example workflow could be "Ask the expert".
No search result workflows	The workflows that are available if there are no search results found. Enter the UUIDs of the workflows. An example workflow could be "Propose new business term".

Collibra Browser Extension

The settings determine how and where you can use the Everywhere Chrome Extension.

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. ✗ 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. ✗ 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.

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. 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.

Identity

Setting	Description
Limit user information access	✓ True: Limits user access to information related to other users. ✗ False (default): Users have access to information related to other users. Note Users that have a role with the System or User administration permission have full access regardless of this setting.

Lineage on Edge

Setting	Description
DGC user name	The DGC user that is used to ingest technical lineage data into the environment via the technical lineage servers.
DGC user password	Password of the DGC user that is used to ingest technical lineage data into the environment via the technical lineage servers.
Collibra system name flag	Enable this option if Lineage uses a Collibra system name.
Power BI and Tableau synchronization enabled	✓ True: Enable ingestion and technical lineage for Power BI and Tableau via Edge. ✗ False (default): Disable ingestion and technical lineage for Power BI and Tableau via Edge.
Technical lineage via JDBC connection enabled	✓ True: Enable technical lineage for data sources by using JDBC connections via Edge. For an overview of the supported data sources, go to the Technical lineage documentation. ✗ False (default): Disable technical lineage for data sources by using JDBC connections via Edge.
Technical lineage for SQL via folder, ETL Tools, and custom lineage on Edge enabled	✓ True: Enable custom technical lineage and technical lineage for ETL tools and SQL data sources by using a Shared Storage connection. Technical lineage ingestion by using the Shared Storage connection type on Edge is equivalent to ingestion by using the folder connection type when you use the lineage harvester. For an overview of the supported data sources, go to the Technical lineage documentation. ✗ False (default): Disable custom technical lineage and technical lineage for ETL tools and SQL data sources by using a Shared Storage connection.

Collibra Protect

Setting	Description
Protect scheduler fixed delay	The number of minutes in between synchronizations. The default value is 60 minutes.

License configuration

Setting	Description
License usage snapshot cron job schedule	This sets how often the license usage snapshot is refreshed. This cannot run at an interval smaller than 60 minutes.

Data Marketplace configuration

The configuration of the Data Marketplace.

Setting	Description
Data Marketplace	✓ True (default): Data Marketplace is enabled. Anyone with the required permissions can use or configure the Data Marketplace application from the Applications icon . Note When Data Marketplace is enabled and you reindex Collibra completely, the relations are also reindexed automatically. You don't need to start it manually. However, reindexing the relations will not reindex Collibra completely. ✗ False: Data Marketplace is not enabled. After you enable this setting, reindex Data Marketplace relations or reindex Collibra completely. Note In new Collibra environments, this setting is enabled by default. In upgraded Collibra environments, the previous status of this setting is retained.

Data Privacy

The configuration of the Data Privacy landing page.

Setting	Description
Privacy landing page	✓ True: Enables the Privacy landing page. ✗ False: Disables the Privacy landing page.

Export Configuration

Asset external link

Setting	Description
URL patterns to external asset pages	A list of URL patterns to external asset pages: - External system id: The external system ID as defined by the <code>externalSystemId</code> field of the import file used with the Collibra REST Import API. - External system label: The name that the external system has on the asset page. - URL pattern to external asset page: The pattern to construct the URL to external asset page, for example <code>https://external-system.com/entity/{externalEntityId}</code>. The <code>externalEntityId</code> is the one defined by the same field of the import file used with the Collibra REST Import API.

Migration

The Migration feature allows you to migrate the operating model and views from one Collibra Platform Self-Hosted 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. You can [edit the file upload settings](#) in Collibra Console.

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.

Note If you have one or more Edge sites in this Collibra environment, you need to create a backup for each Edge site.

2. [Restore](#) the backup in your Development and Testing environments.

Important If the Collibra environment you want to restore has one or more Edge sites, you need to reinstall all of them. To reinstall one or more Edge sites, go to [Reinstall an Edge site](#).

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. You can [edit the file upload settings](#) in Collibra Console.

Prerequisites

You have a [global role](#) that has the **System administration** [global permission](#).

Steps

1. On the main menu, click , and then click  **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. b. Select one or more assignments. 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. b. Select one or more roles. Tip Click Select all to export all roles.
Resource roles	a. At the top of the page, click Resource roles. b. Select one or more roles. Tip Click Select all to export all roles.

If you want to export...	Do the following:
Workflows	- At the top of the page, click Workflows. - Select one or more workflows. 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. Note You can only export views that are public or shared with a global role.
Dashboard views	- At the top of the page, click Views. - In the filter pane to the left, click the type of view that you want to export. » The views that are public or shared with a global role appear in the table. - Select one or more views. 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.
Diagram views	
Search filters	
Global asset views	
Asset views in application pages	- At the top of the page, click Views. - In the filter pane to the left, click Asset views - in Applications. » The applications pages appear in the table. - Perform one of the following steps: ■ 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. ■ If you want to export all views of a specific application page, select the checkbox in front of the name of the application page. ■ If you want to export specific views, do the following: - Click the name of an application page. » The available views appear in the right column. - Select one or more views.

If you want to export...	Do the following:
Asset views in communities and domains pages	- Click Views. - In the filter pane to the left, click Asset views - in Communities and Domains. » The organization browser appears in the table. - Perform one of the following steps: ■ 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. ■ If you want to export all views of a community or domain, select the checkbox in front of the name of the community or domain. ■ If you want to export specific views, do the following: - Click the name of a community or domain. » The available views appear in the right column. - 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.

- In the upper-right corner, click **Export**.
 - » The **Provide file name and description** dialog box appears.
- Enter the required information.

Field	Description
Archive file name	The name of the exported archive file. 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. 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 Platform Self-Hosted 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 • ID • Status ◦ ID ◦ Name ◦ Description • Parent domain ◦ ID ◦ Name ◦ Description ◦ Exclude from Autohyperlinking ◦ Domain type ▪ ID ▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ◦ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description • Asset type ◦ ID ◦ Name ◦ Description ◦ Parent asset types, up to the root asset type (for example Business asset) ◦ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ◦ displayNameEnabled ◦ ratingsEnabled

Object	Migrated fields and secondary objects
Asset type	• ID • Name • Description • Parent asset types, up to the root asset type (for example Business asset) • Display options ◦ Color ◦ Symbol (none, Icon or Code) ◦ Code ◦ Icon reference • displayNameEnabled • ratingsEnabled

