Collibra

Collibra Platform

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Version 2025.06

Collibra

Collibra Platform - 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/#cshid=platform

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Basic features

In this section, we describe the various basic features to make you familiar with your Collibra Platform 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 such as searching for data, using dashboards and the global Create button.

In this chapter

User interface

Use this topic to learn about the Collibra user interface, key screen elements, how to arrange list items, and how to navigate efficiently using your keyboard.

In this topic

Latest UI and classic UI

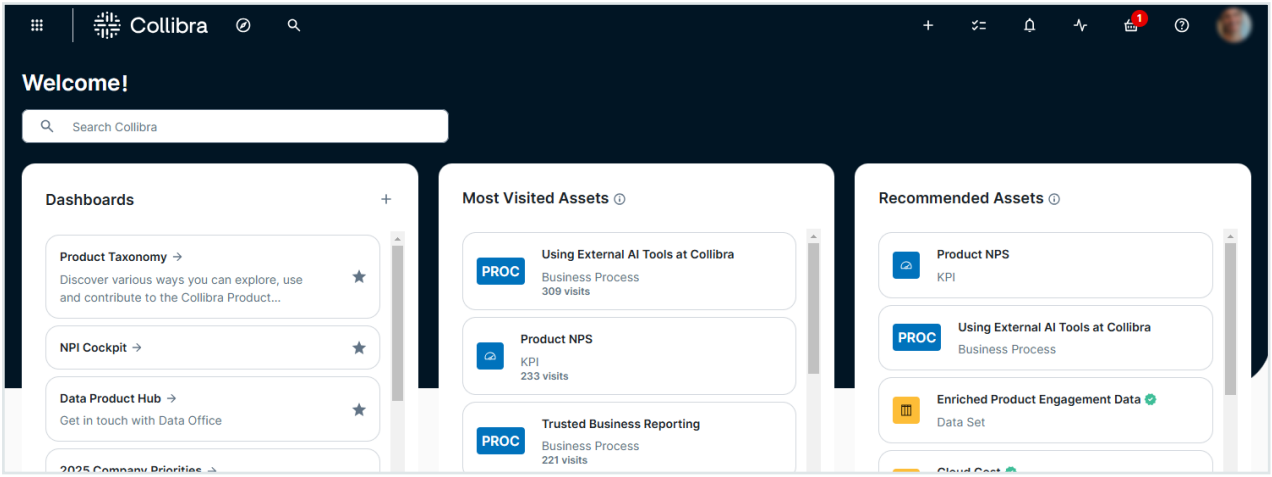
We offer the following options for the Collibra user interface (UI): **Latest** UI and **Classic** UI.

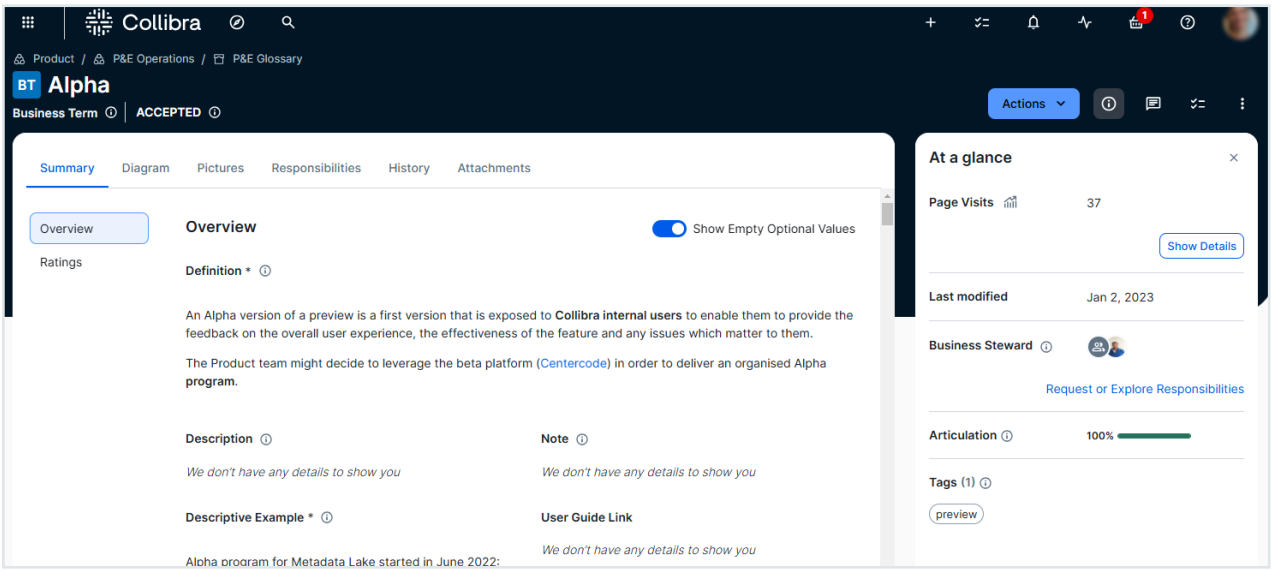
> **Note**
> The documentation contains references to both UI options.
>
> - If a feature is available only in a specific UI, an indication is given.
> - If a feature works differently in each UI, you can select the UI option you use.
> - If a feature works the same way in both UIs, no indication is given.

Latest UI

With release 2024.05, Collibra offers the latest user interface (UI).

We've introduced fresh colors, modern icons, and a new look.





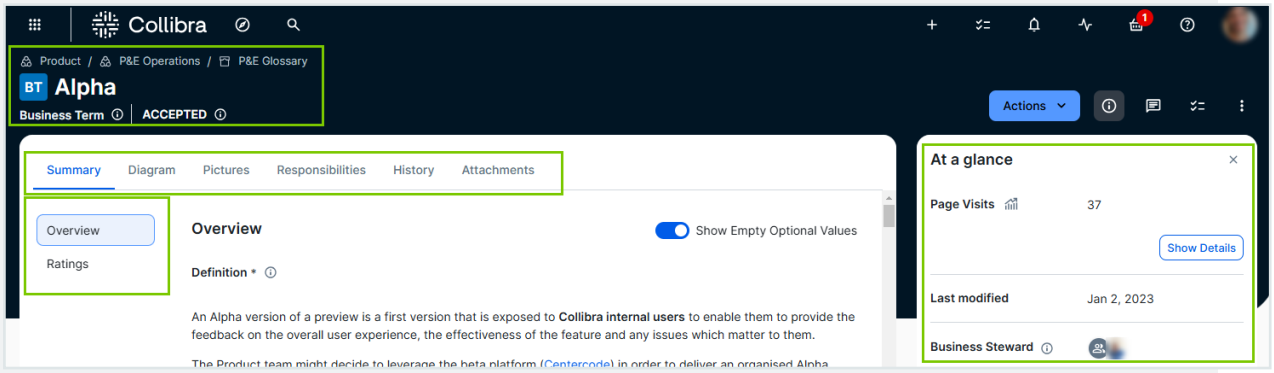
> **Note** Admins can also customize the colors of certain components.

We've streamlined the navigation on asset pages for you to easily determine where you are within Collibra.

- The apps icon has moved to the left side for easier access.
- The asset type icon, asset name, and breadcrumb trail are also available on the left side.

- You can find important information about data in the **At a glance** sidebar. This includes the type of data, when it was last changed and who is responsible for it. If this sidebar is hidden, click .
- The main tab pane has moved to the top of the page, making space for a table of contents tab pane, to help you easily find the various sections.

Example



We've given both you and admins easier control.

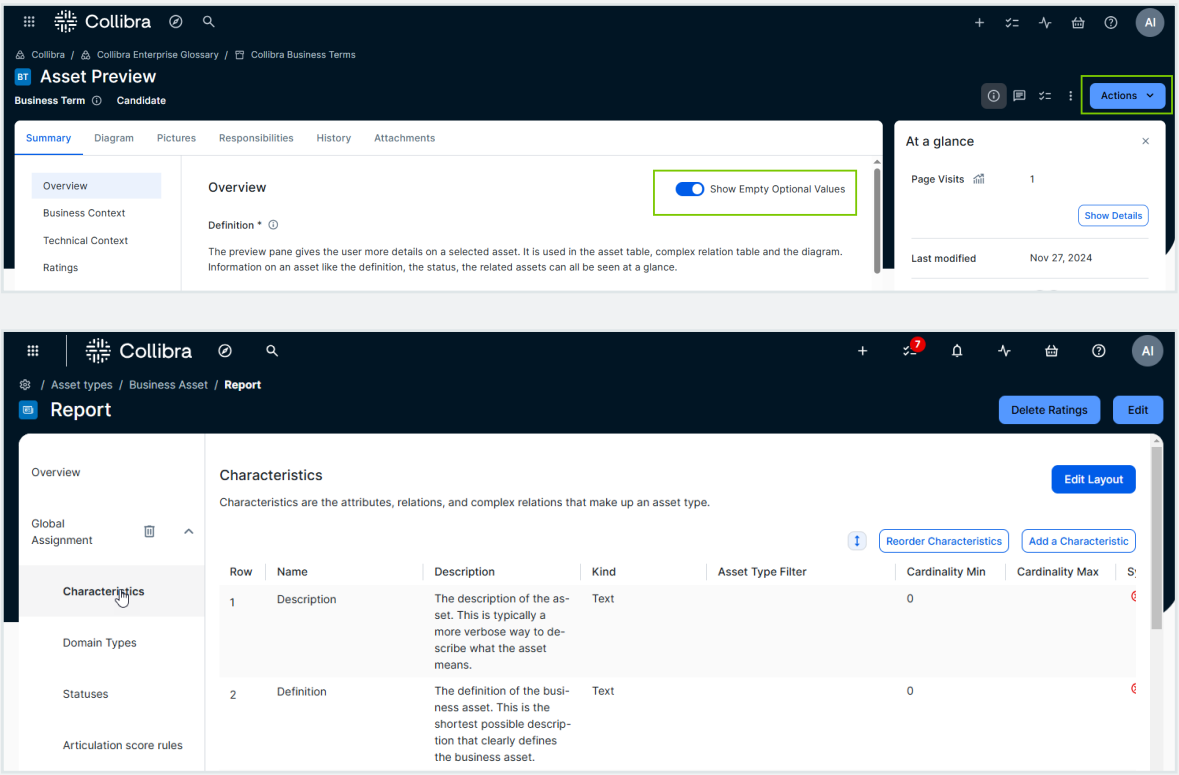
- You can focus on the content you need by using the **Show Empty Optional Values** option to show or hide all empty values that are optional to complete.
- You can use the right side of the page to take control, with options to perform an action via the **Actions** menu or **More** icon , open the **At a glance** sidebar, or show tasks.
- We allow in-page editing. You can edit content directly on the page by clicking the item you want to change.

  > **Tip** To discard your updates, press the ESC key.

- All the available characteristics are already on the page for you. This means the **Add Characteristics** button is no longer shown. If you notice something missing, make sure the **Show Empty Optional Values** option is selected to show all available fields. If the characteristic is still missing, contact your admin.
- Admins can configure the characteristics for the page via a tailored asset page experience, giving them more granular control over data presentation. They can navigate to the asset type page (via the link on the page) and decide which characteristics are available to this asset via this assignment, and then click **Edit Layout** to arrange these

characteristics on the asset page, group them by sections, and even choose to hide certain characteristics from the page.

Example



For a detailed list of changes, go to What is different when the latest user interface is enabled? For information on how to enable the latest UI, go to Enable the latest user interface.

FAQ on the latest UI

What's the difference between the latest UI and the classic UI?

- The latest UI introduces redesigned page layouts along with updated default color schemes.
- Some main navigation buttons have been relocated. For example, the Application Menu icon has moved from the right side of the page to the left.
- On asset pages, certain information has moved to other tabs and submenus.

- The way in which you can customize asset pages has changed. You can define the fields and the layout of the asset pages.
- New features have been made available, such as Tailored Asset Pages, AI Governance, Data Marketplace in Search, Data Notebook, and more.

For a comprehensive list of changes, go to What is different when the latest UI is enabled?
On individual pages within the documentation, you can find an option to switch the information between the classic UI and the latest UI, for example, Screen elements in the UI.

> **Tip** Collibra often shows complex information, including large data tables. To ensure optimal viewing, use a screen width of at least 1,200 pixels. Smaller screens widths are not supported.

> **Tip** To ensure the best experience when using the latest UI, we recommend using the latest browser version and configuring your network settings to allow for HTTP/2 or HTTP/3. For more information, go to the Collibra Support center.

When will the latest UI become available?

- For commercial customers, the latest UI is enabled by default in non-production environments starting from 2024.05. In production environments, the latest UI is enabled starting from 2024.10, unless customers have raised blockers with the Customer Success team. For new commercial customers, the latest UI is enabled by default in all environments.
- For Collibra Cloud for Government, the latest UI is disabled by default in both non-production and production environments.

To enable the latest UI, go to Enable the latest user interface.

I can't find the Add Characteristic button on the asset page. How do I add a characteristic? Additionally, what should I do if I don't find the characteristic I want to complete?
In the latest UI, the **Add characteristics** button is no longer available on the asset page. Instead,

- Use the **Show Optional Empty Values** option to view all fields on the asset page.
- If the characteristic is still not available, use the global assignment and the layout editor to add the characteristic.

How do I ensure that a specific characteristic is set as required for an asset?
Starting from version 2024.05, the latest UI has a similar behavior compared to the classic UI concerning the minimum cardinality. Characteristics (attributes and relations) with a cardinality higher than 0 are always shown on the asset page even if they are empty.

For information on the behavior in the previous releases, go to the Help Center.

How do I apply my company branding?
Brand and theme elements can be applied via the Customizations feature. SysAdmin users can change the logo and the color of branded components such as primary buttons and tabs.

> **Important** The latest UI doesn't support styling that was previously applied via CSS override files.

What should I do if I have changed my environment using override files in the classic UI?
We have created the most common customizations as in-product features. Check this knowledge article in the Help Center for alternate ways to apply some of the previously applied customizations in the latest UI. If your customization is not covered in the article and you would like us to consider supporting it, create a ticket on the Collibra Ideation Platform.

Why are tables, text editors, and dashboard widgets different and how do I edit a cell value in a table?
With the latest UI, we implemented more modern and secure libraries. As a result, some of the patterns in tables, text editors, and dashboard widgets have changed. For example, to edit a table cell, you can double-click anywhere within the cell, rather than using the pencil icon within the cell. As another example, the source code and backend of our rich text editor utilizes different HTML markup than in previous versions.
For more information about changes like these, go to What is different when the latest UI is enabled?

Can I restore a backup of an environment with classic UI on an instance with the latest UI?
Yes, however, currently there is no link between any classic UI branding customizations and the latest UI branding customizations. Customizations are also stored in a different way. This

means that any changes to logos or component colors in the latest UI will be lost if you restore a backup with a classic UI.

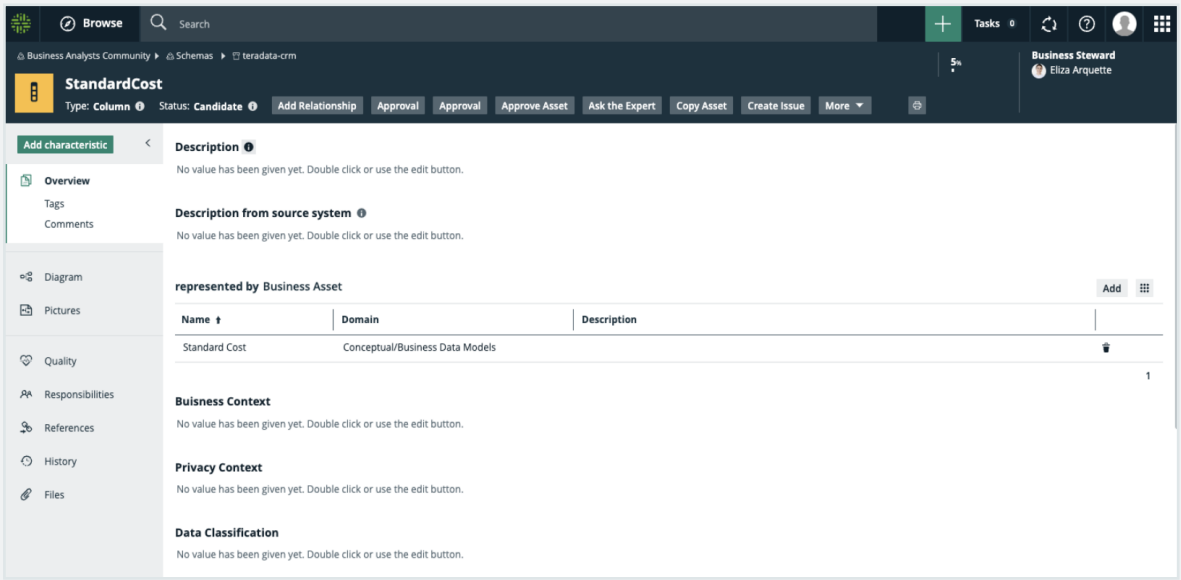
Will Data Marketplace apply the new tailored asset pages?
If you open an asset preview in standalone Data Marketplace or Data Marketplace in Search, the predefined asset preview layout is applied. However, if you open the asset page, the tailored asset pages are shown.

How do admins create a meta model in the latest UI?
The way in which admins can create a meta model in the latest UI hasn't changed. Only the appearance of the pages has changed.

Classic UI

Collibra still supports the classic UI. In a future release, however, your Collibra environment will switch to the latest UI.

Example

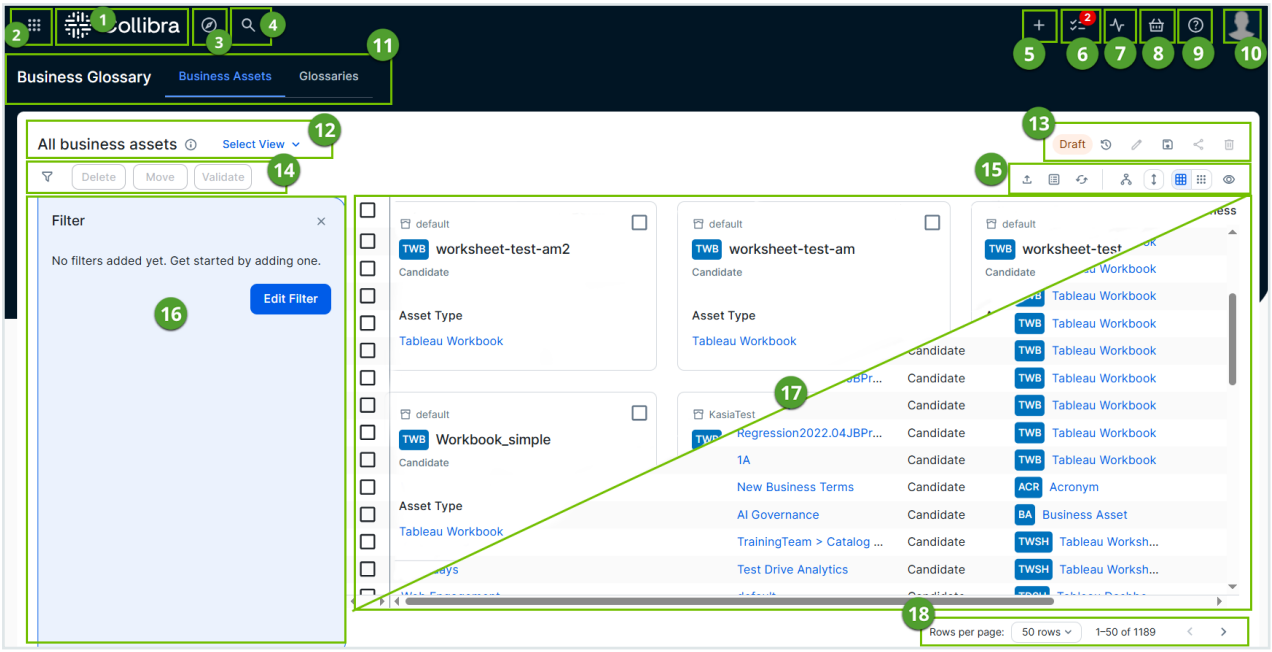


Screen elements in the user interface

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

You can navigate through Collibra using your mouse or keyboard.

Screen layout



No.	Element name	Description
1	Application logo	Open the homepage.
2	Applications	Open another application, such as: • Business Glossary: Manage your business terms. • Catalog: Manage data sets. • Global View: See all assets in a single view. • Reference Data: Manage your code values and code sets. • Stewardship: Manage your tasks. • Policy Manager: Manage your organization's policies. • Settings: Manage your operating model and users. • Data Helpdesk: Manage issues.
3	Browse	Open the browse pane, which contains organization, asset views, and dashboards.
4	Search	Search for any resource in Collibra using a search box.

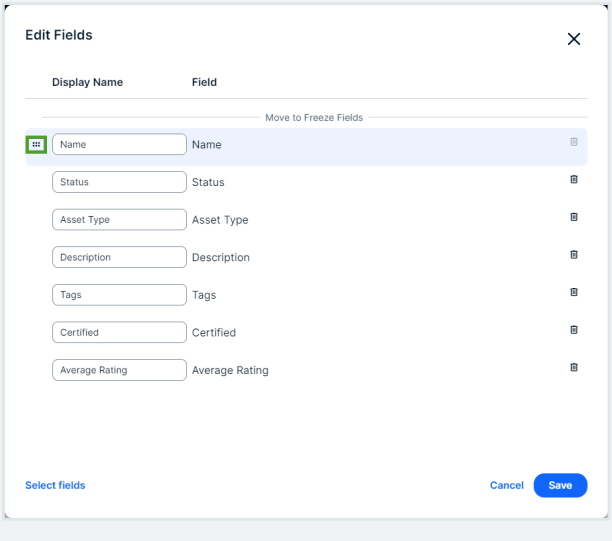
No.	Element name	Description
5	Create	Create any resource from any location.
6	Tasks	Check how many workflow tasks are awaiting your attention and manage those tasks from the **Tasks** page.
7	Activities	Check the Collibra activities and view the history of all the jobs you started.
8	Data basket	Request access to assets.
9	Help	Access Product Documentation, Product Resources Center, University, and Support Portal. **Note** If you are an administrator, you can also access API documentation.
10	Avatar	View and modify your profile, sign out, and report a problem.
11	Subtab	Open one of the pages of the current application.
12	View selector	Switch between views.
13	View toolbar	Manage the current view.
14	Action buttons	Perform actions on the assets that you selected in the view or start a workflow.
15	Content toolbar	Manage the resources in the current view.
16	Filter pane	Filter the resources in the view.
17	Table or set of tiles	See the resources in the current view in a table or as tiles.
18	Rows per page	Change the number of rows or tiles per page, or switch to another page.

Arrange list items

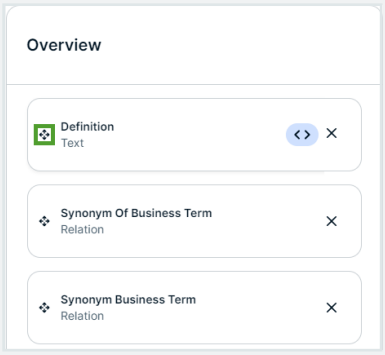
On some pages and in some dialog boxes, you can arrange list items to change the order of their appearance on the page. For example when adding fields to a view or editing an asset type assignment.

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

In a dialog box



On a page



Moving items by dragging and dropping

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

1. Click ✣ or 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.

Navigate using your keyboard

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 sometimessee 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.
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.
Skipping repetitive sections	Most pages in Collibra Platform 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.

Sign in and sign out

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

Sign in

1. Go to any page of your environment.
   » The Sign-in page opens.
2. Enter your username and password.
   If you forgot your credentials, click **Recover Your UserName or Password**.
3. Click **Sign in**.
4. 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.

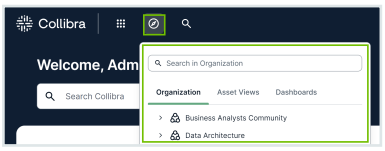
Sign out

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.

Browse pane

You can open a community, domain, asset view, or dashboard directly from the browse pane. The browse pane appears when you click on the main toolbar. The search box within the browse pane can be used to search for a community, domain, asset view, or dashboard.



The following table describes the tabs shown in the browse pane.

Tab	Description
Organization	All communities, subcommunities, and domains, shown in alphabetical order. By default, only top-level communities are shown. To view the subcommunities and domains within a community, click > next to the community. When you click a community or domain, the corresponding community or domain page opens.
Asset Views	All pinned asset views to which you have access, shown in alphabetical order.
Dashboards	All dashboards to which you have access, shown in alphabetical order.

The Create button

In Collibra Platform, there is a **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 categories are available for you via the **Create** button:

Category	Description
Suggested	A list of resources that you might want to create. **Important** 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.

Category	Description
Recent	A list of recently created resources, most recent first.
Actions	A list of global workflows that have the option **Show in global create** enabled.
Asset	A list of all the asset types that are available in your data governance model. The list is divided into sections, according to the parent asset type, for example, Business Asset or Data Asset.
Organization	A list of organizational resources, such as a Community or a Business Asset Domain.

To quickly find what you are looking for, 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

A view defines which assets are shown and how they are presented. It can include filters and appear as a table or as tiles. You can use a view to show key information across multiple assets simultaneously. A view also serves as the basis for importing and exporting data.

A view stores the following data to define its structure:

- **Display mode:** Specifies if assets are shown as rows in a table or as tiles in a set. Relation views can also be shown as items in a list.
- **Filters:** Specifies which assets are shown.
- **Sorting:** Specifies the order in which assets are shown.
- **Visible columns (for tables) or fields (for tiles):** Specifies which information about assets is shown.
- **Hierarchy:** Shows a hierarchy of assets instead of a flat list. This is applicable only in table display mode.

In this topic

Default views

When you open a table or set of tiles for the first time, a Collibra default view is shown. However, if someone has created a view that you are allowed to see and set it as the default view, their custom default view is shown to you instead of the default view.

Creating and accessing views

You can create asset views within a domain, community, globally, or within certain applications such as Business Glossary or Catalog. Creating multiple views doesn't affect Collibra's performance. Each view has a unique URL that allows you to open the view directly without navigating to its location. For example, you can embed a view URL in a text widget on a dashboard or in an email. You can simply copy the URL from the address bar and paste it where needed.

The browse pane allows you to access all pinned asset views that you created or that are shared with you.

When you edit a view, your changes are automatically saved (not published), even if you navigate to a different page or sign out.

Community views

You can create, pin, set as default, and share views on the **Overview** tab of community pages to control how organizational data is presented to users.

Default domain type views (in preview)

You can set a view as the default for a specific domain type. This automatically applies the default domain type view to any newly created domains of that domain type.

Types of views

Collibra offers the following types of views:

- Dashboards
- Search filters
- Diagram views
- Relation views on an asset page
- Asset views, such as in a domain, community, global view, or certain applications

Applications with asset views

The following table lists the applications where asset views are available.

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

Global view

A global view enables you to show all Collibra assets in a single view, regardless of their community, domain, or application.

The various features that are available for a view are also available for a global view. As such, you can:

- Change the display mode to table or tile.
- 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 toolbar, click → **Global View**.
2. If needed, switch to another view.

Manage a view

This section describes how to work with a view.

Create a view

You can create a view to show assets based on specific filters or to show only certain data for a set of assets. You can create multiple views without affecting Collibra's performance. Before creating a view, determine the items you want to include and the most appropriate location for the view, such as, Business Glossary, Global View, or within a specific community or domain.

Prerequisites

You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage your own Views, Dashboards, Search filters**.

Steps

1. Open the set of assets (in table or tile display mode) for which you want to create a view (for example, Business Glossary).

   > **Tip** If you want to begin from an existing view, switch to that view.

2. Set the filters.
3. Customize the table or customize the set of tiles.

4. Optional: If the view is in table display mode, enable hierarchy or wrap text.
5. Click → **Create a copy**.
   » The **Copy View** dialog box appears.
6. Enter the required information.

Field	Description
Name	Name to identify the view.
Description	Description for the view.
Pin	Option to pin the view to the view selector.
Set as default View	Option to set the view as the default view for those with whom the view is shared.
Visible To	Options that determine who can see the view: ◦ **Only You:** Only you can see the view. ◦ **Everyone:** Everyone can see the view. ◦ **Specific Roles, Groups, or Users:** ▪ **Roles:** Only the roles you select can see the view. ▪ **Groups:** Only the groups you select can see the view. ▪ **Users:** Only the users you select can see the view.

7. Click **Save**.

Edit a view

You can edit the name and description of a view.

> **Note** To avoid potential unexpected errors, we recommend against simultaneously editing the same view in multiple browser tabs.

Prerequisites

- **To edit your own view:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage your own Views, Dashboards, Search filters**.
- **To edit a view that is shared with you:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage shared Views, Dashboard and Search Filter**.

Steps

1. Open the set of assets (in table or tile display mode) for which you want to edit a view (for example, Business Glossary).
2. Switch to the view you want to edit.
3. Click ✎.
   » The **Edit Name and Description** dialog box appears.
4. Enter the required information.

Field	Description
Name	Name to identify the view.
Description	Description for the view.

5. Click **Save**.

Edit the view configuration

You can edit the filters used in a view, customize the columns or fields shown, and show the assets in a table as a hierarchy.

Prerequisites

- **To edit your own view:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage your own Views, Dashboards, Search filters**.
- **To edit a view that is shared with you:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage shared Views, Dashboard and Search Filter**.

Steps

1. Open the set of assets (in table or tile display mode) for which you want to edit the view configuration (for example, Business Glossary).
2. Switch to the view for which you want to edit the configuration.

3. If needed:
    - Edit the filters.
    - Customize the table or customize the set of tiles.
    - If the view is in table display mode, enable hierarchy or wrap text.
4. 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 make a view private, public, or visible to only specific roles, groups, or users.

Prerequisites

- **To share your own view:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage shared Views, Dashboard and Search Filter**.
- **To share a view that is shared with you:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage your own Views, Dashboards, Search filters**.

Steps

1. Open the set of assets (in table or tile display mode) for which you want to share a view (for example, Business Glossary).
2. Switch to the view you want to share.
3. Click .
    » The **Share View** dialog box appears.

4. Enter the required information.

Field	Description
Pin	Option to pin the view to the view selector.
Set as default View	Option to set the view as the default view for those with whom the view is shared.
Visible To	Options that determine who can see the view: ◦ **Only You:** Only you can see the view. ◦ **Everyone:** Everyone can see the view. ◦ **Specific Roles, Groups, or Users:** ▪ **Roles:** Only the roles you select can see the view. ▪ **Groups:** Only the groups you select can see the view. ▪ **Users:** Only the users you select can see the view.

5. Click **Save**.

Delete a view

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

Prerequisites

- **To delete your own view:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage your own Views, Dashboards, Search filters**.
- **To delete a view that is shared with you:** You have a global role that has the following global permission: **Views, Dashboards, Search filters** > **Manage shared Views, Dashboard and Search Filter**.
- If a view is the default view for a domain type (in preview), make sure to remove it as the default view before you can delete the view.

Steps

1. Open the set of assets (in table or tile display mode) for which you want to delete a view (for example, Business Glossary).
2. Switch to the view you want to delete.
3. Click 🗑 and confirm the deletion.

> **Tip** You can also delete a view from the overview. To do so:
>
> a. In the **Select View** drop-down list, click **Show All Views**.
> » A table containing all the views is shown.
> b. Click 🗑 next to the row containing the view you want to delete.

Pin a view

You can pin a view to the view selector if you want to easily find the view. When you pin a view, the view is also pinned for those who can see the view.

Steps

1. Open the set of assets (in table or tile display mode) for which you want to pin a view (for example, Business Glossary).
2. In the **Select View** drop-down list, click **Show All Views**.
   » A table containing all the views is shown.
3. Click 📌 next to the row containing the view you want to pin.
   » The view will appear in the **Pinned** section of the **Select View** drop-down list.

Switch between views

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

Steps

1. Click the **Select View** drop-down list.
2. Select the view you want.
3. If the view you want is not in the **Select View** drop-down list:
   a. Click **Show All Views** within the list.
      » A table opens containing all the views.
   b. Select the view you want from the table.

Timeout period for table and tile loading

Sometimes, the loading of a table or set of tiles can take some time. 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 stops 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 tile count.
- Reducing the number of columns (in a table) or fields (in a set of tiles).

You can also 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.

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 Collibra Platform service of that environment.
    d. Click **Configuration**.
    e. Click **Edit configuration**.
2. Go to the **Table** section.

3. Enter the required information:

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

4. Click **Save all**.

Asset filters

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

Basic and advanced filtering

Collibra has two modes for filtering data:

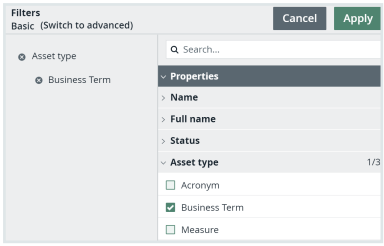
- **Basic:** Filter data by creating simple filter conditions that are always combined by the logical AND operator

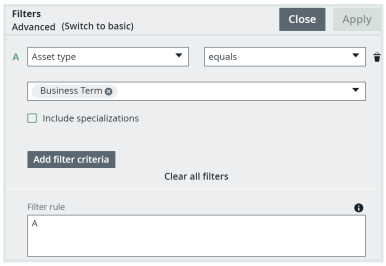
  > **Tip** While the basic mode of filtering is available only in the classic UI, you can view or edit the previously applied basic filters in the latest UI using the Advanced filter pane.

- **Advanced:** Filter data by creating complex filter conditions. An advanced filter is a combination of filter conditions that can be combined by using the logical AND and OR operators.

In the **Filters** pane, you can switch 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

This feature **isn't available** in the latest user interface.

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

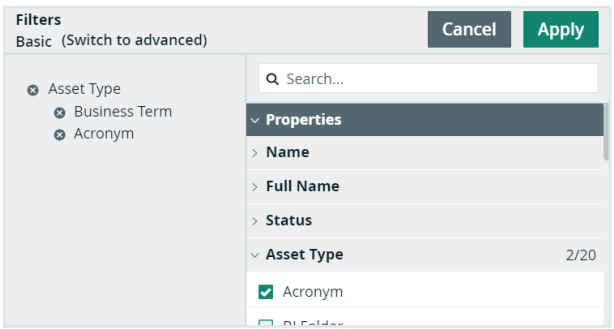
The characteristics are grouped in the following categories:

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

For information about how to add characteristics to a filter, go to Create a basic filter.

Filter behavior

- Multiple values for one characteristic are treated as an OR operator. The filter shown in the following image filters the assets if the asset type is Acronym or Business Term.



- All the simple conditions in a basic filter are treated as an AND operator.
- 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 applies the filter only 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 the Reviewer responsibility. If user B is signed in, the table shows the assets for which User B has the Reviewer responsibility.
- The **Roles** category of a basic filter does not consider inherited responsibilities. If you want to include inherited responsibilities in the filter criteria, you can use an advanced filter.

Create a basic filter

This feature **isn't available** in the latest user interface.

If you want to customize a view to ensure that only certain assets are shown to you, you can create a filter.

Steps

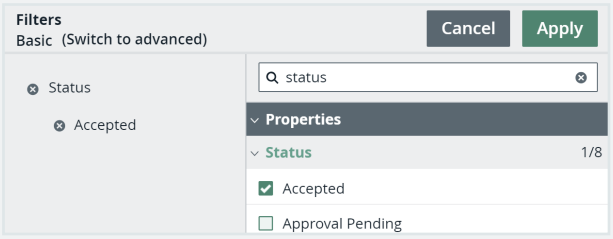
1. Go to a table or set of tiles containing the assets you want to see.
2. Click ▼ to open the filter pane.
3. In the filter pane, click **Edit**.

   Tip If the **Switch to basic** button is shown, click it.

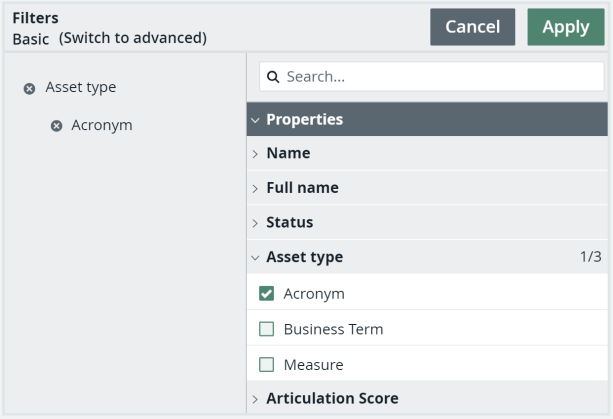
4. In the right column of the filter pane, select the characteristics you want to include in the filter.

Tip
You can do this in multiple ways:

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



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



Note

- For certain characteristics, you need to select the values from a predefined list, for example, **Type** or **Status**.
- For certain characteristics, you need to type one or more values, for example, *Name* or *Definition*.
- Multiple values for a characteristic are treated as an OR operator.
- All the simple conditions in a basic filter are treated as an AND operator.
- You can remove a filter characteristic by clicking ⊗ next to the filter characteristic, or you can remove a single value from a filter characteristic by clicking ⊗ next to its value.

5. Click **Apply**.

Advanced filters

Advanced filters are like basic filters in that they consist of one or more filter conditions. Advanced filters, however, use advanced logical operators. In a basic filter condition, the logical operator is "equals." In an advanced filter condition, 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, asset type, name, and tags.
- **Attributes:** All the asset attributes in Collibra, for example, definition, note, and quality.
- **Relations:** All the relations in Collibra.
- **Roles:** All the resource roles defined in Collibra, for example, Assignee, Business Steward, and Requester.

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 • less or equals • greater • greater or equals

Filter criterion type	Operators
Date, for example, **Created On**	• equals • before • before or equal to • after • after or equal to • last (...) days • exists • does not exist
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.

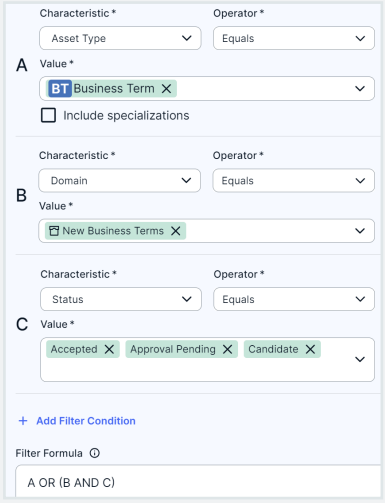
> **Example** John Fisher is included in a user group named **The Dream Team**. There are a number of assets to which **The Dream Team** user group has been assigned as the Business Steward. If you filter a view by Business Steward and specify the user John Fisher, all such assets pass the filter.

You can create a combination of conditions by using the AND and OR operators and parentheses in the Filter Formula box. The order of the conditions does not affect the results.

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

Example
The filter shown in the following image finds assets that meet the following criteria:

- The assets have the asset type **Business Term**.
  OR
- The assets have the domain **New Business Terms** and one of the following statuses: **Accepted**, **Approval Pending**, **Candidate**.



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 Collibra, the name of the corresponding Table asset in Collibra 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 Collibra.

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 for which you want to create an advanced filter.
2. Click to open the filter pane.
3. Click **Edit Filter**.
4. Specify the filter criteria.

   > **Tip** You can add multiple criteria using **Add a Filter**.

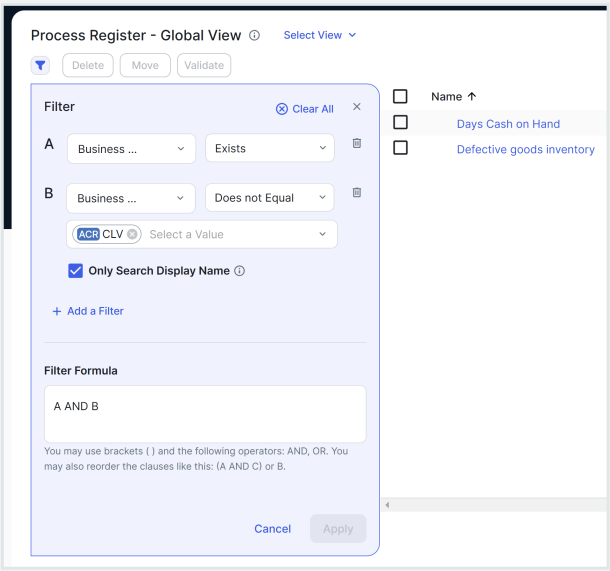
5. In the **Filter Formula** field, specify how you want the filter criteria to be interpreted.

   > **Tip** For more information, go to Filter rules.

6. Click **Apply**.

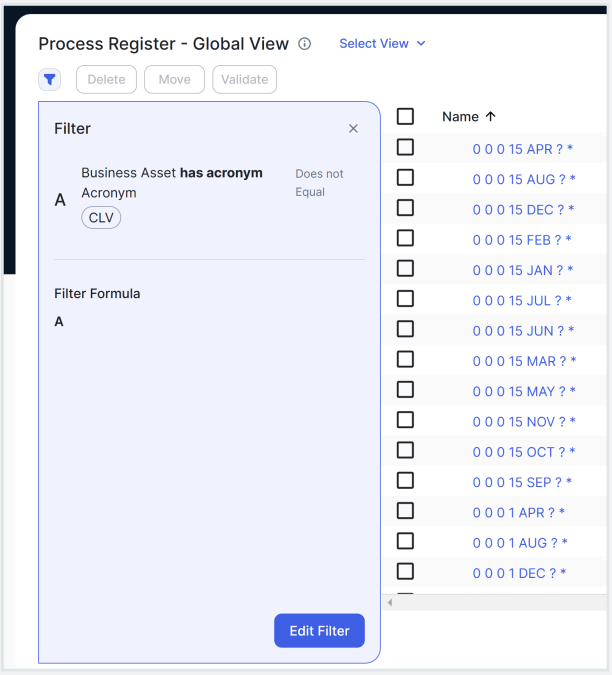
Tip

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 image.



- Criterion **A** ensures that the filter considers only the assets that have the specified relation type (**Business Asset has acronym Acronym**).
- Criterion **B** ensures that the filter considers only the assets for which the acronym **does not equal** the specified value (**CLV**)—but within the subset of assets filtered by **A**.

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



Filter rules

When creating an advanced filter, you can combine the filter conditions. By default, the filter conditions are combined with the AND (conjunction) operator. You can, however, also combine the conditions by using parentheses and the OR (disjunction) operator.

Operator	Description
AND	A result must fit all filter conditions. **Example** A AND B AND C means that only a resource that fits all three filter conditions is added to the results.
OR	A result must fit one of the filter conditions. **Example** A OR B OR C means that whenever a resource fits one of the three filter conditions, it is added to the results.

Operator	Description
( )	A result must be a combination of something inside of the brackets and something outside of the brackets. **Example** A AND (B OR C) means that whenever a resource fits either B or C, and it also fits A, it is added to the results. Results can be a combination of either B and A or C and A resources.

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

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

Filter rule examples

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

Reset a filter

If you have applied a filter to a view and want to restore the previous filter, click **Discard Draft**.

Display modes

Throughout Collibra, you can choose to see assets as a table (table display mode) or as a set of tiles (tile display mode). When assets are shown in table display mode, each row in the table represents an asset. When they are shown in tile display mode, each tile represents an asset.

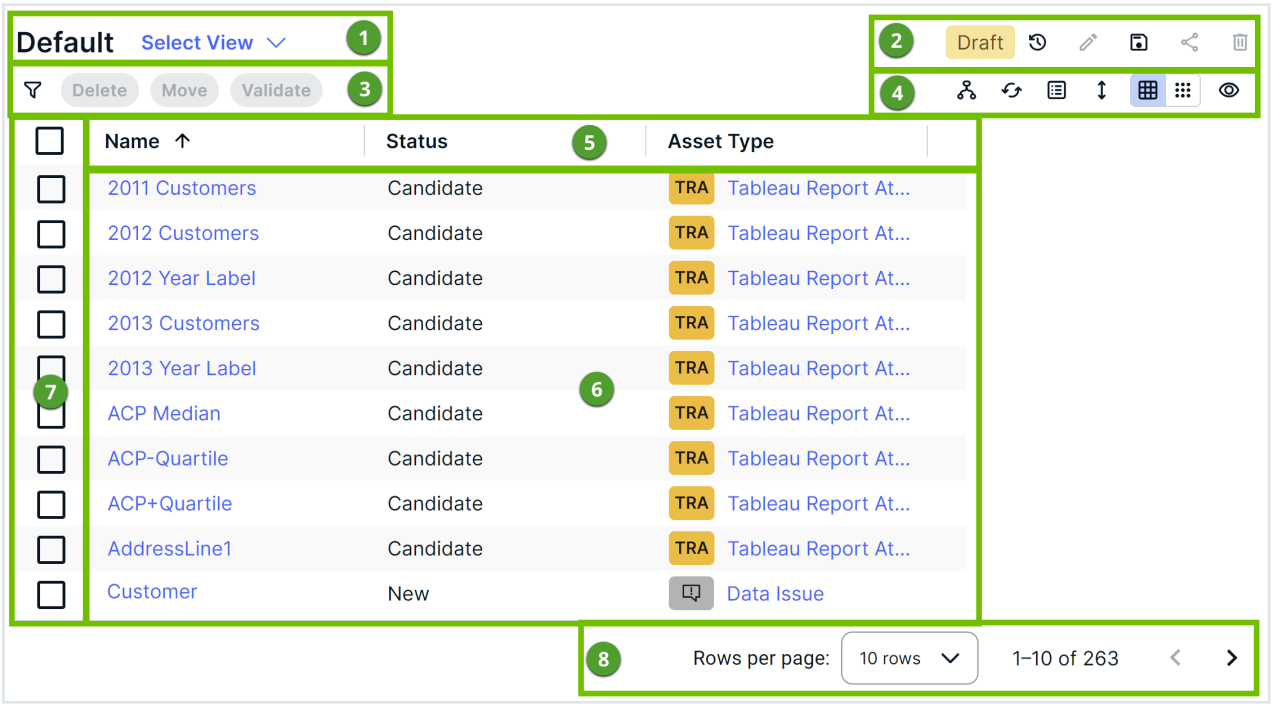
Table display mode

In table display mode, each row in the table represents an asset. You can filter a table by Steps or by using Asset filters.

> **Tip** You can also switch to tile display mode.

Work with tables

In table display mode, each row in the table represents an asset. The following table describes the various elements shown in a Collibra table.



No.	Description
1	Name and description (if available) of the current view, and an option to select another view.

No.	Description
2	discards the draft and replaces it with the last published version of the view. edits the name and description of the view. publishes or duplicates the view. shares the view. deletes the view. **Tip** The text **Draft** indicates that you have edited the view.
3	opens the filter pane, which you can use to limit the number of assets shown in the view. The following buttons are enabled only when you select the checkboxes next to the rows: • Delete deletes the selected assets. • Move moves the selected assets to a different domain. • Validate runs validation rules that may be assigned to the types of the selected assets. **Tip** You may see additional buttons that start a workflow for the selected assets. Only the workflows that are applicable to the selected assets are available.

No.	Description
4	imports assets or complex relations. exports assets or complex relations. enables or disables hierarchy. **Tip** If you enable the hierarchy, a selection of assets is shown in a tree structure based on their relation type. If you select only one relation type, Collibra builds the hierarchy as deeply as possible, traversing occurrences of that single relation type as often as it can. refreshes the table. customizes the columns. You can rename the column headings, show or hide columns, and define the order in which the columns are shown in the table. shows the full text (wraps) or trims the text in all the cells of the table. shows the assets as a set of tiles. shows a preview of the asset whose cell (not the checkbox) you clicked.
5	Asset fields shown as column headings. **Tip** • You can sort the columns in ascending or descending order. • You can apply or clear a column filter.
6	Asset field values. **Tip** You can edit the value in a cell by double-clicking the cell. You can also apply your change to either the selected assets (if any) or all the assets visible in the table. This action cannot be undone.
7	Checkboxes for selecting the assets. **Tip** You can select all the visible assets in the table by selecting the checkbox next to the column headings.

No.	Description
8	• An indicator of how many rows are shown per page. You can change this number by clicking the drop-down list and selecting the number you want. • Arrows to navigate between the pages.

Switch to table display mode

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

Steps

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

Edit cells in a table

You can edit certain cells within a table.

> **Note**
> - This action can't be undone.
> - The Technical data type of a column can't be edited from a view. You can edit the value only from an asset page, if the Technical Data Type attribute has been added separately to the asset type layout.

The following levels of granularity are provided for editing:

- Single cell within a column
- Specific cells within a column
- All visible cells within a column

Steps

1. Open a view in table display mode.

   > **Tip** To edit multiple cells within a column, select the checkboxes in the respective rows. To edit all the visible cells within a column, you don't need to select any checkboxes.

2. Double-click one of the cells. Alternatively, you can double-click ✎ in one of the cells.

   > **Tip** If the cell contains an attribute other than True/False, a dialog box appears for you to specify a value.

3. Specify the value you want.
4. Select the **Apply to all selected rows** or **Apply to all visible rows** checkbox.

   > **Tip** If you don't want to apply your change, click **X** or **Cancel**.

5. Click ✓ or **Save**.
   » The new value is shown in the cells.

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.

Steps

1. Open a view in table display mode.
2. Click ↕.

Customizing tables

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

Add columns to a table

A table shows a default set of columns. You can, however, add more columns to the table.

> **Note** You can also show responsibilities as a column.

Steps

1. Open a view in table display mode.
2. Click .
   » The **Edit Fields** dialog box appears.
3. Click **Select Fields**.
   » The **Select Fields** dialog box appears.
4. Select the checkbox next to the columns you want to add to the table.

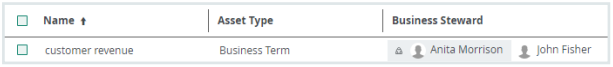
   > **Tip** You can use the **Search** field to quickly find a column.

   > **Note** If the type of the domain is not part of the assignment of the asset types it contains, you cannot select attributes or relations fields.

5. Click **Update**.
   » The **Edit Fields** dialog box appears.
6. Optional: Change the display name and order of the columns.
7. Click **Save**.

Show responsibilities in an asset table

An asset view can show the responsibilities of a resource per role. If you enabled inherited responsibilities in Collibra Console, you can see the inherited responsibilities in the table. Inherited responsibilities have a gray background and cannot be edited in an asset view. Direct responsibilities have a white background and can be edited.



Steps

1. Open a view in table display mode.
2. Click .
   » The **Edit Fields** dialog box appears.
3. Click **Select Fields**.
   » The **Select Fields** dialog box appears.
4. Select one or more roles.

   > **Tip** The **Roles** tab shows all the roles.

5. Click **Update**.
   » The **Edit 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**.

Change the column order

You can change the order in which the columns are shown in a table.

> **Note** If you enable hierarchy, the **Name** column is shown as the leftmost column in the table and it is fixed.

Steps

1. Open a view in table display mode.
2. Click ☰.
   » The **Edit Fields** dialog box appears.
3. Hover your pointer over the column you want to reposition.
   » and a drop-down list appear.
4. Do one of the following:
   - Drag to the required position.
   - Click the drop-down list, and then select one of the following options.

Option	Description
Move to top	Moves the current column to the top.
Move to bottom	Moves the current column to the bottom.
Move to before > [select a column]	Moves the current column to the position immediately preceding the selected column.

5. Click **Save**.

Edit a column name

You can edit the names of the columns shown in a table.

Steps

1. Open a view in table display mode.
2. Click .
   » The **Edit Fields** dialog box appears.

   > **Tip** The **Display Name** column shows the current names of each column shown in the table.

3. In the **Display Name** column, enter the new name for the column.
4. Click **Save**.

Remove columns from a table

A table shows a default set of columns. You can, however, remove columns from the table.

Steps

1. Open a view in table display mode.
2. Click ☰.
   » The **Edit Fields** dialog box appears.
3. Click 🗑 next to the columns you want to remove from the table.

   Tip If you want to remove several columns:
   a. Click **Select Fields**.
      » The **Select Fields** dialog box appears.
   b. Clear the checkbox next to the columns you want to remove from the table. You can use the **Search** field to quickly find a column.
   c. Click **Update**.
      » The **Edit Fields** dialog box appears.

4. Optional: Change the display name and order of the columns.
5. Click **Save**.

Change the number of rows per page

If a table contains a large number of rows, the rows are split into pages. You can change the number of rows shown per page.

Steps

1. Open a view in table display mode.
2. In the lower-right corner of the page, in the **Rows per page** field, select the number of rows you want to show per page.

Freeze columns

When you freeze a column, the column becomes the leftmost column in the table and remains visible even when you scroll horizontally to the right on the table.

> **Note** If you enable hierarchy, the **Name** column is shown as the leftmost column in the table and it is fixed. You can, however, unfreeze it. You can also change the column order.

Steps

1. Open a view in table display mode.
2. Click .
   » The **Edit Fields** dialog box appears.
3. For the column you want to freeze, drag and drop it above the **Move to Freeze Fields** line.

   > **Tip**
   > - The columns that are shown above the **Move to Freeze Fields** line will be frozen.
   > - You can freeze multiple columns.
   > - If you want to unfreeze a column, drag and drop it below the **Move to Freeze Fields** line.

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 the Multi-column sort settings in Collibra Console.
- Multi-column sorting is not available in tile display mode. You can, however, 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. For more information, go to Sort a set of tiles.
- ↑ (up arrow) in a column name indicates that the current sort order is ascending and ↓ (down arrow) indicates that the current sort order is descending.

Steps

Single-column sorting

1. Open a view in table display mode.
   » The table is automatically sorted in ascending order of the **Name** column, as indicated by ↑ (up arrow).

   Tip To sort the table in descending order of the **Name** column, click the column name.

2. Click the name of the column on which you want to sort.
   » The up arrow appears next to the column name and the table is sorted in ascending order of the column.

   Tip To sort the table in descending order of the column, click the column name again.

Multi-column sorting

1. Open a view in table display mode.
   » The table is automatically sorted in ascending order of the **Name** column, as indicated by ↑ (up arrow).

> **Tip** To sort the table in descending order of the **Name** column, click the column name.

2. Click the name of any other column on which you want to sort.
   » The table is sorted in ascending order of the column, and **2** followed by the up arrow appears next to the column name, indicating that the column has the second priority in sorting. Additionally, **1** is shown on the **Name** column, indicating that the **Name** column has the first priority in sorting.

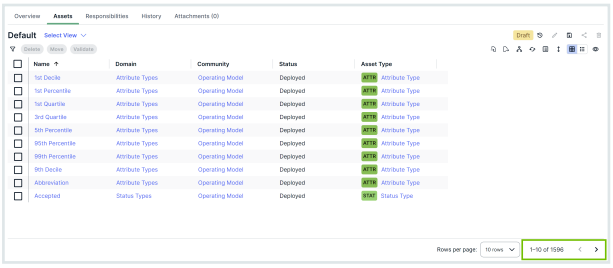
   > **Tip**
   > - To sort the table in descending order of the column, click the column name again.
   > - To remove the sorting from any column, keep clicking the column name until the up or down arrow disappears.
   > - By default, at least one of the columns is always sorted and you cannot remove the sorting from it.

3. To sort the data on more columns, perform the previous step.

   > **Tip** The data in the table is first sorted by the column having the first priority (indicated by the number **1** on the column name). Within that sort result, the data is further sorted by the column having the second priority (indicated by the number **2** on the column name), and so on.

Navigate between table pages

If a table contains more rows than are currently shown, the rows are split into pages and the page numbers are shown in the lower-right corner of the table. You can navigate between these pages.



Steps

1. Open a view in table display mode.
2. To navigate to the next page, click >.
3. To navigate to the previous page, click <.

Apply a column filter

You can use a column filter to see only those rows that contain a particular value in a column.

Steps

1. Open a table.
2. Hover your pointer over the heading of the column you want to filter, and then click 🔍.
   » A filter box appears.
3. Enter the column value based on which you want to filter the rows.
   Only the rows containing the entered value in the column are shown.

> **Tip** If you want to clear the column filter, hover your pointer over the column heading, click 🔍, and then click ×.

Working with hierarchies

A hierarchy is a visual representation of relations between assets. The hierarchy feature for asset views enables you to show 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 show in the hierarchy.

> **Tip**
> - If hierarchy is enabled for a view, a dot appears over 🔗.
> - Collibra uses dotted lines to graphically depict the relations between the assets in the hierarchy. Small carets (triangles) depict nodes in the hierarchy and you can expand them.

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.
- 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.
> - Hierarchy is not available in 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 D
    - Report E
  - Report C (groups Reports F)
    - Report F

> **Note** With the hierarchy display enabled, only **Report A** is shown as the top element of the hierarchy.

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.

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]

> **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 see an asset table in a tree structure, or disable hierarchies to see a flat asset table.

Steps

1. Open a view in table display mode.
2. Click .
   The **Enable and 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.
Relation Type	Select the relation types you want to use for the hierarchy.

4. Click **Apply**.
   » A dot appears over to indicate that hierarchy is enabled.

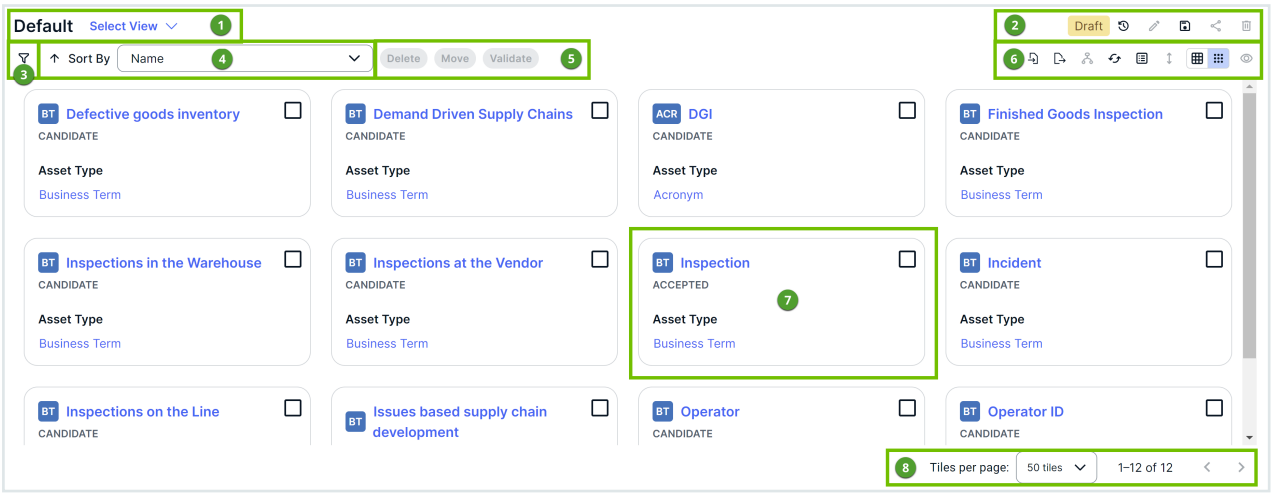
Tile display mode

In tile display mode, each tile in a set represents an asset. You can filter the set of tiles by using Asset filters.

> **Tip** You can also switch to table display mode.

Working with tiles

In tile display mode, each tile represents an asset. The following table describes the various elements shown in a Collibra tile.



No.	Description
1	Name and description (if available) of the current view, and an option to select another view.
2	discards the draft and replaces it with the last published version of the view. edits the name and description of the view. publishes or duplicates the view. shares the view. deletes the view. **Tip** The text **Draft** indicates that you have edited the view.
3	opens the filter pane, which you can use to limit the number of assets shown in the view.
4	Sorts the tiles in ascending or descending order by field.

No.	Description
5	The following buttons are enabled only when you select the checkboxes on the tiles: • Delete deletes the selected assets. • Move moves the selected assets to a different domain. • Validate runs validation rules that may be assigned to the types of the selected assets. **Tip** You may see additional buttons that start a workflow for the selected assets. Only the workflows that are applicable to the selected assets are available.
6	imports assets or complex relations. exports assets or complex relations. refreshes the table. customizes the tiles. You can rename the fields shown on the tiles, show or hide fields, and define the order in which the fields are shown on the tiles. shows the assets as a table.
7	Asset fields and their values.
8	• An indicator of how many tiles are shown per page. You can change this number by clicking the drop-down list and selecting the number you want. • Arrows to navigate between the pages.

Switch to tiles display mode

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

Steps

1. Open a view in table display mode.
2. Click .

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 tile

A tile in a set shows a default set of fields. You can, however, add more fields to the tile.

> **Note** You can also show responsibilities as a field.

Steps

1. Do one of the following:
   - Open a view in tile display mode.
   - Open an asset page with related assets shown in tile display mode.
2. Click .
   » The **Edit Fields** dialog box appears.
3. Click **Select Fields**.
   » The **Select Fields** dialog box appears.
4. Select the checkbox next to the fields you want to add to the tile.

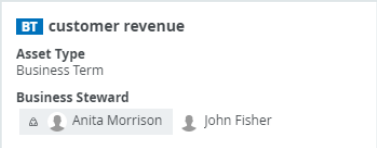
   > **Tip** You can use the Search box to quickly find a field.

   > **Note** If the type of the domain is not part of the assignment of the asset types it contains, you cannot select attributes or relations fields.

5. Click **Update**.
   » The **Edit Fields** dialog box appears.
6. Optional: Change the display name and order of the fields.
7. Click **Save**.

Show responsibilities in a tile set

Tiles can show the responsibilities of a resource per role. If you enabled inherited responsibilities in Collibra Console, you can see the inherited responsibilities. Inherited responsibilities have a gray background and direct responsibilities have a white background.



Steps

1. Do one of the following:
   - Open a view in tile display mode.
   - Open an asset page with related assets shown in tile display mode.
2. Click .
   » The **Edit Fields** dialog box appears.
3. Click **Select Fields**.
   » The **Select Fields** dialog box appears.
4. Select one or more roles.

   > **Tip** The **Roles** tab shows all the roles.

5. Click **Update**.
   » The **Edit 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**.

Change the field order

You can change the order in which the fields are shown 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 was uploaded for the asset).

Steps

1. Do one of the following:
   - Open a view in tile display mode.
   - Open an asset page with related assets shown in tile display mode.
2. Click .
   » The **Edit Fields** dialog box appears.
3. Hover your pointer over the field you want to reposition.
   » and a drop-down list appear.
4. Do one of the following:
   - Drag to the required position.
   - Click the drop-down list, and then select one of the following options.

Option	Description
Move to top	Moves the current field to the top.
Move to bottom	Moves the current field to the bottom.
Move to before > [select a field]	Moves the current field to the position immediately preceding the selected field.

5. Click **Save**.

Edit a field name

You can edit the names of the fields shown in a tile.

Steps

1. Do one of the following:
   - Open a view in tile display mode.
   - Open an asset page with related assets shown in tile display mode.
2. Click .
   » The **Edit Fields** dialog box appears.

   > **Tip** The **Display Name** column shows the current names of each field shown in a tile.

3. In the **Display Name** column, enter the new name for the field.
4. Click **Save**.

Remove fields from a tile

A tile in a set shows a default set of fields. You can, however, remove fields from the tile.

Steps

1. Do one of the following:
   - Open a view in tile display mode.
   - Open an asset page with related assets shown in tile display mode.
2. Click .
   » The **Edit Fields** dialog box appears.
3. Click next to the fields you want to remove from the tile.

   Tip If you want to remove several fields:
   a. Click **Select Fields**.
      » The **Select Fields** dialog box appears.
   b. Clear the checkbox next to the fields you want to remove from the tile.
      You can use the **Search** field to quickly find a field.
   c. Click **Update**.
      » The **Edit Fields** dialog box appears.
4. Optional: Change the display name and order of the fields.
5. Click **Save**.

Change the number of tiles per page

If a set of tiles contains a large number of tiles, the tiles are split into pages. You can change the number of tiles shown per page.

Steps

1. Do one of the following:
    - Open a view in tile display mode.
    - Open an asset page with related assets shown in tile display mode.
2. In the lower-right corner of the page, in the **Tiles per page** field, select the number of tiles you want to show per page.

Select multiple tiles

When you select a single tile, all of the actions available to you appear above the tiles as buttons. 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

1. Do one of the following:
    - Open a view in tile display mode.
    - Open an asset page with related assets shown in tile display mode.
2. Select the checkboxes next to the tiles you want to select.

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 tile 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 tile display mode.
   - Open an asset page with related assets shown in tile display mode.

   » By default, the tiles are arranged in ascending order by name.

   > **Note**
   > - If you or someone had applied sorting to multiple columns in table display mode before switching to tile display mode, the multi-column sorting is retained in tile display mode.
   > - You cannot apply multi-column sorting in tile display mode.

2. Click the **Sort By** drop-down list box.
   A list of fields that are currently visible for the set of tiles appears.
3. Select the field by which you want to sort the tiles.
   » The tiles are sorted in ascending order, as indicated by ↑.
4. To sort in descending order, click ↑.

Navigate between tiles pages

If a set of tiles contains more tiles than are currently shown, the tiles are split into pages and the page numbers are shown in the lower-right corner of the set. You can navigate between these pages.

Steps

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

2. To navigate to the next page, click >.
3. To navigate to the previous page, click <.

Filtering tiles

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

Search

With the quick search box or the search widget, you can find any resource in Collibra, such as assets, communities, domains, users, and user groups. Both options take you to the Search page, where you can refine the search results as needed.

In the latest UI, depending on your permission, the search page includes the **Data Marketplace** tab, which allows you to search for specific asset types, such as data sets, reports, and tables.

Quick search

The quick search box appears in the top navigation bar when you click 🔍. You can use it to quickly find items without first navigating to the search page.

The quick search box allows you to find items containing words that begin with your search text (also known as search query or search term). For example, if you search for *ca*, the search results may include **California**, **Lewis Carroll**, or **Meer-cat**. For more information about search behavior, go to Search behavior.

In this topic

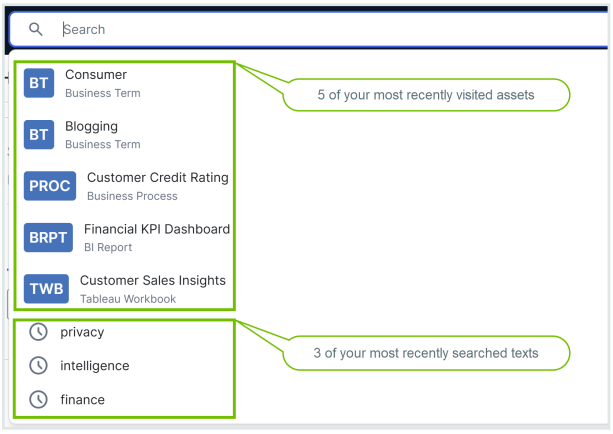
Quick search results

Quick search results are the suggested items that appear below the quick search box when you click inside the box or start entering something in the box.

Clicking inside the search box

When you simply click inside the search box, the following quick search results appear:

- **Recently visited assets:** Up to 5 of your most recently visited assets. Clicking a recently visited asset opens the asset page.
- **Recently searched texts:** Up to 3 of your most recently searched texts. These are indicated by a clock icon. Clicking a recently searched text opens the search page, with the search text and your previously used filters applied. For example, if you recently searched for **privacy** and filtered the results by the **New** status, clicking **privacy** now opens the search page with both the search text (**privacy**) and the filter (**New** status) already applied.

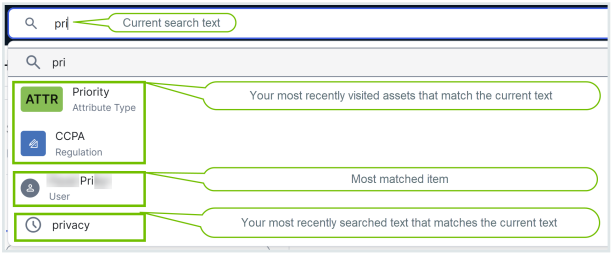


Entering a text in the search box

As you enter a text in the quick search box, the following quick search results appear:

- **Recently visited assets:** Up to 3 of your most recently visited assets that match your text. If there are fewer than 3 such assets, the remaining spots are filled with top matching items. Clicking a recently visited asset opens the asset page.

- **Top matching items:** Up to 2 items that closely match your text. When compiling the top matching items, your text is searched in the **Name**, **Description**, and **Definition** fields (if available). The top matching items in a quick search might not always appear as the top matching items in a full search (that is, on the search page). Clicking a top matching item opens its corresponding page.
- **Recently searched texts:** Up to 3 of your most recently searched texts that match your text. These are indicated by a clock icon. Clicking a recently searched text opens the search page, with the search text and your previously used filters applied. For example, if you recently searched for **privacy** and filtered the results by the **New** status, clicking **privacy** now opens the search page with both the search text (**privacy**) and the filter (**New** status) already applied.



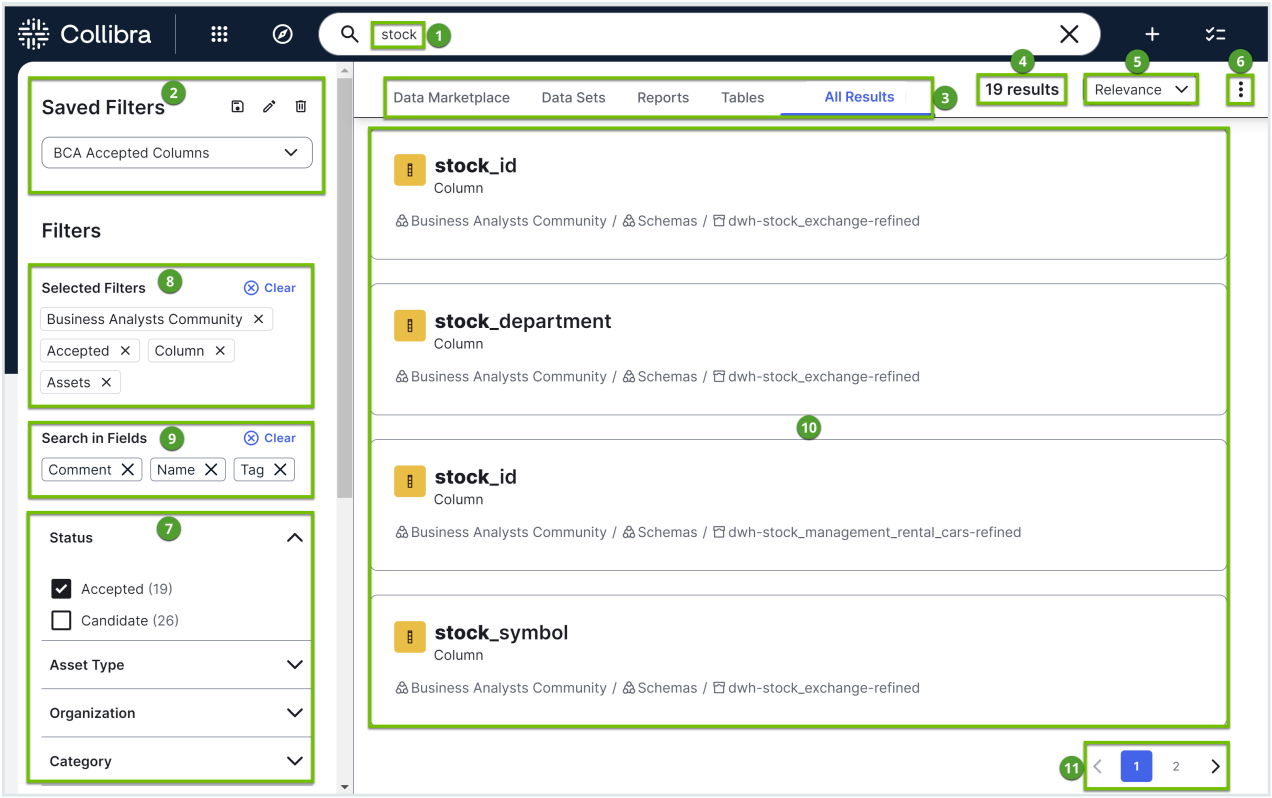
After entering a text in the search box

After you enter a text in the quick search box, to perform a full search, press `Enter`. This opens the search page with results that match your search text.

> **Tip**
>
> - If your search text doesn't match any existing content, results are shown for the closest matching text.
> - If you perform a search with a community or domain page open, the search results on the search page are automatically filtered by the current community or domain.

Search page

The following table describes the various sections shown on a search page.



No.	Description
1	Your search text, which you can edit.
2	**Saved Filters:** A drop-down list of search filters, showing the filter currently applied. By default, no search filter is applied. The drop-down list contains filters you created and those shared with you. creates a search filter or saves a copy of an existing filter. You can then access the filter from the **Saved Filters** drop-down list. edits the name, description, and visibility settings of the filter. deletes the filter.

No.	Description
3	This section, which contains the following tabs, is shown only if you have the **Data Marketplace** global permission. Otherwise, all results are shown. • **Data Marketplace:** Allows you to switch to Data Marketplace search for searching within a curated subset of assets. For more information, go to Data Marketplace in Search. • **All Results:** Allows you to view all global results. The name of this tab is customizable via Collibra settings. The section also contains preconfigured search tabs for quick filters for Data Marketplace. Quick filters allow you to automatically apply a set of filters to the search results in a single action. **Tip** • Up to three quick filter search tabs are shown at a time. If more than three quick filter search tabs are configured, the **More** menu appears to allow you to select additional ones. When you select a quick filter on the **More** menu, that filter is shown as the third quick filter search tab. • The tab you click, either **Data Marketplace** or **All Results**, remains selected as you navigate between pages. However, any quick filter tab you click resets to **Data Marketplace** when you reopen the search page.
4	Total number of results.
5	Sorting criterion to change the order in which the results appear.
6	Option to change the number of results shown on each page.
7	Facet pane, which is a dynamically generated collection of available filters to: • Add or remove filter criteria to make your search broader or narrower. • Navigate and refine your search results. • Select the fields in which you want your text to be searched. **Note** • The facet pane is shown only if a search produces results. • While most searches are performed against assets, the **Category** filter in the facet pane can be helpful to search for non-assets, such as communities or domains, or to limit the results to only assets. The common category options available are assets, users, domains, communities, and user groups. • If you select the **Data Marketplace** tab, the filters in the facet pane change depending on how the Data Marketplace filter facets are configured. The **Search in Fields** filter, however, is always shown.

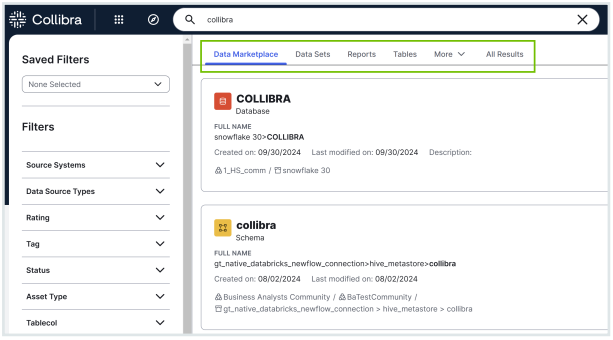
No.	Description
8	**Selected Filters:** Filters you selected in the facet pane.
9	**Search in Fields:** Fields you selected in the facet pane.
10	Results that match your search. **Tip** • To open an asset in a new tab or to see the workflows available for an asset, hover your pointer over the asset in the search results, and then click ⋮. • To open a resource from the search results, click its name. • If the text in a field is long, the text is shortened when shown in the search results.
11	Page numbers to navigate the search results.

Note
- As an administrator, you can add or remove fields shown for each search result. For more information, go to Configure search result fields.
- 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.

Data Marketplace in Search

Important This feature is **available only** in the latest UI.

Data Marketplace in Search refers to the Data Marketplace experience on the search page. It is available only if you have the **Data Marketplace** global permission. If you have this permission, the search page shows a set of tabs, called search tabs, that allow you to switch between curated and global search results.



When you first open the search page, the **Data Marketplace** search tab is active by default. The search tab you then click, either **Data Marketplace** or **All Results**, remains active as you navigate between pages. However, any quick filter search tab you click resets to **Data Marketplace** when you reopen the search page.

In this topic

Search tabs on the search page

The following table describes the search tabs shown on the search page.

> **Note** Search tabs are shown only if you have the **Data Marketplace** global permission. Otherwise, all results are shown.

Search tab	Description
Data Marketplace	Allows you to switch to the Data Marketplace search for searching within a curated subset of assets.
Data Sets, Reports, Tables	Default quick filters configured for Data Marketplace in Search. Quick filters allow you to automatically apply a set of filters to the search results in a single action. **Tip** Up to three quick filter search tabs are shown at a time. If more than three quick filter search tabs are configured, the **More** menu appears to allow you to select additional ones. When you select a quick filter on the **More** menu, that filter is shown as the third quick filter search tab.

Search tab	Description
All Results	Allows you to view global results. The name of this tab is customizable via Collibra settings.

When you click the **Data Marketplace** search tab or one of the quick filter search tabs:

- Additional filters appear in the facet pane on the left depending on how your administrator has configured the Data Marketplace filter facets. The **Search in Fields** filter, however, is always shown.
- The **Preview** button appears next to each search result to open the corresponding asset preview. To see this button, hover your pointer over the result.
- ⋮ appears next to each search result to open the corresponding asset in a new tab or to use the workflows available for the asset. These workflows are different from the Data Marketplace actions defined for the asset preview. To see ⋮, hover your pointer over the result.

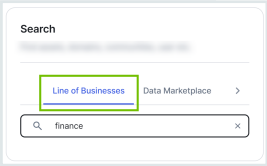
Incoming search

The following table shows which search tab is active by default when you open the search page from a given place.

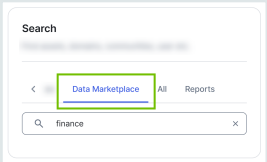
Origin	Default active search tab on the search page
Asset page → Data classification Asset page → Tags Homepage → Search box Stewardship → Data Classification → Preview → Show All Stewardship → Tags	Search tab that was last active **Tip** It is possible that no result is shown when the **Data Marketplace** search tab is active on the search page. In that case, click the **All Results** search tab.

Origin	Default active search tab on the search page
AI Governance → Search AI Use Cases Catalog → Search box Dashboard → Search widget, with a filter tab selected	**All Results** tab, with the same filter applied
Dashboard → Search widget, with a search tab selected	Selected search tab

Tip Here, *filter tab* refers to any tab that isn't a search tab.



Tip *search tab* refers to **Data Marketplace** or quick filter search tabs.



Faceted search

The facet pane is the left pane of the search page. It contains relevant criteria by which you can navigate and refine search results. These criteria are called facets, and the concept of using facets to refine search results is called 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.

In this topic

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 available to you is constant. The relevance of the filters to the search results isn't 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

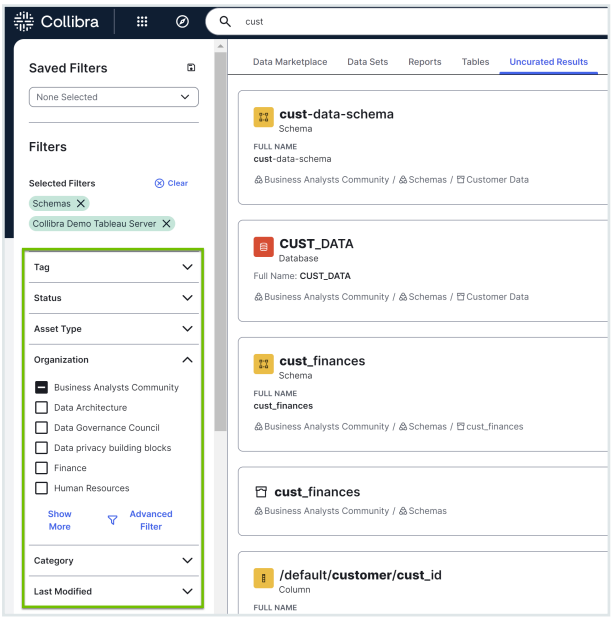
Facets are dynamically generated according to the resources that constitute the search results. They allow you to narrow results by several different dimensions simultaneously.

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.

The facets in the facet pane, at any given time, 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 produce no results.

Refine search results

The search page offers a variety of facets by which you can navigate and refine your search results. These facets are dynamically generated—they change depending on the search results.



The following table describes the filters shown in the facet pane.

> **Tip** When you select the **Data Marketplace** tab or the quick filter tabs on the search page, the filters in the facet pane change depending on how your administrator has configured the Data Marketplace filters.

Filter	Description
Tag	To show search results that have the tags you select. **Tip** You can also click the tag in any of the search results to search for all domains and assets with that tag.
Status	To show search results that have the statuses you select (for example, **Accepted** and **Candidate**).

Filter	Description
Asset Type	To show search results that are of the asset types you select (for example, **Column** and **Table**). **Tip** This filter is applicable if you selected **Assets** in the **Category** filter.
Organization	To navigate to resources by drilling down at the organizational level and limiting the search results to specific communities, subcommunities, and domains. **Tip** To select subcommunities or domains, click **Advanced Filter**.
Category	To navigate to a specific category of resources, such as assets, domains, communities, users, and user groups.
Last Modified	To show search results that were modified within the time frame you select (for example, in the last 24 hours).
Created On	To show search results that were created within the time frame you select (for example, in the last 24 hours).
Created By	To show search results that were created by the users you select.
Domain Type	To show search results that are of the domain types you select. **Tip** This filter is applicable if you selected **Domains** in the **Category** filter.
Certified	To show search results that contain certified assets. **Tip** This filter is shown only if certified assets exist.

Tip

- To clear all facet type selections on the search page, click **Clear**.
- Adding and removing facets on the search page is not the same as filtering the search results, or adding or removing fields from a set of tiles.

Search filter permissions

You don't need a particular license to create or manage search filters. However, you need the following global permissions.

Global permission	Description
Manage shared views, dashboards, search filters	Create and manage search filters for yourself and for other users, and share the filters 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** Permissions are granted to users through global roles and responsibilities.

Sort search results

You can sort the search results on the search page by the following criteria:

- **Relevance:** Sorts the results based on relevance. For more information, go to Relevance in search results.
- **Newest:** Sorts the results in descending order of when they were last modified. The most recently modified results are shown at the top.
- **A-Z**: Sorts the results in alphabetical order of names.
- **Z-A:** Sorts the results in reverse alphabetical order of names.
- **Oldest:** Sorts the results in ascending order of when they were last modified. The oldest results are shown at the top.

Steps

1. Perform a search via the search box or the Search widget.
2. On the search page, in the upper-right corner, click the **Relevance** menu.
3. Select the criterion by which you want to sort the search results.

What's next?

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, Collibra uses a combination of query clauses.

Query clauses

When you perform a search, Collibra 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 text and the text found in a field in the database.
- Calculate how frequently your search text appears in a field. The more often it appears, the greater the relevance. A field containing 5 occurrences of a given text is more likely to be relevant than a field containing a single occurrence of the text.
- Calculate the occurrence percentage of a text among all words in a particular field. For example, if your search text 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 text occurs twice in its 20-word description.

Related topics

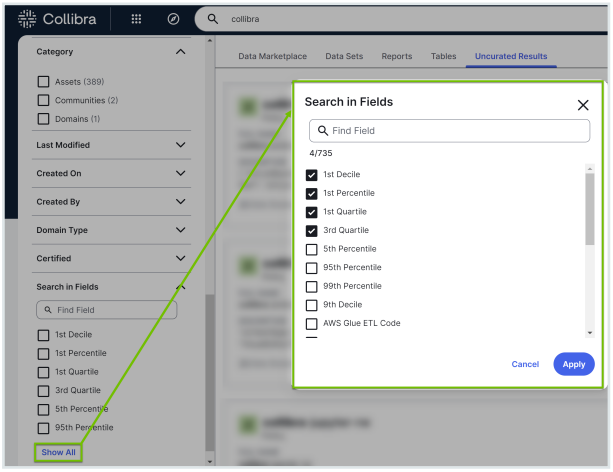
- Search behavior
- Customizing the search index

Search in fields

When you perform a search, the search engine looks for your text in all the fields by default. On the search page, you can then reduce the scope of your search by selecting specific fields. Conversely, if you apply a search filter in which specific fields have been already selected, you can clear one or all of the selected fields to expand the scope of your search.

The **Search in Fields** filter in the facet pane enables you to specify in which fields—attributes, relation types, and properties—you want to search for your text. By default, no fields are selected, meaning that the search engine searches for your text in all the fields.

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



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 box in the dialog box to find specific attributes and properties.
- 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.

Steps

1. Perform a search via the search box or the Search widget.
2. In the facet pane, click **Search in Fields**.
3. Select the fields in which you want to search for your text.

   Tip To see all fields, click **Show All**. This opens the **Search in Fields** dialog box, where you can select more fields.

4. If the **Search in Fields** dialog box is open, click **Apply**.

Search behavior

When you perform a search, specific rules determine how matches are found and ranked in the search results. For example, your search text will be split into smaller parts called tokens, and it may be treated as if it ends with a wildcard (*) even if you don't explicitly add one. These rules use the following methods in the background to process your search text:

- **Standard matching:** Processes your search text as a whole by identifying complete tokens to find broader matches. The standard matching method looks for matches in all fields.
- **Enhanced matching:** Process your search text by splitting any complex tokens into smaller parts to find additional matches. The final search results combine matches from both standard and enhanced matching methods. This ensures that you receive comprehensive and relevant matches without having to modify your search text. The enhanced matching method looks for matches only in the **Name** and **Tag** fields.

Both standard and enhanced matching methods are automatically applied whenever you perform a search.

In this topic

Search behavior explained with examples

The following examples explain how a search text is processed in standard and enhanced matching methods to return comprehensive and relevant matches. These examples assume that the **UI search appends wildcard** setting is disabled.

Why does `loan` return `loansize` but not `sizeloan`?

- **Standard matching:** `loan` is treated as just `loan`. This doesn't return `loansize` and `sizeloan`.
- **Enhanced matching:** `loan` is treated as `loan*`. This returns `loansize` but not `sizeloan`.

Search text	Matching method	Treated as	Returns	Doesn't return
`loan`	Standard	`loan`	`loan`	`loansize` `sizeloan`
	Enhanced	`loan*`	`loansize`	`sizeloan`

Why doesn't `size loan` return `sizeloan`?

- **Standard matching:** The space in `size loan` acts as an OR operator, treating the text as two separate words. This returns results that contain either `size` or `loan`, such as `size case` or `loan amount`. This doesn't return results that contain both `size` and `loan`, such as `size loan` or `sizeloan`.
- **Enhanced matching:** The space in `size loan` acts as an AND operator, treating the text as a single phrase, `size loan`. This returns results that contain both `size` and `loan` in that order, such as `size loan`. Additionally, the text is treated as a single

phrase with a wildcard at the end, `size loan*`. This returns results that start with `size loan`, such as `size loanamount`. However, this doesn't return `sizeloan` because it doesn't contain a space.

Search text	Matching method	Treated as	Returns	Doesn't return
`size loan`	Standard	`size` or `loan`	`size case` `loan amount`	`size loan` `sizeloan`
	Enhanced	`size loan` and `size loan*`	`size loan` `size loanamount`	`sizeloan`

Why doesn't `size_loan` return `sizeable loan`?

- **Standard matching:** The underscore in `size_loan` acts as the literal character, treating the text as a specific phrase, `size_loan`. This returns results only if there is an exact match, that is, `size_loan`.
- **Enhanced matching:** The underscore in `size_loan` acts as an AND operator, treating the text as a single phrase, `size loan`. This returns results that contain both `size` and `loan` in that order, such as `size loan`. Additionally, the text is treated as a single phrase with a wildcard at the end, `size loan*`. This returns results that start with `size loan`, such as `size loanamount`, `size_loanabc`, and `size.loanabc`. However, this doesn't return `sizeable loan` because `sizeable` isn't treated as a match for `size`.

> **Tip** Enhanced matching applies only to the **Name** and **Tag** fields. For example, if `size loanamount` exists in a **Comment** field, enhanced matching can't detect it.

Search text	Matching method	Treated as	Returns	Doesn't return

`size_loan`	Standard	`size_loan`	`size_loan`	`size loan`
				`sizeloan`
				`sizeable loan`

	Enhanced	`size loan*`	`size loan` `size loanamount`	`sizeable loan`

How different search texts are interpreted

The following table shows how complex tokens are processed in the standard and enhanced matching methods.

Search text	Standard matching	Enhanced matching
`sizeLoan`	`sizeloan`	`size,loan`
`size_loan`	`size_loan`	`size,loan`
`size.loan`	`size.loan`	`size,loan`
`size-loan`	`size,loan`	`size,loan`
`size=loan`	`size,loan`	`size,loan`
`size123loan`	`size123loan`	`size,123,loan`

Behavior when the "**UI search appends wildcard**" setting is enabled

The UI search appends wildcard setting, if enabled, uses the standard matching method but with a wildcard (*) added to the end of your search text. However, unlike the enhanced matching method, it looks for matches in all fields.

Related topics

- Relevance in search results
- Customizing the search index

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 don't know, you can use a wildcard in your search text when searching for that resource.

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

Wildcard	Description
?	Represents a single character. **Example** Searching for `?owie` can show results such as **Bowie**, **Mowie**, **Rowie**.
*	Represents a string of characters. **Example** Searching for `B*e` can show results such as **Bowie**, **Breeze**, and **Byte**. **Example** Searching for `Audit License Consumption*` can show results such as the following: • **audit license consumption numbers** • **audit** • **license** • **consumption** • **consumption metrics** • **consumptionRequired** • **consumption123**

Wildcard	Description
" "	Represents a literal search.

> **Example** Searching for `"David Bowie"` can show results such as **David Bowie** and **David Bowie Songs** but it won't show **David** or **Bowie**.

If you are looking for an exact match instead of similar matches in the search results, enclose your search text in double quotation marks (""). For example, when you search for a URL without double quotation marks, the exact URL appears first in the results, followed by similar URLs. If, however, you don't want those similar URLs to appear, enclose the URL in double quotation marks. This could be useful when you are interested in the total count and want only exact matches in your results.

Double quotation marks can be applied to your entire search text or only parts of it.

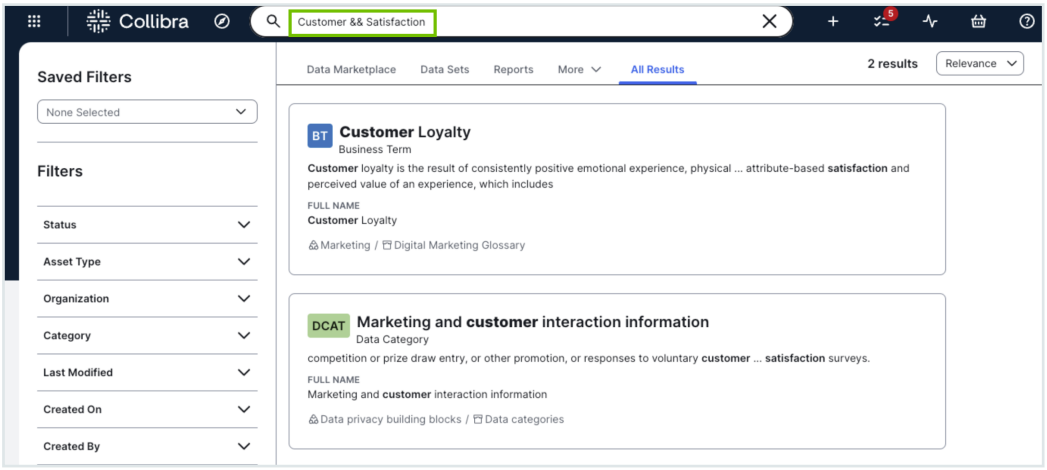
> **Example** Searching for `Audit License Consumption` can return many resources in the results, with any combination of the three words. However, searching for `"Audit License Consumption"` ensures that only resources containing those three words in that specific order are shown in the results.

> **Example** Searching for `data "governance center"` ensures that only resources containing **data** or **governance center** are shown in the results, while those containing only **governance** or only **center** are excluded.

> **Note** If the Lower relevance for Columns setting (in preview) in Collibra Console is enabled, Column assets aren't prioritized in search results even if you use double quotation marks.

Wildcard	Description
&&	Excludes results that don't contain all the search text.

> **Example** Searching for `Customer && Satisfaction` shows a result that contains both **customer** and **satisfaction**. Any result missing one of the words is excluded.



Search examples

This topic explains how certain configuration settings can affect your search results. The topic is intended to:

- Help Collibra Platform 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.

> **Tip** For more information, go to Customizing the search index and Search behavior.

In this topic

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

Search text: *marketing team summit*

Interpretation: "marketing" or "team" or "summit"

Search 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: *MarketingTeam*

Interpretation: "marketing" and "team"

Search 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.

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

Search text: *marketing_team_summit*

Interpretation: "marketing" and "team" and "summit"

Search 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: *team's calendar*

Interpretation: "team" or "calendar"

Search 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: *scheme://doma.in/optional/path*

Interpretation: "scheme://doma.in/optional/path"

Search result: Assets with the following names are found:

- **scheme://doma.in/optional/path**
- **scheme://doma.in/optional/path/suffix**
- **scheme://doma.in, doma.in/optional/other**
- **path, scheme, optional**

Searching for database objects

You can search for database objects using dot notation in your search text. Dot notation allows you to specify database objects by connecting their hierarchical components with dots, such as *schema.table* or *database.schema.table.column*. This method allows you to quickly locate specific assets within a database structure.

Prerequisites: The following assets exist:

- A Database asset named **datahub**.
- A Schema asset named **sales**, which is within **datahub**.
- A Table asset named **transactions**, which is within **sales**.
- A Column asset named **customer_id**, which is within **transactions**.
- The full name of these assets follows the standard convention for database objects. For example, the full name of the **customer_id** Column asset is **datahub > sales > transactions > customer_id**.

Search text: *sales.transactions*

Interpretation: The "transactions" asset within the "sales" asset

Search result: The following assets are found:

- The **transactions** table that is within the **sales** schema. This result is prioritized over others.
- Related assets, such as columns that are in the **transactions** table within the **sales** schema, and other tables that are within the **sales** schema.

> **Tip** Searches are case-insensitive, meaning that the capitalization in your search text doesn't affect the results.

The following table contains additional search texts and their prioritized search results.

Search text	Prioritized result
datahub.sales.transactions.customer_id	The **customer_id** column that is in the **transactions** table within the **sales** schema of the **datahub** database.
datahub.sales.transactions	The **transactions** table that is within the **sales** schema of the **datahub** database.
datahub.sales.	All tables that are within the **sales** schema of the **datahub** database.

> **Note** If the Lower relevance for Columns setting (in preview) in Collibra Console is enabled, Column assets aren't prioritized in search results even if you use dot notation.

Handling duplicate asset names

Suppose that three Column assets with the same name, **customer_id**, have the following full names:

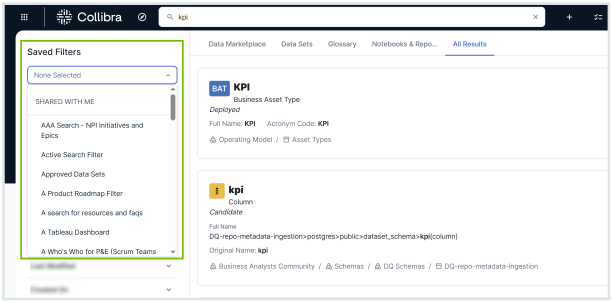
- **datahub1 > sales > transactions > customer_id**
- **datahub2 > sales > transactions > customer_id**
- **datahub1 > sales1 > transactions > customer_id**

The following table contains search texts and their prioritized search results.

Search text	Prioritized result
datahub1.sales.transactions.customer_id	**customer_id** column in the **datahub1** database.
sales.transactions.customer_id	• **customer_id** column in the **datahub1** database. • **customer_id** column in the **datahub2** database.
transactions.customer_id	• **customer_id** column in the **sales** schema. • **customer_id** column in the **datahub1** database. • **customer_id** column in the **datahub2** database. • **customer_id** column in the **sales1** schema.

Search filters

A search filter (also called a saved filter) allows you to apply multiple criteria at once, instead of selecting each criterion individually. You can create a search filter from scratch. When you create a search filter, it exists only for you. However, with the correct permission, you can share the filter with others. The **Saved Filters** drop-down list on the search page shows both the search filters you created and those shared with you. When you open the search page, no search filter is applied by default.



> **Tip** If no results are shown when you select a saved filter, it may be that the filter applies to a different search tab. For example, if you have the **Data Marketplace** tab selected but see no results, try clicking the **All Results** tab.

Create a search filter

You can create a search filter from scratch.

Steps

1. Perform a search via the search box or the Search widget.
   » The search page is shown.
2. Do one or all of the following:
   a. Refine the search results.
   b. Sort the results.
   c. Select the fields in which to search.

   > **Note** All of these are saved in the filter you create.

3. Click 💾.
   » The **Save Search Filter** dialog box appears.
4. Enter the required information.

Field	Description
Name	A name to identify your filter.
Description	A description for the filter.
Visible To	Options that determine who can see the filter: ◦ **Only You:** Only you can see the filter. ◦ **Everyone:** Everyone can see the filter. ◦ **Specific Roles, Groups, or Users:** ▪ **Roles:** Only the roles you select can see the filter. ▪ **Groups:** Only the groups you select can see the filter. ▪ **Users:** Only the users you select can see the filter.

5. Click **Save**.
   » The search filter is created and added to the drop-down list of filters.

Copy a search filter

You can copy an existing search filter and then edit the new filter as needed.

Steps

1. Perform a search via the search box or the Search widget.
   » The search page is shown.
2. Click the **Saved Filters** drop-down list box, and then select the filter you want to copy.
3. Click 💾 → **Create a copy**.
   » The **Copy Search Filter** dialog box appears.
4. Enter the required information.

Field	Description
Name	A name to identify the new filter.
Description	A description for the new filter.

Field	Description
Visible To	Options that determine who can see the new filter: ◦ **Only You:** Only you can see the filter. ◦ **Everyone:** Everyone can see the filter. ◦ **Specific Roles, Groups, or Users:** ▪ **Roles:** Only the roles you select can see the filter. ▪ **Groups:** Only the groups you select can see the filter. ▪ **Users:** Only the users you select can see the filter.

5. Click **Save**.
   » The new search filter is created and added to the drop-down list of filters.

> **Note** When you copy a search filter, its sort criteria and search fields are also saved in the new filter. The search text, however, is not saved.

Edit a filter's name and description

You can edit the name and description of the search filter you created.

Steps

1. Perform a search via the search box or the Search widget.
2. On the search page, in the **Saved Filters** drop-down list box, select the filter.
3. Click ✎.
   » The **Edit Search Filter** dialog box appears.
4. Edit the name and description.
5. Select the option that determines who can see the filter.
6. Click **Save**.

Edit a search filter

You can edit an existing search filter.

Steps

1. Perform a search via the search box or the Search widget.
2. On the search page, in the **Saved Filters** drop-down list box, select the filter.
3. In the facet pane, select the filters to achieve the required search results.
4. Click → **Save**.

Share a search filter

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

Steps

1. Perform a search via the search box or the Search widget.
2. On the search page, in the **Saved Filters** drop-down list box, select the filter.
3. Click .
   » The **Edit Search Filter** dialog box appears.
4. Select the option that determines who can see the filter.
5. Click **Save**.

Delete a search filter

If you have the **Sysadmin** global role, you can delete your own search filters and those that others created and shared with you. Without the **Sysadmin** global role, you can delete only the search filters that you created.

Steps

1. Perform a search via the search box or the Search widget.
2. On the search page, in the **Saved Filters** drop-down list box, select the filter.
3. Click .