Object	Migrated fields and secondary objects										
Assignment	• ID • Asset types referenced in the assignment ◦ ID ◦ Name ◦ Description ◦ Parent asset types, up to the root asset type (for example Business asset) ◦ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ◦ displayNameEnabled ◦ ratingsEnabled • Articulation rules • Fields referenced in the assignment ◦ Attribute types ▪ ID ▪ Name ▪ Description ▪ 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 (Multi value list)</td><td> Allowed values 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 ▪ Metric </td></tr><tr><td>Script</td><td> Language. Note This field is only used for validation rule assets. </td></tr></table>	Kind	Properties	Date	None	Multiple selection (Multi value list)	Allowed values Warning The list of allowed values is overwritten in the target environment, so it may remove values.	Numeric	▪ Only integers ▪ Metric	Script	Language. Note This field is only used for validation rule assets.
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Object	Migrated fields and secondary objects								
	<table border="1" data-bbox="550 322 1418 734"> <thead> <tr> <th data-bbox="550 322 724 389">Kind</th><th data-bbox="724 322 1418 389">Properties</th></tr> </thead> <tbody> <tr> <td data-bbox="550 389 724 546">Selection (single value list)</td><td data-bbox="724 389 1418 546">Allowed values (adding values, AND removals)</td></tr> <tr> <td data-bbox="550 546 724 613">Text</td><td data-bbox="724 546 1418 613">Plain text</td></tr> <tr> <td data-bbox="550 613 724 734">True/False (boolean)</td><td data-bbox="724 613 1418 734">Metric</td></tr> </tbody> </table> ○ Relation types ■ ID ■ Description ■ Role ■ Co-role ■ Head asset type ■ ID ■ Name ■ Description ■ Parent asset types, up to the root asset type (for example Business asset) ■ Display options ■ Color ■ Symbol (none, Icon or Code) ■ Code ■ Icon reference ■ displayNameEnabled ■ ratingsEnabled ■ Tail asset type ■ ID ■ Name ■ Description ■ Parent asset types, up to the root asset type (for example Business asset) ■ Display options ■ Color ■ Symbol (none, Icon or Code) ■ Code ■ Icon reference ■ displayNameEnabled	Kind	Properties	Selection (single value list)	Allowed values (adding values, AND removals)	Text	Plain text	True/False (boolean)	Metric
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Object	Migrated fields and secondary objects																
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Object	Migrated fields and secondary objects
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Object	Migrated fields and secondary objects																
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Object	Migrated fields and secondary objects
	▪ Description • If it is a scoped assignment: the scope of the assignment ◦ ID ◦ Name ◦ Description ◦ Communities ▪ ID ▪ Name ▪ Description ▪ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description Note ▪ If the scope contains an entire community that contains subcommunities and domains, the subcommunities and domains are not included. ▪ 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. ▪ The domain type of the included domains are also included. ◦ Domains ▪ ID ▪ Name ▪ Description ▪ Exclude from Autohyperlinking ▪ Domain type ▪ ID ▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ▪ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description

Object	Migrated fields and secondary objects																
	• If it is a scoped assignment: the global assignment. • Statuses referenced in the assignment ◦ ID ◦ Name ◦ Description • Validation rules referenced in the assignment ◦ Characteristic types that are referenced in the validation script ▪ Attribute types ▪ ID ▪ Name ▪ Description ▪ 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 (Multi value list)</td><td> Allowed values 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 ▪ Metric </td></tr> <tr> <td>Script</td><td> Language. Note This field is only used for validation rule assets. </td></tr> <tr> <td>Selection (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 (boolean)</td><td>Metric</td></tr> </table> ▪ Relation types ▪ ID ▪ Description ▪ Role	Kind	Properties	Date	None	Multiple selection (Multi value list)	Allowed values Warning The list of allowed values is overwritten in the target environment, so it may remove values.	Numeric	▪ Only integers ▪ Metric	Script	Language. Note This field is only used for validation rule assets.	Selection (single value list)	Allowed values (adding values, AND removals)	Text	Plain text	True/False (boolean)	Metric
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Object	Migrated fields and secondary objects
Attribute	• ID • Parent asset ◦ Name ◦ ID ◦ Status ▪ ID ▪ Name ▪ Description ◦ Parent domain ▪ ID ▪ Name ▪ Description ▪ Exclude from Autohyperlinking ▪ Domain type ▪ ID ▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ▪ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description ◦ Asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled • Attribute type ◦ ID

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Object	Migrated fields and secondary objects																
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Object	Migrated fields and secondary objects
	◦ Role ◦ Co-role ◦ Asset types that are head or tail of the relation types ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ◦ Minimum cardinality ◦ Maximum cardinality

Object	Migrated fields and secondary objects
Data quality rule	• ID • Name • Description • Aggregation path ◦ Relation trace entries (path): The sequence of relation types and their direction ▪ ID ▪ Description ▪ Role ▪ Co-role ▪ Head asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ▪ Tail asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ◦ Categorization relation types ▪ ID ▪ Description ▪ Role

Object	Migrated fields and secondary objects				
	▪ Co-role ▪ Head asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ▪ Tail asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled • Data Quality Metrics: attribute types of the Metric attribute type kind ◦ ID ◦ Name ◦ Description ◦ Attribute type kind and its properties <table border="1"> <thead> <tr> <th>Kind</th><th>Properties</th></tr> </thead> <tbody> <tr> <td>Date</td><td>None</td></tr> </tbody> </table>	Kind	Properties	Date	None
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Domain	- ID - Name - Description - Exclude from Autohyperlinking - Domain type - ID - Name - Description - Parent domain types up to root - ID - Name - Description - Parent communities, up to the root level - ID - Name - Description														

Object	Migrated fields and secondary objects
Domain type	• ID • Name • Description • Parent domain types up to root ◦ ID ◦ Name ◦ Description
Relation type	• ID • Description • Role • Co-role • Head asset type ◦ ID ◦ Name ◦ Description ◦ Parent asset types, up to the root asset type (for example Business asset) ◦ Display options ■ Color ■ Symbol (none, Icon or Code) ■ Code ■ Icon reference ◦ displayNameEnabled ◦ ratingsEnabled • Tail asset type ◦ ID ◦ Name ◦ Description ◦ Parent asset types, up to the root asset type (for example Business asset) ◦ Display options ■ Color ■ Symbol (none, Icon or Code) ■ Code ■ Icon reference ◦ displayNameEnabled ◦ ratingsEnabled

Object	Migrated fields and secondary objects
Roles	• No secondary objects • ID • Name • Description • Global • Permissions

Object	Migrated fields and secondary objects
Scope	• ID • Name • Description • Communities ◦ ID ◦ Name ◦ Description ◦ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description Note ◦ If the scope contains an entire community that contains subcommunities and domains, the subcommunities and domains are not included. ◦ 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. ◦ The domain type of the included domains are also included. • Domains ◦ ID ◦ Name ◦ Description ◦ Exclude from Autohyperlinking ◦ Domain type ▪ ID ▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ◦ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description

Object	Migrated fields and secondary objects
Status	• ID • Name • Description

Object	Migrated fields and secondary objects																
Validation rule	• Name • ID • Characteristic types that are referenced in the validation script ◦ Attribute types ▪ ID ▪ Name ▪ Description ▪ 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 (Multi value list)</td><td> Allowed values 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 ▪ Metric </td></tr> <tr> <td>Script</td><td> Language. Note This field is only used for validation rule assets. </td></tr> <tr> <td>Selection (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 (boolean)</td><td>Metric</td></tr> </table> ◦ Relation types ▪ ID ▪ Description ▪ Role ▪ Co-role ▪ Head asset type ▪ ID ▪ Name	Kind	Properties	Date	None	Multiple selection (Multi value list)	Allowed values Warning The list of allowed values is overwritten in the target environment, so it may remove values.	Numeric	▪ Only integers ▪ Metric	Script	Language. Note This field is only used for validation rule assets.	Selection (single value list)	Allowed values (adding values, AND removals)	Text	Plain text	True/False (boolean)	Metric
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Object	Migrated fields and secondary objects
	▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ▪ Tail asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ◦ Complex relation types ▪ ID ▪ Name ▪ Description ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ Attribute types ▪ ID ▪ Name ▪ Description ▪ Attribute type kind and its properties