Search settings

As an administrator, you can configure the following search settings via the **Search** section in Collibra settings:

- Search result fields
- Data Marketplace quick filters on the search page
- Data Marketplace scope
- Data Marketplace filter facets
- Data Marketplace relation indexes
- Data Marketplace actions and preview
- Data Marketplace emails and other options
- Data Marketplace shopping basket and data set management
- Data Marketplace landing page

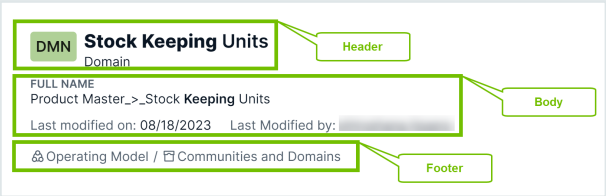
Configure search result fields

> **Important** This feature is **available only** in the latest UI. However, in the classic UI, you can configure search result fields via ⠿ → **Fields** directly on the search page. For more information, go to Search page.

You can configure which fields appear in the body of search results on the search page and also define the sequence in which they appear. A configured field appears in a search result only if it contains a value. However, if the configured field isn't part of an asset type's assignment, it doesn't appear in the corresponding asset's search result, even if it contains a value.

Additionally, if a field's value matches the searched text, that field appears in the search result even if it isn't configured to appear.

> **Note** The configured search result fields are also applicable to Data Marketplace in Search but not to standalone Data Marketplace.



Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **Search** section, click **Results Fields**.
   » The **Results Fields** page opens.

   > **Note** The **Results Fields** page contains the fields that are shown in each search result on the search page. You can't reposition or remove the default fields in the **HEADER** and **FOOTER** sections and the **Definition** and **Tags** fields in the **BODY** section.

3. To add a field, in the applicable drop-down list, select the field, and then click **Add**.

   » The field you added appears in the **BODY** section. If, however, you added the custom field **Status**, it appears in the **HEADER** section.

   > **Tip** You can add multiple fields.

4. To change the position of a field, drag to the required position.

> **Tip** You can reposition the fields you added only within the same section. For example, if you add a field named **Assignee**, it appears in the **BODY** section. You can move this field around within the **BODY** section, but you can't move it to the **HEADER** or **FOOTER** section.

5. To remove a field, click **X** next to it.
6. Click **Save**.

Configure the scope for Data Marketplace in Search

> **Important** This topic is intended for those configuring the scope for Data Marketplace in Search, which is available only in the latest UI. If you are configuring the scope for standalone Data Marketplace, go to Configure the Data Marketplace scope.

As an administrator, you can customize the out-of-the-box scope to expose exactly what makes sense for your data consumers. This includes defining which data is relevant and meets your quality or governance standards. You can configure the scope based on asset type, status, and organization. Data Marketplace in Search considers these three scope definitions. For example, if you choose to include only Reports as the asset type, Approved as the status, and Marketing as the organization, you get results that meet only these specified criteria.

Examples

> **Example**
> In your environment, data consumers must request access on the data set and report levels. As a result, you want to show only approved data sets and reports in Data Marketplace in Search. To achieve this, you can configure the following scope:
>
> - **Asset Types:** Data Set, Report
> - **Statuses:** Approved
> - **Organization:** all
>
> If you enable relation-based search, data consumers can also use column names as search text. Then, Data Marketplace in Search shows the related data set and reports in the search results, instead of the Column assets.

Example
In your environment, you keep track of approved marketing data in a community named **Marketing-Approved-Community**. As a result, you want to show the data of only the specified community in Data Marketplace in Search. To achieve this, you can configure the following scope:

- **Asset Types:** all
- **Statuses:** all
- **Organization:** Marketing-Approved-Community

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

Important
- If you create an asset type, status, community, or domain in Collibra, and you want it to be found in Data Marketplace in Search, you need to select it in the Data Marketplace scope.
- If you delete an asset type, status, community, or domain from Collibra, and it was part of the Data Marketplace scope, it is no longer shown in the Data Marketplace scope list but will still be active in Data Marketplace in Search for some time. Data Marketplace in Search, however, checks the configuration against Collibra daily and updates the configuration as needed. For more information, go to Automatic configuration updates.

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **Search** section, click **Data Marketplace Scope**.
   » The **Data Marketplace Scope** page opens.
3. To limit the search results to assets of specific asset types, on the **Asset Types** tab, select the required asset types.

   Tip Most enabled asset types are physical data assets such as tables, composed data assets such as data sets and products, or report assets.

4. ITo limit the search results to assets with specific statuses, on the **Statuses** tab, select the required statuses.

   > **Tip** If you don't define a scope, data consumers can find assets with any statuses via Data Marketplace in Search, including Candidate, Pending, and so on.

5. To limit the search results to assets in specific communities and domains, on the **Organization** tab page, select the required communities and domains.

   > **Tip** If you don't define a scope, Data Marketplace in Search searches all communities and domains.

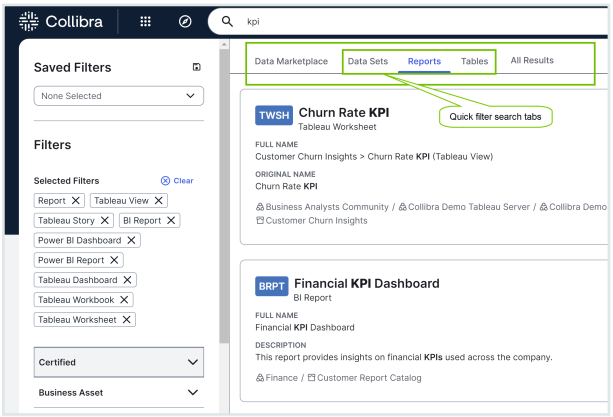
6. Click **Save**.

Search tabs

> **Important** This feature is **available only** in the latest UI.

Search tabs are the tabs that are shown on the search page to users with the **Data Marketplace** global permission.

> **Note** Search filters don't affect standalone Data Marketplace. For information on how to create tabs in standalone Data Marketplace, go to Define the filter tabs in standalone Data Marketplace.



Search tab descriptions

The following table describes the search tabs.

Search tab	Description
Data Marketplace	Shows results by searching within a curated subset of assets (that is, Data Marketplace scope).
Data Sets, Reports, Tables	Additional search tabs that serve as quick filters for Data Marketplace. Quick filters allow you to automatically apply a set of filters to the search results in a single action. By default, the following search tabs are available as quick filters: **Data Sets**, **Reports**, **Tables**. You can, however, specify which quick filter search tabs are shown on the search page, including their order. **Note** • Quick filter search tabs can't be properly configured if no assets exist for the defined Data Marketplace scope. • Quick filter search tabs are applicable only to the search page and are different from the filter tabs of standalone Data Marketplace. • Quick filter search tabs are shown to all users. If you want to create a filter for a specific user group, use search filters instead.
All Results	Shows global results by searching within assets, communities, domains, users, and user groups. **Tip** While you can't customize the **Data Marketplace** and **All Results** tabs, you can rename the **All Results** tab.

Configure search tabs

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- You have configured the Data Marketplace scope.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **Search** section, click **Search Tabs**.
   » The **Search Tabs** page opens. This page contains the search tabs currently shown on the search page.
3. To add a search tab:
   a. Click **Add Search Tab**.
      » The **Add Search Tab** dialog box appears.
   b. Enter the required information.

Field	Description
Label	Name for the search tab. This is shown on the search page.
Note	Description for the search tab for your own reference. This isn't shown on the search page.
Filters	Filter criteria for the search tab.

> **Note** These are filters that are shown in the facet pane on the search page when the search tab is clicked. That is, these are the filter facets that are configured for Data Marketplace. Filters aren't visible if no assets exist for the defined Data Marketplace scope.

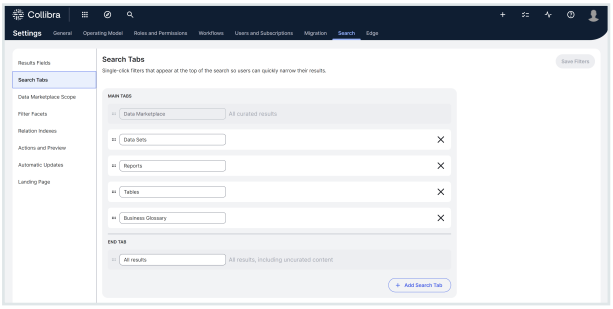
   c. Click **Save**.
   d. Click **Save Filters**.

> **Tip** On the search page, up to 3 quick filter search tabs are shown at a time. If you add more than 3 quick filter search tabs, the **More** menu appears to allow users to select additional quick filters. When they select a quick filter from the **More** menu, that filter is shown as the third quick filter search tab. You can also change the order of the search tabs, as described in Step 5.

4. To edit a search tab:
   a. Click the search tab.
      » The **Edit Search Tab** dialog box appears.

b. Edit the information.
c. Click **Save**.
d. Click **Save Filters**.

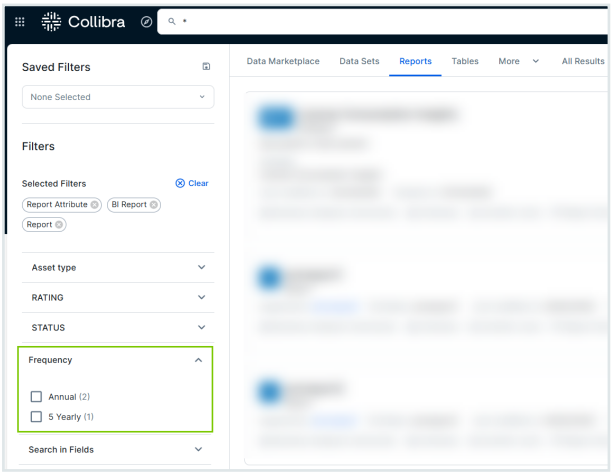
5. To change the position of a search tab, drag to the required position, and then click **Save Filters**.
6. To remove a search tab, click **X**, and then click **Save Filters**.
7. To rename the **All Results** tab, in the **END TAB** section, enter the new name, and then click **Save Filters**.



Attribute facets (in preview)

> **Important** This feature is **available only** in the latest UI.

You can make attributes and their values available as filter facets only for Data Marketplace in Search. Attribute facets don't affect standalone Data Marketplace.



In this topic

Enable attribute facets

Prerequisites

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 Collibra Platform service of that environment.
   d. Click **Configuration**.
   e. Click **Edit configuration**.
2. In the **Search index configuration** section, enable the **Attribute filter facets** setting.

Setting	Description
Attribute filter facets	✓ True: The **Attribute facets** tab becomes available on the **Filter facets** page in the Search settings. Attribute-based filter facets can then be created and made them available for Data Marketplace in Search. ✗ False (default): Attribute-based filter facets can't be created.

3. Click **Save all**.

Create an attribute facet

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.

- The **Attribute filter facets** setting is enabled in your environment.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **Search** section, click **Filter facets**.
   » The **Filter facets** page opens.
3. Click the **Attribute facets** tab.
4. Click **Add facet**.
   » The **Select an Attribute** drop-down list is shown.
5. In the drop-down list, select the attribute you want to add as a facet.

   > **Tip** The drop-down list contains attributes of only the following kind:
   > - Boolean, meaning true or false.
   > - Single value list, meaning single selection.
   > - Text (plain), meaning plain text. Rich text attributes aren't available.

6. Click **Save**.
   » The attribute facet is added.
7. Make the filter facet available in Data Marketplace in Search:
   a. Click the **All facets** tab.
   b. Optional: Double-click the **Filter name** cell of the attribute facet, enter the new name, and then click the checkmark.

      > **Tip** Filter name is shown in the facet pane on the search page for users. By default, the public ID of the attribute type is used as the filter name and filter ID.

   c. Double-click the **Visibility** cell of the attribute facet, and then select **Yes**.
   d. Click **Save**.

      > **Tip** For more information about the **All facets** tab, go to Configure the filter facets in Data Marketplace.

» If the attribute facet contains values for a search, the facet is shown in the facet pane on the search page for the Data Marketplace search tabs.

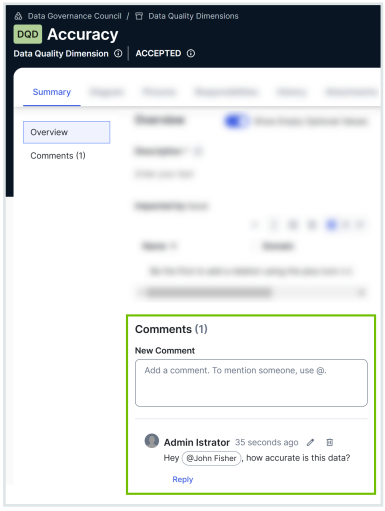
Comments

You can collaborate on any community, domain, asset, or assessment via comments. Comments allow you to share feedback, ask questions, or provide additional context directly within Collibra. They help ensure that all relevant discussions are documented and easily accessible to others. Whether you have questions about a resource, want to propose related resources, or simply want to inform your colleague about a resource's existence, you can do so directly on the resource page by adding a comment. Mentioned users receive email notifications, facilitating faster response time and transparency, while eliminating the need for offline discussions.

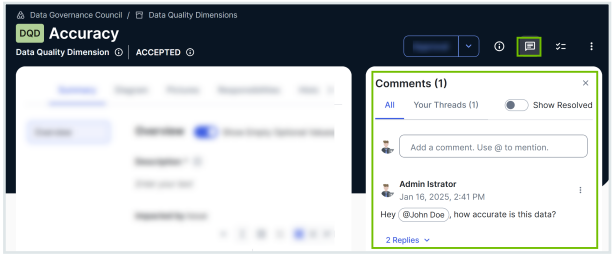
For information about the commenting experience in Assessments, go to Assessment comments.

Collibra offers the following types of commenting experiences:

- Default commenting experience: Comments are shown in the **Comments** section, which appears at the bottom of the **Overview** tab on community, domain, and asset pages.



- New commenting experience: Comments are shown in the **Comments** sidebar, which appears when you click in the title bar on community, domain, and asset pages.



Default commenting experience

> **Important** This topic is applicable only if the New Commenting Experience feature is disabled in the latest UI.

The default commenting experience offers basic communication and collaboration on community, domain, and asset pages, such as adding or replying to comments. When you mention someone in a comment or reply, they receive an email notification.

Unlike the new commenting experience, the default commenting experience doesn't include advanced capabilities, such as marking comments as resolved, filtering threads by participation, or receiving email notifications for thread updates. This makes the default experience suitable only for straightforward discussions that don't need enhanced tracking or prioritization.

Permissions

The following table contains the resource permissions required to add, edit, or delete comments.

> **Tip** You can always edit or delete your own comment.

Resource permission	Description
Comment > Add	• Add a comment. • Reply to a comment. • Edit your own comment. • Resolve or reopen a comment thread in which you are a participant. • Delete your own comment.
Comment > Update	Edit others' comments.
Comment > Remove	Delete others' comments.

> **Tip** Adding, editing, or deleting a comment doesn't change the resource's last modified date.

Add a comment

Prerequisites

You are assigned a responsibility on the community, domain, or asset with a resource role that has the **Comment** > **Add** resource permission.

Steps

1. On the **Overview** tab, in the **Comments** section, enter your comment.

   > **Tip** To mention someone, select @ from the toolbar or enter @ followed by their username.

2. Click **Post**.
   » Your comment is added. If you mentioned someone, they are notified by email.

Reply to a comment

Prerequisites

You are assigned a responsibility on the community, domain, or asset with a resource role that has the **Comment** > **Add** resource permission.

Steps

1. On the **Overview** tab, in the **Comments** section, click **Reply** next to the comment.
2. Enter your reply.

   > **Tip** To mention someone, select @ from the toolbar or enter @ followed by their username.

3. Click **Reply**.
   » Your reply is added. If you mentioned someone, they are notified by email.

Edit a comment

Steps

1. On the **Overview** tab, in the **Comments** section, click ✎ next to the comment.
2. Edit the comment.
3. Click **Save**.
   » Your edited comment is saved.

Delete a comment

When you delete a comment, all the replies within that comment are also deleted.

Steps

On the **Overview** tab, in the **Comments** section, click 🗑 next to the comment.

New commenting experience

This feature is **available only** in the latest UI.

The new commenting experience enhances communication and collaboration on community, domain, and asset pages by offering advanced capabilities not available in the default commenting experience. You can mark a comment thread as resolved. Resolved comment threads are hidden by default, helping you focus on active discussions. You can also quickly

filter to see the threads in which you are a participant, helping you prioritize and manage the most relevant conversations. Additionally, you are notified by email whenever a new comment is added to a thread in which you are a participant, ensuring everyone involved stays informed in real time.

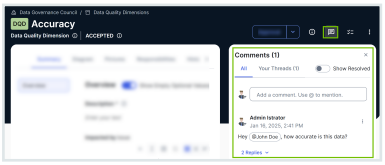
Note

- The new commenting experience is available only if the **New Commenting Experience** feature in Collibra Console is enabled.
- The new experience has fewer formatting options in the comment toolbar than the default experience. For example, you can't add an image or color your text in the new experience. If you apply such unsupported formatting through other means, the formatting may not render correctly in the UI or emails.
- Comments from the default experience remain visible when the new experience is enabled.

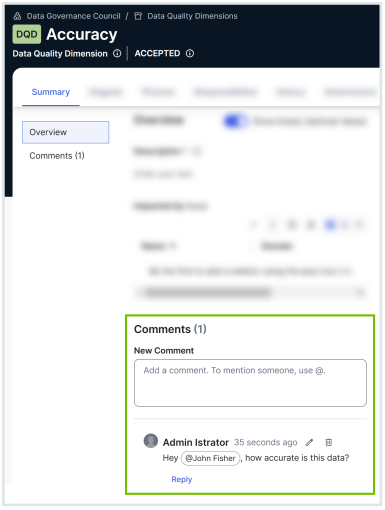
In this topic

How to check if the feature is enabled?

If the new commenting experience is enabled, is shown in the title bar on community, domain, and asset pages. Clicking it opens the **Comments** sidebar.



If the new commenting experience is disabled, the **Comments** section is shown at the bottom of the **Summary** tab on community, domain, and asset pages.



Enable or disable the feature

The new commenting experience is disabled by default.

Prerequisites

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

Steps

1. Open Collibra Console.
   » Collibra Console opens with the **Infrastructure** page.
2. In the tab pane, expand an environment to show its services.
3. In the tab pane, click the Collibra Platform service of that environment.
4. Click **Configuration**.
5. Click **Edit configuration**.
6. Go to the **Knowledge Graph Configuration** section.
7. In the **New Commenting Experience** field, select the required value.
8. Click **Save all**.

» If the feature is enabled, appears in the title bar on community, domain, and asset pages. Comments from the default experience remain visible.

» If the feature is disabled, the **Comments** section appears at the bottom of the **Summary** tab on community, domain, and asset pages.

Comments sidebar

The **Comments** sidebar opens when you click the Comments icon () in the title bar. Comments are arranged in descending order by date, with the most recent comment shown first. Resolved comments are hidden by default but can be viewed by switching on the **Show Resolved** option. A resolved thread is indicated by a green checkmark.

The following table describes the tabs shown in the **Comments** sidebar.

Tab	Description
All	Shows all comments, regardless of who added them. Replies to a comment are nested within the comment as a thread.
Your Threads	Shows all the comments in which you are a participant. You become a participant when you: • Add a comment. • Reply to a comment. • Are mentioned in a comment or reply.

Permissions

The following table contains the resource permissions required to add, edit, or delete comments.

> **Tip** You can always edit or delete your own comment.

Resource permission	Description
Comment > Add	• Add a comment. • Reply to a comment. • Edit your own comment. • Resolve or reopen a comment thread in which you are a participant. • Delete your own comment.
Comment > Update	Edit others' comments.

Resource permission	Description
Comment > Remove	Delete others' comments.

> **Tip** Adding, editing, reopening, or deleting a comment doesn't change the resource's last modified date.

Add a comment

Prerequisites

You are assigned a responsibility on the community, domain, or asset with a resource role that has the **Comment** > **Add** resource permission.

Steps

1. In the title bar, click .
   » The **Comments** sidebar is shown.

   > **Tip** If no comment has been added yet, click **Add a comment** to open the comment box.

2. Enter your comment.

   > **Tip** To mention someone, select @ from the toolbar or enter @ followed by their username.

3. Click **Comment**.
   » Your comment is added. If you mentioned someone, they are notified by email.

Reply to a comment

You can reply to any comment. Replying to a comment notifies the participants in the thread by email, even if they weren't mentioned using @. A participant is someone who started the

thread, replied in the thread, or is mentioned in the thread.

Prerequisites

You are assigned a responsibility on the community, domain, or asset with a resource role that has the **Comment** > **Add** resource permission.

Steps

1. In the title bar, click .
   » The **Comments** sidebar is shown.
2. Select the comment, and then enter your reply.

   > **Tip** To mention someone, select @ from the toolbar or enter @ followed by their username.

3. Click **Reply**.
   » Your reply is added. Thread participants, if any, are notified by email.

Edit a comment

You can edit your own comment, including your reply. Editing a comment doesn't notify anyone, even if you mention them using @.

Steps

1. In the title bar, click .
   » The **Comments** sidebar is shown.
2. Click ⋮ → **Edit** next to the comment.
3. Edit the comment.
4. Click **Save**.
   » Your edited comment is saved.

Resolve a comment thread

Any participant in a thread can mark a comment thread as resolved. A participant is someone who started the thread, replied in the thread, or is mentioned in the thread. Resolving a thread doesn't notify anyone.

When you resolve a thread, all the replies within that thread are also resolved. You can't resolve a reply.

Steps

1. In the title bar, click .
   » The **Comments** sidebar is shown.
2. Click ⋮ → **Resolve** next to the thread.
   » The thread is resolved and it disappears.

> **Tip**
> - Resolved threads are hidden by default. To view all resolved threads, switch on the **Show Resolved** option. A resolved thread is indicated by a green checkmark.
> - Resolved threads can't be edited unless they are reopened.

Reopen a comment thread

Any participant in a thread can reopen a resolved comment thread. A participant is someone who started the thread, replied in the thread, or is mentioned in the thread.

Reopening a thread doesn't notify anyone. Also, if you want to edit your own resolved thread, you need to reopen it first.

Steps

1. In the title bar, click .
   » The **Comments** sidebar is shown.
2. Switch on the **Show Resolved** option.

   > **Tip** A resolved thread is indicated by a green checkmark.

3. Click ⋮ → **Re-open** next to the resolved thread.
   » The thread is reopened. If the thread is yours, you can edit it.

Delete a comment

You can delete your own comment, including your reply. Deleting a comment doesn't notify anyone.

When you delete a comment, all the replies within that comment are also deleted.

Steps

1. In the title bar, click .
   » The **Comments** sidebar is shown.
2. Click ⋮ → **Delete** next to the comment.

User mentions

You can draw a user's attention to a comment, community, domain, or asset by simply mentioning them.

Mention a user

To mention a user in a comment, select @ from the toolbar or enter @, and then enter the user's first name, last name, or username. As you enter a name, matching names appear, even if the entered character isn't 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 aren't available, their username is used. If, however, the profile of the user is deleted, their name in the mention is replaced with **@Deleted User**.

View all comments where you're mentioned

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

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.

View permission

If you are mentioned in a resource but don't have permission to view the resource, a message indicating so is shown when you click the resource link in the email message.

About text editors

Text editor types

Text editors in Collibra allow you to enter, edit, and format text. The following text editors are available.

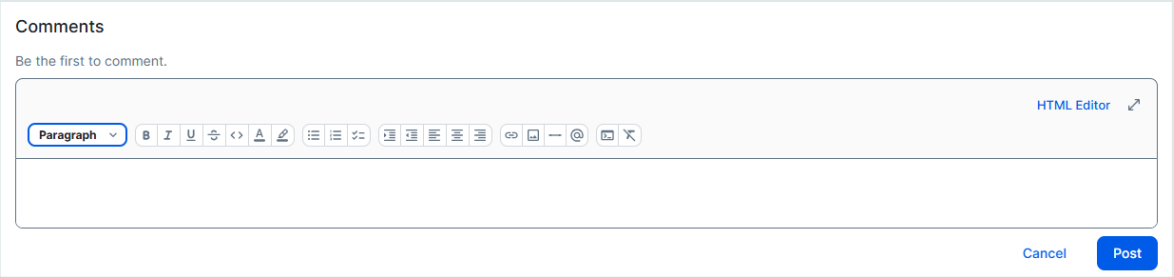
Text editor	Location of use
Standard text editor	• Comments in the default experience (includes an HTML Editor) • Community and domain pages (includes an HTML Editor) • Dashboard text widget (includes an HTML Editor) • Ratings
Mini text editor	• Assessment comments • Assessment template field descriptions • Commenting in the new experience • Table text fields (includes an HTML Editor) • Task sidebar (includes an HTML Editor) • Text attributes on asset pages (includes an HTML Editor)
Plain text editor	• Some text fields

> **Tip** For a list of all known issues, go to the Support Portal.

Standard text editor

The standard text editor is a rich text formatting editor.

Example
Commenting on asset pages in the default experience

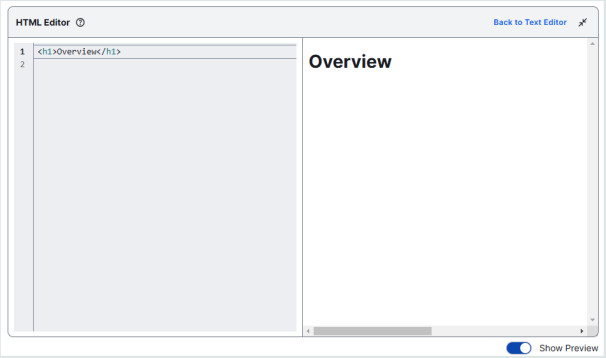


For formatting, you can use:

- The formatting toolbar options, such as paragraph styles, bold, lists, and code block. Via the toolbar, you can also add hyperlinks and images. For information about hyperlinking, go to Manual hyperlinking.
- The HTML Editor, if available. Click **HTML Editor** and enter HTML code. The HTML Editor allows for even more advanced HTML editing, and gives you the option to preview the output.

Tip

- The **HTML Editor** supports most HTML elements. However, this can potentially allow an attacker to run an XSS attack by injecting malicious HTML. That's why, when you save, the following HTML elements are removed for security reasons:
  - frame
  - frameset
  - iframe
  - svg
  - Any event handlers
- The <style> tag affects only elements in the related text editor area, such as the text widget or attribute.
- You can maximize the HTML Editor. In the full screen view, you can see a preview of your code.
  Show an image



Note

- Copying and pasting from Microsoft Office or other sources may not retain all formatting.
- You can't upload an image via a URL path. You can drag an image to the text editor or upload the image from your computer.
- You can resize your image by selecting the image and dragging the corners of the image to the desired size.

Mini text editor

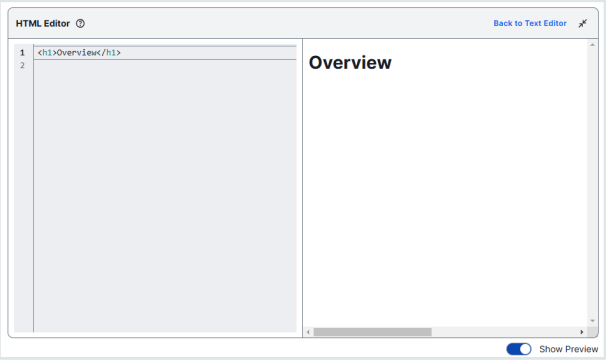
The mini text editor is a variant of the rich text formatting editor. The toolbar in the mini text editor offers a more basic set of formatting options than the standard text editor.

For formatting, you can use:

- The formatting toolbar options, such as paragraph styles, bold, lists, and code block. Via the toolbar, you can also add hyperlinks and images. For information about hyperlinking, go to Manual hyperlinking.
- The HTML Editor, if available. Click **HTML Editor** and enter HTML code. The HTML Editor allows for even more advanced HTML editing, and gives you the option to preview the output.

Tip

- The **HTML Editor** supports most HTML elements. However, this can potentially allow an attacker to run an XSS attack by injecting malicious HTML. That's why, when you save, the following HTML elements are removed for security reasons:
  - frame
  - frameset
  - iframe
  - svg
  - Any event handlers
- The <style> tag affects only elements in the related text editor area, such as the text widget or attribute.
- You can maximize the HTML Editor. In the full screen view, you can see a preview of your code.
  Show an image

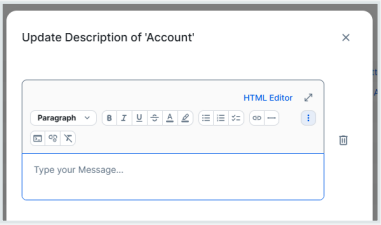


Note

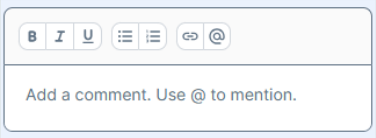
- Copying and pasting from Microsoft Office or other sources may not retain all formatting.
- You can't upload an image via a URL path. You can drag an image to the text editor or upload the image from your computer.
- You can resize your image by selecting the image and dragging the corners of the image to the desired size.

Example
Text attribute on an asset page

Text in tables

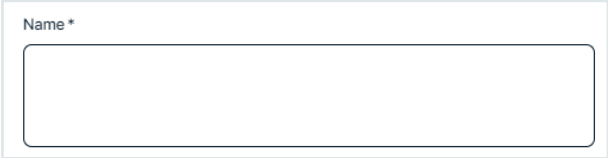


Text in a comment in the new experience



Plain text editor

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



Keyboard shortcuts in text editors

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

Action	PC	Mac
Bold	Ctrl + B	Command + B
Italic	Ctrl + I	Command + I

Action	PC	Mac
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
Don't save your changes	ESC	ESC

Activities

An activity is a process that Collibra runs in the background. While the process is running, you can use Collibra as usual. Some examples of activities include importing and exporting assets, registering a data source, and profiling data.

You can find a list of activities in the following locations.

Activities list on the main menu

The activities list on the main menu shows only the most recent and ongoing activities.

You can open the activities list by clicking on the main menu.

Activities tab on your profile page

The **Activities** tab on your profile page contains a table with all your activities.

You can open the **Activities** tab by clicking **Go to All Activities** in the activities list on the main menu, or by opening your profile page and then clicking the **Activities** tab.

The following table describes the columns shown on the **Activities** tab on your profile page.

Column	Description
Created	Date and time when the activity started.
Name	Name of the activity.
Status	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 aren't started yet.
Job Result	Results of the job, which are 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	Date and time when the activity started.
Finished	Date and time when the activity finished.
Results	If available, the **Results** button to view detailed results of the activity. Depending on the activity, the result can be different. For example, if you exported assets and clicked **Results**, the export results are downloaded. If you registered a data source in Data Catalog and clicked **Results**, a dialog box appears to show more information about the registration job.
A column to delete an activity	Icon (🗑) to remove the activity from the table. This action doesn't delete the activity; it only hides or removes it from the table.

Activities list in the Collibra settings

The **Activities** tab in the **General** section of the Collibra settings contains a table with all activities started by all users.

The following table describes the columns shown on the **Activities** tab in the Collibra settings.

Column	Description
Created	Date and time when the activity started.
Name	Name of the activity.
Status	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 aren't started yet.
Job Result	Results of the job, which are 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	Date and time when the activity started.
Finished	Date and time when the activity finished.

Column	Description
Results	If available, the **Results** button to view detailed results of the activity. Depending on the activity, the result can be different. For example, if you exported assets and clicked **Results**, the export results are downloaded. If you registered a data source in Data Catalog and clicked **Results**, a dialog box appears to show more information about the registration job.
A column to delete an activity	Icon (🗑) to remove the activity from the table. This action doesn't delete the activity; it only hides or removes it from the table.

Chapter 3

Asset management

This section contains information about asset pages.

Asset pages

An asset page contains information about a single asset. An asset is a resource that is stored and managed in Collibra and owned or controlled by the you. An asset is a fundamental building block used to capture information through added characteristics.

Different asset pages show different kinds of information because each asset type has an assignment that determines which attributes they can have. For example, the attribute Technical Data Type is relevant for a Column asset but not for a Business Term asset. Therefore, this attribute is assigned to Column assets and not to Business Terms.

Create assets

In Collibra Platform, 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.

Before you begin

> **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 permissions..

  > **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 About responsibilities.

- The asset type which you want to create is activated by your license.

  > **Tip** Go to Overview of out-of-the-box asset types for a mapping of the out-of-the-box asset types to the products that need to be included in your license in order to use an asset type.

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. Click the **Assets** tab, then click an asset type from the list.
   » The **Create Asset** dialog box appears.

> **Tip** The **Recent** tab next to the Assets tab displays the 5 most recent asset types created within the last month. You can select asset types here and create assets more efficiently.

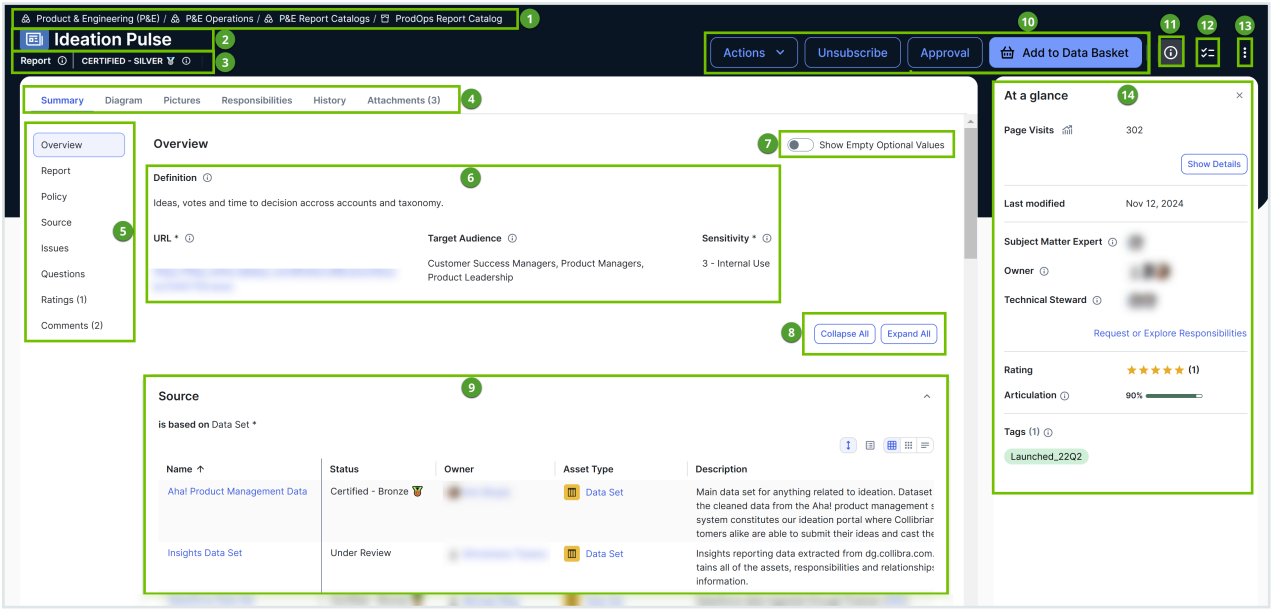
1. Enter the required information.

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.
Asset name	A name to identify the asset. Asset names have a character limit of 2000 characters. **Tip** ◦ You can create multiple assets together. To do so, enter the first name, click the drop-down or press `Enter`, and then enter the next name. ◦ Depending on the settings, asset names may need to be unique within their domain.

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

Asset page overview

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

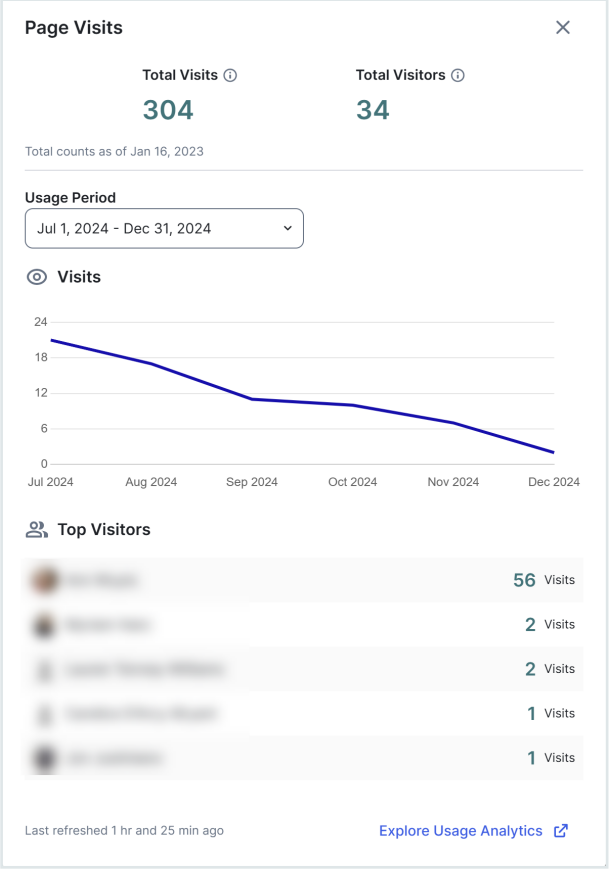


Number	Section	Description
1	Breadcrumbs	Navigation path of the current asset. You can use this to navigate to other resources or confirm you have the correct asset open.
2	Asset type representation and asset name	Icon or abbreviation of the asset type, followed by the name of the asset.
3	Asset type and asset status	Asset type of the asset, followed by the status of the asset.

Number	Section	Description
4	Tab bar	Horizontal tabs that allow you to navigate to specific sections on the asset page. These tabs vary from one asset to another depending on the asset type and your permissions. The following list includes some of the tabs. **Summary** The **Summary** tab is available for every asset type and shows information such as the description, asset relations, and descriptive statistics of the asset. The left pane shows the sections available on the tab. The characteristics shown on the tab depend on the asset type. For example, Column assets have descriptive statistic sections, whereas other assets might not. The left pane shows the sections available on the tab. **Sample Data** The Sample Data tab shows a small subset of data to help you determine if you have found the right assets for your work. **Diagram** The Diagram tab shows the relations between the current asset and other assets. **Technical Lineage** The Technical Lineage tab shows a detailed chart depicting how data transforms and flows from source to destination. **Quality** The Quality tab shows results of the Data Quality rules set by your organization's Data Quality stewards. **Responsibilities** The Responsibilities tab shows the users or user groups assigned to a resource role for the asset. **History** The History tab shows the asset's life cycle, from its creation to the most recent actions. **Attachments** The Attachments tab allows you to add images, reference material, or other files relevant to the asset.

Number	Section	Description
5	Left pane	Vertical tabs that allow you to navigate to specific sections within the **Summary** tab without scrolling. **Note** The availability of the sections in the left pane depends on the asset type's configuration.
6	Attributes	Information about the asset. **Show more information** An attribute is a characteristic of an asset that provides information about the asset. The format of this information depends on the attribute kind. • **True/False:** Binary choice. • **Date:** Format of the date depends on the user's locale settings. • **Multiple selection:** One or more values from a predefined list. • **Number:** For fractions, the decimal separator (comma or dot) shown in the UI is determined by the user's locale settings. • **Selection:** Single value from a predefined list. • **Text:** Text, links, or images. A text attribute can have up to 100,000 bytes. If a text attribute is a link to an asset, you can't open the link in a new tab by right-clicking.
7	Show Empty Optional Values	Switching on this option additionally shows attributes, relations, and complex relations that don't contain any value.
8	Collapse All or Expand All	Collapses or expands all attributes, relations, and complex relations.
9	Relation	Relations of the same type associated with the asset. You can view these relations as a table or as a set of tiles and also customize them.
10	Action buttons	Actions you can perform on the asset. They are preconfigured for the asset type, and they depend on workflow configuration and your permissions.
11	(At a glance)	Shows or hides the **At a glance** sidebar.

Number	Section	Description
12	(Tasks)	Open tasks for the asset.
13	⋮ (More)	Options to: • Add the asset to a collection. • Edit the asset's name, type, and status. • Move the asset to a different domain. • Print the asset page or save it as a PDF file. • Delete the asset.

Number	Section	Description
14	At a glance sidebar	High-level information about the asset, such as the following: • Number of times the asset page has been visited. **Show more information** Clicking **Show Details** shows more information, such as the number of people who visited the asset page and the trend of visits, for a given period. The top 5 visitors are shown only if you have the **Insights** > **View Usage Analytics reports** global permission. For more information, go to Usage Analytics.  • Date the asset page was last modified. • People responsible for the asset. • Average rating of the asset and the number of ratings given. • Articulation score of the asset. • Tags for the asset.

Number	Section	Description

> **Note**
> - The **At a glance** sidebar is hidden by default. To show it, click .
> - Collibra remembers your last selection—whether the sidebar was shown or hidden—and preserves it. However, clearing the local storage always hides the sidebar.
> - The availability of some of the information in the sidebar depends on the asset type's configuration.

Relation views

An asset page provides an overview of information about an asset, based on the assignment of its asset type. This includes relations and complex relations. Complex relations are shown only if you have permission to view all assets in the complex relation.

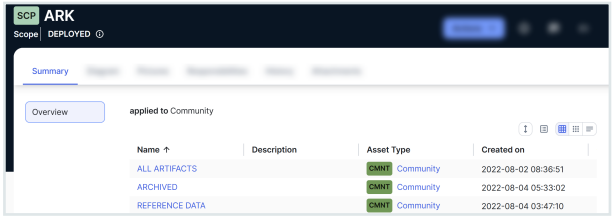
A relation view is a section on an asset page that shows all related assets of the same relation type or complex relation type.

In this topic

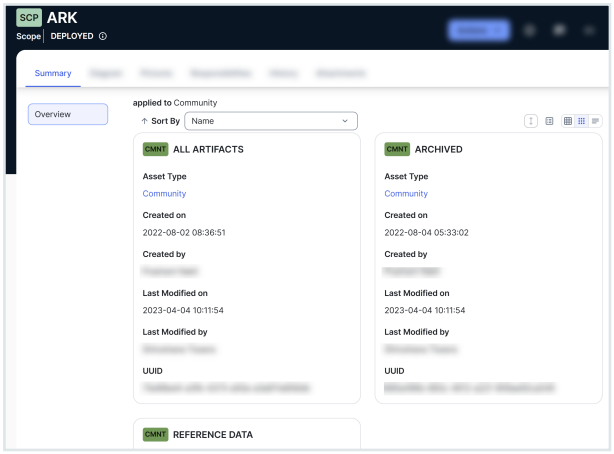
Display modes

Relations and complex relations of the same type are grouped into separate sections, with the relation type as the section heading. Each section can be shown in one of the following modes:

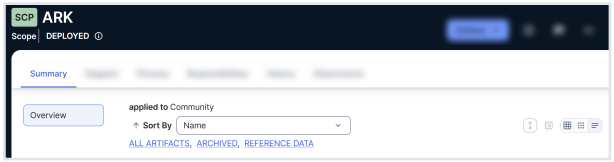
- Table (default): Related assets are shown as a table.



- **Tiles:** Related assets are shown as a set of tiles.



- **List:** Related assets are shown as a list.



Customizing a relation view for yourself

Each relation type or complex relation type section on an asset page has a default relation view. You can customize the default relation view by changing the following:

- Display mode (table, tiles, or list)
- Columns shown in a table or fields shown in a set of tiles
- Number of rows or tiles shown per page
- Sorting direction
- Width of each column in table display mode

Your changes are automatically saved, and they don't affect the customizations made by other users.

A relation view applies to all assets of the same asset type, relation type, and role direction. For example, if you sort the **Status** column in ascending order in the **synonym** relation table of an Acronym asset, the **Status** column in the **synonym** relation table of all other Acronym assets is also sorted in ascending order—only for yourself.

Set a default relation view for everyone

If you have the **Manage shared views, dashboard and search filter** global permission, you can set a default relation view for all users.

> **Warning** By performing this action, you overwrite the customizations made by other users to a relation view.

To set a default relation view for all users, customize the relation view as appropriate, and then click (**Save for all users**). When you do this:

- Your customized relation view becomes the default relation view for all users.
- Any individual customizations made by other users to the relation view are replaced with your customized relation view.

A relation view applies to all assets of the same asset type, relation type, and role direction. For example, if you sort the **Status** column in ascending order in the **synonym** relation table of an Acronym asset and then click , the **Status** column in the **synonym** relation table of all other Acronym assets is also sorted in ascending order—for all users. That is, any customizations made by other users to the **synonym** relation table are replaced with the view you saved.

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 Collibra, for example, for audit, reporting, or security purposes.

> **Note**
> - Related assets from a relation type section are printed as a list, with the relation type as the heading. But not all information is printed. Only the names of the related assets—always from the first page of the relation type section—are printed. Other fields of the related assets, such as their domains and asset types, aren't printed.
> - The following aren't printed:
>   - Attachments
>   - Attributes that were never given a value, except for tags
>   - Comments
>   - Complex relations

Steps

1. Open an asset page.
2. Click ⋮ → **Print**.

Edit an asset

You can edit an asset's name, asset type, and status from the asset page.

Prerequisites

> **Note** The prerequisites 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 About responsibilities.

- You have a global role that has the relevant global permission for the type of asset 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 out-of-the-box asset types, go to Out-of-the-box asset types.

Steps

1. Open an asset page.
2. Click ⋮ → **Edit**.
   » The **Edit Asset** dialog box appears.

3. Enter the required information.

Field	Description
Name	Display name of the asset. If the Identical Asset Names Per Domain feature is disabled for the asset type of the asset, the asset name must be unique within its domain. If you enter an existing name, an error message appears. Zero-width and whitespace characters are allowed in asset names.
Full name	Full name of the asset. The full name of an asset must always be unique within its domain. This field is available only if the Identical Asset Names Per Domain feature is enabled for this asset type. **Warning** Don't edit the full name of an asset. This is because the full name is used to synchronize or refresh data sources. Changing the full name may cause unexpected results and break the synchronization or refresh process.
Type	Asset type of the asset. **Note** ◦ If you change the asset type, certain characteristics may no longer appear on the asset page because they aren't included in the new asset type's layout. These characteristics, however, aren't deleted. An administrator can make them visible on the asset page by changing the layout of the new asset type. ◦ Changing the asset type to **AI Use Case**: ▪ If you change the asset type of an asset to **AI Use Case** via the Collibra user interface, the asset's status is cleared. You can then manually set the status to suit your needs. ▪ If you change the asset type of an asset to **AI Use Case** via API, the asset's status is automatically changed to the default status, which is **Ideation**.
Status	Status of the asset.

4. Click **Save**.

Identical asset names per domain

Identical Asset Names Per Domain is a feature that allows you to give the same name to multiple assets in the same domain. If the feature is enabled for an asset type, 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 the Identical Asset Names Per Domain feature is enabled. It is important to note that zero-width/whitespace characters are allowed in asset names.

In this topic

Types of asset names

An asset has two names:

- **Display name:** This is the name that is used by default and shown in most places in the user interface (UI), such as the title bar on the asset page, preview panes, diagrams, search results, automatic hyperlinks, and relation tables.
- **Full name:** This is 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 display name of an asset is the same as its full name. Collibra 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 display name and full name independently of one another, and have multiple assets with an identical display name in one domain. This has the following benefits:

- You can use a shorter or simpler display name for an asset that has a long or complex full name. This is particularly useful in Data Catalog.
- You can use the same display name for multiple assets in one domain. 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 isn't affected by whether or not the Identical Asset Names Per Domain feature is enabled.
- Drop-down fields
  - In asset drop-down fields, you can search for an asset based on the display name or full name. This also includes the drop-down lists to:
    - Add manual hyperlinks to an asset in a text attribute.
    - Add (complex) relations on an asset page and in an asset table.
    - Filter relations on an asset table.
    - Add data to a data set.
- Tables
  - The **Name** column contains the name. This column can't 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 display name and full name as:
    - An advanced filter.
    - A sort option.
    - A column filter.
  - The preview pane shows the asset's display name.
  - Editing cells:
    - If the asset type allows identical asset names per domain, you can edit both the display 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 display name or full name changes both values.
    - Bulk editing the **Name** and **Full name** column isn't possible.
- Tiles
  - The display name is used in the tile heading.
  - **Full name** is a regular field. It can be moved and hidden, and you can edit the field name.
  - Display 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 the node name.

    - You can use **Name** and **Full Name** as a node overlay.
    - The preview shows the display name of an asset.
- Export
    - The display 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 don't 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 needs to be mapped, unless you map the **ID** column (only available in the special view **All Characteristics**).
    - Full name is automatically mapped to the **Full name** column.
    - When you import a file that was exported before 5.4, you need to manually map the **Full name** column of the view to the **Name** column of the import file.
    - Display name is automatically mapped to the **Name** column.
    - Display name doesn't need to be mapped.
    - Complex relations:
        - Relation asset full name is automatically mapped to **relation name [role/co-role asset type] → Full Name**.
        - When you import a file that was exported before 5.4, you need 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 shouldn't be mapped.
- Search
    - Basic search searches for assets by name.
    - Advanced search searches for assets by name, when name is in the search criteria.
    - You can't 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 display 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 before 5.4 will behave the same way in 5.4.

Actions

- Administrators can enable or disable the Identical Asset Names Per Domain feature.

  > **Note** If the feature is 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 an asset's display 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 an asset from one domain to another from the asset page. You can also move multiple assets to a different domain from a domain page or a global view.

In this topic

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.

Steps

Move a single asset from an asset page

1. Open the asset page.
2. Click ⋮ → **Move**.
   » The **Move Asset** dialog box appears.

   > **Tip** The **Domain** drop-down list in the dialog box contains domains of those domain types that are assigned to the asset type of the asset.

3. Select the new domain, and then click **Save**.

Move multiple assets from a domain page

1. Open the domain page.
2. On the **Assets** tab, select the checkboxes next to the assets you want to move to another domain.
3. Click **Move**.
   » The **Move selected assets** dialog box appears.
4. Select the new domain, and then 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 to another domain.
3. Click **Move**.
   » The **Move selected assets** dialog box appears.
4. Select the new domain, and then click **Save**.

How asset assignments change when moving assets between domains

The domains to which you can move an asset depend on the domain types assigned to the asset type through global and scoped assignments. When you move an asset, the list of target domains includes only those whose domain types are assigned to the asset type of the asset.