Object	Migrated fields and secondary objects	
	Kind	Properties
	Date	None
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- Minimum cardinality - Maximum cardinality - Leg types (relation types) - Role - Co-role - Asset types that are head or tail of the relation types - ID - Name - Description - Parent asset types, up to the root asset type (for example Business asset) - Display options - Color - Symbol (none, Icon or Code) - Code		

Object	Migrated fields and secondary objects
	▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ▪ Minimum cardinality ▪ Maximum cardinality • The parent domain of the validation rule asset ◦ ▪ ID ▪ Name ▪ Description • The Validation Rule Domain type ◦ Parent domain types up to root ▪ ID ▪ Name ▪ Description • The Validation Rule asset type ◦ Parent asset types, up to the root asset type (for example Business asset) • The status of the validation rule ◦ ID ◦ Name ◦ Description

Object	Migrated fields and secondary objects
Workflow	• Name • Description • Status • Assignment rules (Applies To section) ◦ Asset types ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ◦ Communities ▪ ID ▪ Name ▪ Description ▪ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description ◦ Domains ▪ ID ▪ Name ▪ Description ▪ Exclude from Autohyperlinking ▪ Domain type ▪ ID ▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ▪ Parent communities, up to the root level ▪ ID

Object	Migrated fields and secondary objects										
	▪ Name ▪ Description • Is Global Create • Start label • Configuration variables ◦ Asset types ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ◦ Characteristic types ▪ Attribute types ▪ ID ▪ Name ▪ Description ▪ 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 (Multi value list)</td><td> Allowed values 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 ▪ Metric </td></tr><tr><td>Script</td><td> Language. Note This field is only used for validation rule assets. </td></tr></table>	Kind	Properties	Date	None	Multiple selection (Multi value list)	Allowed values Warning The list of allowed values is overwritten in the target environment, so it may remove values.	Numeric	▪ Only integers ▪ Metric	Script	Language. Note This field is only used for validation rule assets.
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Object	Migrated fields and secondary objects								
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Object	Migrated fields and secondary objects
	▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ▪ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description ◦ Roles ◦ Status ▪ ID ▪ Name ▪ Description • Business Item object type (i.e. Global vs Asset) • Roles allowed to start • Roles allowed to stop • Roles allowed to reassign • Start events • Exclusivity • Candidate user check disabled • Guest user accessibility • Registered user accessibility • Process ID • Workflow XML • Flowable forms
Navigation objects	

Object	Migrated fields and secondary objects
Table view	• ID • Name • Description • Configuration • Is preferred • Is default • Sharing rules • Assignment rules

Object	Migrated fields and secondary objects
Dashboard	Any field referenced in a template of a widget: • ID • Name • Asset types ◦ ID ◦ Name ◦ Description ◦ Parent asset types, up to the root asset type (for example Business asset) ◦ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ◦ displayNameEnabled ◦ ratingsEnabled • Communities ◦ ID ◦ Name ◦ Description ◦ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description • Domains ◦ ID ◦ Name ◦ Description ◦ Exclude from Autohyperlinking ◦ Domain type ▪ ID ▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ◦ Parent communities, up to the root level ▪ ID ▪ Name

Object	Migrated fields and secondary objects
	■ Description • Roles • Status ◦ ID ◦ Name ◦ Description BT dashboard may refer to BT global role may refer to BT community may refer to BT domain may refer to BT status may refer to BT asset type BT parent community up to the root... BT domain type up to the root domain... BT parent asset type up to the root asset type BT parent domain type up to the root domain... refers to refers to refers to refers to refers to refers to refers to

Object	Migrated fields and secondary objects										
Diagram view	Any object referenced in the diagram view or its filter: • ID • Name • Asset types ◦ ID ◦ Name ◦ Description ◦ Parent asset types, up to the root asset type (for example Business asset) ◦ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ◦ displayNameEnabled ◦ ratingsEnabled • Characteristic types , for example in an overlay. ◦ Attribute types ▪ ID ▪ Name ▪ Description ▪ 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 (Multi value list)</td><td> Allowed values 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 ▪ Metric </td></tr><tr><td>Script</td><td> Language. Note This field is only used for validation rule assets. </td></tr></table>	Kind	Properties	Date	None	Multiple selection (Multi value list)	Allowed values Warning The list of allowed values is overwritten in the target environment, so it may remove values.	Numeric	▪ Only integers ▪ Metric	Script	Language. Note This field is only used for validation rule assets.
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Object	Migrated fields and secondary objects
	○ Parent communities, up to the root level ■ ID ■ Name ■ Description • Roles

Object	Migrated fields and secondary objects												
Search filter	Any object referenced in the search filter: - Asset types - ID - Name - Description - Parent asset types, up to the root asset type (for example Business asset) - Display options - Color - Symbol (none, Icon or Code) - Code - Icon reference - displayNameEnabled - ratingsEnabled - Characteristic types - Attribute types - ID - Name - Description - 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 (Multi value list)</td><td> Allowed values 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 - Metric </td></tr><tr><td>Script</td><td> Language. Note This field is only used for validation rule assets. </td></tr><tr><td>Selection (single value list)</td><td>Allowed values (adding values, AND removals)</td></tr></table>	Kind	Properties	Date	None	Multiple selection (Multi value list)	Allowed values Warning The list of allowed values is overwritten in the target environment, so it may remove values.	Numeric	- Only integers - Metric	Script	Language. Note This field is only used for validation rule assets.	Selection (single value list)	Allowed values (adding values, AND removals)
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Selection (single value list)	Allowed values (adding values, AND removals)												

Object	Migrated fields and secondary objects						
	<table data-bbox="550 322 1418 577"> <tr> <th data-bbox="550 322 724 389">Kind</th><th data-bbox="724 322 1418 389">Properties</th></tr> <tr> <td data-bbox="550 389 724 456">Text</td><td data-bbox="724 389 1418 456">Plain text</td></tr> <tr> <td data-bbox="550 456 724 577">True/False (boolean)</td><td data-bbox="724 456 1418 577">Metric</td></tr> </table> ◦ Relation types ▪ ID ▪ Description ▪ Role ▪ Co-role ▪ Head asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ▪ Tail asset type ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ◦ Complex relation types ▪ ID	Kind	Properties	Text	Plain text	True/False (boolean)	Metric
Kind	Properties						
Text	Plain text						
True/False (boolean)	Metric						

Object	Migrated fields and secondary objects																
	- Name - Description - Display options - Color - Symbol (none, Icon or Code) - Code - Icon reference - Attribute types - ID - Name - Description - 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 (Multi value list)</td><td> Allowed values 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 - Metric </td></tr> <tr> <td>Script</td><td> Language. Note This field is only used for validation rule assets. </td></tr> <tr> <td>Selection (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 (boolean)</td><td>Metric</td></tr> </table> - Minimum cardinality - Maximum cardinality - Leg types (relation types) - Role	Kind	Properties	Date	None	Multiple selection (Multi value list)	Allowed values Warning The list of allowed values is overwritten in the target environment, so it may remove values.	Numeric	- Only integers - Metric	Script	Language. Note This field is only used for validation rule assets.	Selection (single value list)	Allowed values (adding values, AND removals)	Text	Plain text	True/False (boolean)	Metric
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Date	None																
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Selection (single value list)	Allowed values (adding values, AND removals)																
Text	Plain text																
True/False (boolean)	Metric																

Object	Migrated fields and secondary objects
	▪ Co-role ▪ Asset types that are head or tail of the relation types ▪ ID ▪ Name ▪ Description ▪ Parent asset types, up to the root asset type (for example Business asset) ▪ Display options ▪ Color ▪ Symbol (none, Icon or Code) ▪ Code ▪ Icon reference ▪ displayNameEnabled ▪ ratingsEnabled ▪ Minimum cardinality ▪ Maximum cardinality • Comments • Communities ◦ ID ◦ Name ◦ Description ◦ Parent communities, up to the root level ▪ ID ▪ Name ▪ Description • Domains ◦ ID ◦ Name ◦ Description ◦ Exclude from Autohyperlinking ◦ Domain type ▪ ID ▪ Name ▪ Description ▪ Parent domain types up to root ▪ ID ▪ Name ▪ Description ◦ Parent communities, up to the root level ▪ ID

Object	Migrated fields and secondary objects
	▪ Name ▪ Description • Roles • Status ◦ ID ◦ Name ◦ Description <pre>graph LR SFT[BT search filter] -- "may refer to" --> CRT[BT complex relation type] SFT -- "may refer to" --> RT[BT relation type] SFT -- "may refer to" --> D[BT domain] SFT -- "may refer to" --> C[BT community] SFT -- "may refer to" --> GR[BT global role] SFT -- "may refer to" --> ST[BT status] CRT -- "may refer to" --> AT[BT attribute type] CRT -- "refers to" --> CRTL[BT complex relation type leg] RT -- "refers to" --> AS[BT asset type] D -- "refers to" --> DT[BT domain type] C -- "refers to" --> PC[BT parent community] GR -- "refers to" --> PDT[BT parent domain type] ST -- "refers to" --> PAS[BT parent asset type] AT -- "refers to" --> CRTL CRTL -- "refers to" --> AS DT -- "refers to" --> PDT PC -- "refers to" --> PDT PDT -- "refers to" --> PAS PAS -- "refers to" --> RAS[up to the root asset type]</pre>

Understanding the migration export report

After exporting model objects from a Collibra Platform Self-Hosted 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.

Worksheet name	Contents
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. For the primary resources, the available values are: • Assignment • Role • View:ASSETTABLE • View:DASHBOARD • View:DIAGRAM • View:DOMAINTABLE • Workflow For the associated dependencies, the available values are: • AssetType • AttributeType:BooleanAttributeType • AttributeType:DateAttributeType • AttributeType:NumericAttributeType • AttributeType:ScriptAttributeType • AttributeType:SingleValueListAttributeType • AttributeType:StringAttributeType • Community • ComplexRelationType • Domain • DomainType • RelationType • Role • Status ID: The unique identifier of the object that was exported. Name: The name of the object. In most cases, the name is a clickable link that opens Colibra 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. For most object types, this column contains only the name of the exported object. However, there are some exceptions: • Assignments are exported by asset type. As a consequence, the name is built up accordingly: <asset type> : <assignment>. Example Business Asset : Global Assignment. • 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. Example assetType-00000000-0000-0000-0001-000400000001 relationType-00000000-0000-0000-0000-000000007062 true catalog 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>]. Example [Business Asset] represents / represented by [Data Asset] 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. 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. For most object types, this column contains only the name of the exported object. However, there are some exceptions: • Assignments are exported by asset type. As a consequence, the name is built up accordingly: <asset type> : <assignment>. Example Business Asset : Global Assignment. • 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. Example assetType-00000000-0000-0000-0001-000400000001 relationType-00000000-0000-0000-0000-000000007062 true catalog • 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>]. Example [Business Asset] represents / represented by [Data Asset] 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.](#)

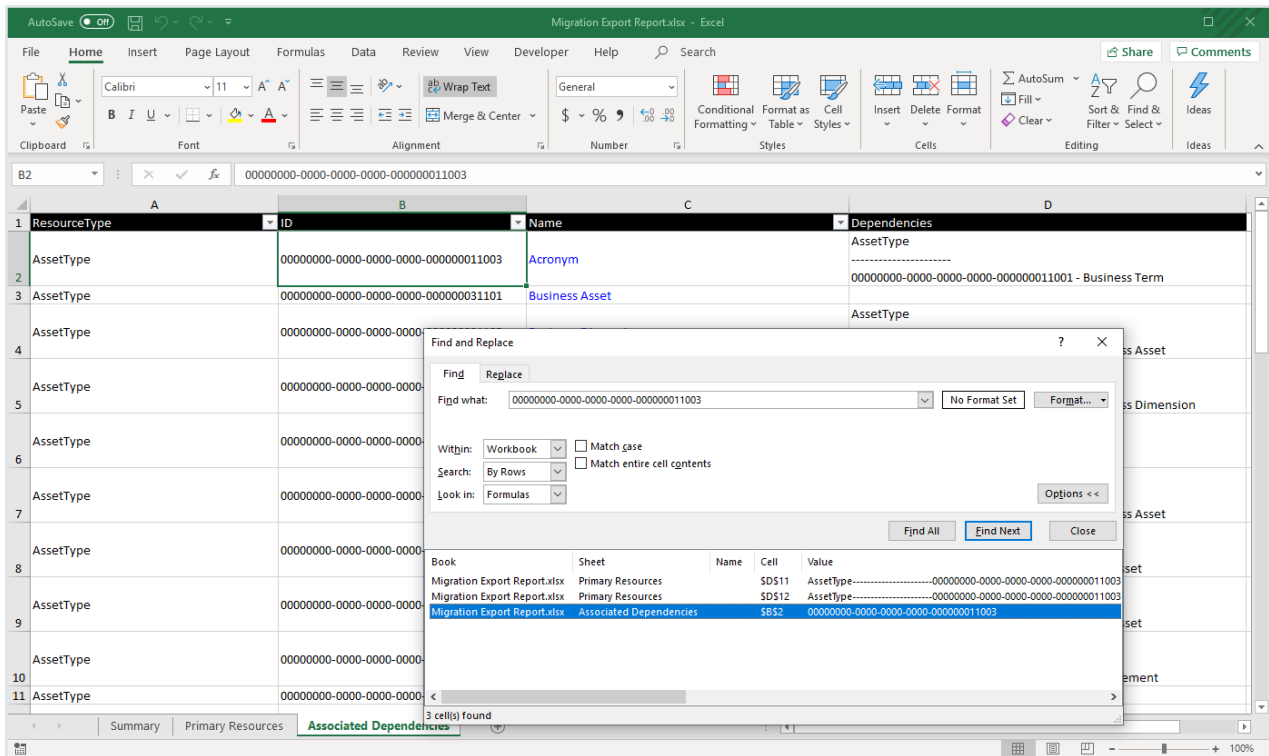
You can easily see which objects require which objects in the Dependencies column. A quick way to trace dependents and precedents is to copy the ID of a dependent object, and search for it in the entire workbook.