When you move an asset from one domain to another, the target domain's domain type determines which assignment applies to the asset. If the target domain's domain type has a different scope (for example, scoped instead of global), the asset's characteristics will change to reflect the assignment for that scope.

Consider the following example:

- **Domain1** with **DomainType1** that is added to an asset type's global assignment.
- **Domain2** with **DomainType2** that is added to the same asset type's scoped assignment.

When you move an asset from **Domain1** to **Domain2**, the asset no longer follows the global assignment, but follows the scoped assignment of **DomainType2**.

Delete an asset

You can delete an asset from the asset page or from an asset view. You can also delete multiple assets at once.

> **Warning** Deletion is permanent and it cannot be undone. When you delete a configuration asset, its configuration is also deleted. The following are some examples of configuration assets:
>
> - Schema assets, if you register a data source using Jobserver
> - Database assets, if you register a data source using Edge
> - S3 File System assets or Tableau Server assets
>
> To create a new configuration asset, you need to register your data source again. For more information, contact Collibra Support.

In this topic

Prerequisites

You have a resource role with the **Asset** > **Remove** resource permission for the asset you want to delete.

Steps

Delete an asset from an asset page

1. Open the asset page.
2. Click ⋮ → **Delete**.

Delete an asset from a view in table display mode

1. Open the view in table display mode.
2. If needed, use an asset filter or column filter to find the asset.
3. Select the checkbox next to the asset you want to delete.
4. Click **Delete**.

Delete an asset from a view in tile display mode

1. Open the view in tile display mode.
2. If needed, use a filter to find the asset.
3. Select the checkbox on the tile containing the asset you want to delete.
4. Click **Delete**.

Delete multiple assets

You can delete multiple assets at once in an asset view in table display mode and tile display mode.

> **Warning** Deletion is permanent and it cannot be undone.

In this topic

Prerequisites

You have a resource role with the **Asset** > **Remove** resource permission for the assets you want to delete.

Steps

Delete multiple assets from a table view

1. Open a view in table display mode.
2. If needed, use an asset filter or column filter to find the assets.
3. Select the checkboxes next to the assets you want to delete.

   > **Tip** You can also select all the visible assets in the table by selecting the checkbox next to the column headings.

4. Click **Delete**.

Delete multiple assets from a tile view

1. Open a view in tile display mode.
2. If needed, use a filter to find the assets.
3. Select the checkboxes on the tiles containing the assets you want to delete.
4. Click **Delete**.

Tailored asset page

This feature is **available only** in the latest UI.

Tailored asset page is a feature that enables you to perform quick in-page edits, simplifying the process of modifying characteristics on asset pages. It also enables administrators to customize the presentation of asset pages for all users. The feature provides a drag-and-drop layout editor to choose what is shown on asset pages of a specific asset type and assignment, and organize the content into logical sections. As an administrator, you can add and arrange various items such as widgets, attributes, relations, and complex relations. You can also create

your own sections to group these items, giving you control over the page's structure, appearance, and visual hierarchy.

Drafting and publishing

When you edit an asset page layout of a specific asset type and assignment, your changes are automatically saved as a draft. Once you publish the layout, it is applied to all the asset pages of that asset type and assignment, affecting how content is shown to users viewing those pages.

> **Important** A draft layout isn't user-specific, meaning that others can edit or publish your draft. As a result, the draft may be different when you return to it if someone else has edited it in the meantime.

System content

While you can customize most of the content in a layout, you can't edit any system content. System content is shown for certain OOTB asset types and is controlled by Collibra at a system level.

Layout types

This feature is **available only** in the latest UI.

An asset type can have any one of the following types of layout:

- Dynamic
- Out-of-the-box (OOTB)
- Published

In this topic

Layout descriptions

The following table describes the layout types.

Layout type	Description	Behavior
Dynamic	No specific page layout is defined for the asset type. The asset type automatically generates a dynamic layout based on the characteristic types in the asset type's assignment. That is, a dynamic layout is one that is created based on the assignment, and it includes all the characteristic types from the assignment. You can, however, remove characteristic types from the layout or change their order.	The dynamic layout is automatically applied to asset pages. When characteristic types are added, removed, or reordered in the assignment, the dynamic layout is automatically updated and applied to asset pages. **Note** If you edit and publish a dynamic layout, it becomes a published type of layout. Then, the asset type will stop automatically generating the layout. You will need to manually edit and publish the layout each time you add or reorder the characteristic types in the assignment. You can, however, restore the dynamic layout using Restore Default.

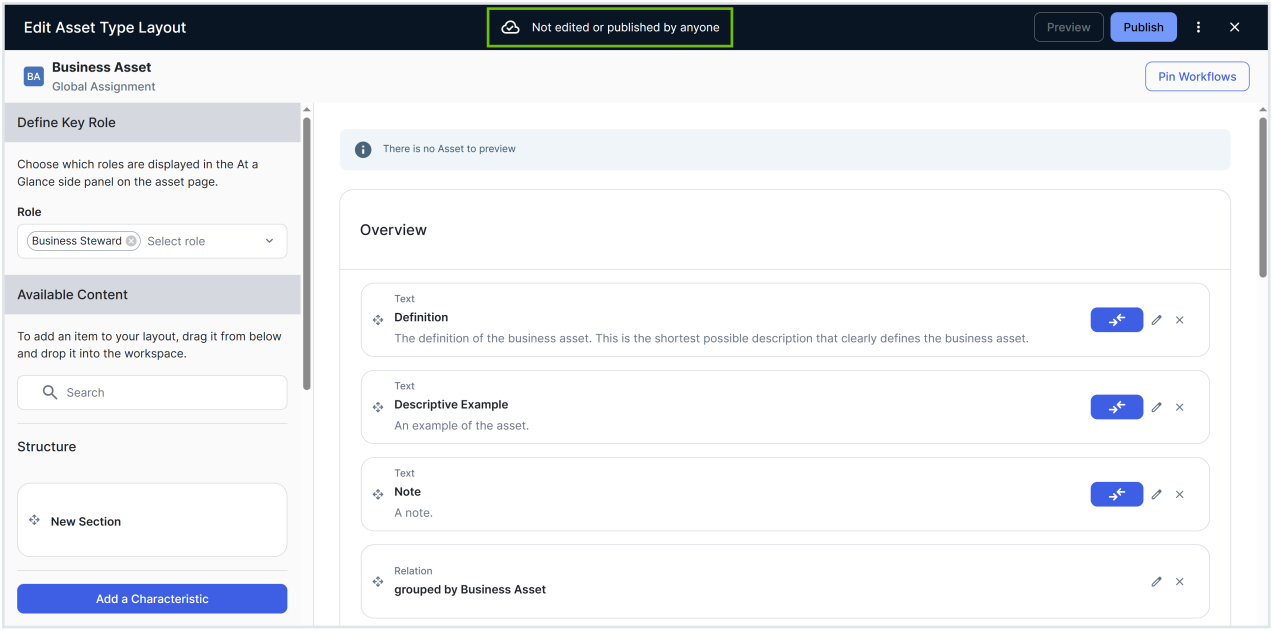
Layout type	Description	Behavior
OOTB	The asset type has a default, OOTB layout defined by Collibra. List of asset types with an OOTB layout • AI Model (in preview) • AI Use Case • Adaptive Rule Score • Column • Data Category • Data Contract • Data Notebook • Data Product • Data Product Input Port • Data Product Output Port • Data Quality Job • Data Quality Rule • Data Set • Database • Database View • Duplicate Score • Outlier Score • Pattern Score • Record Score • Schema • Schema Score • Shape Score • Source Score • Table	The OOTB layout is automatically applied to asset pages. When characteristic types are added or reordered in the assignment, the OOTB layout needs to be edited and published for it to be applied to asset pages. If you edit and publish an OOTB layout, it becomes a published type of layout. You can, however, restore the OOTB layout using **Restore Default**. **Note** • If you add a characteristic type to the assignment, the layout isn't automatically updated. You need to manually edit the layout to include the new characteristic type and then publish it. • Similarly, if you reorder the characteristic types in the assignment, the layout isn't automatically updated. You need to manually edit the layout to move the new characteristic type to the required position and then publish it. This is because Collibra can't know the required position for the new characteristic type. • If, however, you remove a characteristic type from the assignment, the layout is automatically updated and applied to asset pages.

Layout type	Description	Behavior
Published	The asset type's layout is published. **Note** Once a dynamic or OOTB layout is published, it becomes a published layout.	The published layout is applied to asset pages. When characteristic types are added or reordered in the assignment, the published layout needs to be edited and republished for it to be applied to asset pages. **Note** • If you add a characteristic type to the assignment, the layout isn't automatically updated. You need to manually edit the layout to include the new characteristic type and then publish it. • Similarly, if you reorder the characteristic types in the assignment, the layout isn't automatically updated. You need to manually edit the layout to move the new characteristic type to the required position and then publish it. This is because Collibra can't know the required position for the new characteristic type. • If, however, you remove a characteristic type from the assignment, the layout is automatically updated and applied to asset pages.

How to identify the layout type?

The following message appears on the **Edit Asset Type Layout** page depending on the layout type:

- **Dynamic layout:** Not edited or published by anyone.
- **OOTB layout:** Not edited or published by anyone.
- **Published layout:** Last published...
- **Draft layout:** Draft saved less than...



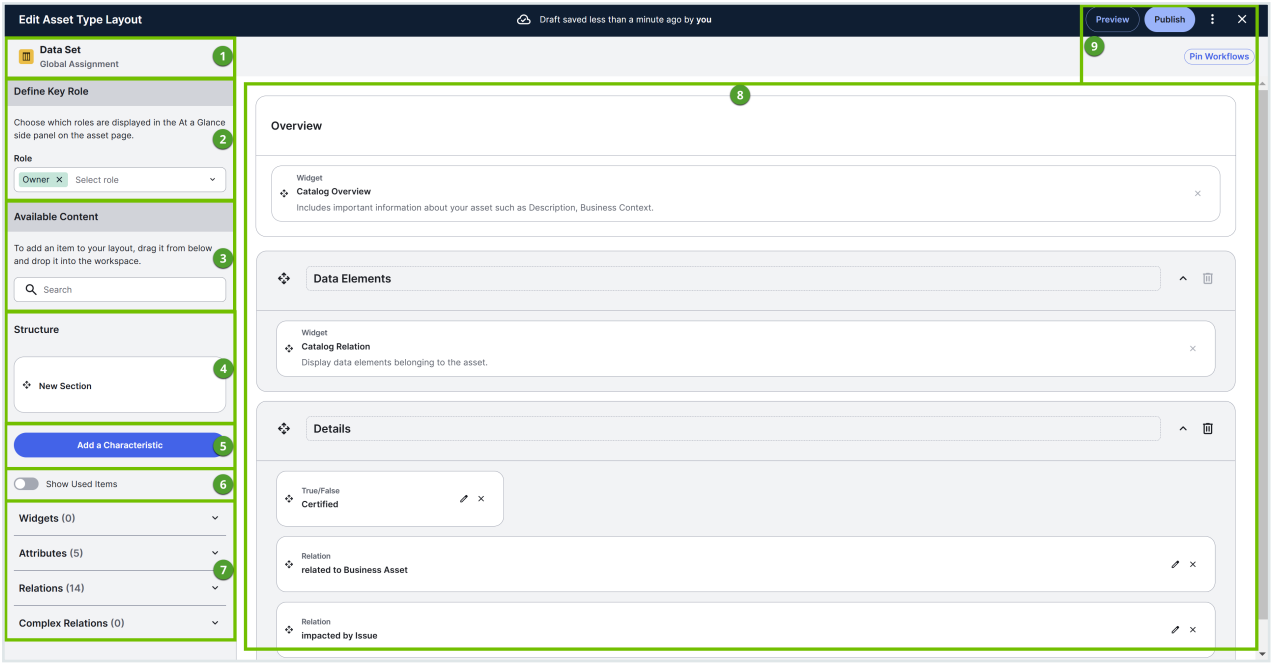
To differentiate between a dynamic layout and an OOTB layout, note the following:

- **Dynamic layout:** All characteristic types are already included in the layout. There are no sections or characteristic types available in the left pane to add to the layout.
- **OOTB layout:** Sections are typically included in the layout, each with a name and grouped characteristic types. You may find some characteristics types in the left pane to add to the layout.

Asset layout editor

This feature is **available only** in the latest UI.

Asset layout editor refers to the **Edit Asset Type Layout** page. It allows you to customize the layout of asset pages for a given asset type. It determines which sections, widgets, and characteristic types are shown on the asset pages of a given asset type, and also the order in which they are shown. As an administrator, you can open the layout editor by clicking **Edit Layout** on the **Characteristics** tab of an asset type page. The layout editor employs a drag-and-drop interface.



The following table describes the various sections shown in the asset layout editor, that is, on the **Edit Asset Type Layout** page.

Number	Section	Description
1	Asset type and assignment type of the layout.	
2	Define Key Role > Role	Roles refer to the stewards responsible for the asset and they are shown in the **At a Glance** sidebar on asset pages. You can select or clear roles.
3	Available Content > Search box	Content or items refer to the widgets, attributes, relations, and complex relations that are present in the left pane. You can use the search box to quickly find an item to add to the layout.
4	Structure > New Section	Sections allow you to structure the layout by grouping together widgets or characteristics. You can create a section by dragging the **New Section** block to the layout.
5	Add a Characteristic	Characteristics refer to attributes, relations, and complex relations. You can add a characteristic type to the asset type by clicking **Add a Characteristic**. For more information, go to Add a characteristic type to an asset type.

Number	Section	Description
6	Show Used Items	You can select this option to view all the items already added to the layout. Used items appear grayed out in the left pane. Clearing this option shows only unused items.
7	Items	You can add widgets, attributes, relations, and complex relations to the layout by dragging them to the layout.

Number	Section	Description
8	Layout	A layout defines how content is structured visually on an asset page. It represents the arrangement and organization of various items on an asset page. A global assignment for an asset type inherits the layout from the global assignment of the nearest parent asset type. Similarly, a scoped assignment for an asset type inherits the layout from the global assignment of that asset type. **Editing a layout** **Action** / **Description** Select the key roles you want to show in the **At a glance** sidebar of asset pages. / Use the **Role** field in the left pane. **Items (widgets and characteristic types)** Add a characteristic type to the asset type / Click **Add a Characteristic**. Add an item to the layout. / Drag the item from the left pane to the layout. Move or reposition an item. / Use ⁘. **Tip** Two items in compact display mode can be placed next to each other using ⁘. Remove an item. / Use X. **Note** Certain items can't be removed. Edit a characteristic type. / Use ✎.

Number	Section	Description

Action	Description
Change the display mode of a text attribute characteristic type from full width to compact or vice versa.	Use . **Tip** Two items in compact display mode can be placed next to each other using .
Sections	
Name a section.	Click the current name, and then enter the new name.
Move a section.	Use .
Expand or collapse a section.	Use the arrows in the section. **Note** A section on an asset page is always shown expanded, regardless of how it is saved in the layout. The collapsed view of a section in a layout is intended only for easier navigation of the page as you edit the layout—it doesn't affect the actual asset pages.
Remove a section.	Use .

Number	Section	Description
9	Action buttons	**Preview:** Shows a preview of the layout. **Publish:** Publishes the layout and makes it available on all the asset pages of the current asset type for all users. **Restore Default:** Restores the draft or published layout to its out-of-the-box or default version. This button appears when you click ⋮. > **Note** When you click **Restore Default** in a dynamic layout, the default layout is regenerated from the assignment. This restores all characteristics, including those you may have previously removed from the layout, and arranges them in the same order as in the assignment. **Delete Draft:** Deletes the draft layout. This button appears when you click ⋮. **X:** Closes the layout editor without saving your changes. **Pin Workflows:** Allows you to pin up to 5 actions to the title bar on asset pages. Pinned actions appear as primary and secondary buttons, while unpinned actions are included on the **Actions** menu in the title bar. If the title bar doesn't have enough space (for example, if the asset name is very long), pinned actions are included on the **Actions** menu. > **Tip** > • To change the order of the pinned actions, in the **Pin Actions** dialog box, use ⠿. > • If the action you pinned in the **Pin Actions** dialog box has a different name when it appears in the layout editor or asset pages, it means that the action has an alias (start label) defined in its configuration.

Edit and publish an asset layout

This feature is **available only** in the latest UI.

You can edit the layout of the asset pages of a given asset type directly on the asset type page. The new layout is applied to all the asset pages of that asset type after you publish it.

When editing a layout, you can choose which sections, widgets, and characteristic types are shown on the asset pages and in which order they are shown. You can also choose which roles (stewards responsible for the asset) are shown in the **At a glance** sidebar on asset pages.

Best practices when editing a layout

Number of sections

We recommend keeping the number of sections in an asset page layout to seven or fewer.

While you can add unlimited sections to a layout, research shows that around seven or fewer sections are ideal. This number prevents overwhelming users and offers enough variety for comparison and selection.

If you find yourself with more than seven sections, consider reassessing how you are organizing the content. Engage with your intended audience to understand what they are looking for in a given type of asset. Additionally, evaluate whether the way you are presenting the content is the most efficient:

Could you use relations to refer users to other assets for further details?

Could you summarize the content better for certain audiences (assignments) using a description?

These considerations can help ensure that your asset pages remain user-friendly and effective.

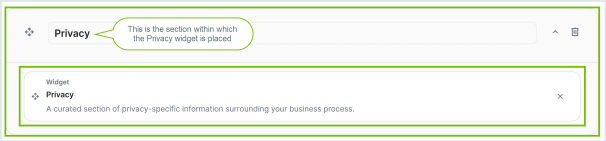
Naming sections

To ensure that users can easily find and understand content, give clear and concise names to sections.

Privacy widget

If adding the Privacy widget, which is available for the Business Process asset type, place it in a section named **Privacy** or a similar title. The Privacy widget doesn't have a default name, so

placing it in a clearly labeled section helps users distinguish it from other content on the asset page.



Organizing content

Consider the logic behind how sections are organized and the structure of the content within each section. You know best what your users are looking for and the most logical order for the content. If you don't have this information, consult with those who will be using the layout.

Working on the same layout

There is no safeguard against simultaneous editing. This means that if someone else makes a change to the layout after you last edited it without publishing, your changes are lost. Therefore, consider collaborating with other editors to ensure that you both aren't working on the same layout at the same time.

Prerequisites

- Characteristic types are added to the asset type.
- You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

> **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. In the tab pane, click the relevant assignment, and then click **Characteristics**.
   » A table containing all the characteristic types assigned to the asset type is shown.
3. On the **Characteristics** tab, click **Edit Layout**.
   » The Edit Asset Type Layout page opens.
4. Edit the layout.

Action	Description
Select the key roles you want to show in the **At a glance** sidebar of asset pages.	Use the **Role** field in the left pane.
Items (widgets and characteristic types)	
Add a characteristic type to the asset type	Click **Add a Characteristic**.
Add an item to the layout.	Drag the item from the left pane to the layout.
Move or reposition an item.	Use ⁘. > **Tip** Two items in compact display mode can be placed next to each other using ⁘.
Remove an item.	Use X. > **Note** Certain items can't be removed.
Edit a characteristic type.	Use ✎.

Action	Description
Change the display mode of a text attribute characteristic type from full width to compact or vice versa.	Use . **Tip** Two items in compact display mode can be placed next to each other using .
Sections	
Name a section.	Click the current name, and then enter the new name.
Move a section.	Use .
Expand or collapse a section.	Use the arrows in the section. **Note** A section on an asset page is always shown expanded, regardless of how it is saved in the layout. The collapsed view of a section in a layout is intended only for easier navigation of the page as you edit the layout—it doesn't affect the actual asset pages.
Remove a section.	Use .

» Your changes are saved.

Tip You can visualize the layout on asset pages by clicking **Preview**.

Important A draft layout isn't user-specific, meaning that others can edit or publish your draft. As a result, the draft may be different when you return to it if someone else has edited it in the meantime.

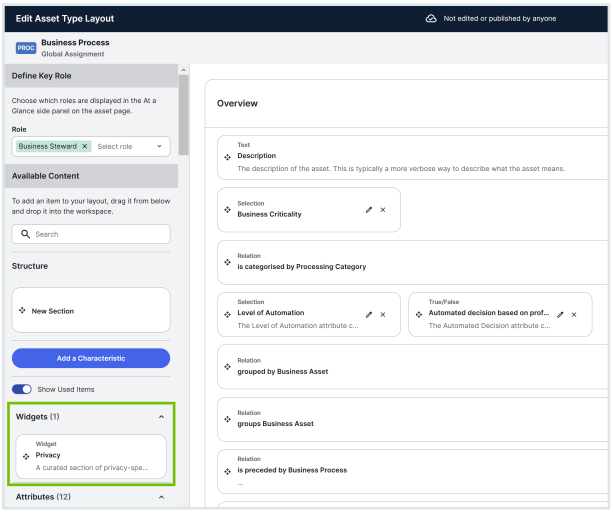
5. Click **Publish**.
   » Your changes are published and applied to all the asset pages of the asset type.

Asset layout widgets

This feature is **available only** in the latest UI.

Asset layout widgets enable you to show custom content on all the asset pages of a given asset type. For example, if you want to show Catalog elements on the asset pages of the Column asset type, you can achieve this using widgets. As an administrator, you can add widgets to the asset pages of a given asset type or reposition them when you edit the asset page layout for that asset type.

> **Note** Widgets are predefined, meaning you can't create new ones or delete existing ones. However, you can add and reposition them as needed.



Asset types with widgets

The following table lists the asset types with an out-of-the-box page layout that contains widgets. The table also shows if a widget is read-only and the default sections in which the widgets appear.

Asset type	Widget	Description	Read-only?	Section
AI Model (in preview)	Lifecycle Tracker	Enables users to monitor the evolution of AI models. They can view assessment history and statuses, start new assessments, add assessments and sign-off activities, record decisions, and advance the AI model to its next lifecycle stage. For more information, go to Working with the Lifecycle Tracker.	No	Lifecycle Tracker
	Other Policies That Apply	Policies linked to training data, inference data, output data, or AI use cases linked to AI models.	Yes	Model Information
AI Use Case	Lifecycle Tracker	Enables users to monitor the evolution of AI use cases. They can view assessment history and statuses, start new assessments, add assessments and sign-off activities, record decisions, and advance the AI use case to its next lifecycle stage. For more information, go to Working with the Lifecycle Tracker. **Tip** You can define whether the **Lifecycle tracker** widget appears expanded or collapsed (default state) on the AI Use Case asset pages using ⚙.	No	Lifecycle Tracker
	Other Policies That Apply	Policies linked to training data, inference data, output data, or AI Models linked to the AI use case.	Yes	Legal, Ethics and Compliance
	Privacy Context	Data categories linked to data columns.	Yes	Privacy Context
	Diagram	Diagram view of the AI Use Case asset, depicting all of the relations that exist between the AI use case and other assets.	Yes	Data Flow

Asset type	Widget	Description	Read-only?	Section
Column	Catalog Overview	Description, description from source, business context, categorization, source tags. For more information, go to Catalog asset pages.	Yes	Overview
	Descriptive Statistics	Attributes populated by metadata synchronization and data profiling.	Yes	Descriptive Statistics
Data Category	Data Classes	Data classes linked to the data category.	No	Overview
Data Set	Catalog Overview	Description and business context. For more information, go to Catalog asset pages.	Yes	Overview
	Catalog Relation	"Data Set contains Data Element" relation.	No	Data Elements
Database	Catalog Overview	Description, description from source, and source tags. For more information, go to Catalog asset pages.	Yes	Overview
Database View	Catalog Overview	Description, description from source, business context, categorization, and source tags.	Yes	Overview
	Catalog Relation	"Table contains Column" relation.	No	Columns
Schema	Catalog Overview	Description, description from source, and source tags. For more information, go to Catalog asset pages.	Yes	Overview
	Catalog Relation	"Schema contains Table" relation.	No	Tables

Asset type	Widget	Description	Read-only?	Section
Table	Catalog Overview	Description, description from source, business context, categorization, and source tags. For more information, go to Catalog asset pages.	Yes	Overview
	Catalog Relation	"Table contains Column" relation.	No	Columns

Migrate an asset layout

This feature is **available only** in the latest UI.

As an administrator, you can define and test an asset page layout in your development environment before migrating it to your production environment. This allows you to experiment with different layouts to find what works best for your organization, reducing rework and potential errors.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

For exporting

1. Add the appropriate characteristic types to the asset type.
2. Edit the asset page layout as needed.
3. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
4. In the tab pane, click **Migration** → **Export**.
   » The **Migration Export** page opens.
5. Select the assignment for which the layout was created.
6. Click **Export**.

For importing

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the tab pane, click **Migration** → **Import**.
   » The **Migration Import** page opens.
3. Upload the CMA file.
4. Click **Import**.

Asset characteristics

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

Attribute type	Description of the attribute	Example of an attribute
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. Whether you wish to add content to an empty attribute or edit content, you can add the attribute you need directly on the page through in-page editing.

Before you begin

- The attribute's type is in the relevant assignment of the asset's type.
- Ensure you have an author role to perform in page editing.
- Ensure your attribute has been added to the asset page from the layout editor. This must be done by an admin.

> **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. Click in the field for the attribute you want to add content to.

   Tip You might have to click the **Show empty values** toggle if that attribute has no content yet.
3. Enter the attribute content. For example, give the name asset a definition attribute.
4. Click **Save**.

To add additional content, where multiple values are allowed, follow these steps:

1. Click Add New under an existing field on an asset page.
2. Enter the desired content.
3. Click **Save**.

Add an attribute from a table

1. Open a view in table display mode.
2. If required, add the column of the attribute type to the table:
   a. Above the table, to the right, click ⠿ → **Fields**.
   b. Click **Select fields** → **Attributes**.
   c. Select the relevant attribute types.
   d. Click **Update**.
   e. Click **Save**.
3. Hover your pointer over the cell, and double click.
   » The cell editor appears.
4. Enter the required information.
5. Do one of the following:

If you want to change...	do...
the current row only:	a. Click **Save**.
all visible rows:	a. Click **Apply to all visible rows**. b. Click **Save**.

If you want to change...	do...
selected rows:	a. Select one or more rows. b. Click **Apply to all selected rows**. c. Click **Save**.

Edit an attribute

You can edit the value of an attribute, for example, if you want to edit the definition of an asset.

> **Note**
> Some attributes can't be edited directly from an asset page, such as the following:
>
> - Description from source
> - Source tags
> - Profiling results
> - Technical data type in the **At a glance** sidebar

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.

Prerequisites

> **Note** The prerequisites 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 About responsibilities.

- You have a global role that has the relevant global permission for the type of asset for which you are editing characteristics. 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 of a Policy asset, you must have a global role that has the **Policy Manager** global permission.

> **Tip** To view the global permissions for all out-of-the-box asset types, go to Out-of-the-box asset types.

Steps

Edit an attribute from the asset page

1. Open an asset page.
2. Double-click in the field for the attribute you want to edit.
3. Change the content as required.
4. Click **Save**.

Edit an attribute from a table

1. Open a view in table display mode.
2. If required, add the column of the attribute type to the table:
   a. Above the table, to the right, click ⠿ → **Fields**.
   b. Click **Select fields** → **Attributes**.
   c. Select the relevant attribute types.
   d. Click **Update**.
   e. Click **Save**.
3. Hover your pointer over the cell, and double click.
   » The cell editor appears.
4. Enter the required information.
5. Do one of the following:

If you want to change...	do...
the current row only:	a. Click **Save**.

If you want to change...	do...
all visible rows:	a. Click **Apply to all visible rows**. b. Click **Save**.
selected rows:	a. Select one or more rows. b. Click **Apply to all selected rows**. c. Click **Save**.

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

To delete content from a text editor, such as a description you no longer want, follow these steps:

1. Open an asset page.
2. Click in the field you want to delete.
3. Select the content and press the **delete** key on your keyboard.
4. Click **Save**.

To clear content you no longer want, such as from a True or False selection, follow these steps:

1. Open an asset page.
2. Click in the field you want to delete.
3. Click the **X** to clear the content..
4. Click **Save**.

Delete an attribute from a table

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

> **Note** After clicking the 🗑, the attribute will automatically be deleted. There is no confirmation dialog box for you to confirm deletion. However, you can click cancel instead of save if you mistakenly delete an attribute.

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. Whether you wish to add a relation to an empty field or add a relation to a table, you will be able to search and select from a drop-down menu of available relations.

Before you begin

- The relation's type is in the relevant assignment of the asset's type.
- Ensure you have an author role to perform in page editing.
- Ensure your relation has been added to the asset page from the layout editor. This must be done by an admin.

> **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. Click the **Show Empty Optional Values** toggle, if it not already on.
3. Click in the field for the relation you want to add content to.
4. Select the desired relation.
5. Click **Save**.

To add additional relations, where multiple values are allowed, follow these steps:

1. Click the + icons at the top of a relation table.
2. Select the desired relation.
3. Click **Save**.

Add relations from a table

1. Open a view in table display mode.
2. If you don't see the column of the relation type, add it to the table:
   a. Above the table, to the right, click ⠿ → **Fields**.
   b. Click **Select fields** → **Relations**.
   c. Select the relevant relation types.
   d. Click **Update**.
   e. Click **Save**.
3. Hover your pointer over the cell, and double click.
   » The cell editor appears.
4. Enter one or more relations.

> **Note** Click outside of the box to save the selected relation. Click the X closes the box without saving your relation. Clicking the up arrow closes the drop-down menu and does not save a selected relation.

5.

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

Edit a relation

You can edit a relation from an asset page. In a table, you can delete the existing relation and create a new one.

Prerequisites

> **Note** The prerequisites 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 About responsibilities.

- You have a global role that has the relevant global permission for the type of asset for which you are editing characteristics. 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 of

a Policy asset, you must have a global role that has the **Policy Manager** global permission.

> **Tip** To view the global permissions for all out-of-the-box asset types, go to Out-of-the-box asset types.

Steps

Edit a relation from an asset page

1. Open an asset page.
2. Double-click in the field for the relation you want to edit.
3. Change the content as required.
4. Click **Save**.

Edit a relation from a table

- Delete the existing relation.
- Add a new relation.

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. Hover your cursor over a relation table on the row containing the relation you want to delete.
3. Click the 🗑 icon at the end of the row.
4. In the confirmation dialog box, Click **Delete**.

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

Delete a relation from a table

To delete a relation from the entire table, follow these steps:

1. Open a view in table display mode.
2. On the content toolbar, click ⠿ → ✎ **Edit Fields**.
   » The **Fields** dialog box appears.
3. Click the 🗑 icon at the end of the row.
4. Click **Save**.

To delete a relation from one or more rows in the table, follow these steps:

1. Open a view in table display mode.
2. If you don't see the column of the relation type, add it to the table:
   a. 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. Hover your pointer over the cell, and double click.
   » The cell editor appears.
4. Click the **X** to clear the content.
5.

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

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.

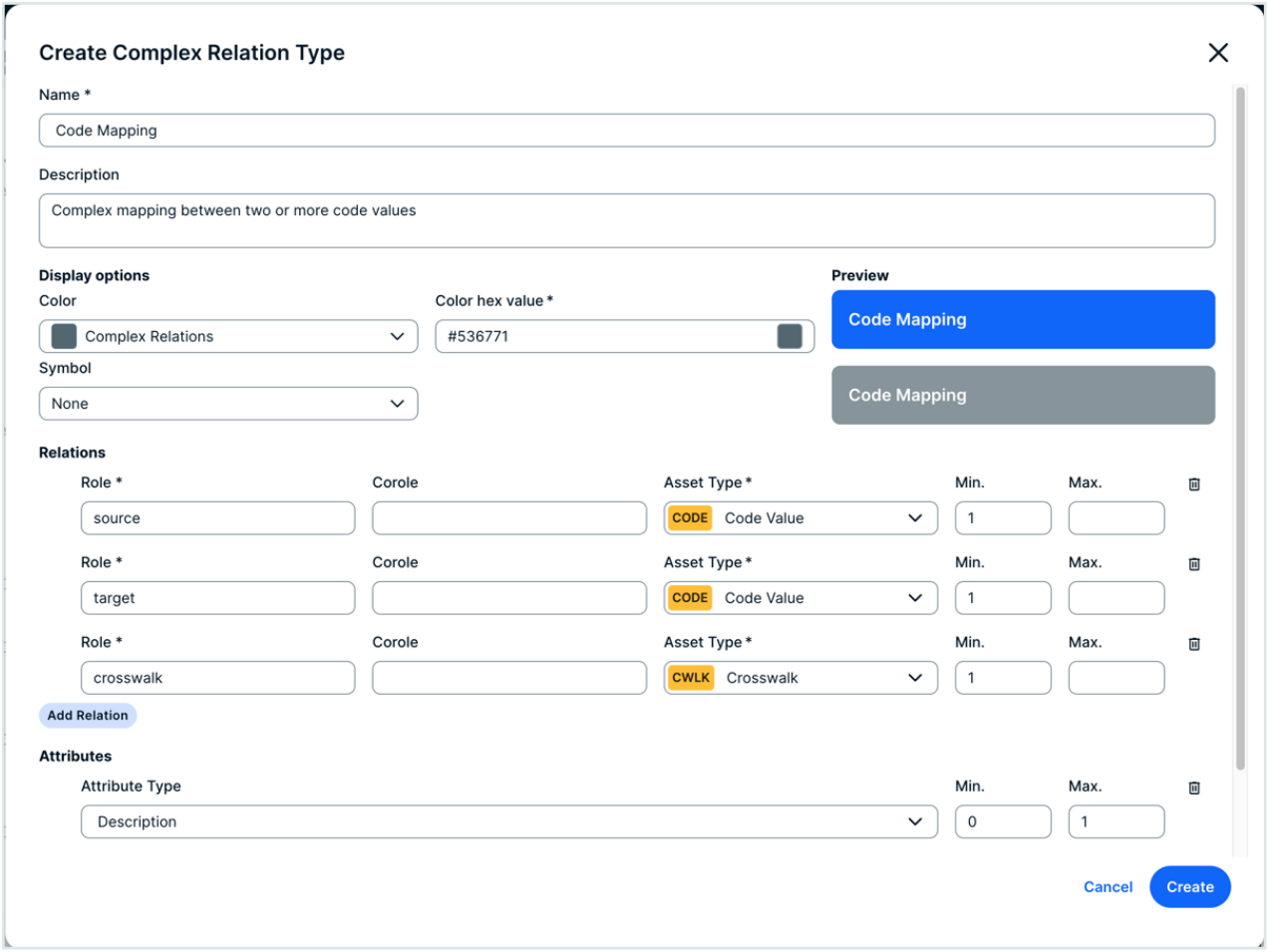
> **Note** A complex relation cannot have more than 32,767 relations to assets.

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.

Before you begin

- The complex relation's type is in the relevant assignment of the asset's type.
- Ensure you have an author role to perform in page editing.
- Ensure your relation has been added to the asset page from the layout editor. This must be done by an admin.

> **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. Click the asset type in the upper-left corner. For example, **Business Term**.

   > **Tip** Alternatively, you can open an asset type through the Collibra Settings page ▸ Asset types.

3. In the tab pane, click the drop-down arrow beside **Global Assignment**.
4. In the tab pane, click **Characteristics**.
5. In the upper-right corner, click **Edit Model**.
6. Click **Add a Characteristic**.
7. Click the **Relations** tab and find the complex relation you want to add. For example, **Fact Type**.
8. Click **Save**.

Adding complex relations to layout

To add the complex relation to the asset type page, you must ensure the complex relation is added to your page layout.

Steps

1. After adding a complex relation, click **Edit Layout**.
2. If you don't see your new complex relation on your page layout, drag and drop the complex relation onto the page.
3. Click **Publish**.

Edit a complex relation

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

Prerequisites

> **Note** The prerequisites 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 About responsibilities.

- You have a global role that has the relevant global permission for the type of asset for which you are editing characteristics. 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 of a Policy asset, you must have a global role that has the **Policy Manager** global permission.

  > **Tip** To view the global permissions for all out-of-the-box asset types, go to Out-of-the-box asset types.

Steps

1. Open an asset page.
2. Click in the field for the complex relation you want to edit.

   > **Tip** You might need to switch on the **Show Empty Optional Values** option if the complex relation has no content yet.

3. Enter the required information.

   > **Tip** The required fields depend on the configuration of the complex relation type.

4. 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. Click the asset type in the upper-left corner. For example, **Business Term**.

   > **Tip** Alternatively, you can open an asset type through the Collibra Settings page ▸ Asset types.

3. In the tab pane, click the drop-down arrow beside **Global Assignment**.
4. In the tab pane, click **Characteristics**.
5. In the upper-right corner, click **Edit Model**.
6. Click the 🗑 in the row for the complex relation you want to delete.
7. Click **Save**.

About hyperlinking

Hyperlinking allows you to create connections between assets or between assets and webpages directly within text attributes of asset pages. They can be created automatically or manually, depending on your needs.

Automatic hyperlinking dynamically links asset names mentioned in text attributes to their corresponding asset pages, ensuring the links remain up to date. This feature is especially useful for linking to frequently referenced assets, such as Business Terms. Manual hyperlinking allows you to create links to specific assets or webpages, offering flexibility especially when automatic hyperlinking is disabled or when the link text differs from the target asset name.

Related topics

Hyperlinking configuration

Automatic hyperlinking

Every asset can be the target of an automatic hyperlink. Automatic hyperlinking creates a hyperlink to an asset when its name appears in another asset's text attribute. These hyperlinks are always kept up to date when you edit your data. Automatic hyperlinking is especially useful for linking to Business Term assets.

In this topic

Where automatic hyperlinking can be applied

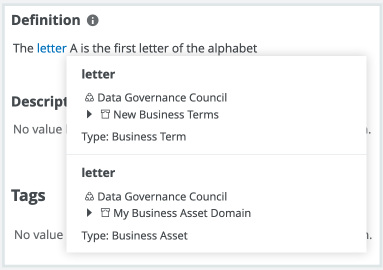
You can enable or disable automatic hyperlinking at the following levels:

- **Environment:** Contact Collibra Support to enable or disable automatic hyperlinking for your entire environment.
- **Domain:** Enable automatic hyperlinking for all assets in a domain.

- **Asset type:** Exclude a specific asset type from automatic hyperlinking to prevent all assets of that asset type from being automatically hyperlinked. This also improves performance.
- **Asset:** Exclude a specific asset from automatic hyperlinking if its name is a common word, such as "is," "a," "or," or "and," to avoid creating unnecessary hyperlinks.

Note

- If multiple assets with the same name exist and you click a hyperlink, they are shown in a dialog box. You can then select one of the assets to open its asset page.



- After importing data or after a backup is restored, Collibra triggers a rebuild of automatic hyperlinks. You can also manually rebuild hyperlinks.
- By default, automatic hyperlinking isn't case sensitive. For example, an asset named "Nato" will be the target asset even if "NATO" is mentioned in a text attribute. Contact Collibra Support to change case-sensitivity for automatic hyperlinking.

Enable automatic hyperlinking

You can enable automatic hyperlinking at both the domain level and the asset level.

When enabled at the domain level: Automatic hyperlinks to all assets in the domain are created. If the name of any asset in the domain is mentioned in the text attributes of other assets (whether previously or in the future), that mention is automatically converted into a hyperlink.

Example Suppose that a domain named **Acronyms** contains an asset named **WHAM**. If automatic hyperlinking is enabled for the **Acronyms** domain, Collibra automatically creates hyperlinks for any mentions of **WHAM** in the text attributes of other assets. For example, if the text **WHAM** was mentioned in the definition of another asset named **Project Overview**, the text **WHAM** is now shown as a hyperlink. Clicking this hyperlink takes you to the **WHAM** asset in the **Acronyms** domain.

When enabled at the asset level: Automatic hyperlinks to the specific asset is created. If the name of the asset is mentioned in the text attributes of other assets (whether previously or in the future), that mention is automatically converted into a hyperlink.

Prerequisites

The automatic hyperlinking setting is enabled in Collibra Console.

The automatic hyperlinking setting is enabled. Contact Collibra Support if it isn't enabled.

Steps

1. Open the domain or asset for which you want to enable automatic hyperlinking.
2. Click → **Auto hyperlinks**.
   » The **Automatic Hyperlinks** dialog box appears.
3. Clear the **Prevent Automatic Hyperlinks...** checkbox, and then click **Save**.
   » If you are on the domain page, automatic hyperlinking is enabled for all assets in the domain.
   » If you are on the asset page, automatic hyperlinking is enabled for only that asset.

> **Tip** You can disable automatic hyperlinking for a specific asset in a domain even if automatic hyperlinking is enabled for that domain.

What's next?

Rebuild hyperlinks.

Disable automatic hyperlinking

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

When disabled at the domain level: Automatic hyperlinks to all assets in the domain are removed.

When disabled at the asset level: Automatic hyperlinks to the specific asset are removed.

Tip

- You can always manually create a hyperlink that targets an asset.
- You can disable automatic hyperlinking for a specific asset in a domain even if automatic hyperlinking is enabled for that domain.
- Contact Collibra Support if you want to enable or disable automatic hyperlinking for your entire environment.

Steps

1. Open the domain or asset for which you want to disable automatic hyperlinking.
2. Click → **Auto hyperlinks**.
   » The **Automatic Hyperlinks** dialog box appears.
3. Select the **Prevent Automatic Hyperlinks...** checkbox, and then click **Save**.
   » If you are on the domain page, automatic hyperlinking is disabled for all assets in the domain.
   » If you are on the asset page, automatic hyperlinking is disabled for only that asset.

Remove an automatic hyperlink

You can remove a specific automatic hyperlink that targets an asset without affecting other automatic hyperlinks that target the same asset.

Tip If you want to instead remove all automatic hyperlinks that target an asset, disable automatic hyperlinking for the asset.

Steps

1. Open the asset.
2. Click the text attribute containing the hyperlink you want to remove.
   » The text editor opens.
3. Select the hyperlinked text, click (**Prevent auto hyperlinking**), and then click the check-mark icon.
   » The hyperlink is removed from the name. However, if you add the same name again in the text attribute, automatic hyperlink to the corresponding asset is created again. Addi-

tionally, if hyperlinks are rebuilt, for example, after restoring a backup, the hyperlinks may reappear.

Related topics

Hyperlinking configuration

Manual hyperlinking

If you want more control over hyperlinks, you can manually create hyperlinks to assets to guide others to or from a specific asset. This is especially useful if automatic hyperlinking is disabled or if the text you want to link to an asset doesn't match the name of the target asset. You can also manually create hyperlinks to webpages.

In this topic

Create a hyperlink to an asset

You can manually create a hyperlink to an asset in a text attribute of an asset page.

Steps

1. Open the asset.
2. Click the text attribute containing the text you want to convert into a hyperlink.
   » The text editor opens.
3. Select the text, and then click (**Link**) → **Link to asset**.
   » The **Link to asset** dialog box appears.

4. Enter the required information.

Setting	Description
Asset	Name of the target asset to which you want to link the selected text. Assets are filtered as you enter a name. **Tip** ◦ To help you identify the correct asset, the domain of each asset is shown below the asset name in the drop-down list. ◦ If you want to search for an asset by its full name in addition to its display name, clear the **Only Search Display Name** checkbox. ◦ You can link to multiple assets by adding more than one name. When someone clicks a hyperlink that is linked to multiple assets, the linked assets are shown in a dialog box. They can then select one of the assets to open its asset page.
Text to display	Display text for the hyperlink. By default, this is the text you selected.

> **Note** Links added using the **Link to asset** option aren't clickable in emails.

5. Click **Save**.
6. In the text editor, click the checkmark icon.

Create a hyperlink to a web address

In addition to creating a hyperlink to an asset, you can create a hyperlink to a web address in a text attribute of an asset page. Clicking such a hyperlink opens the web page in a new tab.

Steps

1. Open the asset.
2. Click the text attribute containing the text you want to convert into a hyperlink.
   » The text editor opens.
3. Select the text, and then click (**Link**) → **Link to URL**.
   » The **Link to URL** dialog box appears.

4. Enter the required information.

Setting	Description
URL	Address of the target webpage to which you want to link the text you selected. **Note** If the address contains unsafe characters, it is either ignored or encoded depending on the sanitizer enforced by your administrator. For more information, go to Enforce legacy sanitizer.
Text to display	Display text for the hyperlink. By default, this is the text you selected.

5. Click **Save**.
6. In the text editor, click the checkmark icon.

Edit a manually created hyperlink

You can edit a manually created hyperlink in a text attribute of an asset page.

> **Note** Automatic hyperlinks can't be edited.

Steps

1. Open the asset.
2. Click the text attribute containing the hyperlink you want to edit.
   » The text editor opens.
3. Click anywhere within the hyperlinked text, and then click **Edit**.
   » The **Link to URL** dialog box appears.
4. Edit the information.

Field	Description
URL	Address of the target webpage to which you want to link the text you selected. **Note** If the address contains unsafe characters, it is either ignored or encoded depending on the sanitizer enforced by your administrator. For more information, go to Enforce legacy sanitizer.

Field	Description
Text to display	Display text for the hyperlink. By default, this is the text you selected.

5. Click **Save**.
6. In the text editor, click the checkmark icon.

Remove a manually created hyperlink

You can remove a manually created hyperlink from a text attribute of an asset page.

Steps

1. Open the asset.
2. Click the text attribute containing the hyperlink you want to remove.
   » The text editor opens.
3. Click anywhere within the hyperlinked text, and then click **Unlink**.
4. Click the checkmark icon.
   » The hyperlink is removed from the text. If the hyperlink pointed to many assets, all links are removed.

About ratings

Ratings enable you to subjectively rate the quality of an asset using a 5-star rating system and enter a free-text review of the asset to support your rating.

You can select a star rating and leave a review on asset pages to let your colleagues know how complete, accurate, or meaningful the asset is. These ratings can be helpful when you are searching for meaningful and trustworthy data for your own work. Unlike objective parameters such as data quality, certifications, and articulation scores, ratings are purely a subjective evaluation of the quality of data.

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

In this topic

Permissions

The following table contains the resource permissions required to rate assets and to edit or delete ratings.

> **Tip** You can always edit or delete your own rating.

Resource permission	Description
Rating > Add	Rate any asset of an asset type if ratings are enabled for the asset type.
Rating > Modify	Edit others' ratings.
Rating > Remove	Delete others' ratings.

> **Note**
> - Users are granted permissions through global roles and responsibilities, not directly.
> - While guest users can view all ratings and reviews, they can't provide their own ratings or reviews.
> - Adding, editing, or deleting a rating doesn't change the asset's last modified date.

Rate an asset

You can rate any asset of an asset type if ratings are enabled for the asset type. Ratings can be given only via asset pages. You can edit or delete your ratings any time.

Steps

1. Open the asset.
2. On the **Summary** tab, in the **Ratings** section, click the star that corresponds most closely to your opinion of the quality of the asset.

   > **Tip** The rating range is from 1 to 5e stars, with 5 representing the highest level of quality and 1 representing the lowest.

3. Optionally, in the text editor, enter a review of the asset.

> **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 can be improved.

4. Click **Save**.
   » Your rating is recorded. 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 your rating any time. With the correct permissions, you can also edit other users' ratings.

Steps

1. Open the asset.
2. On the **Summary** tab, in the **Ratings** section, click ✎ next to the rating.
3. Click the star that corresponds most closely to your opinion of the quality of the asset.
4. Optionally, in the text editor, edit the review of the asset.
5. Click **Save**.
   » The edited rating is recorded. The average user rating is recalculated.

Delete a rating

If, for any reason, your opinion of the quality of an asset changes, you can delete your rating any time. With the correct 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 the asset.
2. On the **Summary** tab, in the **Ratings** section, click 🗑 next to the rating, and then click **Delete**.
   » The rating is deleted. The average user rating is recalculated.

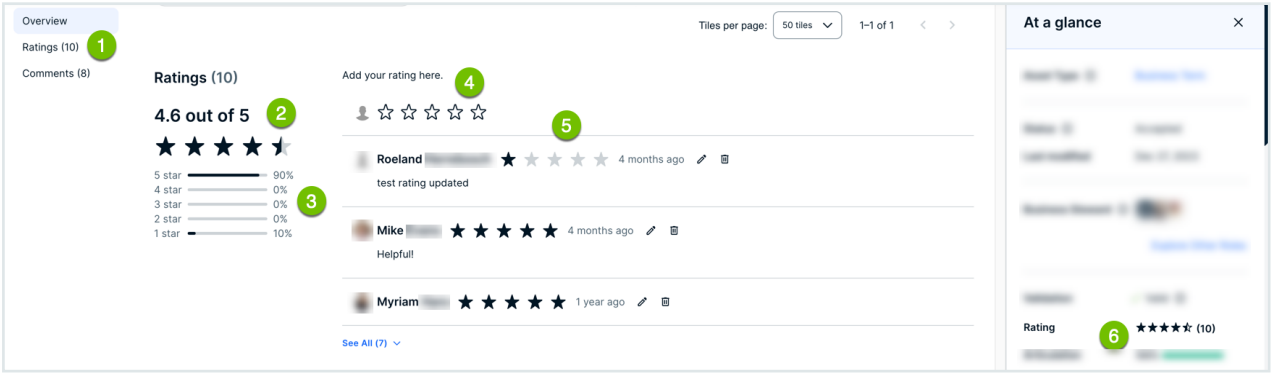
View ratings

If ratings are enabled for an asset type and one or more ratings has been provided for an asset of that type, the associated rating activity appears in several places, such as the asset page, the **History** tab, and asset table or tiles.

Show more information

Asset page

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



No.	Description
1	The **Ratings** section on the **Summary** tab, with the total number of ratings for the asset.
2	Average rating for the asset.
3	Horizontal bar chart showing the distribution of ratings.
4	Option to rate the asset. You can also enter a review after rating the asset.
5	Other users' ratings and reviews, ordered from newest to oldest.
6	Visual representation of the average rating for the asset, with the total number of ratings for the asset.

History tab

Ratings and any changes made to it for an asset are shown on the **History** tab of the asset page and the associated community and domain pages. The **History** tab of your profile page shows all your ratings and the changes you made to them.