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.

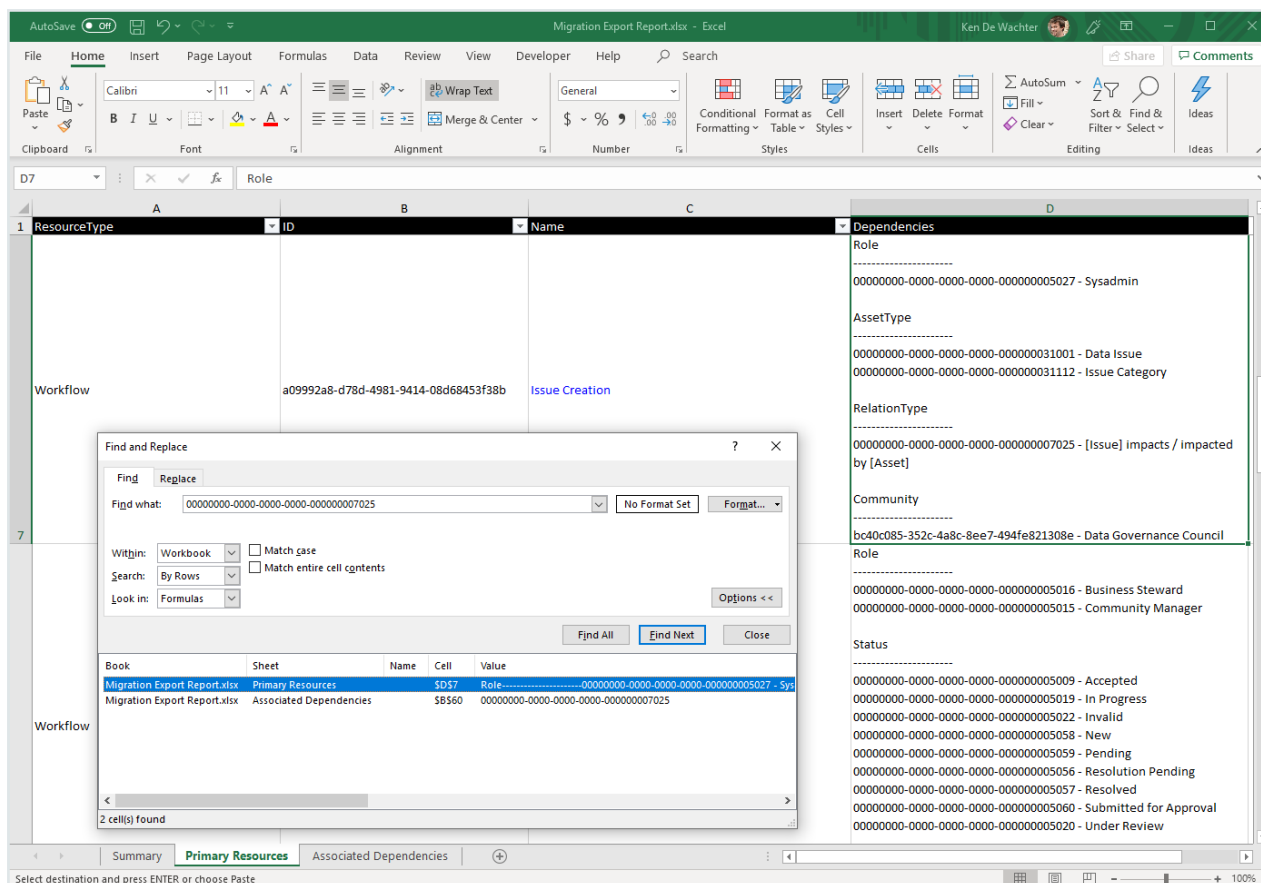
Example 1: Precedents

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 Platform Self-Hosted 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. You can [edit the file upload settings](#) in Collibra Console.

Warning

- Importing model objects cannot be undone. Make sure that there is a recent backup available before doing this.

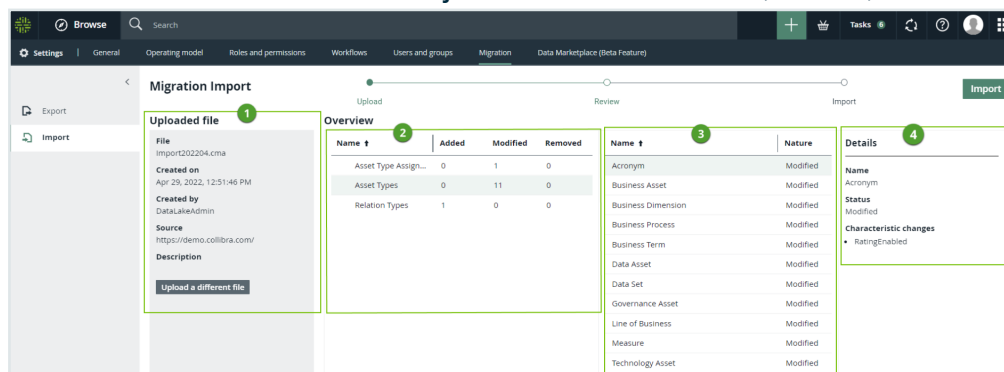
- The versions of the source and target environment have to be the same. Migrating between different versions may lead to unexpected behavior.

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 , and then click  **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.

Number	Description
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.
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. 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. 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. Example • If you migrate an assignment that includes fewer characteristic types than in the target, Colibra removes those characteristic types from the assignments, but does not delete the actual characteristic types. • If you migrate a view with a filter on a community that has a different name in the target, Colibra renames the community in the target.

Outcome	When	Description
An unmatched object is updated.	1. A match is found based on the ID of the objects, but they have different names. 2. In the target environment, another object has the same name as the migrated object.	1. The name of the existing object with the same name will be changed to <code><original name>-Migration-YYYYMMDD hh:mm:ss</code>. 2. The matched object will be edited with the properties from the migrated object, including the name. Example Before the import: • The target environment contains an asset type with the following information: Name: <code>Crawler</code>, ID: <code>0000</code>. • The target environment contains a second asset type with the following information: Name: <code>AWS Crawler</code>, ID: <code>1111</code>. • The archive contains an asset type with the following information: Name: <code>AWS Crawler</code>, ID: <code>0000</code>. After the import: • The target environment contains an asset type with the following information: Name: <code>AWS Crawler</code>, ID: <code>0000</code>. • 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>.
A new object is created.	If no match is found.	A new object is created with all properties from the migrated object, including the ID.

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.

Object	Import logic																
Asset	Matching logic based on: 1. ID 2. Full name and parent domain 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> Note Assets in system-owned domains (for example Issues) cannot be migrated.	Case	Matched asset 1	Matched asset 2	Result	1	ID	n/a	Matched asset 1 is updated.	2	Full name and parent domain	n/a	Matched asset 1 is updated.	3	None	n/a	A new asset is created.
Case	Matched asset 1	Matched asset 2	Result														
1	ID	n/a	Matched asset 1 is updated.														
2	Full name and parent domain	n/a	Matched asset 1 is updated.														
3	None	n/a	A new asset is created.														

Object	Import logic																								
Asset type	Matching logic based on: 1. ID and name 2. Name 3. ID The following table contains the possible cases and results. <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. 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> Note • 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. • Asset types are imported using the depth-first order.	Case	Matched asset type 1	Matched asset type 2	Result	1	ID and name	n/a	Matched asset type 1 is updated.	2	ID	Name	Matched asset type 1 is updated. Matched asset type 2 is renamed.	3	Name	n/a	Matched asset type 1 is updated.	4	ID	n/a	Matched asset type 1 is updated.	5	None	n/a	A new asset type is created.
Case	Matched asset type 1	Matched asset type 2	Result																						
1	ID and name	n/a	Matched asset type 1 is updated.																						
2	ID	Name	Matched asset type 1 is updated. Matched asset type 2 is renamed.																						
3	Name	n/a	Matched asset type 1 is updated.																						
4	ID	n/a	Matched asset type 1 is updated.																						
5	None	n/a	A new asset type is created.																						

Object	Import logic																
Assignment	Matching logic based on: 1. ID 2. Asset type and scope The following table contains the possible cases and results. <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> Note Assignments are imported in a specific order: 1. Global assignments 2. Scoped assignments	Case	Matched assignment 1	Matched assignment 2	Result	1	ID	n/a	Matched assignment 1 is updated.	2	Asset type and scope	n/a	Matched assignment 1 is updated.	3	None	n/a	A new assignment is created.
Case	Matched assignment 1	Matched assignment 2	Result														
1	ID	n/a	Matched assignment 1 is updated.														
2	Asset type and scope	n/a	Matched assignment 1 is updated.														
3	None	n/a	A new assignment is created.														

Object	Import logic																
Attribute	Matching logic based on: 1. ID 2. Combination of parent asset, attribute type and value The following table contains the possible cases and results. <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> Note • Attributes in system-owned domains (for example Issues) cannot be migrated. • The only fields that you can migrate are validation scripts of validation rule assets and description fields of any resource.	Case	Matched object 1	Matched object 2	Result	1	ID	n/a	Matched object 1 is updated.	2	Combination of parent asset, attribute type and value	n/a	Matched object 1 is updated.	3	None	n/a	A new object is created.
Case	Matched object 1	Matched object 2	Result														
1	ID	n/a	Matched object 1 is updated.														
2	Combination of parent asset, attribute type and value	n/a	Matched object 1 is updated.														
3	None	n/a	A new object is created.														

Object	Import logic																								
Attribute type	Matching logic based on: 1. ID, name and kind 2. Name and kind 3. ID and kind The following table contains the possible cases and results. <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><tr><td>2</td><td>ID and name</td><td>n/a</td><td> Matched attribute type 1 is renamed. A new attribute type is created. Note Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if: 1. An attribute type is deleted. 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. 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><tr><td>5</td><td>ID and kind</td><td>n/a</td><td>Matched attribute type 1 is renamed and updated.</td></tr></table>	Case	Matched attribute type 1	Matched attribute type 2	Result	1	ID, name and kind	n/a	Matched attribute type 1 is updated.	2	ID and name	n/a	Matched attribute type 1 is renamed. A new attribute type is created. Note Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if: 1. An attribute type is deleted. 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.	3	Name	n/a	Matched attribute type 1 is renamed. A new attribute type is created.	4	Name and kind	n/a	The ID of matched attribute type 1 is updated.	5	ID and kind	n/a	Matched attribute type 1 is renamed and updated.
Case	Matched attribute type 1	Matched attribute type 2	Result																						
1	ID, name and kind	n/a	Matched attribute type 1 is updated.																						
2	ID and name	n/a	Matched attribute type 1 is renamed. A new attribute type is created. Note Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if: 1. An attribute type is deleted. 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.																						
3	Name	n/a	Matched attribute type 1 is renamed. A new attribute type is created.																						
4	Name and kind	n/a	The ID of matched attribute type 1 is updated.																						
5	ID and kind	n/a	Matched attribute type 1 is renamed and updated.																						

Object	Import logic																													
	<table><thead><tr><th>Case</th><th>Matched attribute type 1</th><th>Matched attribute type 2</th><th>Result</th></tr></thead><tbody><tr><td>6</td><td>ID</td><td>n/a</td><td> A new attribute type is created with a new ID. Note Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if: 1. An attribute type is deleted. 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. Matched attribute type 2 is renamed. </td></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. 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></tbody></table>	Case	Matched attribute type 1	Matched attribute type 2	Result	6	ID	n/a	A new attribute type is created with a new ID. Note Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if: 1. An attribute type is deleted. 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.	7	ID and kind	Name and kind	Matched attribute type 2 is updated.	8	ID and kind	Name	Matched attribute type 1 is renamed and updated. Matched attribute type 2 is renamed.	9	ID	Name and kind	Matched attribute type 2 is updated.	10	ID	Name	Matched attribute type 2 is renamed. A new attribute type is created with a new ID.	11	None	n/a	A new attribute type is created.	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. 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.
Case	Matched attribute type 1	Matched attribute type 2	Result																											
6	ID	n/a	A new attribute type is created with a new ID. Note Because you cannot edit the attribute type kind through Collibra's UI, this can only be done if: 1. An attribute type is deleted. 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.																											
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10	ID	Name	Matched attribute type 2 is renamed. A new attribute type is created with a new ID.																											
11	None	n/a	A new attribute type is created.																											

Object	Import logic																								
Community	Matching logic based on: 1. ID and name 2. Name 3. ID 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. 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> Note Communities are imported using the depth-first order.	Case	Matched community 1	Matched community 2	Result	1	ID and name	n/a	Matched community 1 is updated.	2	ID	Name	Matched community 1 is updated. Matched community 2 is renamed.	3	Name	n/a	Matched community 1 is updated.	4	ID	n/a	Matched community 1 is updated.	5	None	n/a	A new community is created.
Case	Matched community 1	Matched community 2	Result																						
1	ID and name	n/a	Matched community 1 is updated.																						
2	ID	Name	Matched community 1 is updated. Matched community 2 is renamed.																						
3	Name	n/a	Matched community 1 is updated.																						
4	ID	n/a	Matched community 1 is updated.																						
5	None	n/a	A new community is created.																						