Asset table or tiles

You can customize an asset table or tiles to show the following fields related to ratings:

- **Average rating:** Average of all user ratings for each asset.
- **Number of ratings:** Total number of ratings for each asset.

Related topics

- Enable or disable ratings
- Delete all ratings

Enable or disable ratings

You can allow users to rate assets by enabling ratings for the associated asset type. Enabling ratings for an asset type doesn't automatically enable ratings for its child asset types. You need to manually enable ratings for each child asset type.

For certain out-of-the-box asset types such as **Data Set** and **Report**, ratings are enabled by default, For the asset types you create, ratings are disabled.

> **Warning** Ratings can't be disabled for an asset type if user ratings already exist for any assets of that asset type. To disable ratings then, you need to manually delete those ratings.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The Settings page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. Click **Edit**.
   » The **Edit <asset type>** dialog box appears.
3. Select or clear the **Enable ratings** checkbox, and then click **Save**.

Delete all ratings

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

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The Settings page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.

c. On the **Asset types** tab, click the name of the asset type.
   » The asset type page opens.

> **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. On the **More** menu, click **Delete ratings**.

Tags

A tag is a piece of metadata that is used to label and categorize an asset. In addition to strictly governed metadata, you can use tags to categorize assets more flexibly.

You may notice that some assets are tagged with keywords. These tags are clickable and they help you easily find similar assets.

You can use the same tag for all assets that belong to the same category of a business. For example, assets relevant to the finance department can be tagged with **finance**. You can then locate these assets by searching for the tag or clicking the tag directly on an asset page. When you click a tag on an asset page, you are taken to the search page where you can find all assets with that tag.

Although tags are stored in the Collibra database, they aren't strictly governed by Collibra.

> **Note**
> - Tags can be added only to assets.
> - Adding, editing, or deleting a tag from an asset doesn't change the asset's last modified date.

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** page.
- You can use the **Tag** filter on the search page to refine search results.

- You can use tags in filter criteria.
- 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 aren't case sensitive. For example, entering *car* can provide the following suggestions: *Car*, *car*.
- Tag names can't contain spaces.
- Tag names can contain underscores (_).
- A tag name can contain up to 250 characters.

Permissions

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

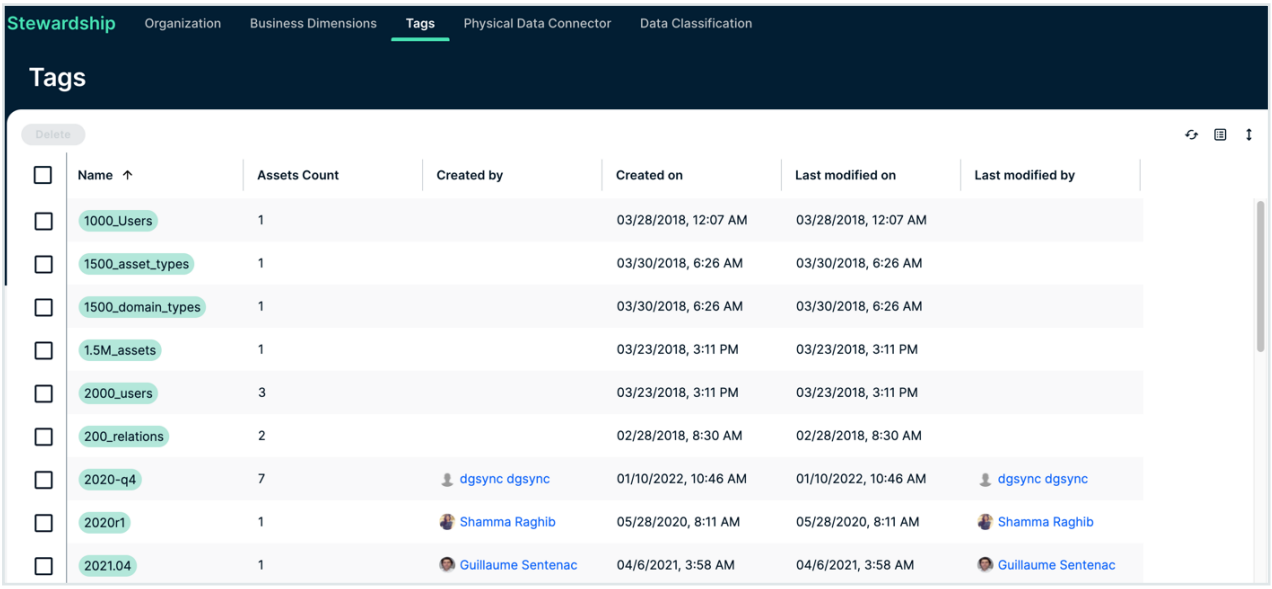
Page		Permission
Asset page	Resource	**Asset** > **Tags** > **Update:** Add, edit, and delete tags. For information about how to give this permission to a role, go to Enable permission to use tags. **Note** You can give this permission to only the role that has the relevant global permission for the associated asset type and has at least the view access to the associated community or domain. For more information, go to About responsibilities.
The Stewardship application **Tags** page	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** page. **Note** You do not need a role with the **View tags** permission to see tags set by stewards while searching, in table views, diagram views, global views, and on asset pages.

Tags overview page

The tags overview page provides an overview of all the tags in Collibra Platform.

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**.



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 toolbar, click → **Stewardship**.
2. In the submenu, click **Tags**.
   » The **Tags** overview page opens.
3. Double-click in the tag you want to edit.
4. Edit the name.
5. Press `ENTER` or click outside of the field to save the edits.

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 toolbar, click → **Stewardship**.
2. In the submenu, click **Tags**.
   » The **Tags** overview page opens.
3. Double-click the tag you want to merge.
4. Change the name of the tag to that of another existing tag.
   » The **Merge tags confirmation** dialog box appears.
5. Click **Confirm**.

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 toolbar, 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 **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. In the **At a glance** sidebar, double-click the **Tags** section. If this sidebar is hidden, click .
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.

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.
   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 outside of the field to save the changes.

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. In the **At a glance** sidebar, double-click the **Tags** section. If this sidebar is hidden, click .
3. Click next to the tags that you want to delete.

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.
   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 or selected assets that are visible on the page,

select the **Apply to all visible rows** check box or the **Apply to all selected rows** check box..

4. Click outside of the field to save the changes.

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

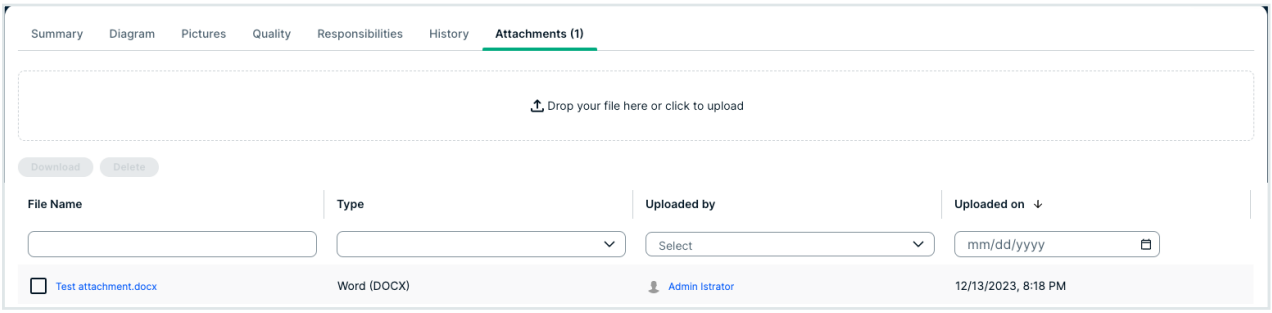
An attachment is a file that you upload via an asset page, domain page, or community page. Attachments are used to store the images that are uploaded in the following areas of Collibra:

- rich text attributes on the asset page.
- the description of a domain or community.
- in comments linked to the relevant asset, domain, and community.

Attachments can also be used to attach a limited set of reference documents.

> **Note** The attachment feature isn't meant to allow Collibra to be used as an alternative for a file storage system like Google Drive or Amazon S3. Collibra doesn't include functionalities like file versioning, setting download access differently per individual file, or uploading large files. If you want to use these functionalities, store your file on a file storage system and create a link to it in a rich text attribute or comment.

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



The number of attached files is shown next to the **Attachments** tab. To easily find the right attachment, you can sort and filter the attachments per asset, domain, or community page by the following:

- File name
- File type
- Uploaded by
- Uploaded on
- 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. Collibra administrators with access to Collibra Console can manage these settings.

Add attachments

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

Before you begin

You have a resource role with the Attachment > Add resource permission on the relevant asset, domain, or community.

Steps

1. Open a community, domain, or asset page.
2. In the tab bar, click **Attachments**.
3. Upload an attachment in one of the following ways:
    - Drag and drop the file in the upload area.
    - Click within the upload area, find the file you want to attach, and click **Open**.

    » The attachment is displayed in the table.

Limitations

- 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. Collibra administrators with access to Collibra Console can manage these settings.

Setting name	Setting description
Max file size	The maximum upload size allowed in bytes.
Max per day	The maximum number of files any user will be allowed to upload in a day.
Accepted content types	Use the MIME type format. For more information, go to the Complete MIME Types List.
Restricted content types	Content types in MIME type format that cannot be uploaded. Restricted content types take precedence over accepted content types.

Remove attachments

You can move files from an asset, domain, or community as attachments.

Before you begin

You have a resource role with the Attachment > Remove resource permission on the relevant asset, domain, or community.

Steps

1. Open a community, domain, or asset page.
2. In the tab bar, click **Attachments**.
3. Select the attachment you want to delete.
4. Click **Delete**.
5. Click **Delete** in the pop-up window.

> **Note** When an attachment is referenced as an image or link in a rich text attribute, a community or domain description, or a comment, removing the attachment results in a broken reference.

About responsibilities

A responsibility is the assignment of a resource role to one or more users or user groups for a resource. Based on their responsibilities, users can act on the permissions assigned to them via the resource role.

The **Responsibilities** tab on an asset page shows you who is assigned a role for the asset, helping you know whom to contact for assistance or questions about the asset.

Child resources always inherit the responsibilities from their parent resources:

- For communities, the responsibilities are inherited by subcommunities, domains and assets in those communities. For example, if you are a **Business Steward** for a certain community, you are also a **Business Steward** for all the subcommunities, domains and assets inside that community.
- For domains, the responsibilities are inherited by the assets in those domains.
- For assets, the responsibilities only apply to the assets.

Example

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

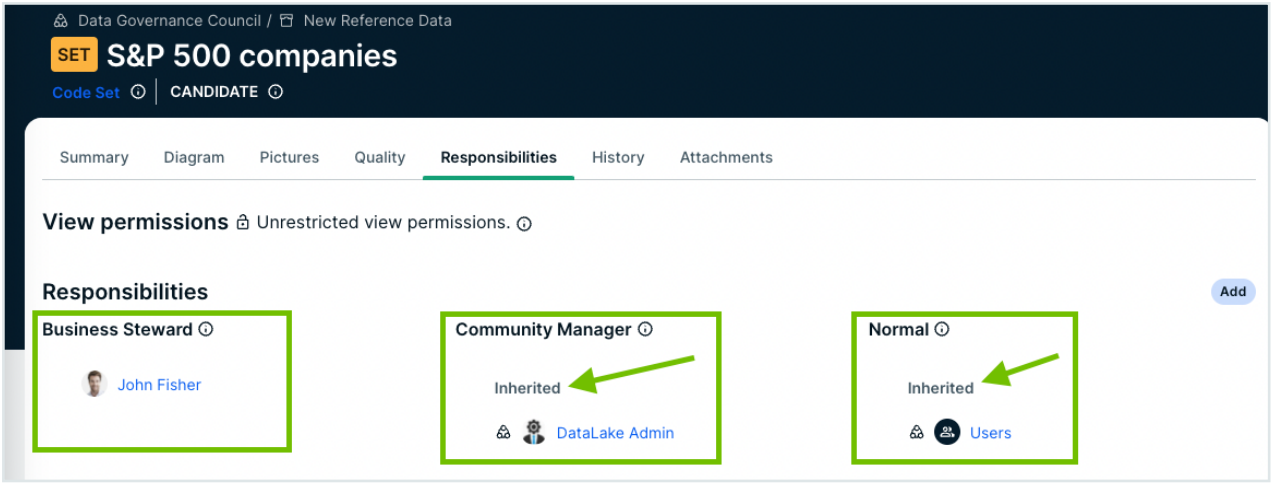
This leads to the following responsibilities:

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.

Responsibilities tab

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



The **Inherited** tag is shown if the user or group inherited the role. If the **Inherited** tag isn't shown, the user or group was directly assigned to this role for the resource.

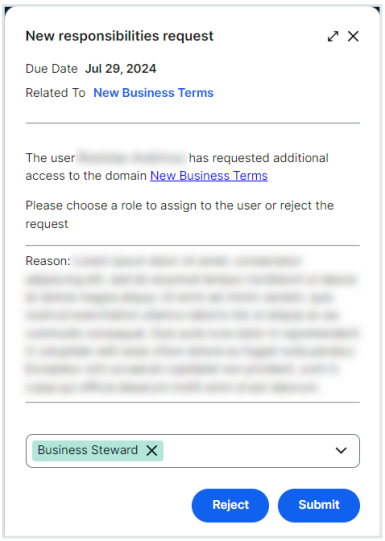
If a user or group has a responsibility but not the required view permissions, a warning appears in the box, for example, when a user was assigned the Steward role for a resource but doesn't have view permissions for it.

Request responsibilities

This feature is **available only** in the latest UI.

You can request responsibilities for domains and assets if the **Request Responsibility** feature is enabled in your environment. If this feature is enabled, the **Request Responsibility** button is shown on the **Responsibilities** tab of domain and asset pages.

When you request responsibilities for a resource, a task is automatically created for approvers. Approvers are those who have a specific role for the resource, such as Community Managers. An approver can assign one or more roles to you based on your request or reject the request. In either case, you receive an email notification when the task is complete.



Tip

- You can request responsibilities only if you don't have permission to add responsibilities. If you have the following permissions, the **Add** button is shown on the **Responsibilities** tab, instead of the **Request Responsibility** button, to allow you to add or edit responsibilities.
  - **Resources** > **Manage all resources** global permission
  - **Asset** or **Domain** > **Responsibilities** > **Add** or **Update** resource permission
- Unlike workflows, requesting or adding responsibilities doesn't require you to have a role with workflow permissions.

Steps

1. Open a domain or asset page.
2. On the **Responsibilities** tab, click **Request Responsibility**.
   » The **Request Responsibility** dialog box appears.
3. Enter the required information.
4. Click **Submit**.

View and edit responsibilities

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

- On the **Responsibilities** tab of a resource.
- In any view that contains communities, domains, or assets, in the specific field or column for that role, by adding the fields or columns you want to see.

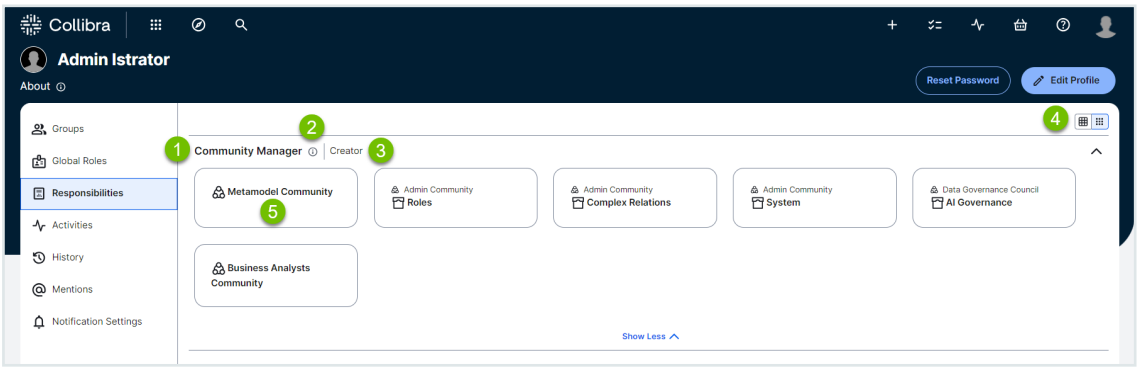
  > **Note**
  > - Each role has its own field or column.
  > - Depending on the settings in Collibra Console, inherited responsibilities may also be shown.

- On the **Responsibilities** tab of a user profile.

  > **Note** Only 300 responsibilities are visible at one time, even if more exist in the system.

  Show more information
  You can see a full list of both direct and inherited responsibilities for a user on the **Responsibilities** tab of the user **Profile** page, in either tile mode or table mode.

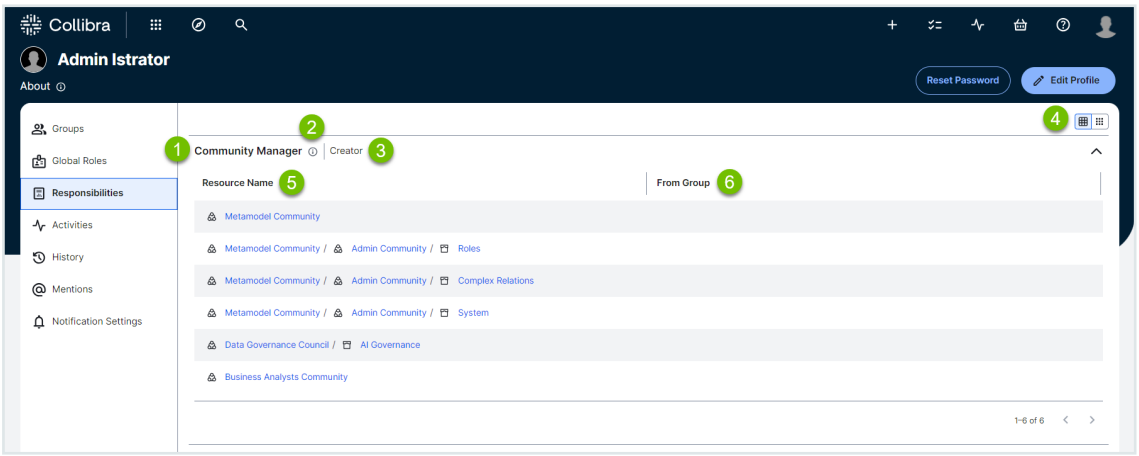
Tile mode



No.	Item name	Description
1	Resource role	Name of the resource role.
2	Tooltip	Tooltip that shows the resource role description.

No.	Item name	Description
3	License	Highest license type required by the resource permissions assigned to this role.
4	Display mode	Switch between the tile and table mode.
5	Resource tile	Tile showing details of the resource to which the responsibility applies, including the groups with that responsibility that have the user as a member. **Tip** Click the tile to see additional details about the resource.

Table mode



No.	Item name	Description
1	Resource role	Name of the resource role.
2	Tooltip	Tooltip that shows the resource role description.

No.	Item name	Description
3	License	Highest license type required by the resource permissions assigned to this role.
4	Display mode	Switch between the tile and table mode.
5	Resource name	Details of the resource to which the responsibility applies.
6	Group name	Groups with that responsibility that have the user as a member.

- On the **Responsibilities** tab of a user group page.
- In the **Preview** pane of an asset.

Editing responsibilities

You can add or remove responsibilities:

- By adding or removing a resource role to or from a user or user group on the **Responsibilities** tab of a resource.
- By adding or removing a user or user group in the role column of an asset table.

> **Important** For future maintainability and higher transparency, add responsibilities as high up in the organization hierarchy as possible and rely on the automated inheritance of responsibilities from communities and domains to the individual assets.

Edit a responsibility on the Responsibilities tab

1. Open a community, domain, or asset page.
2. Click the **Responsibilities** tab.
3. To add a responsibility:
    a. In the upper-right corner of the **Responsibilities** section, click **Add**.
        » The **Add responsibility** dialog box appears.

b. Enter the required information.

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

c. Click **Add**.

» For the new license model, the **Updating Responsibilities** dialog box appears. It contains a summary of the changes to the number of Contributor or Creator seats as a result of the action you are about to perform. Click **Confirm** to proceed or **Cancel** to go back to the **Add responsibility** dialog box.

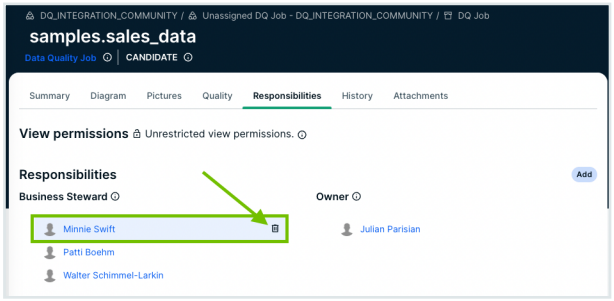
» The users or user groups appear under the assigned role in the **Responsibilities** section.

4. To delete a responsibility:

a. Hover your pointer over the name of the user or user group you want to remove from a role.

> **Note** You can't remove inherited responsibilities.

b. Click .



» The **Delete** dialog box appears.

c. Click **Delete**.
   » The user or user group no longer appears under that role in the **Responsibilities** section.

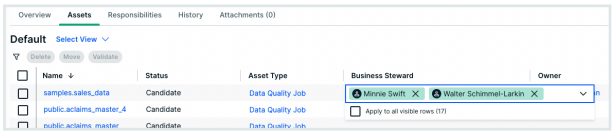
Edit a responsibility in a table

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

> **Note** Depending on the settings in Collibra Console, inherited responsibilities may also be shown. You can't edit these inherited responsibilities.

> **Tip** You can filter the columns first to edit responsibilities to specific resources at once.

3. Double-click a cell in the column of the role:
   - To add a responsibility, select a new user or user group.
   - To remove a responsibility, click next to a user or user group.



   - If required, select **Apply to visible rows**.
     » This edits the responsibilities of all visible rows.

4. Click outside of the cell to save the configuration.

View permissions

A view permission is the right to see a resource and any child resources of that resource. View permissions 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.

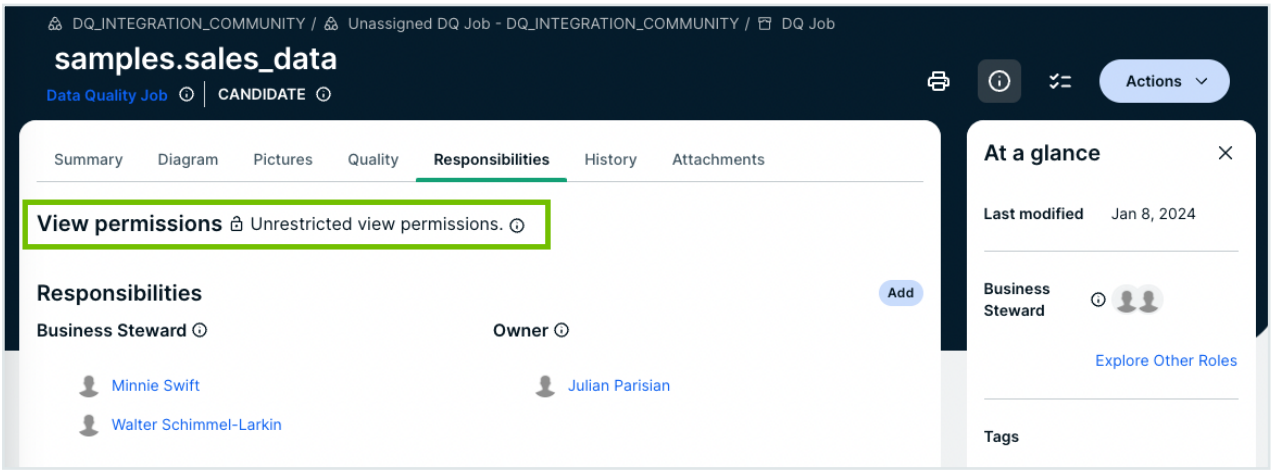
> **Note** If you limit the view permissions on a domain in a community, you can no longer update the view permissions on the community level.

Only these assigned users can see those resources and their child resources, including the assets. View permissions also impact asset relations, so if you don't have view permissions for an asset, you also don't see the relations that contain that asset, for example in views or on the asset page of the related assets.

> **Example** If User A has view permissions for Community 4 but not Community 6, then User A is able to see and work with any resources in Community 4, including the assets. Anything in Community 6 is inaccessible to User A, unless they are subsequently assigned view permissions for Community 6.

Understanding view permissions

By default, all users can see all resources. If there are no view permissions, the **View permissions** section of the **Responsibilities** page of that resource shows **Unrestricted view permissions**.



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 child resources.

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 that has a role with the **System Administration** global permission, for example 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.

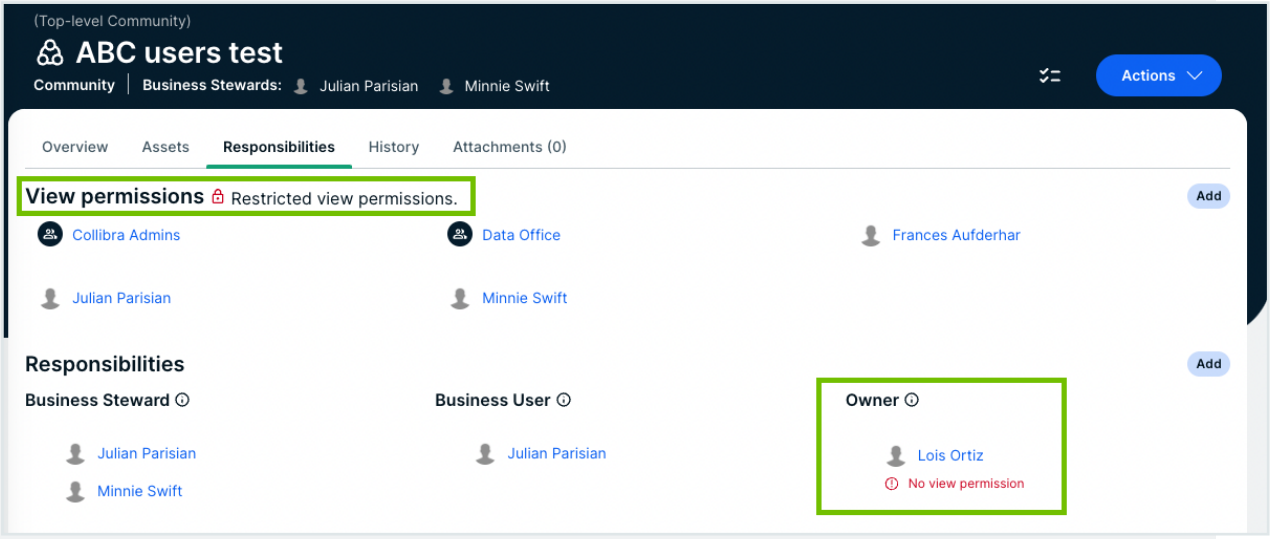
Impact of view permissions on responsibilities

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 must create the view permission for this resource or a parent resource.

Example
In the example below, Lois Ortiz is the **Owner** of the **ABC users test** domain, but she does not have the view permission to see the domain. As a consequence, she cannot see the assets or act on her responsibility. On the **Responsibilities** page, her 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 Lois.
- Add Lois to the user group that has a view permission.
- Delete all view permissions, so that everyone can see the assets.
- Delete Lois's responsibility as **Owner** and pick another person for that role.



Create a view permission

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

Note There is a limitation on how many domain view permissions you can create. Domain view permissions cease at 65,000. Remember, when you set permissions to a community, those permissions also apply to all the domains within that community. Also, domains can be different per user in an organization.

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. Click the **Responsibilities** tab.
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

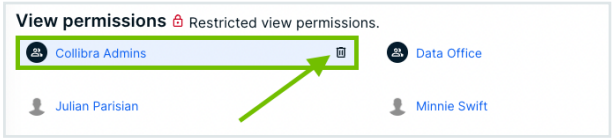
You can delete a view permission if you want to change which users are allowed to see certain resources.

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. Click the **Responsibilities** tab.
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**.
   » The view permission is deleted. 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

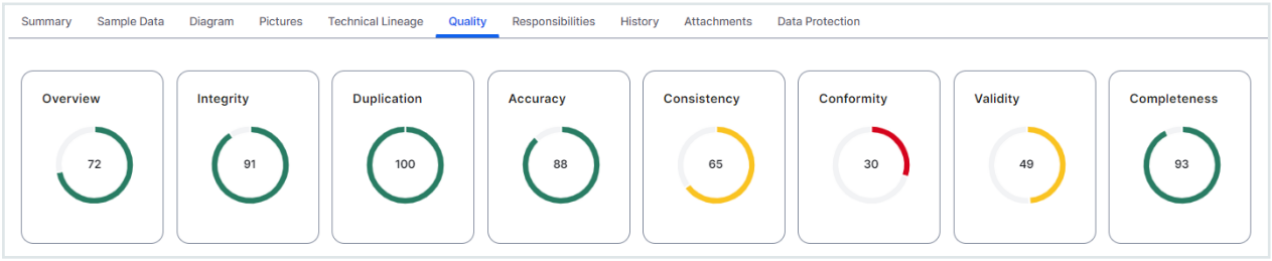
The **Quality** page of an asset delivers the available results of an asset to business stakeholders. The dashboard collects and displays the following values which are:

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

The assets that have these data quality dashboards available and how these values are aggregated are defined in data quality rules. These rules 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**.

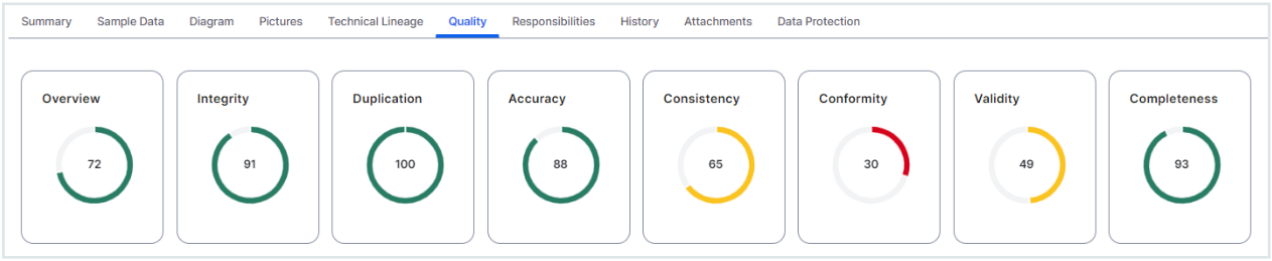
Underneath the top pane, three selection boxes are available. They display an extra overview, details and history pane, respectively.

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.



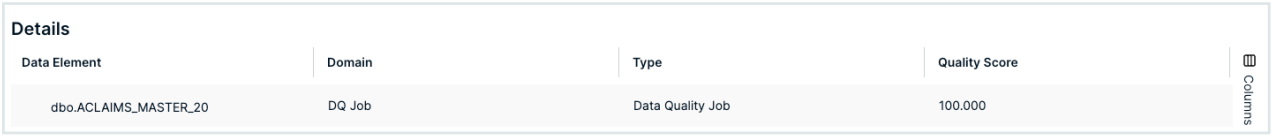
Asset quality details pane

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:

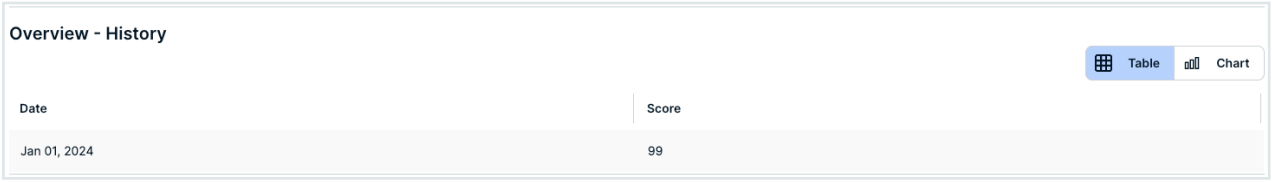
- **Full name**: The unique full name of the asset.
- **Domain**: The domain to which the asset belongs.
- **Type**: The type of the asset.
- **Dimension**: The dimension that applies to these assets, if any. Dimensions are used to calculate the subscores, as mentioned earlier.

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.

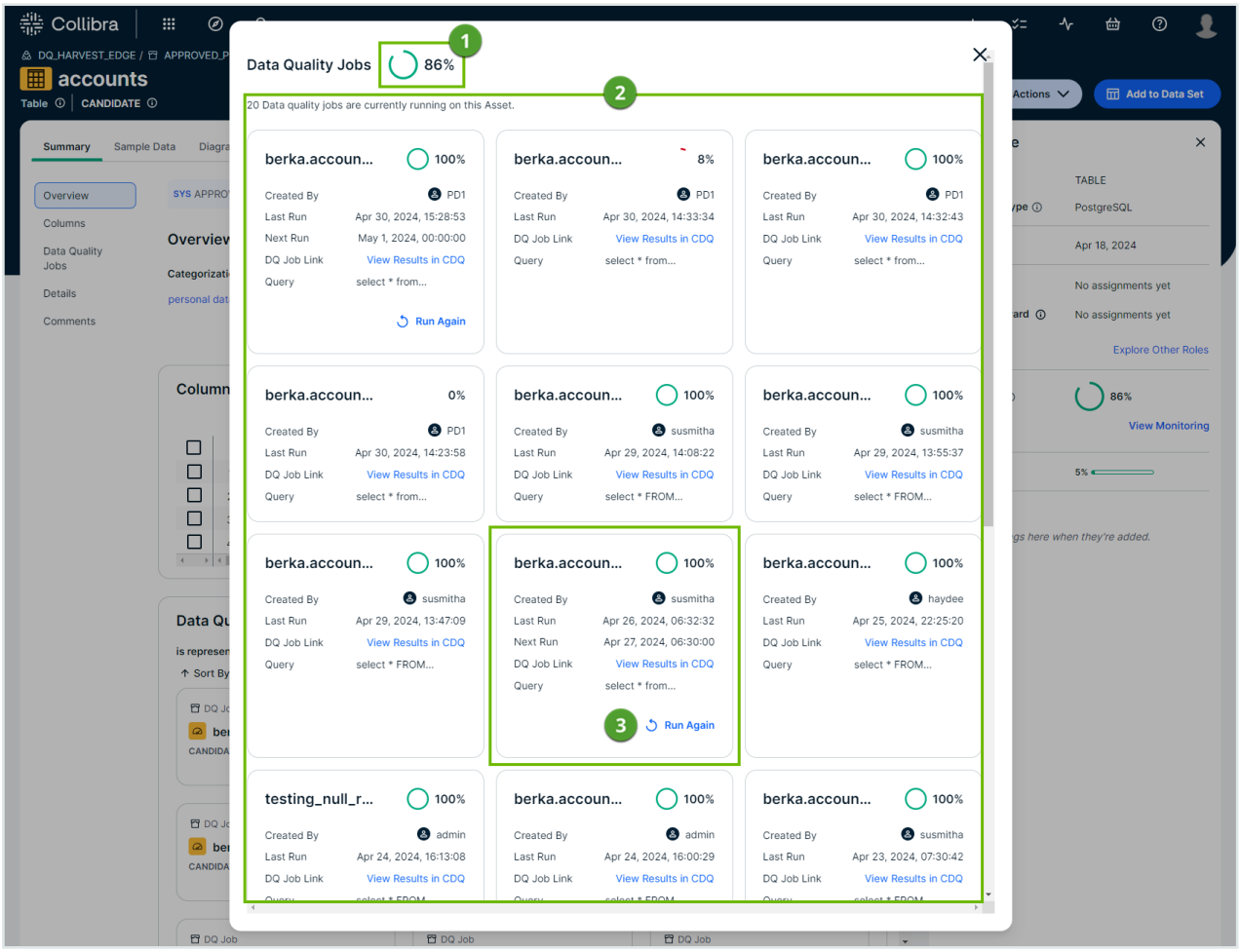


Asset quality monitoring

Important

- This feature is available only in the latest UI.
- This feature is available only when you have an active integration with Data Quality & Observability Classic.

The **View Monitoring** link in the **At a glance** sidebar opens a modal that shows key data points of data quality jobs running on a Table asset. If this sidebar is hidden, click ⓘ.



Number	Section	Description
1	Aggregate data quality score	The aggregate score of all jobs running on the Table asset. When a new job runs on this asset, this score updates to include the score from that run in its aggregation.

Number	Section	Description
2	Total data quality jobs	The total number of data quality jobs running on the Table asset.
3	Data quality job overview	Each tile represents an individual data quality job running on the Table asset. By default, each tile shows the following details: • Job name: When the name is truncated because it exceeds the allotted width in the tile, you can hover your cursor over it to display its full name. • Data quality score: The data quality score of the job run. This contributes to the aggregated data quality score at the top of the modal. • Created By: The user who created the job in Data Quality & Observability Classic • Last Run: The timestamp of the previous run of the data quality job. • DQ Job Link: A hyperlink that opens the Findings page in Data Quality & Observability Classic of the most recent run of the data quality job. • Query: The underlying SQL query of the data quality job that executed during the most recent run. When a job is configured in Data Quality & Observability Classic to run on a schedule, the tile shows the default information about the job along with the following details: • Next Run: The timestamp of the next scheduled run of the data quality job. • Run Again: You can click this button to re-run the data quality job in Data Quality & Observability Classic.

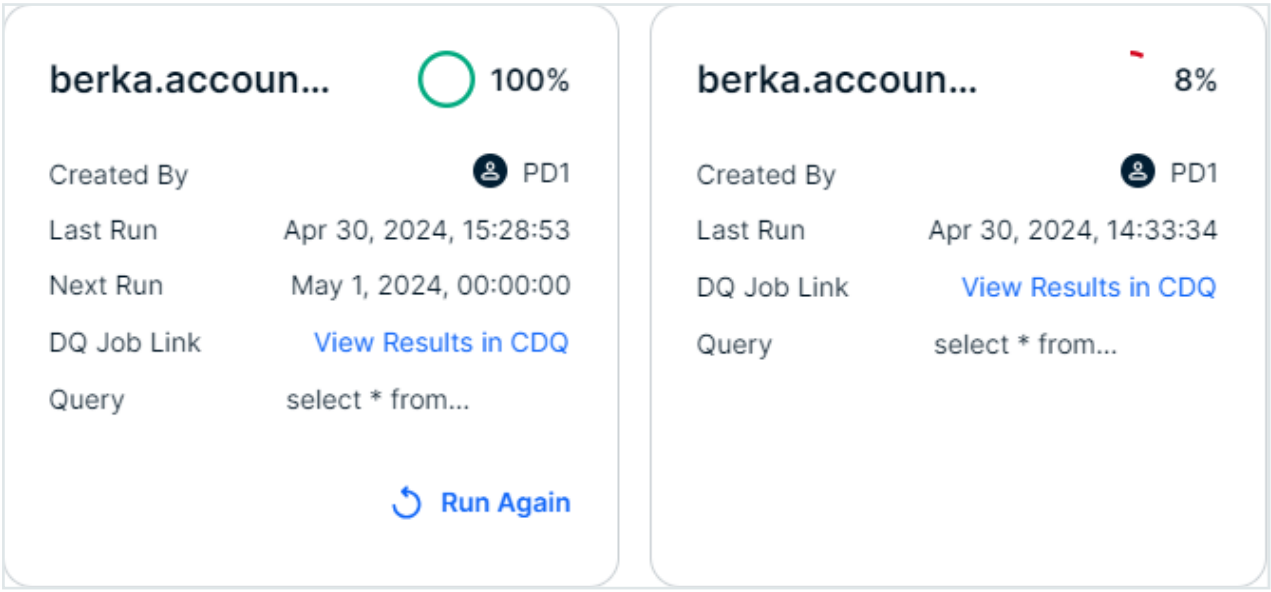
Re-run a data quality job

> **Important**
> - This feature is available only in the latest UI.
> - This feature is available only when you have an active integration with Data Quality & Observability Classic.

You can re-run data quality jobs on Table assets when they are configured in Data Quality & Observability Classic to run on a schedule.

The following screenshot shows two data quality job tiles. The job represented in the tile on the left is configured in Data Quality & Observability Classic to run on a schedule, showing when

the job will run next and allowing users to re-run it directly from the Data Quality Jobs modal. Since the job in the tile on the right is not scheduled, it only shows information from the previous run. The steps outlined in this guide only apply to scheduled jobs, such as the one on the left side of the screenshot.



Prerequisites

- You have a data quality job configured in Data Quality & Observability Classic to run on a schedule.
- You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. In the global Search box, enter the name of your **Table asset**, and then click it to open it.
   » The Table asset page opens.
2. In the **At a glance** sidebar, click **View Monitoring**. If this sidebar is hidden, click .
   » The Data Quality Jobs modal appears.
3. From a data quality job configured to run on a schedule, click **Run Again**.
   » A success message appears.
4. Click **View Results in CDQ** to navigate to the Findings page in Data Quality & Observability Classic to view the results of the job run.
   » The Findings page in Data Quality & Observability Classic opens in a new tab.

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.

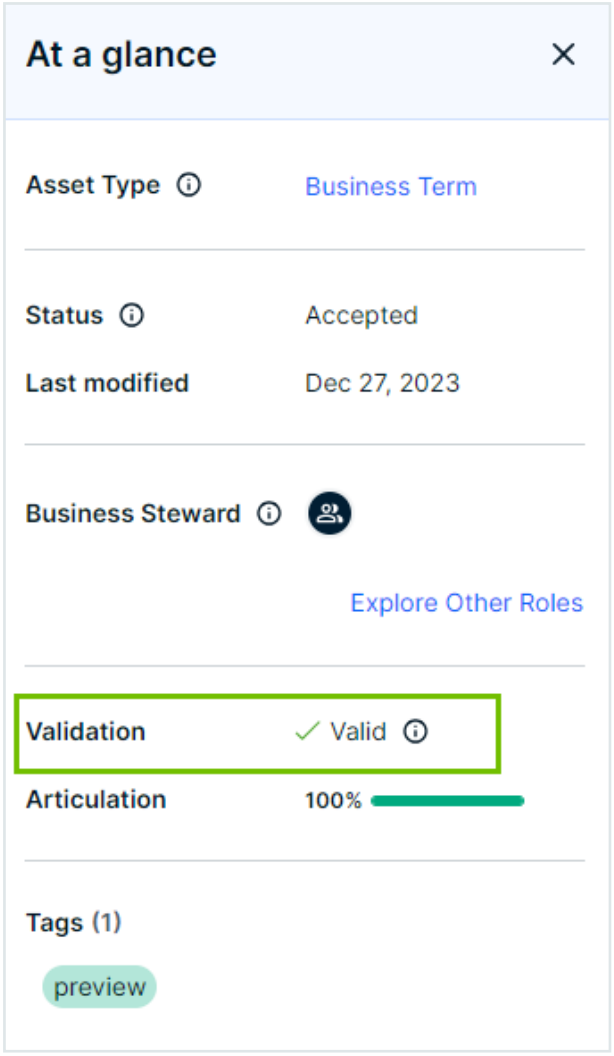
For more information on how to configure validation logging, see Logging.

> **Tip** When contacting support regarding a problem with validation, attach the log file to the ticket.

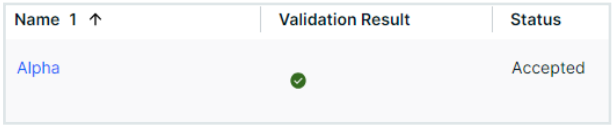
Validate assets

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 in the following locations:

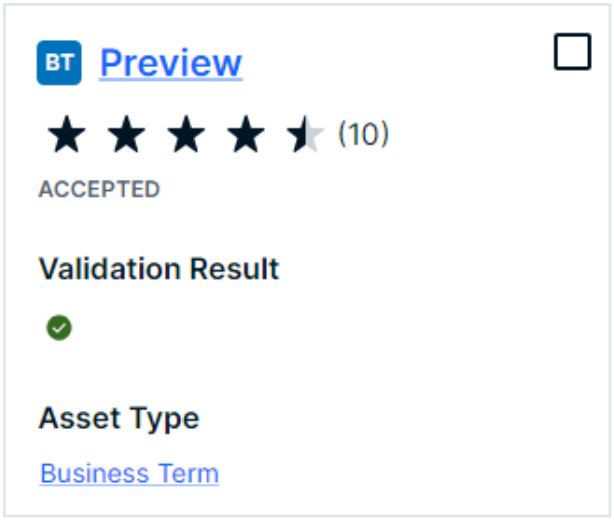
- In the **At a glance** sidebar of an asset. If this sidebar is hidden, click ⓘ.



- As a column, **Validation Result**, when viewing assets in table display mode.



- As a field, **Validation Result**, when viewing assets in tiles display mode.



- As an overlay in a traceability diagram.

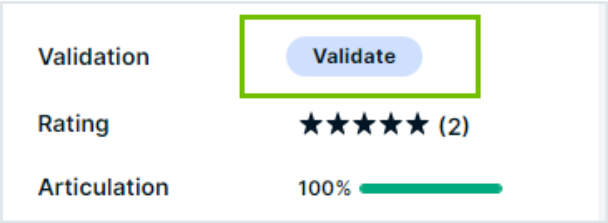
> **Note**
> - After validation, the **dgc.log** file will also contain more extensive messages. For more information on how to configure validation logging, see Logging.
> - By default, validation is not automatically triggered when an asset is edited, so you have to revalidate it after editing an asset. However, you can create a workflow for this. To configure validation on certain events, see Getting started with workflows.

Prerequisites

- 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. In the **At a glance** pane, click **Validate**.



   You can also use **Actions** → **Validate**.

Validate one or more assets from an asset table

1. Open a set of assets in table display mode.
2. Select the checkboxes in front of the assets you want to validate.
3. Click **Validate**.
   » The validation activity starts.
4. Once the validation is completed, refresh the page.

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. Click **Validate**.
   » The validation activity starts.
4. Once the validation is completed, refresh the page.

Revalidate an asset

You can revalidate assets that were previously validated to see whether they still 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. For information on where you can see the validation result, go to Validate an asset.

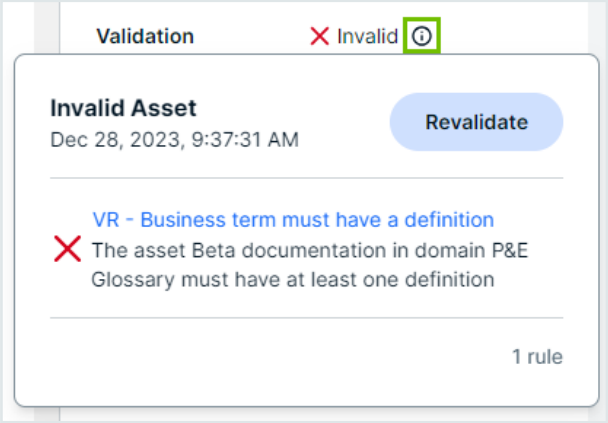
> **Note** You can create a workflow to automatically revalidate assets. To configure validation on certain events, see Getting started with workflows.

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 validation result, click the info icon.
   » The validation result details appear. You see the validation result for each validation rule.

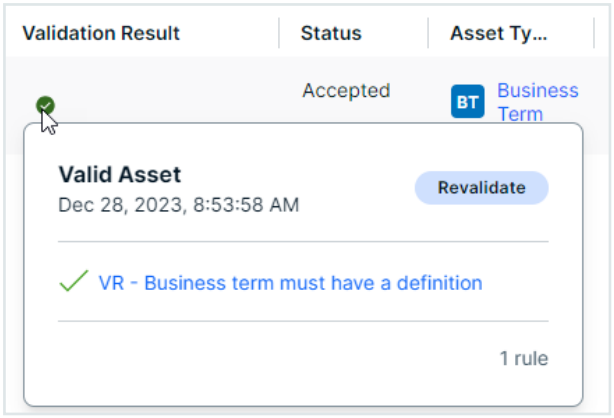


3. Click **Revalidate**.

Revalidate one asset from an asset view

1. Open a set of assets in table display mode.
2. If you don't see the **Validation Result** column, add it to the table.
   For more information on adding columns, go to Customizing tables.
3. Click ✓ or ✗ for the asset.
   » The validation result details appear. You see the validation result for each validation rule.

4. Click **Revalidate**.



Revalidate one or more assets from an asset view

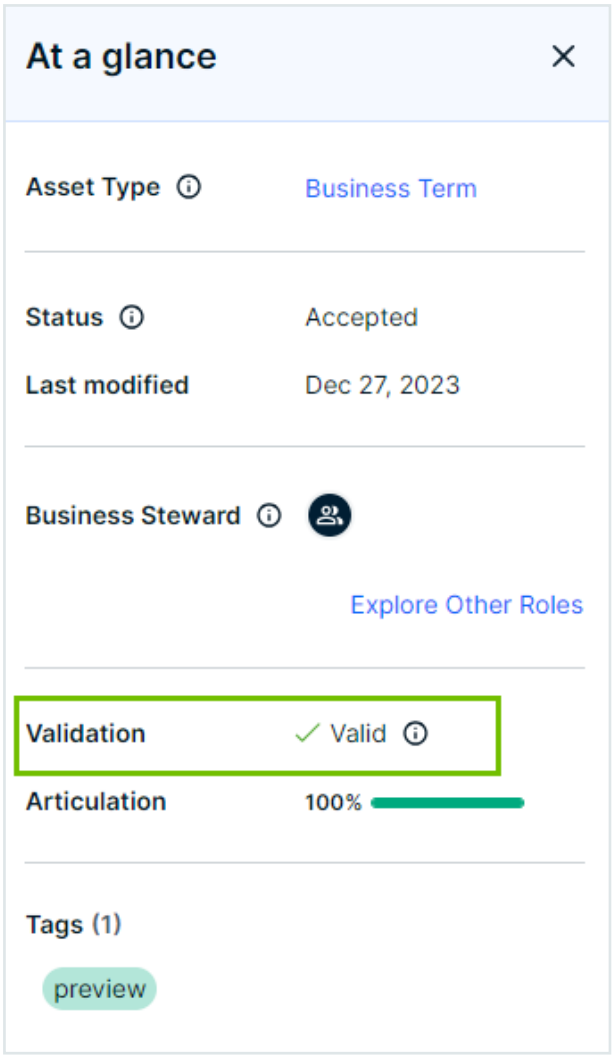
1. Open a set of assets in table display mode.
2. Select the checkboxes in front the assets you want to revalidate.
3. Click **Validate**.