Object	Import logic																								
Complex relation type	Matching logic based on: 1. ID and name 2. Name 3. ID The following table contains the possible cases and results. <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. 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> Note • 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. • 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. • Migration does not update leg types when source, target, role, co-role are identical.	Case	Matched complex relation type 1	Matched complex relation type 2	Result	1	ID and name	n/a	Matched complex relation type 1 is updated.	2	ID	Name	Matched complex relation type 1 is updated. Matched complex relation type 2 is renamed.	3	ID	n/a	Matched complex relation type 1 is updated.	4	Name	n/a	Matched complex relation type 1 is updated.	5	None	n/a	A new complex relation type is created.
Case	Matched complex relation type 1	Matched complex relation type 2	Result																						
1	ID and name	n/a	Matched complex relation type 1 is updated.																						
2	ID	Name	Matched complex relation type 1 is updated. Matched complex relation type 2 is renamed.																						
3	ID	n/a	Matched complex relation type 1 is updated.																						
4	Name	n/a	Matched complex relation type 1 is updated.																						
5	None	n/a	A new complex relation type is created.																						

Object	Import logic																								
Data quality rule	Matching logic based on: 1. ID and name 2. Name 3. ID The following table contains the possible cases and results. <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. 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>	Case	Matched data quality rule 1	Matched data quality rule 2	Result	1	ID and name	n/a	Matched data quality rule 1 is updated.	2	ID	Name	Matched data quality rule 1 is updated. Matched data quality rule 2 is renamed.	3	Name	n/a	Matched data quality rule 1 is updated.	4	ID	n/a	Matched data quality rule 1 is updated.	5	None	n/a	A new data quality rule is created.
Case	Matched data quality rule 1	Matched data quality rule 2	Result																						
1	ID and name	n/a	Matched data quality rule 1 is updated.																						
2	ID	Name	Matched data quality rule 1 is updated. Matched data quality rule 2 is renamed.																						
3	Name	n/a	Matched data quality rule 1 is updated.																						
4	ID	n/a	Matched data quality rule 1 is updated.																						
5	None	n/a	A new data quality rule is created.																						

Object	Import logic																								
Domain	Matching logic based on: 1. ID and name 2. Name and parent community 3. ID 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. 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> Note Issue domains cannot be migrated	Case	Matched domain 1	Matched domain 2	Result	1	ID and name	n/a	Matched domain 1 is updated.	2	ID	Name and parent community	Matched domain 1 is updated. Matched domain 2 is renamed.	3	Name and parent community	n/a	Matched domain 1 is updated.	4	ID	n/a	Matched domain 1 is updated.	5	None	n/a	A new domain is created.
Case	Matched domain 1	Matched domain 2	Result																						
1	ID and name	n/a	Matched domain 1 is updated.																						
2	ID	Name and parent community	Matched domain 1 is updated. Matched domain 2 is renamed.																						
3	Name and parent community	n/a	Matched domain 1 is updated.																						
4	ID	n/a	Matched domain 1 is updated.																						
5	None	n/a	A new domain is created.																						

Object	Import logic																								
Domain type	Matching logic based on: 1. ID and name 2. Name 3. ID 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. 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> Note Domain types are imported using the depth-first order.	Case	Matched domain type 1	Matched domain type 2	Result	1	ID and name	n/a	Matched domain type 1 is updated.	2	ID	Name	Matched domain type 1 is updated. Matched domain type 2 is renamed.	3	Name	n/a	Matched domain type 1 is updated.	4	ID	n/a	Matched domain type 1 is updated.	5	None	n/a	A new domain type is created.
Case	Matched domain type 1	Matched domain type 2	Result																						
1	ID and name	n/a	Matched domain type 1 is updated.																						
2	ID	Name	Matched domain type 1 is updated. Matched domain type 2 is renamed.																						
3	Name	n/a	Matched domain type 1 is updated.																						
4	ID	n/a	Matched domain type 1 is updated.																						
5	None	n/a	A new domain type is created.																						

Object	Import logic																				
Relation type	Matching logic based on: 1. ID, source asset type and target asset type 2. Source asset type, target asset type, role and co-role The following table contains the possible cases and results. <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>	Case	Matched relation type 1	Matched relation type 2	Result	1	ID, source asset type and target asset type	n/a	Matched relation type 1 is updated.	2	ID	Source asset type, target asset type, role and co-role	Matched relation type 2 is updated.	3	Source asset type, target asset type, role and co-role	n/a	Matched relation type 1 is updated.	4	None	n/a	A new relation type is created.
Case	Matched relation type 1	Matched relation type 2	Result																		
1	ID, source asset type and target asset type	n/a	Matched relation type 1 is updated.																		
2	ID	Source asset type, target asset type, role and co-role	Matched relation type 2 is updated.																		
3	Source asset type, target asset type, role and co-role	n/a	Matched relation type 1 is updated.																		
4	None	n/a	A new relation type is created.																		

Object	Import logic																								
Roles	Matching logic based on: 1. ID and name 2. Name 3. ID The following table contains the possible cases and results. <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. 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>	Case	Matched role 1	Matched role 2	Result	1	ID and name	n/a	Matched role 1 is updated.	2	ID	Name	Matched role 1 is updated. Matched role 2 is renamed.	3	Name	n/a	Matched role 1 is updated.	4	ID	n/a	Matched role 1 is updated.	5	None	n/a	A new role is created.
Case	Matched role 1	Matched role 2	Result																						
1	ID and name	n/a	Matched role 1 is updated.																						
2	ID	Name	Matched role 1 is updated. Matched role 2 is renamed.																						
3	Name	n/a	Matched role 1 is updated.																						
4	ID	n/a	Matched role 1 is updated.																						
5	None	n/a	A new role is created.																						

Object	Import logic																								
Scope	Matching logic based on: 1. ID and name 2. Name 3. ID The following table contains the possible cases and results. <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. 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> Note The global scope cannot be migrated.	Case	Matched scope 1	Matched scope 2	Result	1	ID and name	n/a	Matched scope 1 is updated.	2	ID	Name	Matched scope 1 is updated. Matched scope 2 is renamed.	3	Name	n/a	Matched scope 1 is updated.	4	ID	n/a	Matched scope 1 is updated.	5	None	n/a	A new scope is created.
Case	Matched scope 1	Matched scope 2	Result																						
1	ID and name	n/a	Matched scope 1 is updated.																						
2	ID	Name	Matched scope 1 is updated. Matched scope 2 is renamed.																						
3	Name	n/a	Matched scope 1 is updated.																						
4	ID	n/a	Matched scope 1 is updated.																						
5	None	n/a	A new scope is created.																						