View the validation result

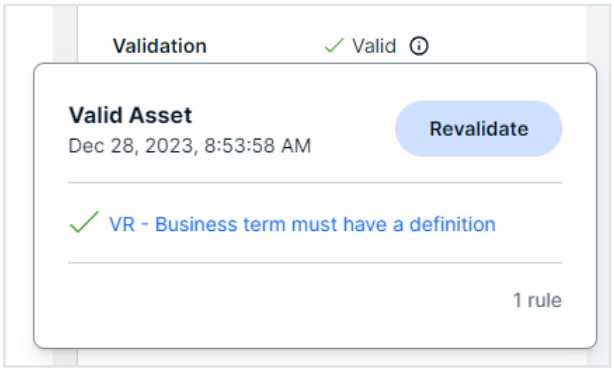
After validating or revalidating assets, you can view the result and make changes where necessary.

View the validation result on the asset page

1. Open an asset page.
   » In the **At a glance** sidebar, you see a ✓ **valid** icon or ✕ **invalid** icon. If this sidebar is hidden, click ⓘ.

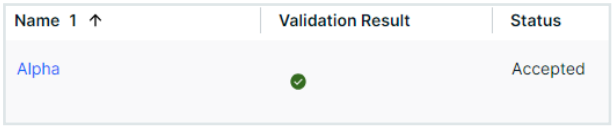


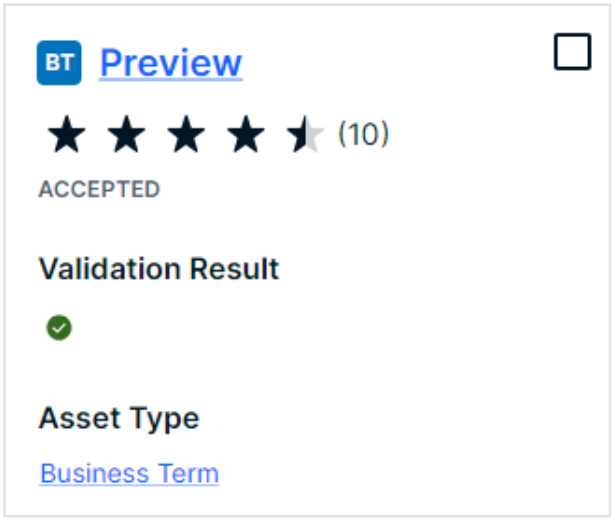
2. Click the info icon.
   » The validation result details appear. You see the validation result for each validation rule.



View the validation result in an asset table

1. Open a set of assets in table or tile display mode.
2. If you don't see the **Validation Result** column, add it to the table.
   For more information on adding columns, go to Customizing tables.





3. Click ✓ or ✕ for the asset.
   » The validation result details appear. You see the validation result for each validation rule.

History

Collibra automatically keeps a history of users and resources such as assets, domains, 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 on the **History** tab of the resource's page. It contains all actions related to the following:

- Creating, editing, and deleting resources.

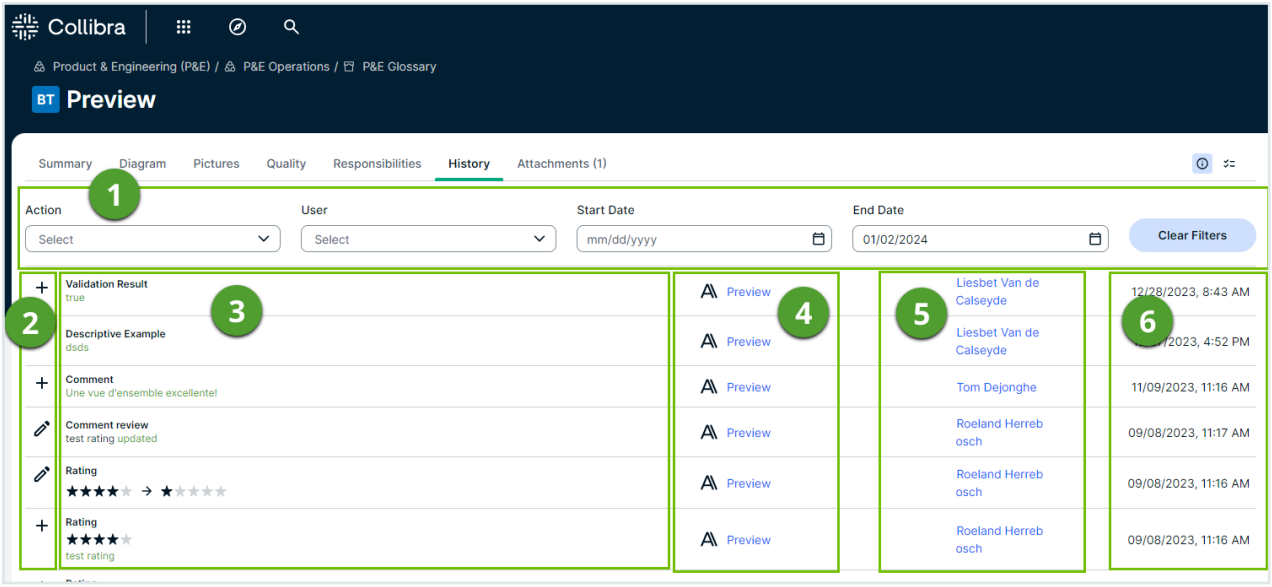
  > **Note**
  > In some cases, an edit is logged as a delete and a create. For example, if you edit a Description attribute of a Data Usage complex relation, the original Description attribute is deleted, and a new Description attribute is created with the new content.

- Moving assets to a different domain.
- Adding, editing, and removing characteristics.
- Changes to the asset status.
- Accepting a data classification suggestion or rejecting an accepted data classification.
- Changes to an assigned data class, when the data class is removed or merged.
- Social features such as comments, tags, and ratings.
- Uploading and deleting attachments.
- Workflows and the resulting changes.
- Creating, editing, and deleting responsibilities.
- View permissions.

  > **Note**
  > The history doesn't show changes to inherited responsibilities.

- In the case of the user history, adding and removing the user to or from user groups.

> **Tip** Some actions don't change the last modification date of an asset. Check out the actions that do and don't change the last modification date.



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. • : Updated 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.

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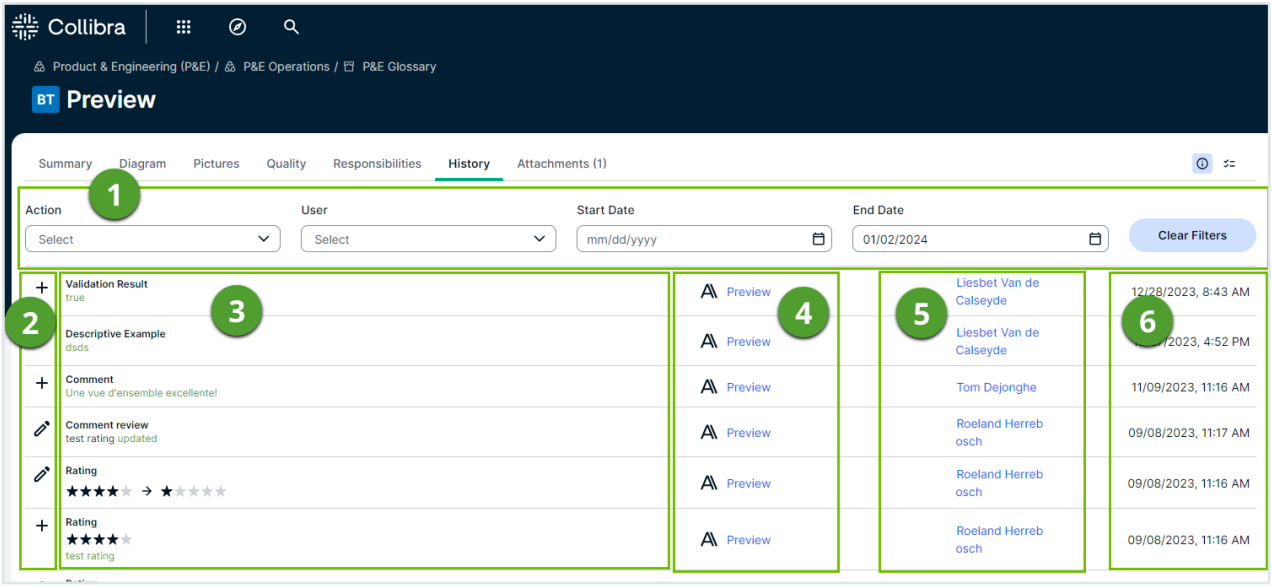
- Adding, editing, and removing characteristics.
- Changes to the asset status.
- Accepting a data classification suggestion or rejecting an accepted data classification.
- Changes to an assigned data class, when the data class is removed or merged.
- Social features such as comments, tags, and ratings.
- Uploading and deleting attachments.
- Workflows and the resulting changes.
- Creating, editing, and deleting responsibilities.
- View permissions.

  > **Note**
  > The history doesn't show changes to inherited responsibilities.

- In the case of the user history, adding and removing the user to or from user groups.

> **Tip** Some actions don't change the last modification date of an asset. Check out the actions that do and don't change the last modification date.



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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 bar, click **History**.
   » The history is shown in a table.
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** ■ **Update** ■ **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 subcommunities of the community.
User	Choose a user whose actions you want to see.
Start Data	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.
End Date	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.

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
  - Accept a data classification suggestion or reject an accepted data classification
  - Update of the data classification because the data class itself was removed or merged

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.

Prerequisites

- You have one of the following global permissions:
  - You have a global role with the **Catalog** global permission, for example, **Catalog Author**.
  - You have a global role that has the Data Marketplace global permission.
- You have a global role that has the **Workflows** > **Start Workflow** global permission.

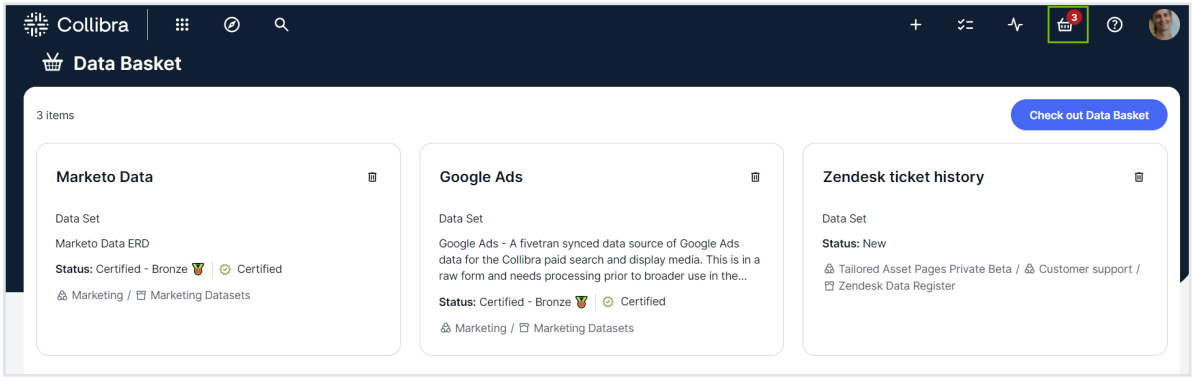
Steps

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

Searching	a. In Collibra Platform, search for the asset you need and click the name. » The asset page of the asset opens. b. Click **Add to Data Basket** or open the **Actions** menu and select **Add to Data Basket**.
Navigating	a. On the main toolbar, click → **Catalog**. » The Catalog homepage opens. b. Navigate to one of the tabs, such as Data Sets and select the checkboxes 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 indicates that the asset has been added to your basket.
   » A Data Usage asset is created in Collibra Platform.

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 an asset by clicking .
4. When you are ready, click **Check out 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, select the Purpose that describes the business case for which you are requesting access to the data. Then click

Submit.

> **Note** This dialog box appears only if Data Privacy is activated.

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

The Request Assets Access workflow allows you to request access to assets that are added to 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.

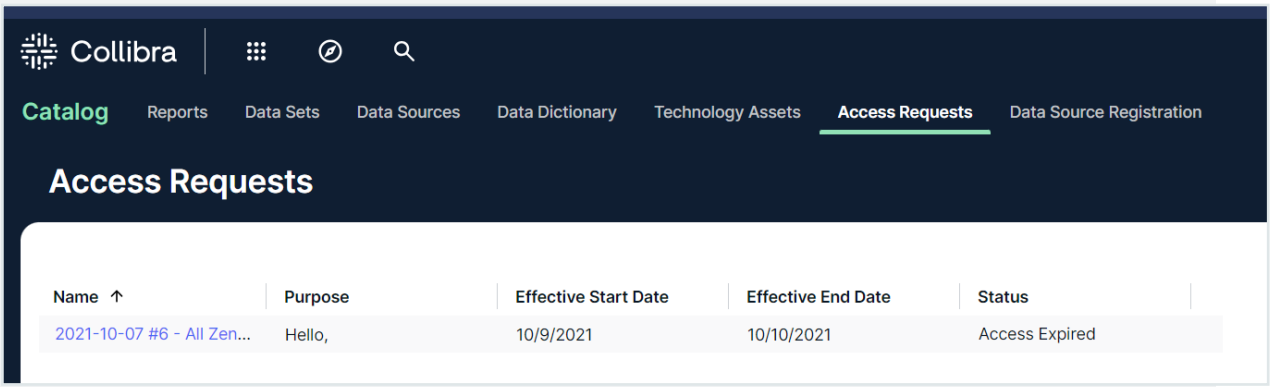
» The Data Usage asset is renamed with the format YYYY-MM-DD #X, where X is a sequential number, for example 2019-12-16 #3.

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.



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 the 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.
> - To start the access request workflow, a user needs a global role that has the **Workflows** > **Start Workflow** global permission.
> - The access request workflow requires all involved Owners and Technical Stewards to have a global role that has the **Workflows** > **Participate in workflow** global permission.
> - **If your environment was created before 2024.06**, download and enable the latest version of the Request Assets Access workflow. When you activate this workflow, make sure to add the Data Usage asset type in the **Applies to** section.
> For more information, go to Out-of-the-box workflow deployments.
> - If you want to validate the date provided by a user, you have to update the Request Assets Access workflow logic.

Prerequisites

- The Settings landing page is enabled.
- **If your environment was created before 2024.06**, download and enable the latest version of the Request Assets Access workflow. When you activate this workflow, make sure to add the Data Usage asset type in the **Applies to** section.
  For more information, go to Out-of-the-box workflow deployments.
- You have the Sysadmin global role.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **Search** section, click **Actions and Preview**.

3. Click the **Shopping Basket** tab.
4. 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 can't be removed.

5. To allow an extra asset type, click **Add**.
6. 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 assets 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.

7. Click **Save**.
8. Make sure the users have the required permissions to see the **Add to Data Basket** action.
   Users must have one of the following global permissions:
   - You have a global role with the **Catalog** global permission, for example, **Catalog Author**.
   - You have a global role that has the Data Marketplace global permission.

   »
   For the allowed asset types and for users with the correct permissions:
   - The **Add to Data Basket** action is added to the asset pages.
     By default, the action is available from the **Actions** menu on an asset page. To make sure the action is visible as a button, pin the action.
   - The **Add to Data Basket** button also appears if you have selected one or more assets with allowed asset types in Data Catalog.
   - In Data Marketplace, the **Add to Basket** button is available in the asset previews.

» If a user clicks the button, the asset is added to the data basket. For more information, go to Request access to data.

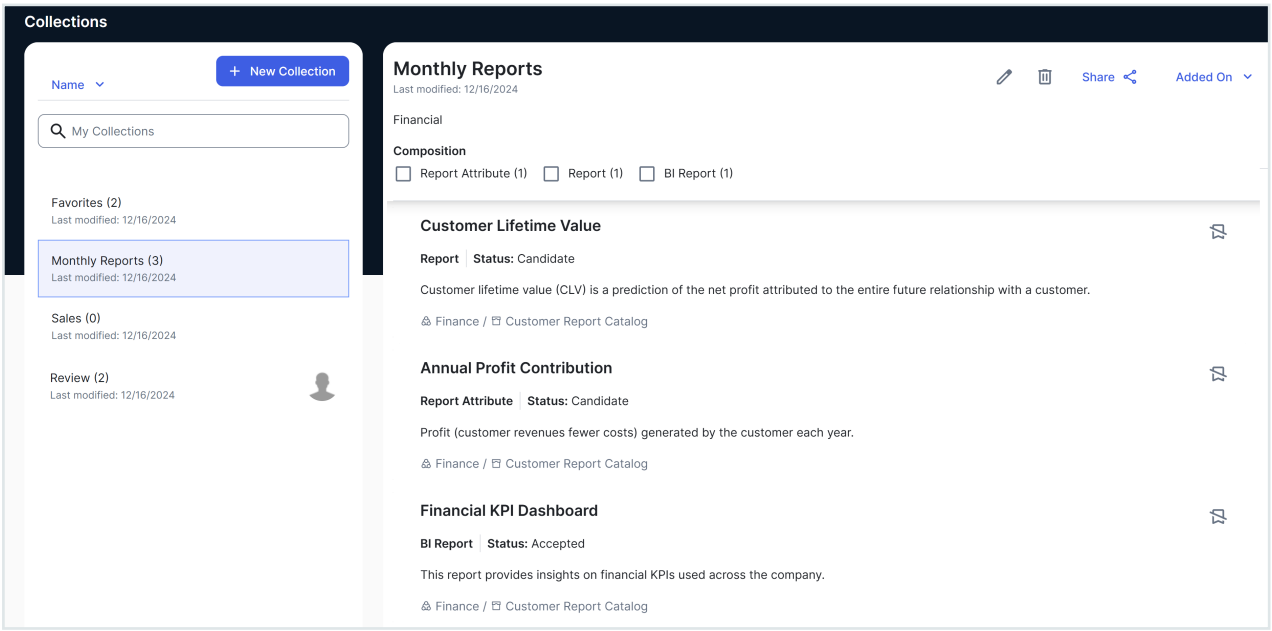
Collections

Collections enable you to group assets into organized lists, making it easier to access the assets you need. For example, you can create collections of your favorite assets, assets required for specific projects, or assets you want to monitor.

In the latest UI, you can add assets to a collection from both asset pages and Data Marketplace asset previews. However, in the classic UI, assets can be added to collections only from standalone Data Marketplace. Additionally, to use collections in the classic UI, Data Marketplace needs to be enabled.

You can create, manage, and share collections, as well as add assets to collections. Each user can create up to 100 collections and add up to 200 assets to each collection. The **Favorites** collection, which is an out-of-the-box collection, is available by default, and it can't be renamed, shared, deleted. You can access all collections via your avatar → **Collections**. For more information, go to Manage a collection.

Within a collection, you can view the included assets, the description of the collection, the date the collection was last updated, and its composition, which refers to the asset types of the assets included in the collection.



Create a collection

A collection in Collibra is a group of assets. You can create collections from the **Collections** page, an asset page, or an asset preview in Data Marketplace.

You can create up to 100 collections and add up to 200 assets to a single collection. This topic describes how to create a collection, including how to add assets to and remove assets from a collection.

Steps

- From the Collections page
- From an asset page
- From Data Marketplace

From the Collections page

The following steps show how to create a collection from the **Collections** page.

1. Click your avatar → **Collections**.
   » The **Collections** page opens.
2. Click **New Collection**.
   » The **Create Collection** dialog box appears.
3. Enter the required information.

Field	Description
Name	A name to identify the collection.
Optional: Description	A description for the collection.

4. Click **Save**.
   » The collection is created. You can add an asset to the collection from the asset page or Data Marketplace.

From an asset page

The following steps show how to add an asset to an existing collection from an asset page, and also how to create a new collection and add an asset to it at the same time.

1. Open an asset page.
2. Click ⋮.
   » The **Add to Collection** option appears.

   > **Tip** If the bookmark icon next to the **Add to Collection** option is filled, it indicates that the asset has already been added to a collection. To remove the asset from a collection, select the option, and then select the collection in the **Add to Collection** dialog box.

3. Select the **Add to Collection** option.
   » The **Add to Collection** dialog box appears.
4. To add the asset to existing collections, select the collections.
   » The asset is added to the collections.
5. To create a new collection and add the asset to it, in the search box, enter a name to identify the new collection, and then press Enter.
   » The collection is created and the asset is added to it.

> **Tip**
> - To remove the asset from a collection, in the **Add to Collection** dialog box, select the collection.
> - To view all your collections, click your avatar → **Collections**.

From Data Marketplace

The following steps show how to add an asset to an existing collection from Data Marketplace, and also how to create a new collection and add an asset to it at the same time.

1. Go to the asset preview in Data Marketplace.
2. Click 🔖.
   » The **Add to Collection** dialog box appears.
3. To add the asset to existing collections, select the collections.
   » The asset is added to the collections.

4. To create a new collection and add the asset to it, in the search box, enter a name to identify the new collection, and then press Enter.
   » The collection is created and the asset is added to it.

> **Tip**
> - To remove the asset from a collection, in the **Add to Collection** dialog box, select the collection.
> - To view all your collections, click your avatar → **Collections**.

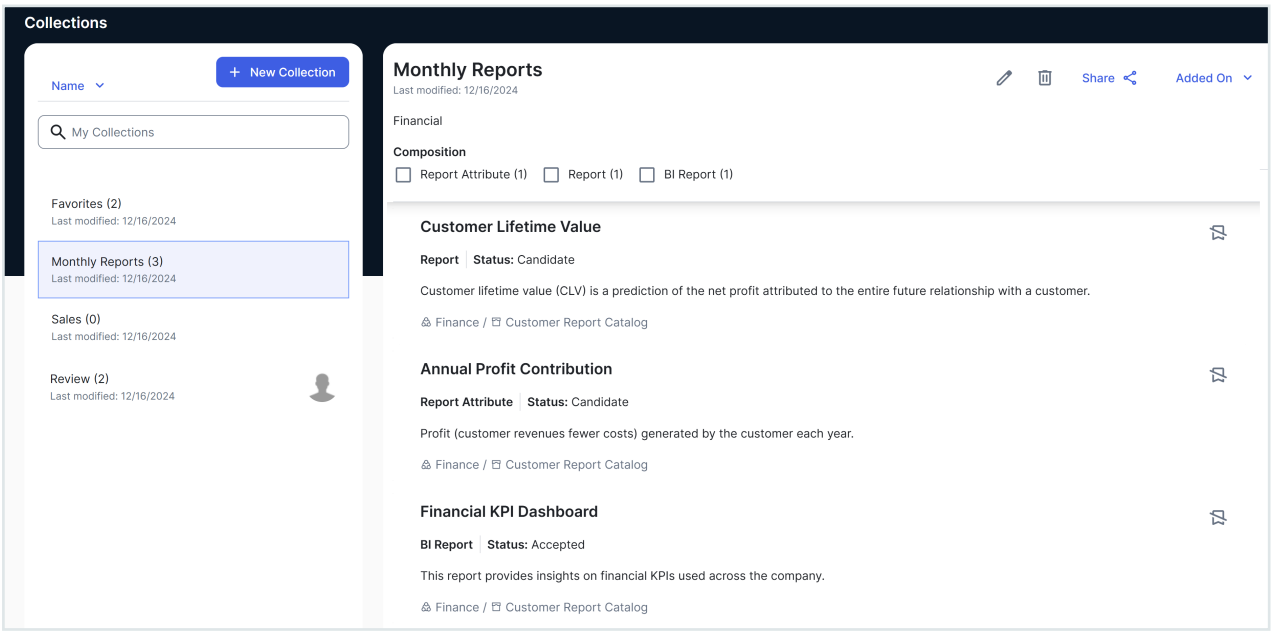
What's next?

Manage or share your collection.

Manage a collection

> **Note** While this topic is applicable to both classic and latest UI, any images in the topic show the latest UI.

The following table provides an overview of the various actions you can perform to manage your collections on the **Collections** page, including editing, deleting, and sorting them. To access the **Collections** page, click your avatar → **Collections**.



Action	Description
Create a collection.	Click **New Collection** in the left pane. For more information, go to Create a collection.
View assets in a collection.	Click the collection in the left pane. **Tip** The **Composition** section shows the asset types of the assets included in the collection.
Sort the assets in a collection.	Use the **Added On** menu. **Tip** By default, assets are sorted by the date they were added to the collection, from newest to oldest. You can sort them alphabetically in ascending order by clicking **Added On** → **Name**.
Open an asset in a collection.	Click the asset name.
Remove an asset from a collection.	Click .
Edit a collection name or description.	Click . **Tip** The **Favorites** collection can't be renamed.
Delete a collection.	Click . **Tip** • Only the owner of the collection can delete it. • The **Favorites** collection can't be deleted.
Share a collection.	Click **Share**. For more information, go to Share a collection. **Tip** • To know who shared a collection with you, click their avatar in the left pane. • The **Favorites** collection can't be shared.

Action	Description
Search for a collection.	Use the **My Collections** box in the left pane. **Tip** The list shows only 100 collections at a time. It is possible, however, that the total number of collections to which you have access is more than 100. In that case, you can use the **My Collections** box to find the collection.
Sort collections.	Use the **Name** menu in the left pane. **Tip** By default, collections are sorted alphabetically in ascending order. You can sort them by created or last updated date by clicking **Name** → **Last Modified** or **Creation Date**.

Share a collection

By sharing a collection with someone, you allow them to either view or edit the collection. The following table describes the privileges associated with each type of access.

Type of access	What can a user do?
Viewer	View the assets in the collection.
Editor	• View the assets in the collection. • Add assets to and remove assets from the collection. • Edit the description of the collection. • Share the collection with others.

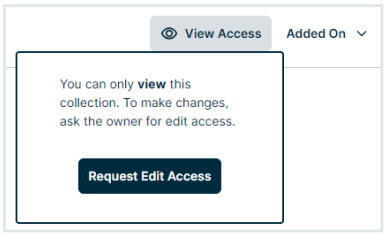
Tip

- The owner of a collection is the person who created it. In addition to the actions that an editor can perform, the owner can edit the name of the collection and delete the collection.
- The ownership of a collection can't be transferred.
- The **Favorites** collection can't be shared.

Request access to a collection

You can request access to a collection from the owner of the collection.

- If you click a link to a collection to which you don't have access, the **Collections** page opens with the **Request Access** button. Clicking this button sends an email to the owner to request access. The owner can give you either the viewer access or the editor access to the collection.
- If you have the viewer access to a collection, the collection shows the **View Access** tag on the **Collections** page. To request the editor access, click **View Access** → **Request Edit Access**. This sends an email to the owner to request editor access.



Give and remove access from a collection

If you are the owner of a collection or have the editor access to the collection, you can share the collection from the **Collections** page.

Steps

1. Click your avatar → **Collections**.
   » The **Collections** page opens.
2. Select the collection you want to share.

   > **Tip** As an owner, you may also have received an email indicating that someone requested access to a collection. In the email, click **Manage access for this collection** to open the collection.

3. Click **Share**.
   » The **Share <collection name> With** dialog box appears.
4. If the user with whom you want to share the collection doesn't have access to the collection yet, start entering their name in the **Add users** box, and then select their name in the drop-down list.
   » The user is added to the **People with access** list with the viewer access.
5. To change a user's access type, in the drop-down list next to their name, select the required access type.

> **Tip** If you don't want the user to be able to access the collection, select **Remove Access**.

6. Click **Save**.
   » An email is sent to the user notifying them of the access change.

References tab of an asset page

The References tab no longer exists in the latest user interface.

Asset	The full name of the asset that references the opened asset.
Reference Type	The type of the attribute that references the opened asset.
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.

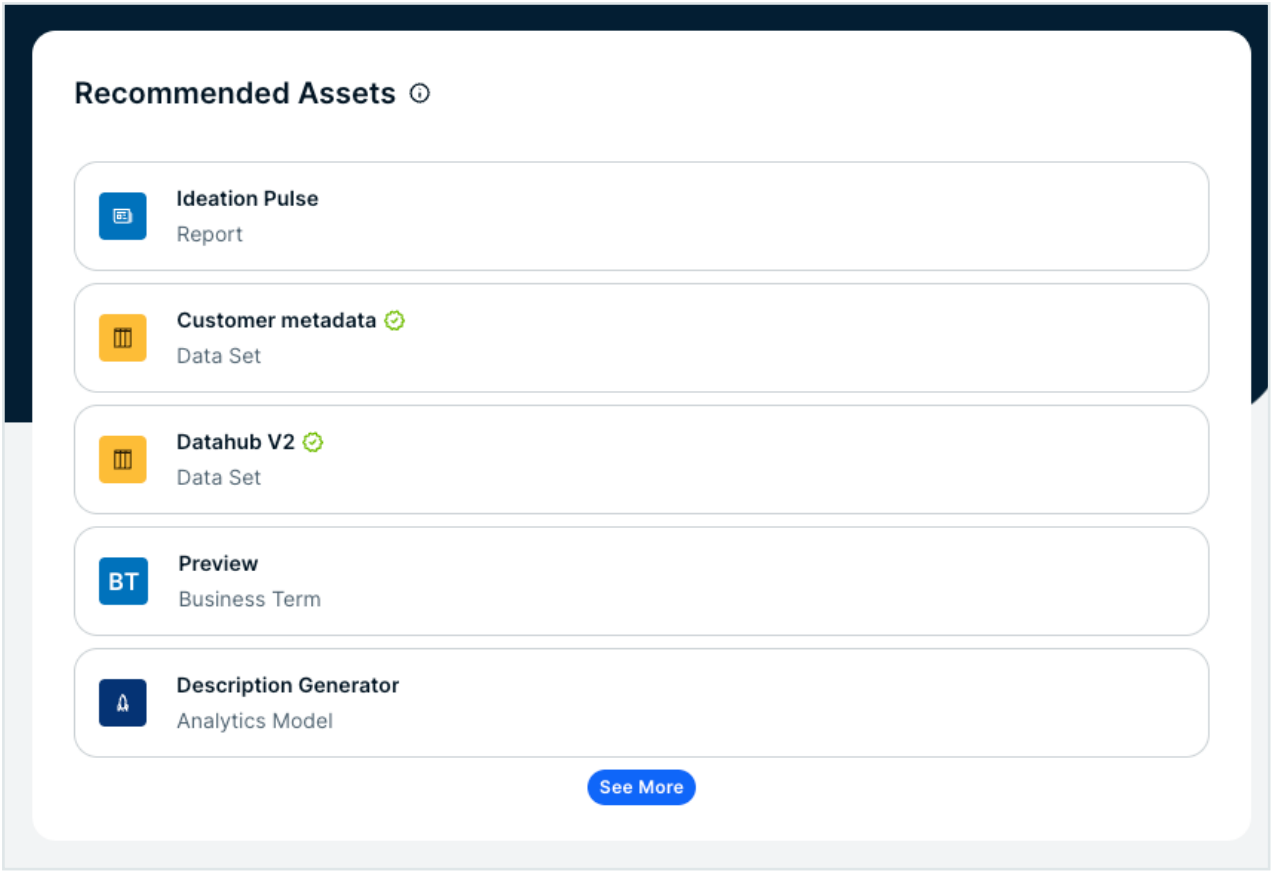
Asset recommender

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 based on the asset recommender strategy.

Asset recommendations are shown on the homepage and Data Marketplace. In the following example, the asset recommender shows popular and recommended data in Data Marketplace.

> **Tip** For information on how we leverage AI in our products, including how we handle data used for training and input, please visit the Collibra Trust Site.



Important

- The asset recommender is a cloud-only feature. It requires that application usage data is collected for the environment. This is achieved via the **Collect Application Usage Data** setting in Collibra Console, which is enabled by default. To change this setting, you need to create a support ticket.
- Recommendations are not available in environments with 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. The steps it roughly follows are:

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 and Data Marketplace are considered. Visits to the following names are not considered:
   > - Names that contain the following strings: -qa, beta, -poc, ie-, infra-, docker, training, sandbox.
   > - 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 can't 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 aren't recommended in the context of Data Marketplace.
- It is possible that no relevant assets can be suggested in the environment.

Importing and exporting

The import and export functionalities in Collibra Platform 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.

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 on the Collibra Support Portal.
>
> If you want to edit a large amount of assets in one go, you can perform an export-import round trip:
>
> 1. Create a view that contains all the assets and characteristics that you want to edit.
> 2. Export the assets from that view.
> 3. Edit the exported file.
> 4. 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.
- 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.

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.

Steps

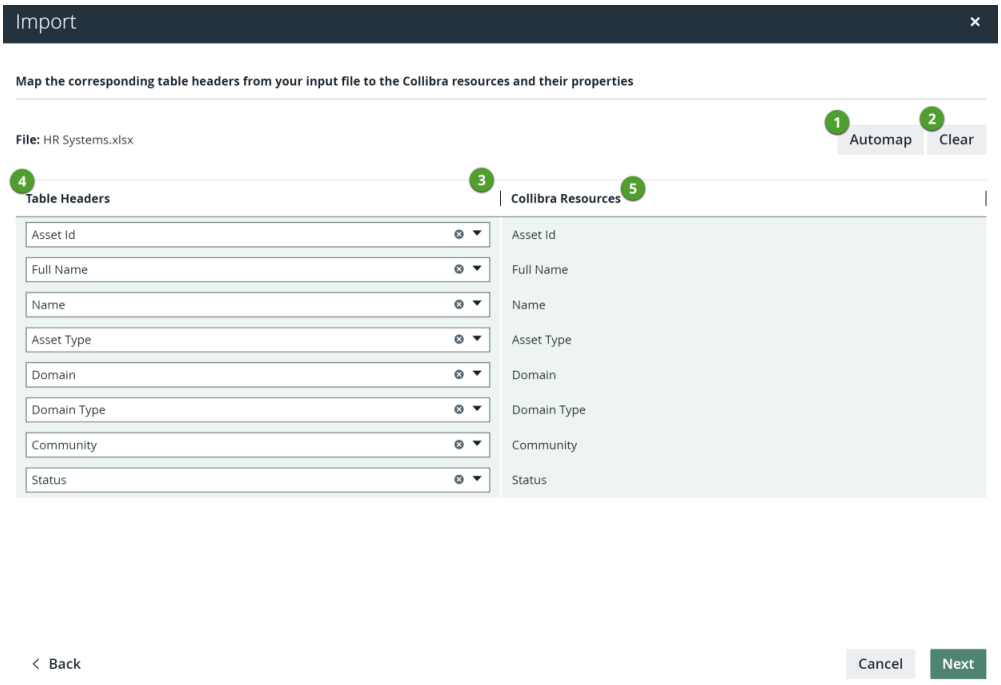
> **Tip** You can import responsibilities along with your assets.

1. Open a view.
   > **Tip** For an export-import round trip, open the same view you have used during export.
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 columns and the available columns in the view you have started the import from.

Tip If you are performing and export-import round trip, all columns are mapped automatically.



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 community names are unique and the new domain names are unique in each community.
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.

Setting	Result
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 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.

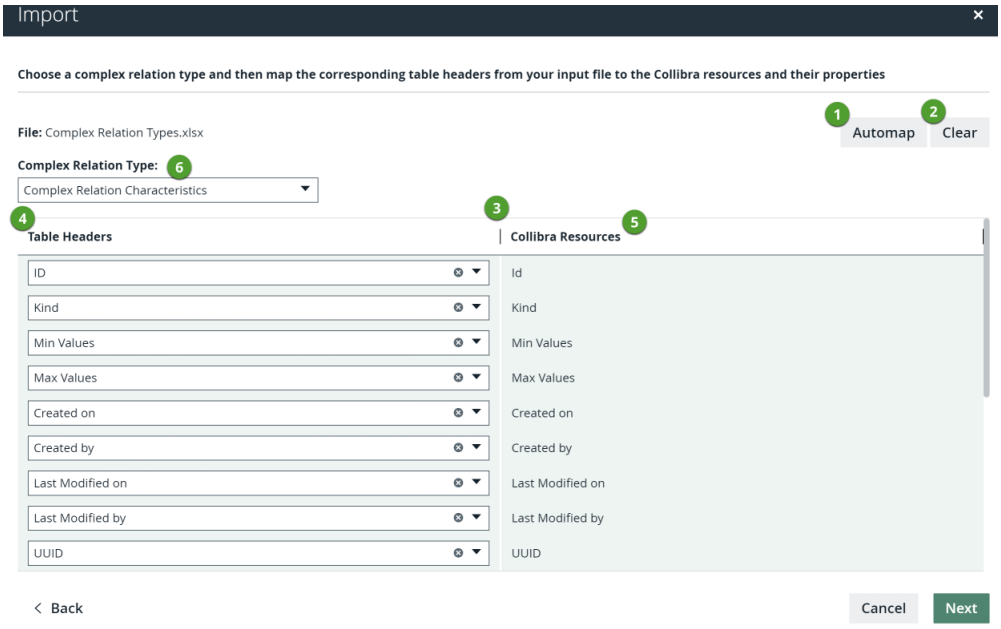
Steps

1. Open a view.

   > **Tip** For an export-import round trip, open the same view you have used during export.

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 columns and the available columns in the view you have started the import from.

   > **Tip** If you are performing and export-import round trip, all columns are mapped automatically.



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.
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 file structure of a complex relation

You can define multiple relations with the same role.

The different assets to relate to are formatted as a comma-separated list in a single cell.

This means that:

- For every role in the complex relation type, you have to specify the **Asset** column. Fill in a comma-separated list of the asset names to connect to the complex relation with that role. If there is an asset in the import file that does not exist, it is created automatically.
- If an asset name contains a comma, you can use double quotes around the asset names to ignore the comma as a separator.
  For example, to refer to an asset named **last name, first name**, the name has to be written as **"last name, first name"**.
- If your asset names have commas as well as double quotes, you can change the standard behavior of the double quote by using a backslash (\).
  For example, to refer to an asset called **last name "," first name**, the name has to be written as **"last name \",\" first name"**.
- If you specify the domain names for mapped assets, you also have to use a comma-separated list in the **Domain** column, even if the domain is the same for all the assets.
- If you have to specify the domain and community for the relation assets as well, it is important that the size and order of the comma-separated lists for all three aspects (asset name, domain, community) is the same.
- If the referred assets are not all in the current domain, you can specify one or more domains to search in, by mapping the **Domain** characteristic to a column containing a comma-separated list of domain names. If there is a domain in the import file that does not exist, it is created automatically.
- If the referred domains are not all in the current community, you can specify one or more communities to search in, by mapping the **Community** characteristic to a column containing a comma-separated list of community names.

Exporting

The export functionality makes it easy to transfer data from Collibra to an external file or system.

You can export assets or complex relations to a CSV or XLSX file. The exported file is very similar to the data you view in the table on the screen.

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.

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. **Important** You cannot use views with hierarchy.
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.

Field	Description
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**.
Attach to this resource	Select this option to also save the file as an attachment to the resource you started the export from. **Important** 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. Collibra administrators with access to Collibra Console can manage these settings. 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.

Field	Description
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** 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. Collibra administrators with access to Collibra Console can manage these settings. 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 their relations in an easy-to-read format. They help you quickly identify how a specific asset is related to other assets. Two assets are related if you can navigate from one to the other by traversing one or more relations.

You can find the diagram for an asset on the **Diagram** tab of the asset page. You can use the diagram editor to customize how a diagram is shown. Collibra provides several out-of-the-box diagram views for common use cases, and you can also create and share your own diagram views.

Collibra offers the following types of user interfaces for Diagrams:

- **New Diagram UI:** This view is enabled by default and includes the following features:
  - A modern design with enhanced performance. When you click the **Diagrams** tab on an asset page, the diagram opens within the **Diagrams** tab instead of the browser tab.
  - The **Explorer** button to switch a diagram to the Explorer mode.
  - The option to use Collibra AI to automatically generate descriptions for diagram pictures.
- **Old Diagram UI:** This view is disabled by default.

> **Note**
> - Administrators can switch between the diagram UIs using the **New Diagram UI** setting in Collibra Console.
> - Diagram UIs work independently of the classic and latest UIs. If the new diagram UI is enabled, it is applied to both classic and latest UIs. If it is disabled, the old diagram UI is applied to both classic and latest UIs.

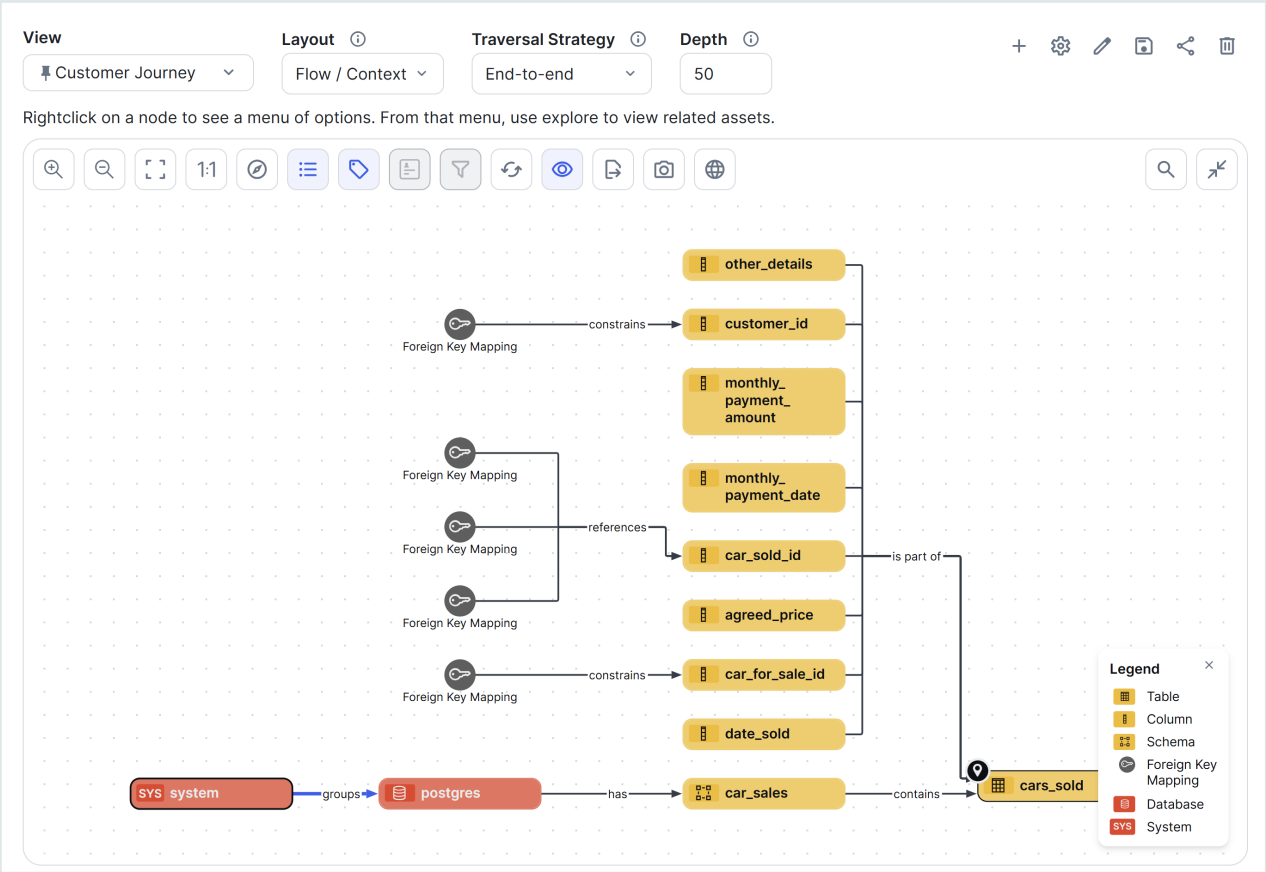


Diagram and diagram view terminology

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. The node is depicted by a rectangle.
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.
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.

Concept	Description
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

> **Note** The images in this topic show the old diagram user interface. You can still refer to them to understand the concept.

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.

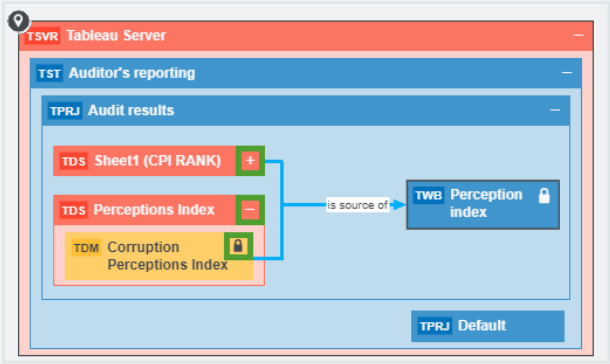
  A node that has an outgoing edge of the boxing style, becomes a boxing node. For the boxed node, the same edge is an incoming edge of the boxed style. Additionally, one boxing node could contain several boxed nodes, which have edges of their own.

  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

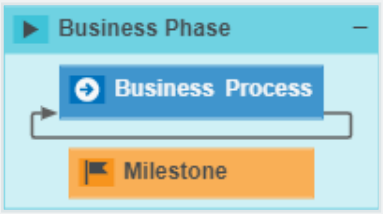
In some cases, the same asset might be represented by more than one node. In other words, there are two nodes representing the same asset, on the same diagram. This can be caused by several of reasons, but the most common reason is that an asset matches more than one node of the diagram view.

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:

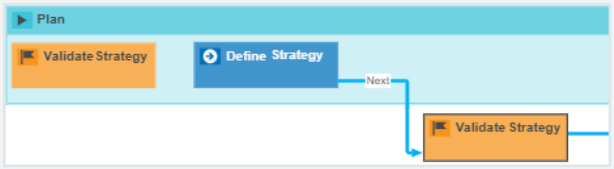


Diagram layouts

The layout of a diagram determines the location of its nodes and edges. They, however, don't change which nodes and edges are shown.

Layout	Description
Hierarchy left - right	Nodes and edges are shown in a flow, mostly from left to right. This is the default lay-out.
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 section. If there are no nodes in the context region, the **Flow / Context** 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 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 aren't 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 dia-gram.

Layout	Description
Radial	Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings, and few bends. Boxing nodes aren't supported in the **Radial** layout. This has the same consequences as those described for the **Circular** layout.
Smart Organic	Nodes and edges are distributed in a well-balanced manner, with few edge crossings.

Traversal strategies

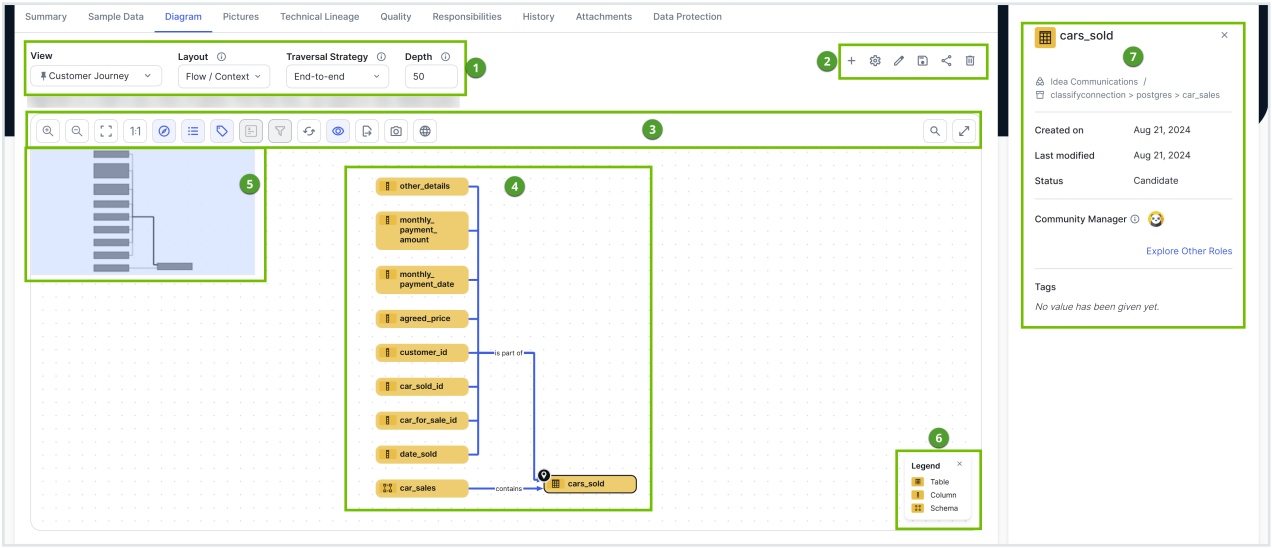
A traversal strategy determines which nodes and edges are traversed and shown in a diagram. The diagram view determines the initial traversal strategy, but you can select a different strategy.

Traversal strategy	Description
End-to-end	For the start node, Collibra 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.

Traversal strategy	Description
Complete	For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram. 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.