Object	Import logic																								
Status	Matching logic based on: 1. ID and name 2. Name 3. ID The following table contains the possible cases and results. <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. 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>	Case	Matched status 1	Matched status 2	Result	1	ID and name	n/a	Matched status 1 is updated.	2	ID	Name	Matched status 1 is updated. Matched status 2 is renamed.	3	Name	n/a	Matched status 1 is updated.	4	ID	n/a	Matched status 1 is updated.	5	None	n/a	A new status is created.
Case	Matched status 1	Matched status 2	Result																						
1	ID and name	n/a	Matched status 1 is updated.																						
2	ID	Name	Matched status 1 is updated. Matched status 2 is renamed.																						
3	Name	n/a	Matched status 1 is updated.																						
4	ID	n/a	Matched status 1 is updated.																						
5	None	n/a	A new status is created.																						

Object	Import logic																
Validation rule	Matching logic based on: 1. ID 2. Full name and parent domain The following table contains the possible cases and results. <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> Note If there is a match, only the Description and Validation script are changed. Other characteristics are not changed.	Case	Matched validation rule 1	Matched validation rule 2	Result	1	ID	n/a	Matched validation rule 1 is updated.	2	Full name and parent domain	n/a	Matched validation rule 1 is updated.	3	None	n/a	A new validation rule is created.
Case	Matched validation rule 1	Matched validation rule 2	Result														
1	ID	n/a	Matched validation rule 1 is updated.														
2	Full name and parent domain	n/a	Matched validation rule 1 is updated.														
3	None	n/a	A new validation rule is created.														
Workflow	Matching logic based on: 1. Workflow process ID 2. Workflow name The following table contains the possible cases and results. <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. Matched workflow 2 is renamed with a suffix of – \$processId.</td></tr><tr><td>3</td><td>None</td><td>n/a</td><td>A new workflow is created.</td></tr></table>	Case	Matched workflow 1	Matched workflow 2	Result	1	Process ID and workflow name	n/a	Matched workflow 1 is updated.	2	Process ID	Workflow name	Matched workflow 1 is updated. Matched workflow 2 is renamed with a suffix of – \$processId.	3	None	n/a	A new workflow is created.
Case	Matched workflow 1	Matched workflow 2	Result														
1	Process ID and workflow name	n/a	Matched workflow 1 is updated.														
2	Process ID	Workflow name	Matched workflow 1 is updated. Matched workflow 2 is renamed with a suffix of – \$processId.														
3	None	n/a	A new workflow is created.														
Navigation objects																	

Object	Import logic																
Table view	Matching logic based on: 1. ID 2. Name, type, location and common assigned resources The following table contains the possible cases and results. <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>	Case	Matched table view 1	Matched table view 2	Result	1	ID	n/a	Matched table view 1 is updated.	2	Name, type, location and at least 1 common assigned resource	n/a	Matched table view 1 is updated.	3	None	n/a	A new table view is created.
Case	Matched table view 1	Matched table view 2	Result														
1	ID	n/a	Matched table view 1 is updated.														
2	Name, type, location and at least 1 common assigned resource	n/a	Matched table view 1 is updated.														
3	None	n/a	A new table view is created.														
Dashboard	Matching logic based on: 1. ID 2. Name, type, location and common assigned resources The following table contains the possible cases and results. <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>	Case	Matched dashboard 1	Matched dashboard 2	Result	1	ID	n/a	Matched dashboard 1 is updated.	2	Name, type, location and at least 1 common assigned resource	n/a	Matched dashboard 1 is updated.	3	None	n/a	A new dashboard is created.
Case	Matched dashboard 1	Matched dashboard 2	Result														
1	ID	n/a	Matched dashboard 1 is updated.														
2	Name, type, location and at least 1 common assigned resource	n/a	Matched dashboard 1 is updated.														
3	None	n/a	A new dashboard is created.														

Object	Import logic																
Diagram view	Matching logic based on: 1. ID 2. Name, type, location and common assigned resources The following table contains the possible cases and results. <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>	Case	Matched diagram view 1	Matched diagram view 2	Result	1	ID	n/a	Matched diagram view 1 is updated.	2	Name, type, location and at least 1 common assigned resource	n/a	Matched diagram view 1 is updated.	3	None	n/a	A new diagram view is created.
Case	Matched diagram view 1	Matched diagram view 2	Result														
1	ID	n/a	Matched diagram view 1 is updated.														
2	Name, type, location and at least 1 common assigned resource	n/a	Matched diagram view 1 is updated.														
3	None	n/a	A new diagram view is created.														
Search filter	Matching logic based on: 1. ID 2. Name, type, location and common assigned resources The following table contains the possible cases and results. <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>	Case	Matched search filter 1	Matched search filter 2	Result	1	ID	n/a	Matched search filter 1 is updated.	2	Name, type, location and at least 1 common assigned resource	n/a	Matched search filter 1 is updated.	3	None	n/a	A new search filter is created.
Case	Matched search filter 1	Matched search filter 2	Result														
1	ID	n/a	Matched search filter 1 is updated.														
2	Name, type, location and at least 1 common assigned resource	n/a	Matched search filter 1 is updated.														
3	None	n/a	A new search filter is created.														

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 Platform Self-Hosted 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.

Warning From version 2022.11 onwards, you can no longer edit the user interface configuration of new features. This includes Usage Analytics, [Data Marketplace](#) and the [Homepage](#).

Prerequisites

- You have 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.

Steps

1. Add your images to the Collibra folder structure:
 - a. Open Collibra Console with a user profile that has at least the ADMIN role.
 - » Collibra Console opens the **Infrastructure** page.
 - b. [Create](#) a backup of your cloud environment that only includes the customizations and configuration.
 - c. [Download](#) the backup.
 - » A ZIP file is downloaded to your hard disk.
 - d. 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.

- e. Restore the new backup file:
 - i. **Upload** the new ZIP file to Collibra Console.
 - ii. **Restore** the customizations and configuration of the new ZIP file.
 - iii. Wait until your environment is up and running again.
- 2. Contact [Collibra Support](#) to edit the user interface configuration to use the images.
- 3. Edit the user interface configuration to use the images:
 - a. Open Collibra Console with a user profile that has the SUPER role.
 - » Collibra Console opens the **Infrastructure** page.
 - b. In the tab pane, click the Data Governance Center service of your environment.
 - c. Click **Configuration**.
 - d. Click **Edit configuration**.
 - e. Go to the section **User interface configuration**.
 - f. 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 to 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.

g. 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 Platform Self-Hosted has the Collibra logo as favicon. You can also upload the favicon of your own organization.

Warning From version 2022.11 onwards, you can no longer edit the user interface configuration of new features. This includes Usage Analytics, [Data Marketplace](#) and the [Homepage](#).

Prerequisites

- You have the **ADMIN** or **SUPER** role in Collibra Console.
- 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. Edit the backup:
 - a. Extract the backup somewhere on your local computer.
A folder with the name of the ZIP file is created.
 - b. In the created folder structure, go to **<backup-dir>/dgc/images/icons**.

Note If any of these folders do not exist, create them.

- c. Copy your **favicon.ico** in this folder.
 - d. 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.
4. Restore the new backup file:
 - a. [Upload](#) the new ZIP file to Collibra Console.
 - b. [Restore](#) only the customizations and configuration of the new ZIP file.
 - c. Wait until your environment is up and running again.
5. Clear the cache of your browser and go to your environment.
 - » Your own favicon will appear.