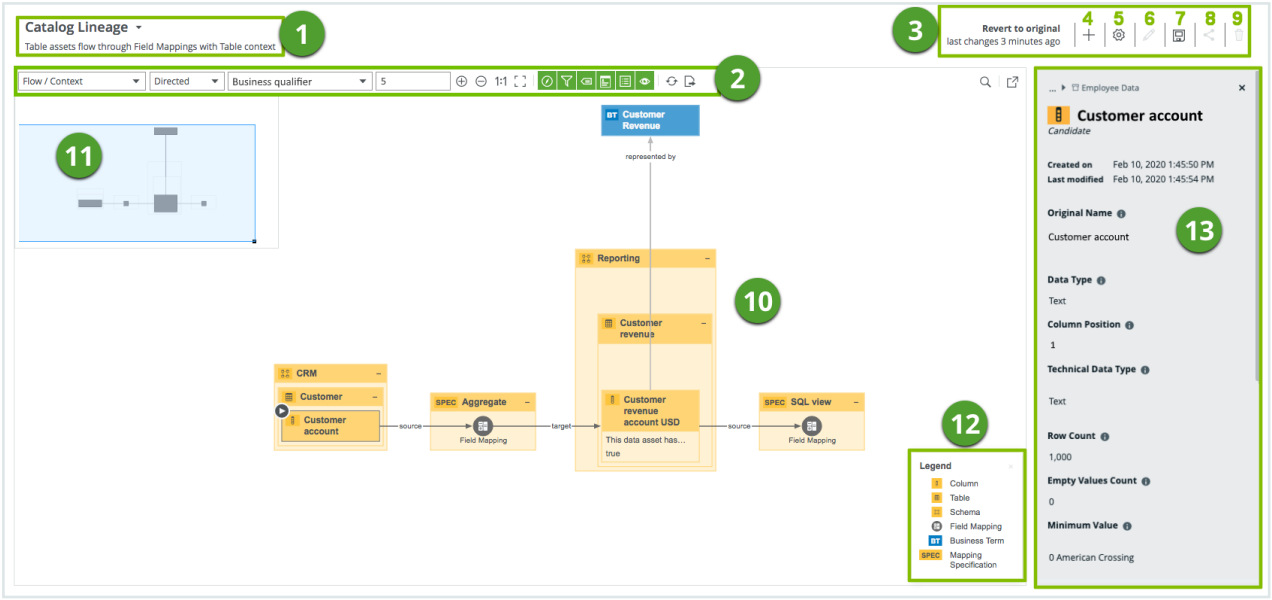
Diagram editor

The diagram editor allows you to view and edit diagrams.



Number	Description
1	• **View:** Name of the current view. You can select a different view from a list of pinned diagram views for the asset. To see all available diagram views for the asset, in the **View** drop-down list, click **Show all**. • **Layout:** Determines the location of nodes and edges in the diagram. • **Traversal Strategy:** Determines which nodes and edges are traversed and shown in the diagram. • **Depth:** Controls the size of the diagram.

Number	Description
2	• **(Add view):** To create a new diagram view, starting from the selected node. • **(Add diagram view configuration):** To edit the configuration of the diagram view. • **(Edit name and description):** To edit the name and description of the diagram view. • **(Save (as) view):** To save the diagram view as a new view. • **(Share view):** To share the diagram view. • **(Delete view):** To delete the diagram view.
3	Toolbar to work with the diagram.
4	Actual depiction of the traceability of the current asset, based on the selected diagram view.
5	Overview with a box to zoom and navigate the diagram. The overview appears when you click **(Overview)**. **Tip** This is useful when the diagram is too large to fit the screen. You can move the box anywhere in the diagram.
6	Legend to explain color codes and symbols of the items in the diagram. You can move the legend box 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 an item 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.
7	Diagram preview pane with information about the selected node in the diagram.

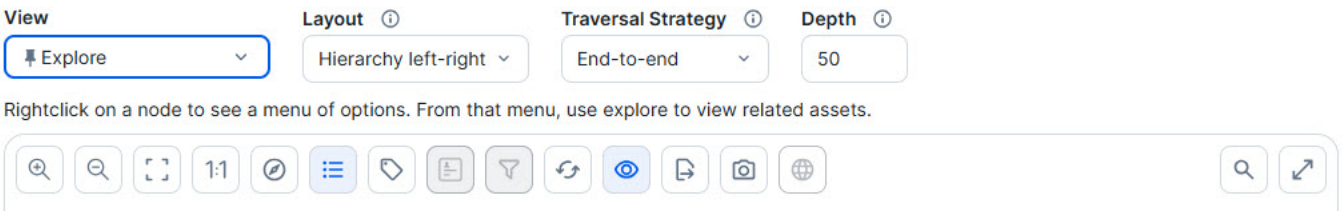


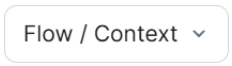
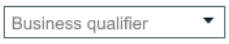
No.	Name	Description
1	View title	Name and description of the current diagram view. You can select a different view from a list of pinned and applicable views for an asset of this type. You can open the list of views when you click the view name and then **Show all**.
2	Diagram toolbar	Toolbar to work with the diagram.
3	View bar menu	Icons to manage the diagram view.
4	+	Icon to create a new diagram view, starting from the selected node.
5	⚙	Icon to edit the current diagram view.
6	✎	Icon to edit the name and description of the current diagram view.
7	💾	Icon to save the diagram view as a new view.
8	⤴	Icon to share the diagram view.

No.	Name	Description
9		Icon to delete the diagram view.
10	Diagram	Actual depiction of the traceability of the current asset, according to the selected diagram view.
11	Overview ( )	Box to zoom and navigate a diagram that is too large to fit the screen. You can move it to anywhere in the diagram.
12	Legend	Legend to explain color codes and symbols of the items in the diagram. You can move the legend box 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 an item 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 pane	Preview pane 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.
	Depth	Specify the flow depth, meaning the flow relation path length from the start flow node set to any other flow node.
	Business qualifier	Filter a diagram to contain only assets that are qualified by a chosen business qualifier.
	Zoom in	Zoom in on the diagram.
	Zoom out	Zoom out of the diagram.
	Zoom to readable size	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.

Button	Name	Description
	Legend	Show or hide the legend box containing the explanation of the nodes. Legend to explain color codes and symbols of the items in the diagram. You can move the legend box 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 an item in the legend to select all occurrences of that type in the diagram. You can use this to expand or collapse all nodes of the same type.
	Preview	Show or hide the preview pane 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.
	Explorer	Change the view to the Explorer mode without using the **View** field. The icon is disabled if you are already in the Explorer mode.
	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.

Diagram preview pane

The preview pane offers a quick overview of the node that you select in a diagram. The content of the preview pane depends on the type of node that you select in the diagram.

Assets

- Breadcrumbs
- Name of the asset
- Asset type code or icon, as described in Edit an asset type.

> **Tip** You can hover over the code or icon to view the asset type.

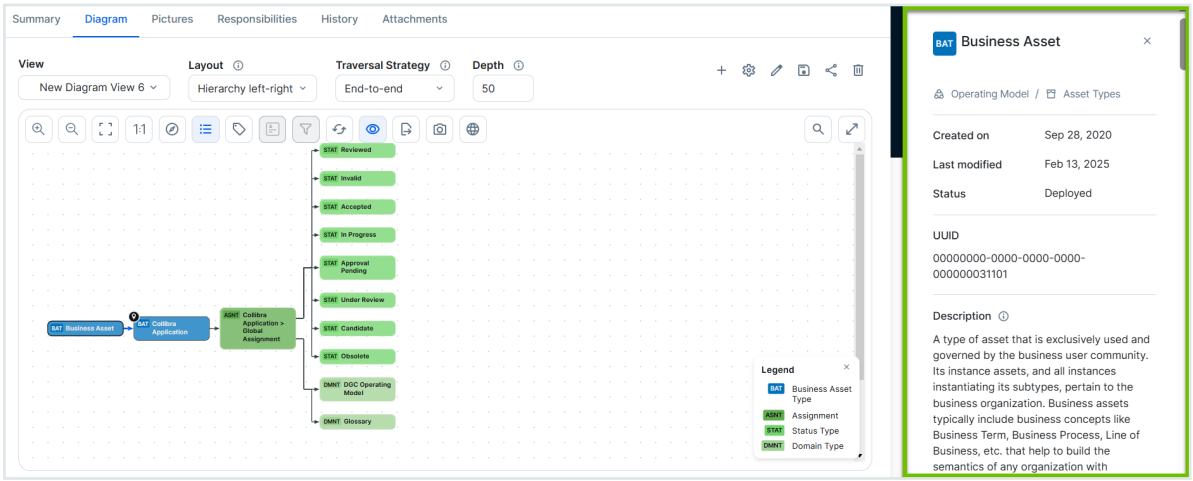
- Status
- Created on
- Last modified
- All assigned characteristics
- Tags

Complex relations

- All assigned characteristics
- Last modified by (user), with date and time
- Created by (user)

Open or close the diagram preview pane

1. Open the diagram.
2. On the diagram toolbar, click 👁.
3. Optionally, click the node that you want to preview.
   » The preview pane appears or disappears.



Working with diagrams

> **Note** The images in this topic show the old diagram user interface. You can still refer to them to understand the concept.

Diagrams is a feature to show and interact with many assets and relations in an easy-to-read representation. A diagram helps you to quickly see the assets to which a specific asset is related. Two assets are related if you can navigate from one asset to another by traversing one or more relations.

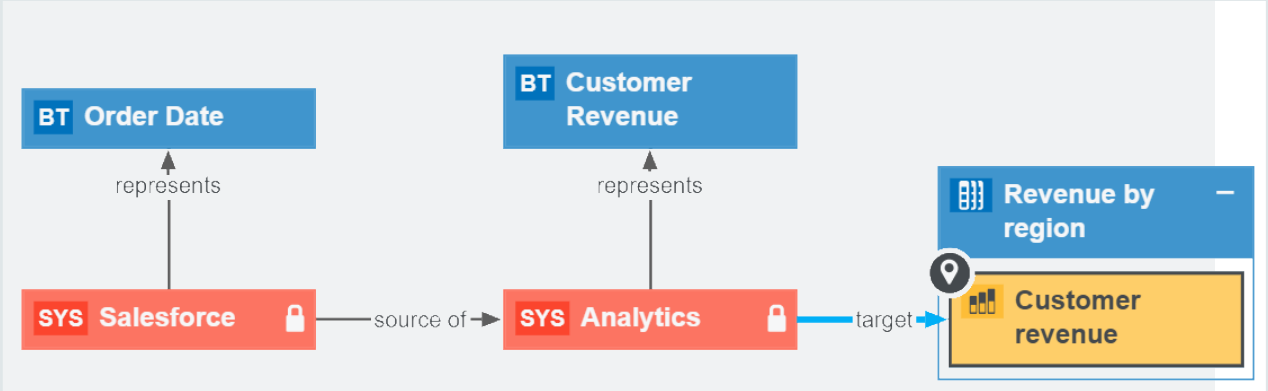
Summary diagrams

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 used only to show the high-level outcome.

> **Note** The limit is 10,000 nodes per view.

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. Click the **Diagram** tab.
   » The diagram is shown in the default diagram view.
3. If needed, in the **View** field, select a different diagram view.

Tip If a diagram exceeds the size or time limit set by your administrator, an error message appears. 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 the diagram.
2. Click ⋮ for 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, which is 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. Click the **Diagram** tab.
   » The diagram is shown in the default diagram view.
3. If needed, in the **View** field, select a different diagram view.

   > **Note** 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 the diagram.
2. Click ⋮ for 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 the 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 the 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 the diagram.
2. Click ⋮ for 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 the 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 the diagram.
2. In the **Layout** field, select the required layout.
3. On the toolbar, in the layout drop-down list, select the required layout.

> **Tip** You can go back to the initial diagram by clicking . Note that this action discards all your changes.

Select a traversal strategy

You can select a traversal strategy to determine which nodes and edges are traversed and shown in a diagram. If you change the traversal strategy, the diagram is completely redrawn and explored nodes are removed.

Steps

1. Open the diagram.
2. In the **Traversal Strategy** field, select the required traversal strategy.
3. On the diagram toolbar, in the traversal strategy field, select the required traversal strategy.

Adjust the flow depth in a diagram

To help you control the size of business diagrams, you can adjust the flow depth, the flow relation path length from the start flow node set to any other flow node.

> **Tip** You can also:
>
> - Contact Collibra Support to edit system-wide maximum flow depth.
> - Specify the maximum flow depth in a diagram view.

For complete information on related terminology and functionality, see Maximum flow depth.

Steps

1. Open the diagram view.
2. In the **Depth** field of the diagram toolbar, enter a value between 0 and 99.
3. Click **Save**.

Working with the diagram overview inset

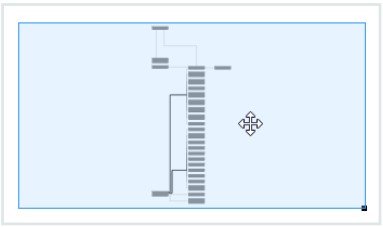
The overview inset of the diagram editor allows you to keep an overview of the complete diagram, while the main screen is showing only a section of it.

Steps

1. Open the diagram.
2. On the toolbar, click the ⊘ to show or hide the overview inset.

   » The overview inset is shown over the diagram. You can still see the diagram underneath.
3. Do one of the following:

Action	Descriptions
Zoom in or out by scaling:	a. Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow. b. 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.

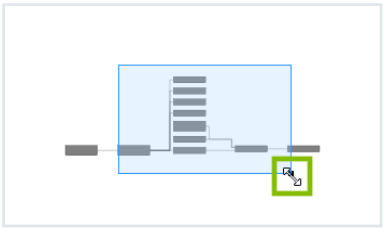
Zoom in or out in the diagram editor

When working with diagrams, you can zoom in or out in different ways.

Steps

1. Open the diagram.
2. Do one of the following:

Strategy	Description
Zoom in or out with buttons.	On the toolbar, click (Zoom in) or (Zoom out) as needed.
Zoom in or out by scrolling with your mouse.	Move your mouse pointer to anywhere on the diagram and use your mouse wheel to zoom. The zoom is centered at the mouse pointer.

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

> **Note** The images in this topic show the old diagram user interface. You can still refer to them to understand the concept.

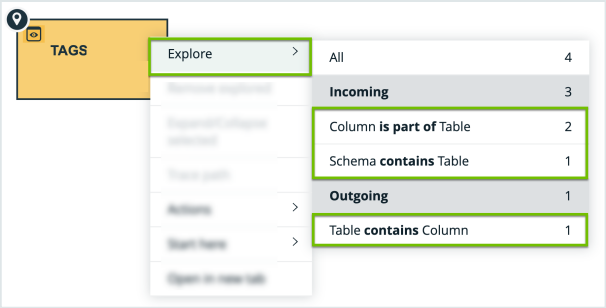
For each node in a diagram, there might be relations that aren't depicted in the diagram, typically because the relation type isn't included in the diagram view, or the relation isn't traversed due to the selected traversal strategy. You can still view these relations by using the **Explore** option for the node.

The **Explore** option uses the operating model to show how data flows into and out of an asset. The relations shown when you explore a node are based exclusively on the operating model—specifically, the head, role, and tail elements of the relation types. They are grouped according to the roles defined in the operating model and are independent of any diagram configuration.

Head	Role	CoRole	Tail
Table	contains	is part of	Column
Schema	contains	is part of	Table
Column	is part of	contains	Table

Note Unlike a diagram view, the data shown when you explore a node isn't persistent and disappears when the page is refreshed.

If a node's asset type is the tail of a relation type in the operating model, that relation is considered incoming. Conversely, if the asset type is the head of a relation type, the relation is considered outgoing.



Example

Suppose that the following relation types are available in the operating model and they are assigned to the Table asset type.

Head	Role	Co-role	Tail
Column	is part of	contains	Table
Schema	contains	is part of	Table
Table	contains	is part of	Column

Consider a Table asset named **TAGS** containing the following relations:

- Table contains Column
- Table is part of Schema

In a diagram, when you explore the node for **TAGS**, the following relations are shown:

Incoming:

- Column is part of Table
- Schema contains Table

Outgoing:

- Table contains Column

These relations are based on the head, role, and tail elements from the operating model.

Steps

1. Open the diagram.
2. Click ⋮ for a node.
3. On the context menu, point to **Explore**.
   » A list of available relation types appears. The number next to a relation type represents the count of relations for the relation type.
4. Click one of the relation types or group of relation types.

Mode	Description
All	Explores all relation types of the selected node. Clicking **Explore** on the context menu has the same result.
Incoming	Explores all incoming relations of the selected node. A relation is considered incoming when the selected node is the tail of the relation type. For example, the relation *[Business Term] has code / is code for [Code Value]* is incoming for a Code Value asset.
Outgoing	Explores all outgoing relations of the selected node. A relation is considered outgoing when the selected node is the head of the relation type. For example, the relation *[Business Term] has code / is code for [Code Value]* is outgoing for a Business Term asset.
Any specific relation type	Explores the relations of the selected relation type.

> **Tip** To remove a relation, click ⋮ for a node and then select **Remove explored**.

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 the diagram.
2. Do one of the following:
   - Select a node.
   - Select multiple nodes by holding down the select key and clicking nodes.

On a macOS system	On a Windows system
Click the first one and then hold down `cmd` while clicking on the next ones.	Click the first one and then hold down `ctrl` while clicking on the next ones.

   - In the legend, click the asset type or complex relation type that you want to expand or collapse. You have now selected all nodes of this type.
3. Do one of the following:
   - In the node, click + or −.
   - In the context menu of a node, click **Expand/Collapse selected**.

Trace all paths between nodes in the diagram

You can trace all paths between any number of nodes on the diagram, which means you can show the relations between the nodes.

You can trace a path between nodes in the following ways:

- The highlight mode: Keep the whole diagram and highlight the nodes and edges on the path.
- The crop mode: Remove any node or edge that is not on the path.

Steps

1. Open the diagram.
2. Select one, two, or more nodes in the diagram:

On a macOS system	On a Windows system
Click the first one and then hold down `cmd` while clicking on the next ones.	Click the first one and then hold down `ctrl` while clicking on the next ones.

3. Do one of the following:
   - To keep the whole diagram and highlight the path, click ⋮ for 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, click ⋮ for 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 the diagram.
2. Click a node and hold down your mouse button. To select multiple nodes, do the same but select multiple nodes.

On a macOS system	On a Windows system
Click the first one and then hold down `cmd` while clicking on the next ones.	Click the first one and then hold down `ctrl` while clicking on the next ones.

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

> **Note** You cannot save the these changes, but you can create a picture or export the diagram with these changes.

Diagram views

In this section, you can find more information about what you can do with diagram views.

Create a diagram view

You can create your own diagram views from scratch or from an existing view.

Create a diagram view from scratch

1. Open an asset page.
2. Click the **Diagram** tab.
   » The diagram is shown 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. Click the **Diagram** tab.
   » The diagram is shown in the default diagram view.
3. If needed, select another diagram view.
4. Click .
   » The **Save view as** dialog box appears.

5. Enter the required information.

Field	Description
Name	Name to identify the diagram view.
Description	Description for the diagram view. If Collibra AI is enabled, then it automatically creates the description.
Sharing options	Options that determine who can see this diagram view.
Public	Everyone can see this diagram view.
Private	No one can see this diagram view.
Share with specific roles, groups & users	Only the roles, groups, or users you select can see this diagram view.
Roles	Only the roles you select can see this diagram view.
Groups	Only the groups you select can see this diagram view.
Users	Only the users you select can see this diagram view.
Promote	Options that determine how and where this diagram view is shown.
Default	Shows this diagram view as the default view when you open the diagram editor.
Pin	Pins this diagram view. Pinned diagram views appear in the View drop-down list.

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 the asset.
2. Click the **Diagram** tab.
   » The diagram is shown in the default diagram view.
3. If needed, in the **View** field, select a different diagram view.

> **Tip** If you can't find the required diagram view, scroll to the bottom of the drop-down list, click **Show all**, and then click the required view from the table.

> **Note**
> - If a diagram exceeds the size or time limit set by your administrator, an error message appears. 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.
> - If the diagram depth is limited by a specified maximum flow depth value, a notification appears to inform you that the diagram is incomplete.
> - It is possible that an asset type or characteristic that is referenced in a diagram view was deleted by someone from your Collibra environment. In this case, an error message appears, and the deleted asset type or characteristic is amended with the word **Invalid** to help you identify it and edit the diagram view as needed.

Edit the name and description of a diagram view

You can edit the name and the description of a diagram view.

Steps

1. Open the 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 the diagram view.
2. Click .
   » The **General Properties** section appears.
3. Edit the general properties as needed.
4. Select a node.
   » The **Node Properties** section appears.
5. Edit the node properties as needed.
6. Select an edge.
   » The **Edge Properties** section appears.
7. Edit the edge properties as needed.
8. Click **Save**.

Diagram general properties

The **General Properties** section is used to define the overall look and feel of a diagram. This section appears when you edit a diagram view and select a node or edge.

Field	Description
Layout	Layout of your diagram view.

Field	Description
Traversal StrategyTraverse	Indicates which nodes and edges need to be traversed and shown.
Depth	Flow relation path length from the start flow node set to any other flow node.
Overview	Shows or hides the overview inset in the initial diagram.
Filters	Shows or hides the filters in the diagram.
Labels	Shows or hides the edge and node labels in the initial diagram.
Overlays	Shows or hides the characteristics of a node.
Legend	Shows or hides the legend in the initial diagram.
Preview	Shows or hides the preview in the initial diagram.
Max node label length	Maximum number of characters for node labels. If a label is longer than this value, it is truncated. The default setting is 50. Enter *0* if you always want to show the entire label.
Max edge label length	Maximum number of characters for edge labels. If a label is longer than this value, it is truncated. The default setting is 30. Enter *0* if you always want to show the entire label.

Diagram node properties

The **Node Properties** section is used to define a node in the diagram view and the edges that are connected to it. This section appears when you edit a diagram view and select 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	Name for the selected node. **Tip** By default, this is the name of the asset type or complex relation type. For readability, we recommend using the name of the asset type or complex relation type. You can refer to the node by using its ID in the **From** and **To** fields in the **Edge Properties** section. This ID must be unique in the current diagram view.
Type	Asset type. By default, this is the asset type of the selected node.
Display Name	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 shows all the characteristics that apply. You can filter the list by starting to enter.
Overlays	Fields that you want to show on the node. For example, you can show characteristics, status, or parent domain. The drop-down shows all the fields that you can show. You can filter the list by starting to enter.
Context	Selecting this checkbox places the node in the context region of the diagram. Clearing this checkbox places the node 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 need to flip any edge that is outgoing from this context node and incoming to a flow node. For more information, go to Which nodes and edges are included in a diagram?
Boxing Node Options	Options to determine how you want to show boxed nodes by default. The start node is always visible in the diagram, even when it is boxed inside of a collapsed or locked node.
Expanded	Show boxing nodes and their boxed nodes.

Field	Description
Collapsed	Show boxing nodes, but not their boxed nodes. In the resulting diagram, you can expand these boxing nodes.
Hidden Internals Collapsed (hide boxed nodes)	Show boxing nodes, but not their boxed nodes. In the resulting diagram, these nodes are locked, so you can't expand them. **Tip** • Diagrams with locked nodes are also called summary diagrams. • The boxed nodes of a locked node aren't loaded when you open the diagram. As a result, 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>	Outgoing edges that currently exist.
Add	Add an outgoing edge.
Incoming	
<incoming edges>	Incoming edges that currently exist.
Add	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	Filter the diagram by a Business Qualifier asset. This feature is available only if it is enabled in Collibra Console.

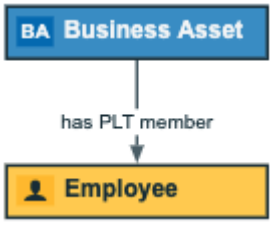
Field	Description
<existing filters>	Filter criteria that currently exist.
Add Filter Criteria	Create a filter.

Diagram edge properties

> **Note** The images in this topic show the old diagram user interface. You can still refer to them to understand the concept.

The **Edge Properties** section is used to define edges in the diagram view. This section appears when you edit a diagram view and select an edge.

Field	Description
Relation Type	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. • **If the checkbox is selected:** The edge is traversed from head to tail. The edge label is the role of the relation type. • **If the checkbox is cleared:** The edge is traversed from tail to head. The edge label is the co-role of the relation type.
From	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 don't 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 (if **Role direction** is selected) or (a parent of) the tail asset type of the relation type (if **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	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 (if **Role direction** is selected) or (a parent of) the head asset type of the relation type (if **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.
Style	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.

Field	Description
Label	Label for the edge. If you don't specify a label, either the role name or the 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, the co-role is used.

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

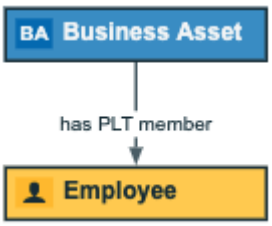
You can add an edge to a node in a diagram view.

Steps

1. Open the diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Select a node in the diagram.
   » The **Node properties** form appears.
4. In the **Node properties** form, go to the **Edges** section.

5. Do one of the following:
   - Under **Outgoing**, click **Add**.
     This adds an edge starting from the selected node.
   - Under **Incoming**, click **Add**.
     This adds an edge ending in the selected node.
6. Define the edge characteristics:

Edge characteristic	Description
Relation Type	Choose a relation type from the list of applicable types. 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 drop-down list 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	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.

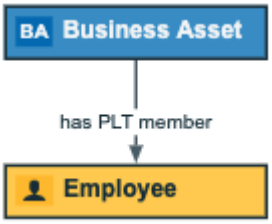
Steps

1. Open the diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Do one of the following:
   - Select an edge in the diagram.
   - Select a node in the diagram and click 🖌 next to an incoming or outgoing edge in the edge section.

   » The **Edge properties** form appears.
4. Enter the required information.

Field	Description
Relation Type	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. ◦ **If the checkbox is selected:** The edge is traversed from head to tail. The edge label is the role of the relation type. ◦ **If the checkbox is cleared:** The edge is traversed from tail to head. The edge label is the co-role of the relation type.

Field	Description
From	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 don't 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 (if **Role direction** is selected) or (a parent of) the tail asset type of the relation type (if **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	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 (if **Role direction** is selected) or (a parent of) the head asset type of the relation type (if **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	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	Label for the edge. If you don't specify a label, either the role name or the 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, the co-role is used.

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 the diagram view.
2. Click ⚙.
   » The **General properties** form appears.
3. Select a node in the diagram.
   » The **Node properties** form appears.
4. Do one of the following:
   - Click 🗑 next to an incoming or outgoing edge in the edge section.
   - Select an edge in the diagram and click 🗑 in the upper right corner.
5. Above the diagram, to the right, click **Save**.

Maximum flow depth

Big diagrams can have very long paths, or chains of edges. They can take a long time to build, and are canceled if they exceed specified time and size limits for fetching data.

To help you control the size of diagrams, you can specify the maximum flow depth, meaning the flow relation path length from the start flow node set to any other flow node. This aims to improve readability and performance, and reduce the potential for diagrams that are too big to build.

Terminology and details

Terminology	Description
Flow node	A diagram node that matches a diagram view node that is not marked as context. 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 Collibra Console.

Limitations

It bears mentioning that limiting flow depth does not prevent all diagrams from becoming too big to build. It can be that a single node has a large number of related assets, for example, a Schema asset that contains 10,000 Table assets. In this case, the flow depth is only "1", but the diagram will "fan out" and might become too big to build.

Specify maximum flow depth

To help you control the size of business diagrams, you can specify the maximum flow depth in a diagram view in the following ways:

- Via the diagram editor
- Via the JSON text editor

You can also adjust the flow depth in a result diagram.

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

Via the diagram editor

1. Open the diagram view.
2. Click .
   » The **General Properties** section appears.
3. In the **Flow depth** field, enter a value between 0 and 99.
4. Click **Save**.

Via the JSON text editor

1. Open the diagram view.
2. Click .
   » The **General Properties** section appears.
3. Select the **Text** option below the diagram view name.
   » The diagram view text editor is shown.

4. Scroll down and add `"flowDepth": x,` where "x" is the maximum flow depth.

5. Click **Save**.

For more information, go to:

- JSON syntax: Nodes section
- Tips for creating correct diagram views with the JSON text editor

Detailed description of JSON syntax for diagram views

A diagram view can be described by a file in a specific JavaScript Object Notation (JSON) format.

To design diagram views in JSON text format, it is important that you know the information in this section.

The examples of JSON code in the following sections are key-value pairs that you can use to create a diagram view.

JSON syntax: Diagram section

These settings determine general display settings for the diagram.

JSON syntax	Description

`"visitStrategy": "directed", "directedIncoming", "directedOutgoing","completeGraph"`	• Indicates which nodes and edges have to be traversed and displayed.
	• This setting is optional.
	• You can select 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 `layoutRegion`.
	  • `"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 relations only in the same direction as how they are encountered: outgoing relations only.

JSON syntax	Description
	Be careful with using `completeGraph`, this setting can lead to very large diagrams.

`"resultNodeUnicityStrategy": "multipleNodesPerAssetId", "singleNodePerAssetId"`	• 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:
	  • `"multipleNodesPerAssetId"`: If an asset is encountered more than once for different nodes in the diagram view, it is represented by multiple nodes in the diagram, one per matching view node. This is the default setting.
	  • `"singleNodePerAssetId"`: If an asset is encountered more than once for different nodes in the diagram view, it is represented by a single node in the diagram.
	
	Note If one asset is encountered multiple times for the same node in the diagram view, it is always displayed only once in the diagram. In that situation, there is a loop for that node.

JSON syntax	Description

`"layout": "HierarchyLeftRight", "HierarchyTopBottom", "HierarchyBottomTop", "Circular", "SmartOrganic", "Radial", "Flow/Context"`	• Indicates the layout style of the diagram.
	• 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 `layoutRegion` 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 a context node, the from node has to be in the flow region and the to node has to be in the context region.

JSON syntax	Description

`"showOverview": false, true`	• Indicates if the overview is displayed.
	• This setting is optional.
	• You can pick one of the following values:
	  • `false`: The overview is not displayed. This is the default setting.
	  • `true`: The overview is displayed.

`"showLabels": false, true`	• Indicates if the edge and node labels are displayed.
	• This setting is optional.
	• You can pick one of the following values:
	  • `false`: The overlays are not displayed. This is the default setting.
	  • `true`: The overlays are displayed.

`"showLegend": false, true`	• Indicates if the diagram legend is displayed. The legend shows all asset types and complex relation types that occur in the diagram.
	• This setting is optional.
	• You can pick one of the following values:
	  • `false`: The legend is not displayed.
	  • `true`: The legend is displayed. This is the default setting.

`"showPreview": false, true`	• Indicate if the preview pane is displayed by default. The preview pane shows information about the selected node or edge.
	• This setting is optional.
	• You can pick one of the following values:
	  ◦ `false`: The legend is not displayed.
	  ◦ `true`: The legend is displayed. This is the default setting.

`"showFields": false, true`	• Indicates if the overlays are displayed.
	• This setting is optional.
	• You can pick one of the following values:
	  • `false`: The labels are not displayed.
	  • `true`: The labels are displayed. This is the default setting.

JSON syntax	Description

`"maxNodeLabelLength": 0, <positive integer number>`	• Indicates the maximum length of the node labels (whether they should be truncated when they are too long).
	• 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.

`"maxEdgeLabelLength": 0, <positive integer number>`	• 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.

`"edgeBundling": false, true`	• Indicates whether edges of the same type are bundled to reduce clutter.
	• This setting is optional.
	• You can pick one of the following values:
	  ◦ `false`: Edges are not bundled.
	  ◦ `true`: Edges are bundled. This is the default setting.

JSON syntax	Description
`"webworkersEnabled": false, true`	• Indicates whether the layout-related calculations can be moved to a separate Collibra 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: ◦ `false`: Layout-related calculations are not moved to a separate DGC thread of your processor. ◦ `true`: For large diagrams, layout-related calculations are moved to a separate DGC thread of your processor. This is the default setting.

JSON syntax: Layout options

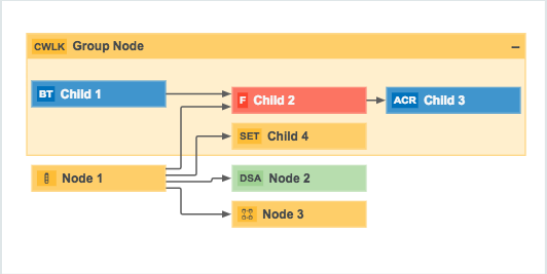
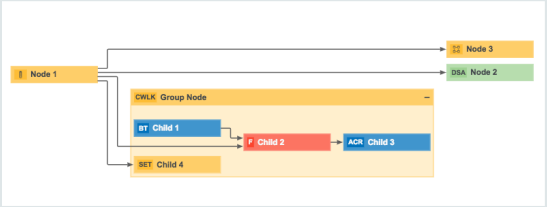
> **Note** The images in this topic show the old diagram user interface. You can still refer to them to understand the concept.

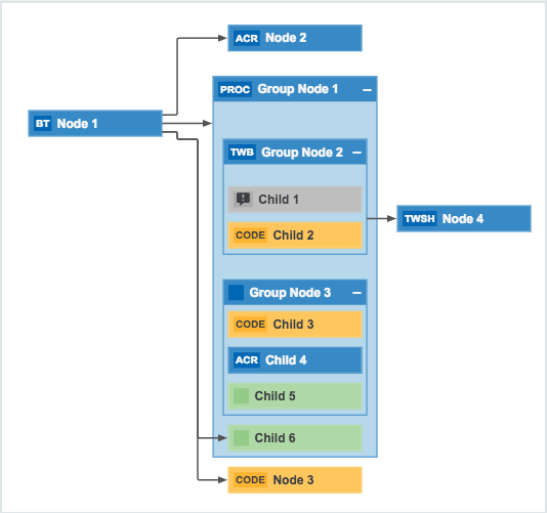
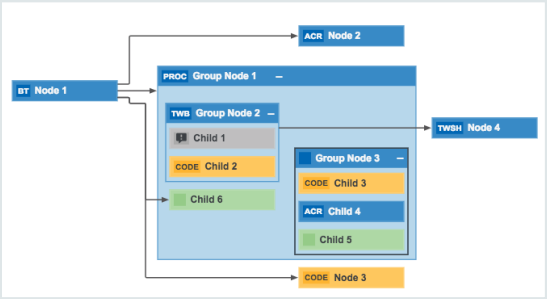
These options determine the layout of hierarchical diagrams.

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

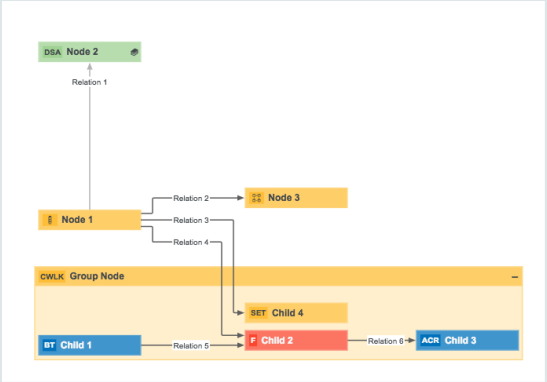
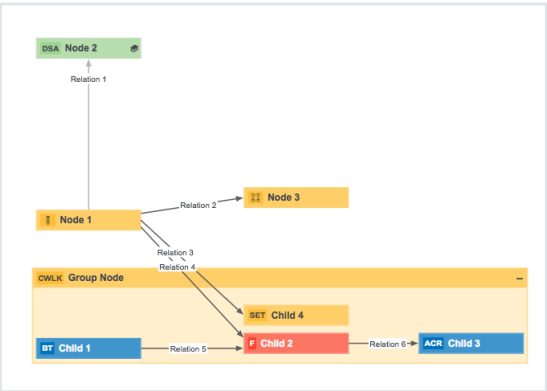
Example

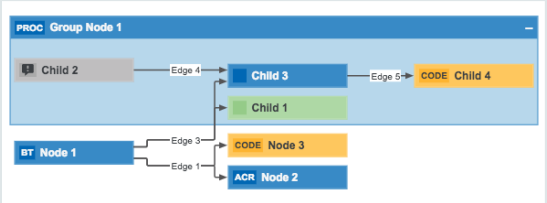
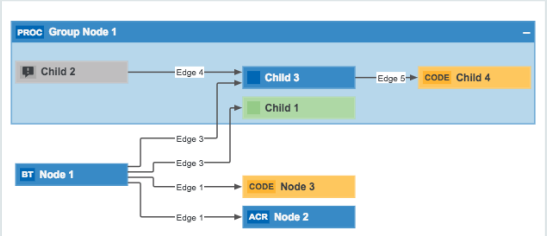
```
"layoutOptions": {
   "compactGroups": false,
   "componentArrangementPolicy": "topmost",
   "edgeBends": true,
   "edgeBundling": true,
   "edgeToEdgeDistance": 5,
   "minimumLayerDistance": "auto",
   "nodeToEdgeDistance": 5,
   "orthogonalRouting": true,
       "preciseNodeHeightCalculation":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

JSON syntax with all default values	Description
`"compactGroups": true // false`	Group compaction reduces the number of node layers without reversing edge directions. The resulting layering tries to keep the layer span of a boxing node at a minimum, while minimizing the overall vertical space. You can select one of the following values: • `true`: The diagram view uses as few node layers as possible. The layers of a diagram are also used inside a boxing node. Example  • `false`: 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 `recursiveGroupLayering` is set to `true`. • This option is optional. • The default value is `false`. • This option does not affect the loading time of the diagram.

JSON syntax with all default values	Description
`"componentArrangementPolicy": "topmost" // "compact"`	Choose how to arrange boxed nodes that are not connected by the arrow edge with other nodes. This is only applicable to boxed and boxing edges. You can select 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
	Note • This option is optional. • The default value is `topmost`. • This option does not affect the loading time of the diagram.

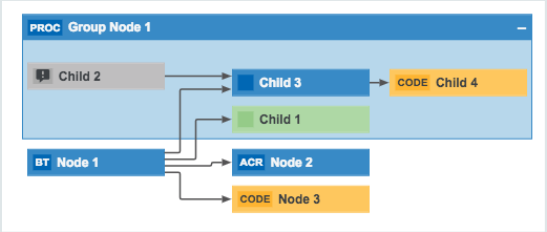
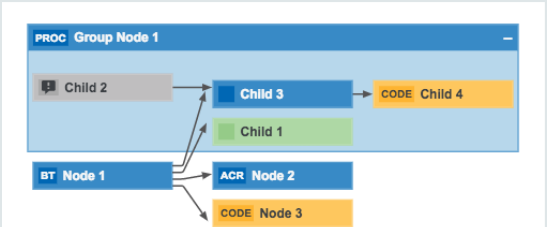
JSON syntax with all default values	Description
`"edgeBends": true // false`	Choose whether edges can be curved and can contain bends. **Warning** When this option is false, the `edgeBundling` and `orthogonalRouting` options are automatically ignored. You can select one of the following values: • `true`: Enables edge bends. Example  • `false`: Disables edge bends, `edgeBundling` and `orthogonalRouting`. 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 `true`. • Choosing `true` may lead to an increased loading time of the diagram.
`"edgeBundling": true // false`	Choose whether arrow edges can be bundled at the source or target node when they represent the same incoming or outgoing relation. **Note** Only one edge label is displayed for a bundled edge. You can select one of the following values: • `true`: Enable edge bundling. Example  • `false`: Disable edge bundling. Example  **Note** • This option is optional. • The default value is `true`. • Choosing `true` may lead to an increased loading time of the diagram.

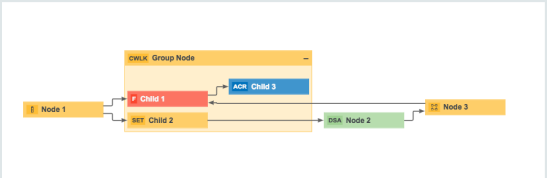
JSON syntax with all default values	Description
`"edgeToEdgeDistance": 5 // "auto"`	Set the minimum distance (in pixels) between two adjacent edges in one layer. This affects the horizontal distance if the diagram layout is: • **Hierarchy left - right** • **Flow / Context**, but only for nodes in the 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 select 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.

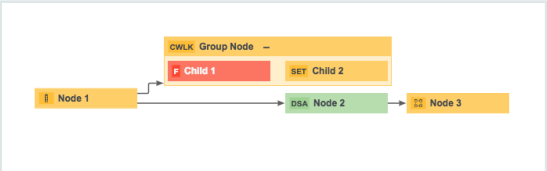
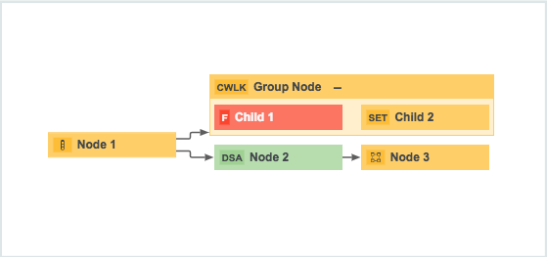
JSON syntax with all default values	Description
`"minimumLayerDistance": 5 // "auto"`	Set the minimum distance (in pixels) between two adjacent layers. This affects the horizontal distance if the diagram layout is: • **Hierarchy left - right** • **Flow / Context**, but only for nodes in the flow This 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 select 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 `auto`. • This option does not affect the loading time of the diagram.

JSON syntax with all default values	Description
`"nodeToEdgeDistance": 5 // "auto"`	Set the minimum distance (in pixels) between an edge and an adjacent node in the same layer. 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 select 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.

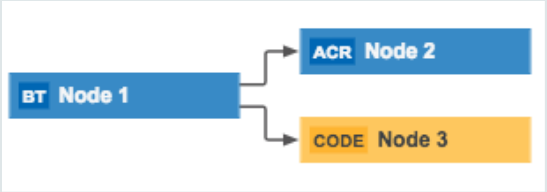
JSON syntax with all default values	Description
`"orthogonalRouting": true // false`	Choose whether or not edges can be routed orthogonally. You can select one of the following values: • `true`: All edge segments are horizontal or vertical. Example  • `false`: Edge segments can be diagonal. Example  **Note** • This option is optional. • The default value is `true`. • This option does not affect the loading time of the diagram.

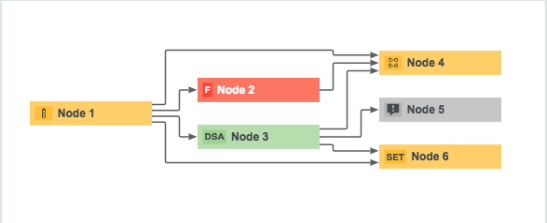
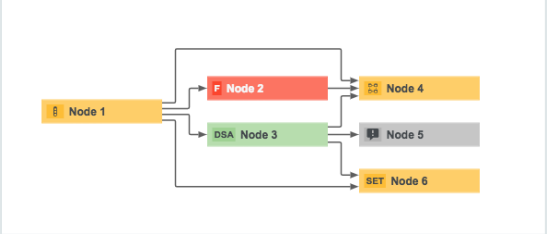
JSON syntax with all default values	Description
`"preciseNodeHeightCalculation": true // false`	Determines the precision with which node heights are rendered to visually accommodate diagram text. • `true`: Each node is correctly sized to fit its label text. For extremely large diagrams, this can result in significantly longer loading times. • `false`: Loading times are vastly improved, but label text might not always fit in the nodes. When label text doesn't fit, the text is truncated by an ellipsis. For example: "ABC_Finance_Freq...". **Note** • This option is optional. • The default value is `true`. • Choosing `true` may lead to an increased loading time of the diagram.

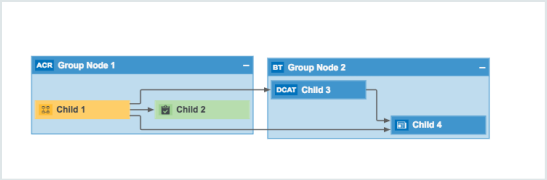
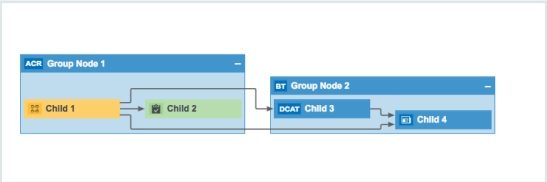
JSON syntax with all default values	Description
`"recursiveGroupLayering": true // false`	Choose whether boxing edges are respected during layering. This option is ignored when the diagram does not contain boxing nodes. **Warning** Enabling this option may change the diagram flow. Some arrow edges may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

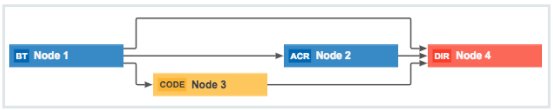
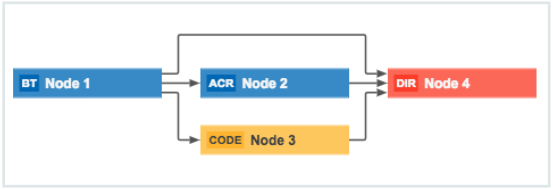
JSON syntax with all default values	Description
`"separateLayers": true // false`	Strictly separate nodes of different layers. In other words, nodes are placed below each other. This prevents big nodes from extending into an adjacent layer. You can select one of the following values: • `true`: Layers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

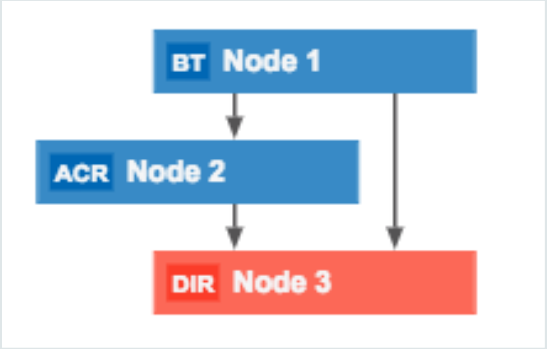
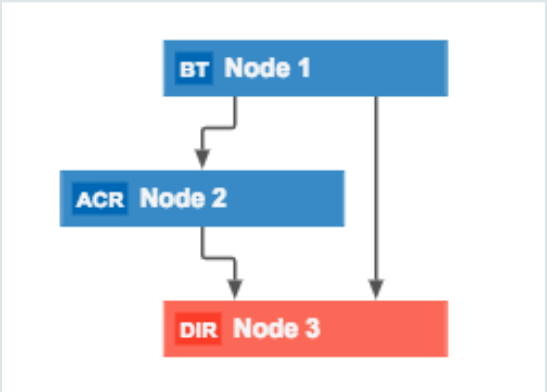
JSON syntax with all default values	Description
`"webWorkers": true // false`	Choose whether big diagrams should be built in the background thread. You can select one of the following values: • `true`: Enables multi-thread support for diagram building. > **Note** This makes layout processing faster and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

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

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

JSON syntax with all default values	Description
`"groupCompactionStrategy": "none" // "maximum"`	Choose the strategy for controlling the horizontal compactness of boxing nodes. You can select one of the following values: • `"none"`: Do not use horizontal group compaction. The contents of a boxing node will occupy nearly the same horizontal positions as when not grouped at all. Example  • `"maximum"`: Make boxing nodes as narrow as possible. Example  **Note** • This option is optional. • The default value is `none`. • Choosing `none` may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
`"nodeCompaction": true // false // "auto"`	Choose whether to reduce the height of the diagram as much as possible. This places the nodes of a layer in a stacked style (horizontally interleaving), which reduces the width of the layer. You can select one of the following values: • `true`: Nodes are placed in a compact style. **Note** This may result in an increased width. Example  • `false`: Nodes are not placed in a compact style. Example  • `"auto"`: The layouting algorithm decides whether this option is set to `true` or `false`, depending on the diagram data. **Note** • This option is optional. • The default value is `auto`. • This option does not affect the loading time of the diagram.

JSON syntax with all default values	Description
`"straightenEdges": true // false // "auto"`	Apply a post-processing step to reduce edge bends. You can select one of the following values: • `true`: The post-processing step is applied to reduce edge bends. Example  **Warning** This may violate some minimum distances specified by the user and the edge distribution may no longer be uniform. • `false`: Post-processing step is not applied. Example  • `"auto"`: The layouting algorithm decides whether this option is set to `true` or `false`, depending on the diagram data.

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

JSON syntax: Nodes section

These settings determine the display settings for nodes. You must add a node for each asset type and complex relation type that you want to include in the diagram.

> **Note** The JSON representation of a diagram is always automatically generated. The JSON syntax allows you to update the diagram layout. Keep in mind that it is much easier to add and edit overlays through the graphical diagram view editor. See Edit a diagram view and Diagram node properties.

JSON syntax	Description
`"id": "Business Asset"`	• 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 `"from"` and `"to"` key-value pairs of the edges section.
`"type": {"id": "00000000-0000-0000-0000-000000011001"}`	• 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 `Type` 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.

JSON syntax	Description

`"layoutRegion": "flow", "context"`	• Determine if the node is treated as a flow node or a context node. This influences the traversal strategy. An edge from a flow node to a context node is always included in the diagram. An edge between two flow nodes FN1 and FN2 is only included in the diagram if the edge from FN1 to FN2 is traversed in the same direction as the edge that brought FN1 into the diagram.
	• This setting is optional.
	• You can select one of the following values:
	  • `"flow"`: The node is part of the flow. This is the default setting.
	  • `"context"`: The node is part of the context. When you select the **Flow/Context** layout for a diagram, the edges between flow nodes are rendered horizontally, mostly from left to right (the from node is to the left of the to node). The edges from flow to context nodes are rendered vertically, from bottom to top.

`"label": "Term"`	• Determines the name that is displayed on the node in the diagram design view. For a node that represents a complex relation type, the label is used in the diagram as well. • 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.

`"collapsed": false, true`	• Indicates if the selected node is collapsed in the initial diagram.
	• This setting is optional.
	• You can select one of the following values:
	  ◦ `false`: The selected node is a boxing node and the boxed nodes are displayed.
	  ◦ `true`: The selected node is a boxing node and the boxed nodes are hidden.

`"name":`	• Defines the name that has to be displayed on the node. By default, this is the asset's name, but you can specify any characteristic. Use the same syntax as for `"fields"`.

JSON syntax	Description
`"fields":`	• Defines which characteristics are shown in the node's overlay. The order of the fields determines the order of the characteristics in the overlay. • This setting is optional. • You can pick one or more of the following values: ◦ "name": The asset's name, as defined in the "name": setting. ◦ "status": The asset's status value. ◦ "domain": The domain in which the asset is located. ◦ "community": The lowest-level community in which the asset is located. ◦ "assetType": The asset's type. > **Note** When filtering a diagram by asset type, note that all subtypes are included, meaning they pass the filter along with the specified asset type. ◦ "tags": Any tags that were created for the asset. ◦ “responsibility_<ID>": The overlay is a resource role type with the ID that you type here. The diagram shows the avatars of users and user groups that have this role for this asset. ◦ "createdOn": The date when the asset was created. ◦ "createdBy": The name of the user who created the asset. ◦ "lastModifiedOn": The date and time when the asset was last modified. ◦ "lastModifiedBy": The name of the user who last modified the asset. ◦ "stringAttribute_<ID>": The overlay is a string attribute type with the ID that you type here. Example: "stringAttribute_00000000-0000-0000-0000-000000000001" ◦ "dateAttribute_<ID>": The overlay is a date attribute with the ID that you type here. ◦ "numericAttribute_<ID>": The overlay is a date attribute with the ID that you type here. ◦ "booleanAttribute_<ID>": The overlay is a boolean attribute with the ID that you type here. ◦ "singleValueListAttribute_<ID>": The overlay is a single-selection attribute with the ID that you type here.

JSON syntax	Description
	◦ "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

`"type": "00000000-0000-0000-0000-000000007038"`	• 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.

`"roleDirection": true, false`	• 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:
	  • `true`: The edge is traversed from head to tail.
	  • `false`: The edge is traversed from tail to head.

`"style": "arrow", "boxed", "boxing"`	• Determines how edges are displayed.
	• This setting is optional.
	• You can pick one of the following values:
	  • `"arrow"`: The edge is represented by an arrow. The arrow starts at the 'from' node and ends at the 'to' node. This is the default setting.
	  • `"boxing"`: The edge is represented as a 'from' asset that boxes one or more 'to' assets. In other words, a head asset contains one or more tail assets.
	  • `"boxed"`: The edge is represented as a 'from' asset that is boxed by a 'to' asset. In other words, a tail asset contains one or more head assets.

`"label": "Groups"`	• Determines the name that is displayed on edges in the diagram. • 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 `"roleDirection"` is *true*, Collibra uses the role, if it is *false*, it uses the co-role.

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

> **Note** The images in this topic show the old diagram user interface. You can still refer to them to understand the concept.

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 checks the full syntax of your JavaScript Object Notation (JSON) as you type. If the JSON code is incorrect, Collibra detects this immediately and the **Save** button remains inactive.

  For example:
  - If you omit the required comma between two key-value pairs, Collibra shows an error message, and highlights the offending line.
  - If you make a typo in a value, Collibra shows an error and displays the allowed values.

- JSON is a case-sensitive language. This means that you must use the exact key-value pairs as they are described in this guide.
- The code must contain a **nodes** section and an **edges** section. The order of the sections is irrelevant. Layout to improve readability (spaces, tabs, empty lines), is irrelevant.
- Collibra checks if each resource ID (conceptTypeId, binaryFactTypeId, attributetypeID) that you specified, exists in the operating model. If a resource ID does not exist, it is removed from the diagram view and a warning and an error are displayed. Collibra does not save your view unless you correct the error.

- Collibra checks if the diagram view is a connected graph.
  A diagram view is a connected graph when every node can be reached from any other node by traversing the edges. If the diagram is not connected, a warning is displayed. Collibra does not save your view unless you correct the error.
- You can create key-value pairs with a key name that is not listed in this guide. These key-value pairs are allowed in the code but are ignored. As such, typos in the key names do not trigger Collibra to show a warning or error. You can use this to your advantage, for example, to add comments to the JSON view.

Pin a diagram view

You can pin a diagram view in the dropdown of the view selection field:

- While creating it.
- From the diagram editor.
- From the diagram view list.

Pin a view from the diagram editor

1. Open the diagram view.
2. Click .
   » The **Share view** dialog box appears.
3. Select the **Pin** toggle.
4. Click **Save**.

Pin a view from the diagram view list

1. Open the 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 the diagram view.
2. Click .
   » The **Share view** dialog box appears.
3. Clear the **Pin** toggle.
4. Click **Save**.

Unpin a view in the diagram view list

1. Open the 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 the diagram view.
2. Click <.
   » The **Share view** dialog box appears.
3. Select the **Default** checkbox.
4. Click **Save**.

Share a diagram view

You can share a diagram view with others or make it private. Users with whom the diagram view is shared can only edit the diagram view if they have the **Manage shared Views, Dashboard and Search Filter** global permission.

> **Note** By default, diagram views are public.

Steps

1. Open the 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** 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** You can enable or disable all filters in the diagram toolbar.

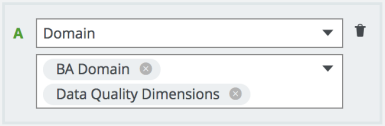
Steps

1. Open the diagram view.
2. Click ⚙.
   » The **General Properties** section appears.
3. Select a node in the diagram.
   » The **Node Properties** section appears.

4. Go to the **Filters** section.
5. Do one of the following:

Action	Description
Filtering by business qualifier	**Collibra version**: 2021.01 **Action**: 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.
	Collibra version: 2021.02 or newer **Action**: 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 available only 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 *Domain IN (BA Domain, Data Quality Dimensions)* ◦ 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. Click **Save**.

Configure advanced filter expressions

To configure advanced filter expressions for a diagram, you need to complete the configuration via the diagram view JSON text editor.

In this topic

Steps

1. Add a simple filter, as described in Work with filters in a diagram view.
2. Select the **Text** option, which is shown below the view name.
3. Find the node on which you created the simple filter, and then 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 don't work in advanced filter expressions for diagrams.

   Operators for attribute kinds "date" and "number"
   - IN
   - NOT_IN
   - LESS
   - LESS_OR_EQUALS
   - GREATER
   - GREATER_OR_EQUALS
4. 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, note that all subtypes are included, meaning they pass the filter along with the specified asset type.

```
{
 "layoutRegion": "flow",
 "id": "Report Attribute",
 "type": {
  "id": "00000000-0000-0000-0000-000000031027"
 },
 "filters": [
  {
   "operator": "IN",
   "values": [
    "00000000-0000-0000-0000-000000031027"
   ],
   "field": "assetType"
  }
 ]
},
```

Example of a node with a filter on a data attribute

You need 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, go to:

- 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 out-of-the-box relation type:

Head	Role	Co-role	Tail
Business Qualifier	qualifies	is qualified by	Asset

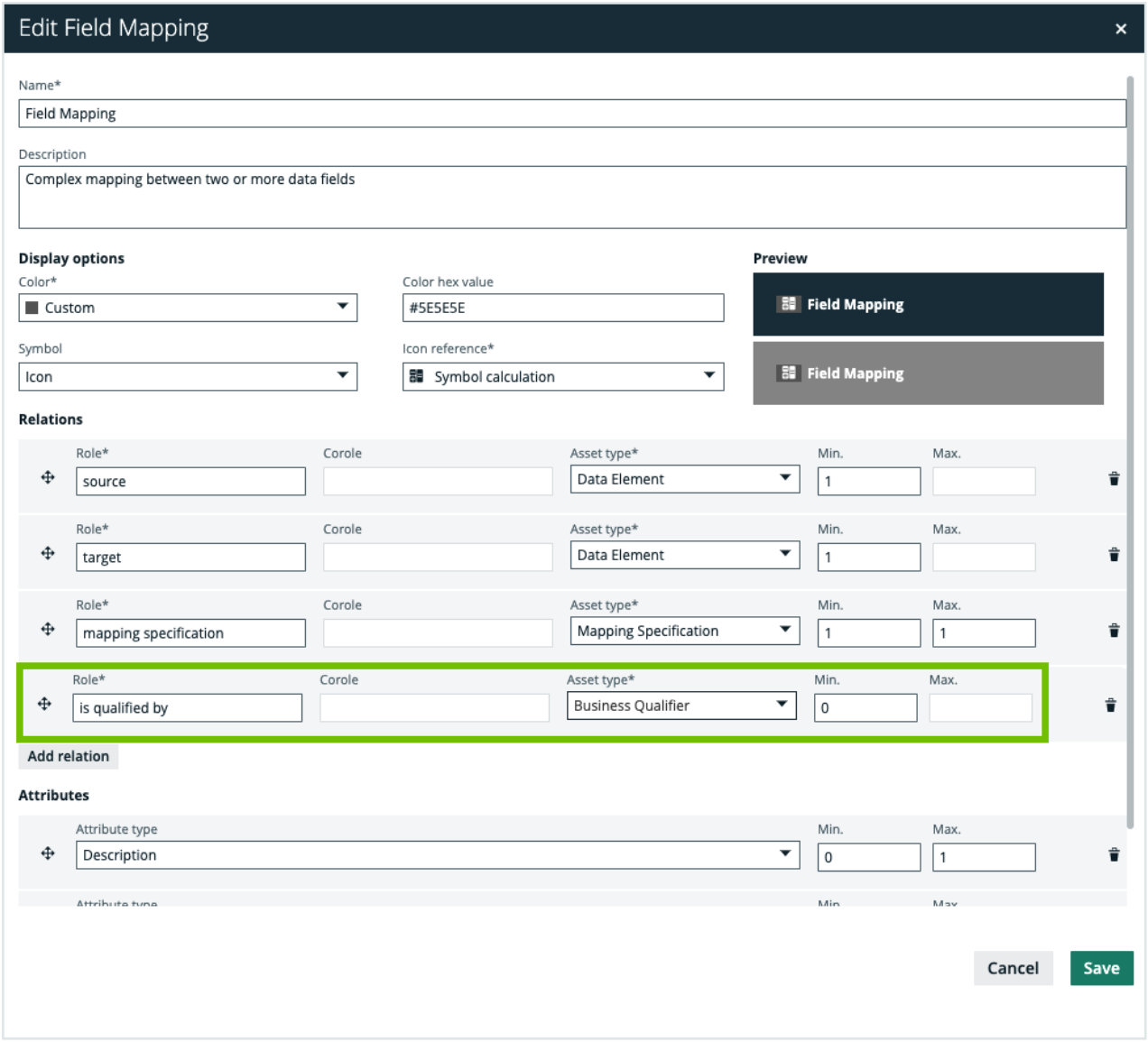
Column assets

Column assets relate to Business Attribute assets that are related to Business Qualifier assets. The out-of-the-box relation types are the following:

Head	Role	Co-role	Tail
Business Qualifier	qualifies	is qualified by	Data Attribute
Data Attribute	groups	is grouped by	Column

Complex relations

When configuring business qualifier filtering for complex relations, you need to edit the relevant complex relation type and add a relation leg pertaining to the Business Qualifier asset.



Terminology

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

Term	Description

Business qualifier diagram	A diagram for which all of the following conditions are met:
	• 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 perform 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.

Example

In this example, we work with the commonly used Field Mapping complex relation type that comes out of the box with Collibra Platform. 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 toolbar, click → **Settings**.
      » The Settings page opens.
   b. In the **Operating Model** section, click **Complex relation types**.
   c. In the table, find the **Field Mapping** row, and then click ✎ at the end of the row.
      » The **Edit Field Mapping** dialog box appears.
   d. In the **Relations** section, click **Add Relation**.
   e. Enter the required information.
      - **Role:** We recommend entering the value *is qualified by*, but you can enter any text that suits your needs.
      - **Asset Type:** Business Qualifier.

      > **Tip** Retain the default values in the remaining fields.

   f. Click **Save**.
2. If no appropriate Business Qualifier asset exists, 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
Asset type	The asset type of the asset that you are creating: *Business Qualifier*
Domain	The domain to which the new assets will belong. You can create only an asset type in any domain of a domain type that is assigned to a selected asset type.
Asset name	The name of the new Business Qualifier asset: *BQ1*

e. Click **Create**.

» A message stating that one or more assets are created appears.

3. Specify the Business Qualifier asset in the complex relation type:
   a. Open one of the relevant leg assets, for example, a Column asset.
   b. Ensure that the **Show empty values** option is selected.
   c. In the **Field Mapping** section, hover your pointer over any asset, and then click ✎.

   » The **Edit Field Mapping** dialog box appears. Notice that the **Is Qualified By** relation leg is empty.
   d. In the **Is Qualified By** field, enter the Business Qualifier asset, for example, *BQ1*.
   e. Optional: In the **Description** field, enter a description of the Field Mapping complex relation.
   f. Click **Save**.
4. Add a relation between a Column asset and the Business Qualifier asset:
   a. Open one of the relevant Column assets.
   b. Ensure that the **Show empty values** option is selected.
   c. Click the **Is Qualified By** field.

   » The **Business Qualified** drop-down list box appears.
   d. Select the name of the Business Qualifier asset: **BQ1**
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. Click the **Diagram** tab.

   » The diagram is shown in the default diagram view.
   c. If needed, in the **View** field, 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 follow 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	Select the **Filtering by business qualifier** checkbox.
2021.02 or newer	In the **Filtering by business qualifier** drop-down list box, select **Mandatory**, so that the diagram will contain only the 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 list, and then select **BQ1**.

Delete a diagram view

You can delete a diagram view.

Steps

1. Open an asset page.
2. Click the **Diagram** tab.
   » The diagram is shown in the default diagram view.
3. Select the diagram view that you want to delete from the **View** drop-down list.
4. In the View bar menu, 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.

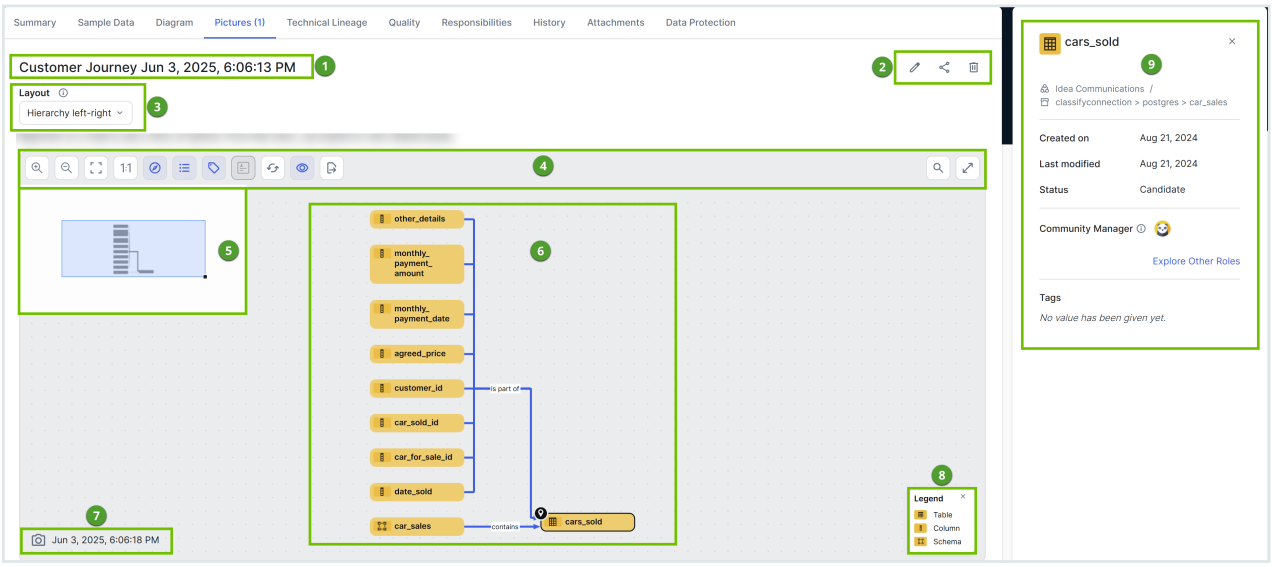
Pictures are an easy way to save a diagram after you configured it. You can then reuse it later.

Available actions

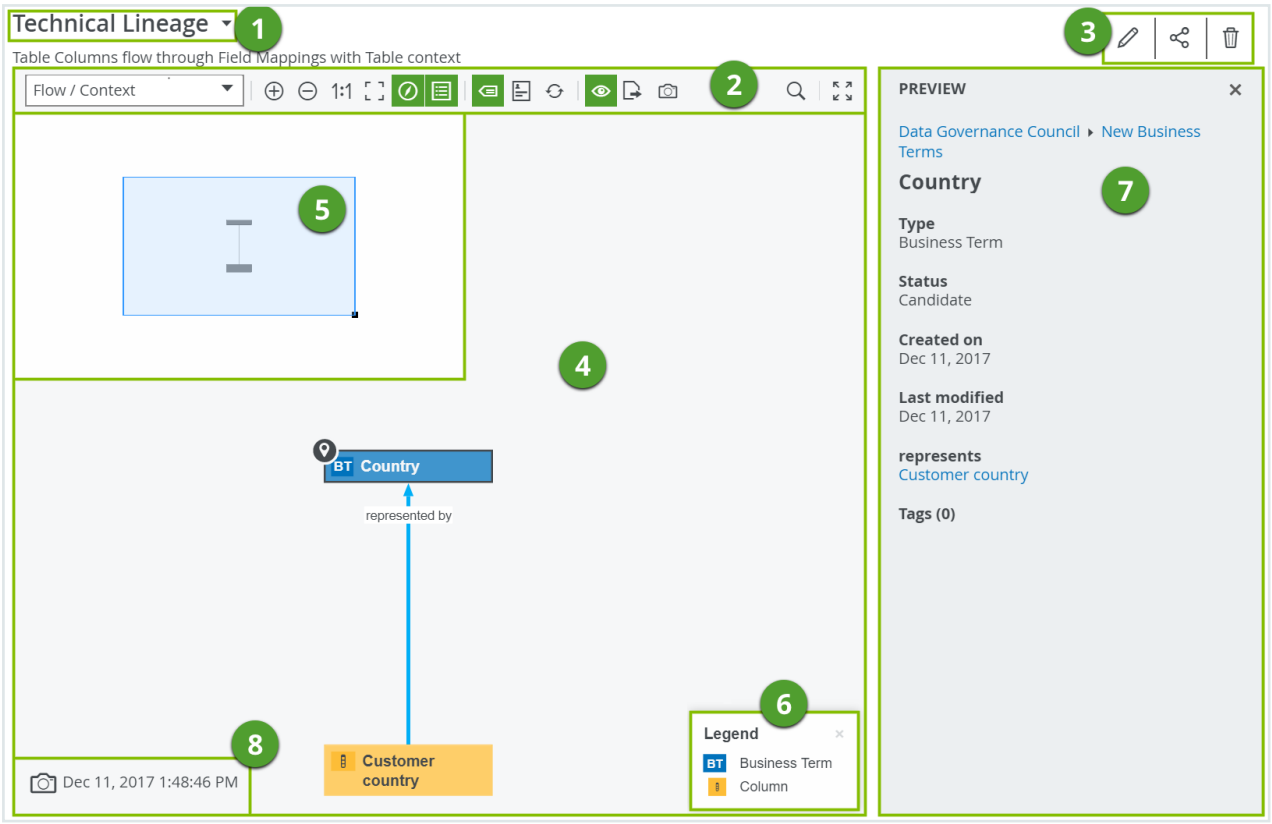
- Create a picture.
- Open the picture.
- Edit a picture.
    a. Select a layout.
    b. Zoom in or out.
    c. Expand or collapse nodes.
    d. Trace a path between nodes.
    e. Move nodes, enable or disable labels, the legend, and so on.
- Export a picture.
- Delete a picture.

Picture editor

The picture editor allows you to view and edit diagram pictures.



Number	Description
1	Name of the picture.
2	• **(Edit name and description):** To edit the name and description of the picture. • **(Share picture):** To share the picture. • **(Delete picture):** To delete the picture.
3	Layout that determines the location of nodes and edges in the picture.
4	Toolbar to work in the picture.
5	Overview with a box to zoom and navigate the picture. The overview appears when you click (**Overview**). **Tip** This is useful when the picture is too large to fit the screen. You can move the box anywhere in the diagram.
6	Actual depiction of the traceability of the current asset, based on to the selected picture.
7	Date and time when the picture was created.
8	Legend to explain color codes and symbols of the items in the picture. You can move the legend box 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 an item in the legend to select all occurrences of that type in the picture. You can use this to all nodes of the same type.
9	Preview pane with information about the selected node in the picture.

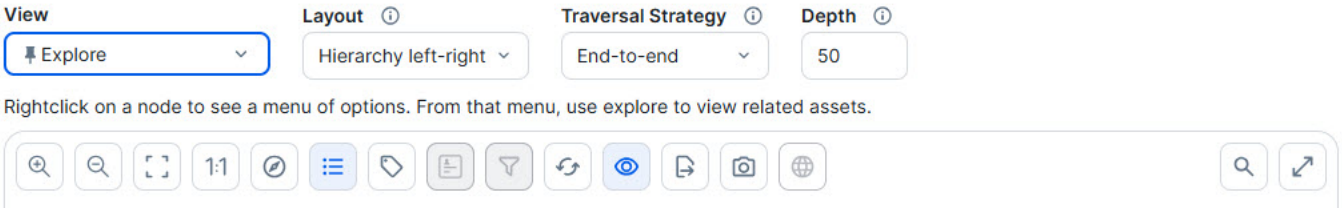


No	Name	Description
1	Picture name	Name of the picture.
2	Picture toolbar	Toolbar to work in the picture.
3	View bar menu	Icons to edit the picture's name, share it or delete it.
4	Picture	Actual depiction of the traceability of the current asset, according to the picture you opened.
5	Overview ( )	Box to zoom and navigate a picture that is too large to fit the screen. You can move it anywhere in the diagram.

No	Name	Description
6	Legend	Legend to explain color codes and symbols of the items in the picture. You can move the legend box 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 an item in the legend to select all occurrences of that type in the picture. You can use this to all nodes of the same type.
7	Preview pane	Preview pane with information about the selected node.
8	Time stamp	Date and time when 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
Flow / Context	Layout	Select a layout. The layout determines the location of nodes and edges, but does not change which nodes and edges are shown.
	Zoom in	Zoom in on the picture.
	Zoom out	Zoom out from the picture.
	Zoom to readable size	Zoom the picture to a size that is readable.
	Shrink to fit	Zoom the picture to a size that fits the screen.

Button	Name	Description
	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 box containing the explanation of the nodes. Legend to explain color codes and symbols of the items in the picture. You can move the legend box 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 an item in the legend to select all occurrences of that type in the picture. You can use this to all nodes of the same type.
	Preview	Show or hide the preview pane 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. If Collibra AI is enabled, a description is automatically generated for the picture.

Button	Name	Description
	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	Name to identify the picture. The default name is the name of the diagram view and a date stamp.
Description	Description for the picture. If Collibra AI is enabled, then it automatically creates the description.
Sharing options	Options that determine who can see this picture.
Public	Everyone can see this picture.
Private	No one can see this picture.

Field	Description
Share with specific roles, groups & users	Only the roles, groups, or users you select can see this picture.
Roles	Only the roles you select can see this picture.
Groups	Only the groups you select can see this picture.
Users	Only the users you select can see this picture.
Promote	Options that determine how and where this picture is shown.
Pin	Pins this picture. Pinned pictures appear in the View drop-down list.

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 **View** drop-down list:

- while creating it.
- from the picture editor.

Pin a view from the picture editor

1. Open the picture.
2. Click .
   » The **Share picture** dialog box appears.
3. Select the **Pin** toggle.
4. Click **Save**.

Unpin a picture

You can unpin a picture to remove it from the **View** drop-down list.

Unpin a picture in the picture editor

1. Open the diagram view.
2. Click .
   » The **Share view** dialog box appears.
3. Clear the **Pin** toggle.
4. Click **Save**.

Share a picture

You can share a picture with other users or keep it private.

Steps

1. Open the 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** drop-down list.

4. Click **Save**.

Open a picture

You can open a picture of a diagram of an asset to visualize its relations.

Steps

1. Open the asset.
2. Click the **Pictures** tab.
3. In the table, click the name of the picture.
   » The picture editor is shown.

Find node in a picture

You can search a picture for a specific node.

Steps

1. Open the 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 the 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. If Collibra AI is enabled, then it automatically creates the description.

4. Click **Save**.

Edit a picture

You can edit a picture to represent the nodes as clearly as possible.

Steps

1. Open the 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 the picture.
2. In the **Layout** field, select the required layout.
3. On the toolbar, in the layout drop-down list, select the required layout.

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.

Layout	Description
Hierarchy left - right	Nodes and edges are shown in a flow, mostly from left to right. This is the default layout.

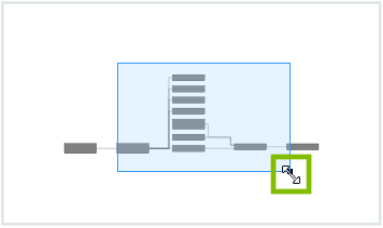
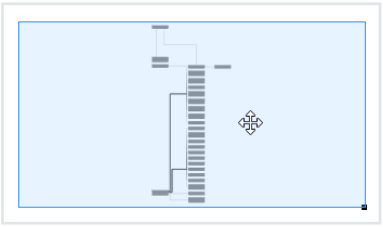
Layout	Description
Flow / Context	Nodes and edges are shown in a flow and a context region. In the flow region, nodes are shown mostly from left to right. The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the **Context** checkbox in the Node Properties section. If there are no nodes in the context region, the **Flow / Context** 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 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 aren't 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 aren't supported in the **Radial** layout. This has the same consequences as those 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 the picture.
2. On the toolbar, click the ⊘ to show or hide the overview inset.
   » The overview inset is shown over the picture. You can still see the picture underneath.
3. Do one of the following:

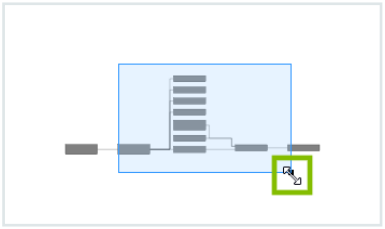
Action	Descriptions
Zoom in or out by scaling:	a. Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow. b. Click and hold, then drag the pointer to zoom in or out. 
Navigate in the picture:	a. Move your mouse pointer over the blue square. The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

Strategy	Description
Zoom in or out with buttons.	On the toolbar, click (Zoom in) or (Zoom out) as needed.
Zoom in or out by scrolling with your mouse.	Move your mouse pointer to anywhere on the picture and use your mouse wheel to zoom. The zoom is centered at the mouse pointer.
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 the picture.
2. Select one, two, or more nodes in the picture:

On a macOS system	On a Windows system
Click the first one and then hold down `cmd` while clicking on the next ones.	Click the first one and then hold down `ctrl` while clicking on the next ones.

3. Do one of the following:
   - To keep the whole picture and highlight the path, click ⋮ for 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, click ⋮ for 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 the picture.
2. Click a node and hold down your mouse button. To select multiple nodes, do the same but select multiple nodes.

On a macOS system	On a Windows system
Click the first one and then hold down `cmd` while clicking on the next ones.	Click the first one and then hold down `ctrl` while clicking on the next ones.

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

> **Note** You cannot save the these changes, but you can create a picture or export the picture with these changes.

Expand or collapse picture nodes

If a node has an outgoing edge with the boxing style, it becomes a boxing node. Your diagram view determines whether boxing nodes are expanded or collapsed by default. Your diagram view can also lock collapsed nodes, which means that you cannot expand the collapsed boxing node.

Steps

1. Open the picture.
2. Do one of the following:
   - Select a node.
   - Select multiple nodes by holding down the select key and clicking nodes.

On a macOS system	On a Windows system
Click the first one and then hold down `cmd` while clicking on the next ones.	Click the first one and then hold down `ctrl` while clicking on the next ones.

   - In the legend, click the asset type or complex relation type that you want to expand or collapse. You have now selected all nodes of this type.
3. Do one of the following:
   - In the node, click + or −.
   - In the context menu of a node, click **Expand/Collapse selected**.

Export a picture

You can export a picture to a PDF or SVG file.

Steps

1. Open the 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. Click the **Pictures** tab.
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 the 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?

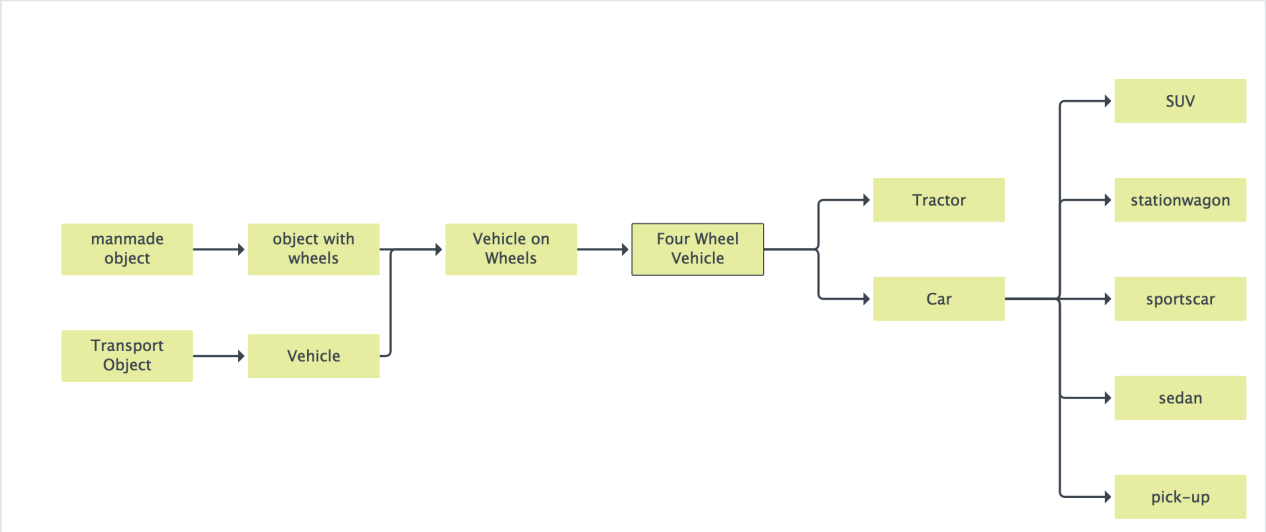
Collibra Platform only adds relevant relations and nodes to the diagram by using a specific traversal strategy. The traversal strategy is the logic that describes which relations and assets have to be included in the diagram. To understand the traversal strategy, it is important that you know the difference between incoming and outgoing edges and between flow and context nodes.

From a start node, Collibra adds all the relations (both incoming and outgoing) and the relation's node whose relation type is mentioned in the view.

When traversing further downstream from a node that is downstream from the start node, Collibra adds all the relations and nodes that are downstream, but not the ones that are upstream.

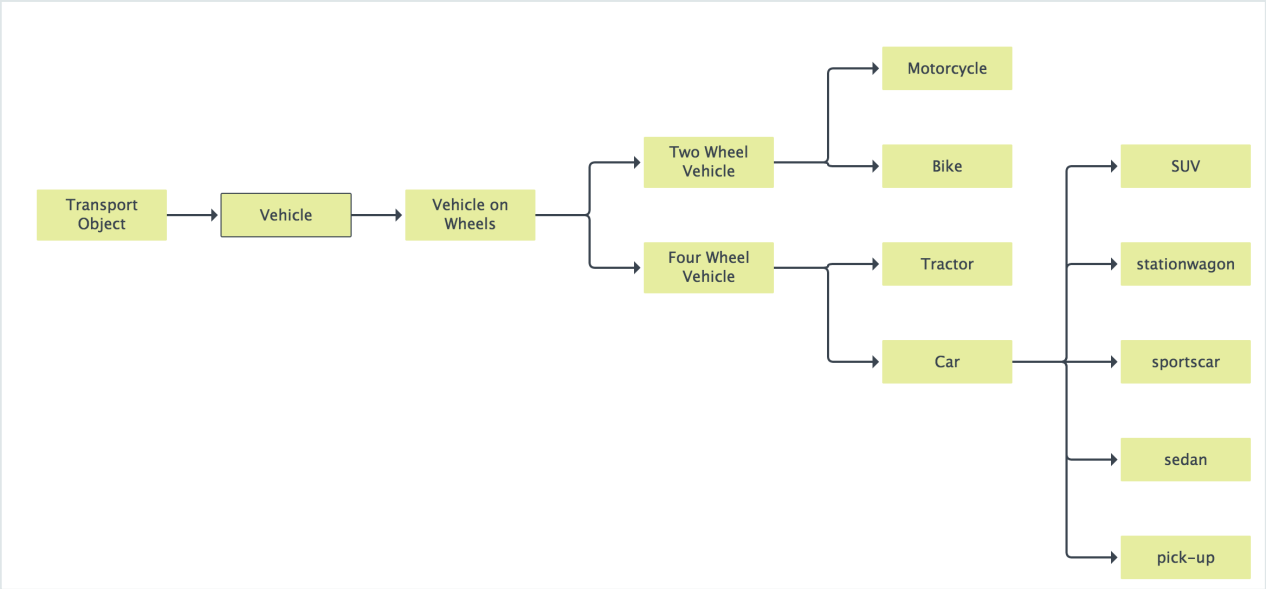
When traversing further upstream, Collibra adds all relations and nodes that are upstream of that node, but not the ones that are downstream.

For the following example diagram, the view contains the **Groups** relation type and **Four Wheel Vehicle** is the start node.



Any downstream relation of an upstream node (**Vehicle**, **Vehicle on Wheels**, ...) is irrelevant for the diagram and thus not shown. The same traversal strategy is applied to any node that is on the upstream side of a node that is downstream of the start node.

If you jump to **Vehicle**, you see that the diagram has changed for the **Vehicle on Wheels** node. This node no longer has the upstream relation to object with wheels, but the relation to **Two Wheel Vehicle** is added.

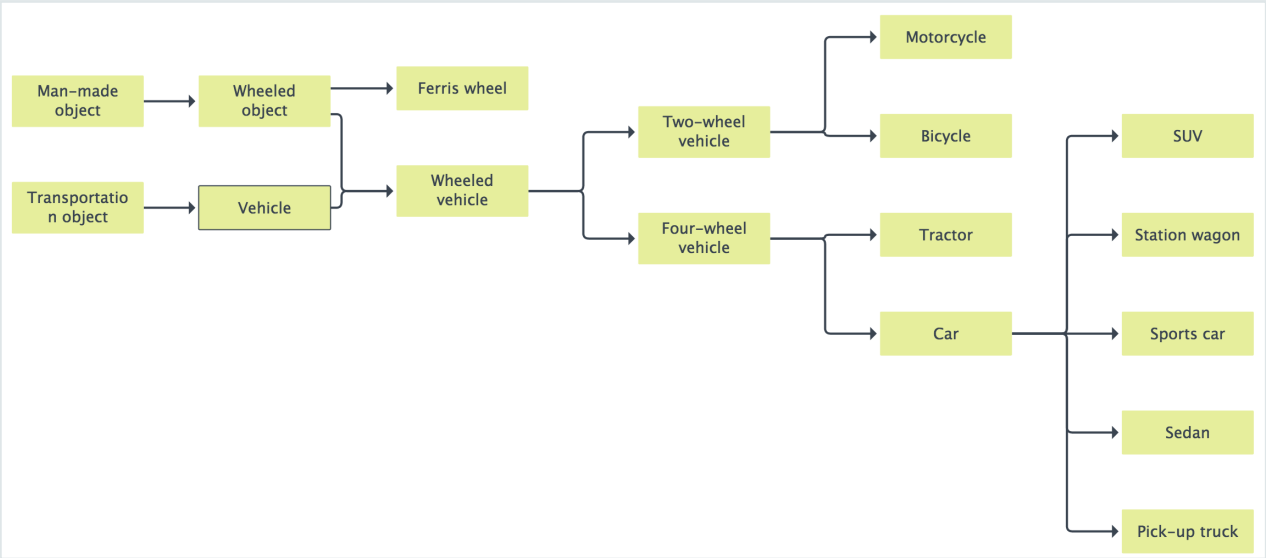


Can I set a different traversal strategy for my diagram view?

All examples in this chapter, unless mentioned otherwise, use the default traversal strategy. We call this the "directed" traversal strategy. It can be paraphrased as "keep on walking and don't look back".

You can also switch the traversal strategy to complete graph, by always looking in all directions. Depending on your data, this could obviously lead to a much bigger diagram, with many more nodes and edges.

Going back to the example given in the FAQ Which nodes and edges are included in a diagram?, and applying that strategy results in the following diagram:



Note the new upstream branch of **Wheeled vehicle**, which is downstream from the start node. An upstream node in that branch, **Wheeled object**, has a downstream branch: **Ferris wheel**.

You can switch the traversal strategy in the JSON form of the diagram view by adding the following key-value pair to the top-level diagram section.

`"visitStrategy": "completeGraph".`

For more information, see Diagram views.

When editing a diagram view, I can assign each node to either the 'Flow' or 'Context' layout region. What does that do?

> **Note** The images in this topic show the old diagram user interface. You can still refer to them to understand the concept.

The default traversal strategy (end-to-end) 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 end-to-end 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.

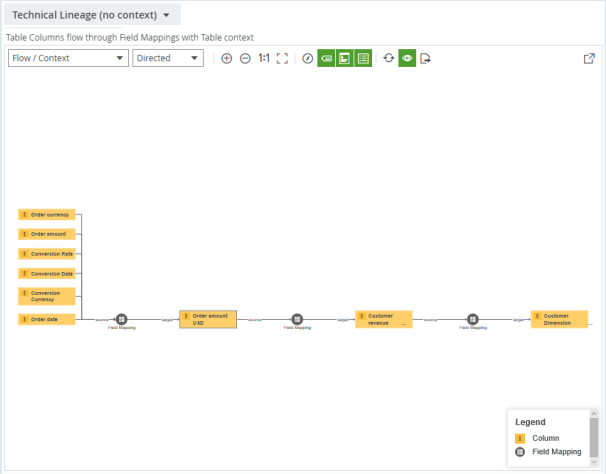
When the flow depicts transformations of table columns, the tables that contain the columns, and the business terms that are related to them, provide context to the columns. The context nodes are always relevant, regardless of whether the column was encountered while going upstream or downstream. The 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.

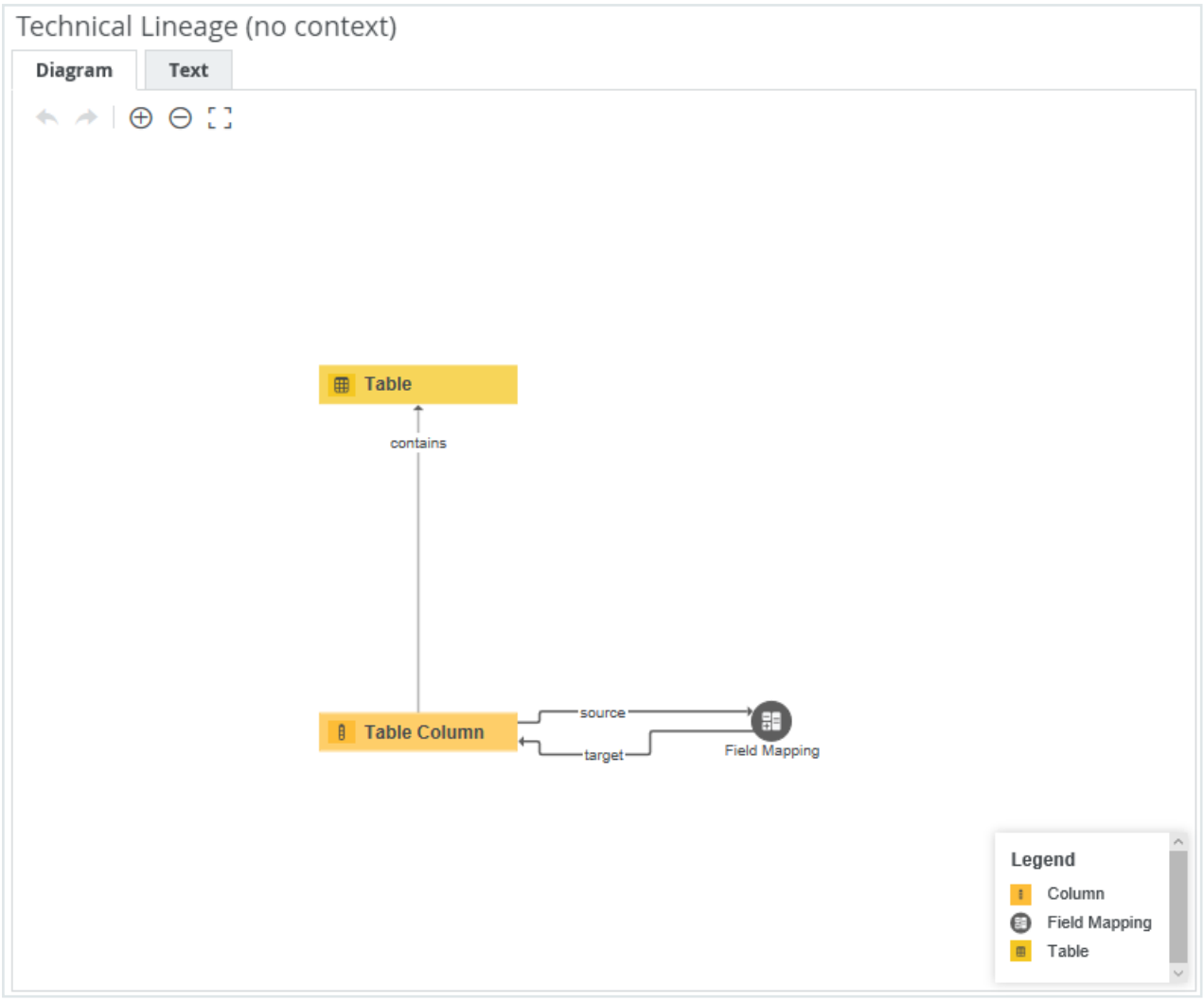
An example diagram for this view is below:



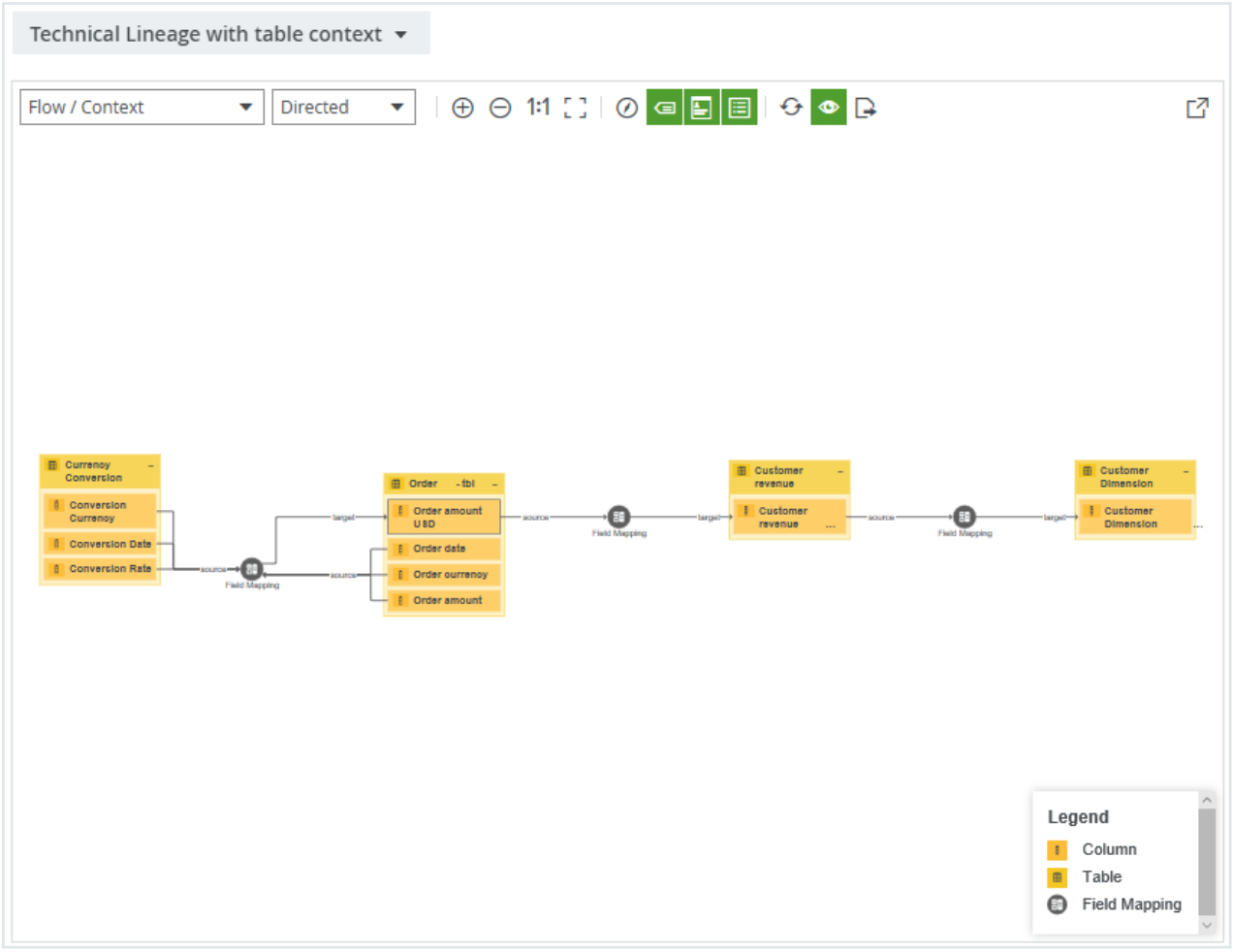
We started from the **Order amount USD** asset.

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 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 the Collibra settings. However, you need a role that can access the Collibra 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

Collibra is made up of resources such as assets, domains, and communities, which have types and characteristics assigned. When you organize them all together, you get an operating model.

There are a few places within Collibra that represent your organization's operating model. One of them is the navigation browser, which is organized by community, with the subcommunities and domains contained underneath. Another is an asset's diagram, which shows how each resource is related to the rest.

This section describes the structure of the Collibra data model, how data is related, and how you can organize your data.

Collibra building blocks

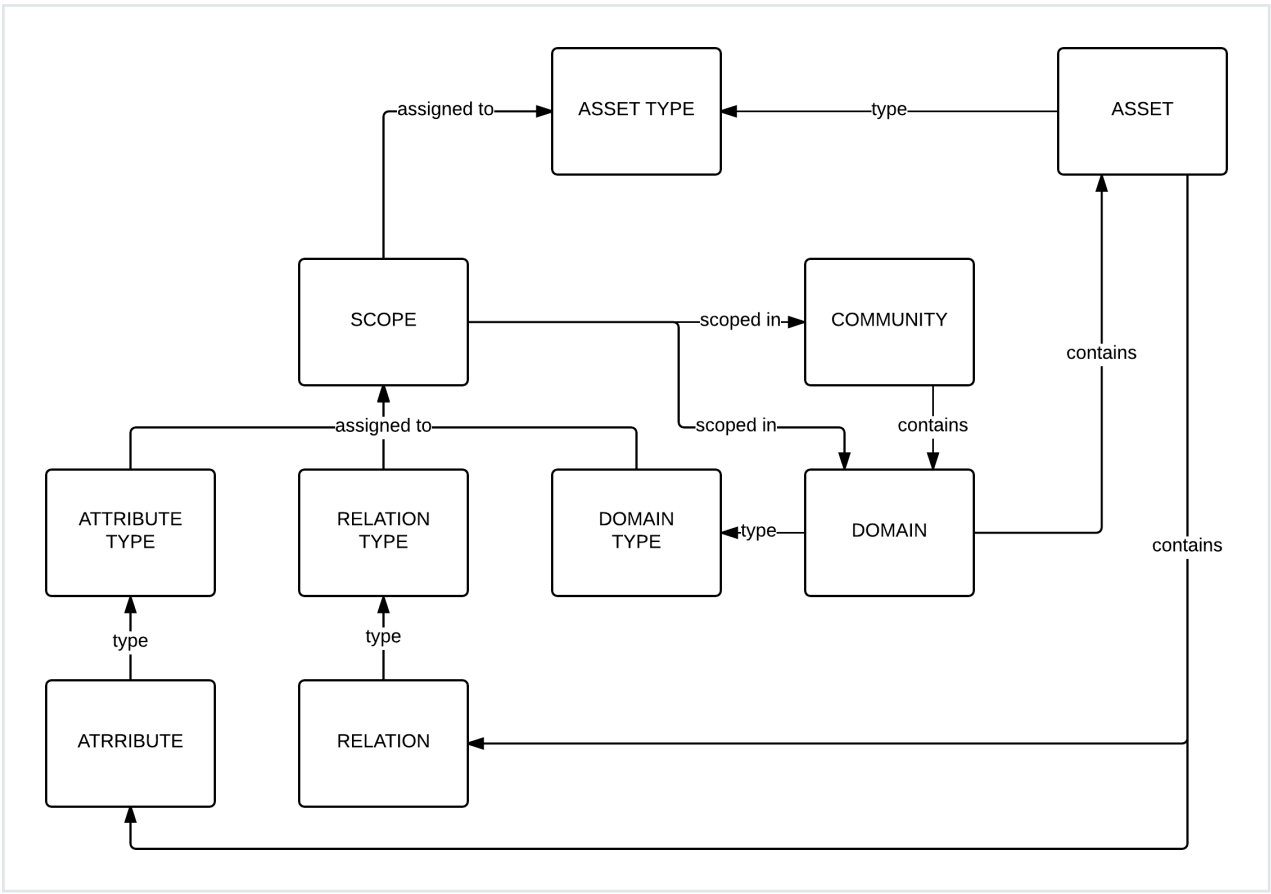
To create an unbeatable data governance model, it's important to understand the basic building blocks of Collibra Platform and how they are related.

The following table lists Collibra concepts and explains how Collibra captures information.

Concept	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	A domain type defines the semantics of a domain, similar to a template. It defines which assets types users can create in the domain.
Domain	A domain is a logical grouping of assets and belongs to only one community. It has only one domain type that specifies which asset types can be created in the domain. A domain has a unique name within its community.
Scope	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	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.
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.

Concept	Description
Attribute type	An attribute type defines the class of information that an attribute contains. It is assigned to an asset type through a scope.
Attribute	An attribute is a specific piece of information that captures information about an asset. One asset can contain many attributes.
Relation type	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	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	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.


assigned to
ASSET TYPE
type
ASSET
SCOPE
scoped in
COMMUNITY
contains
assigned to
scoped in
contains
ATTRIBUTE TYPE
RELATION TYPE
DOMAIN TYPE
type
DOMAIN
contains
type
type
ATRRIBUTE
RELATION

Communities

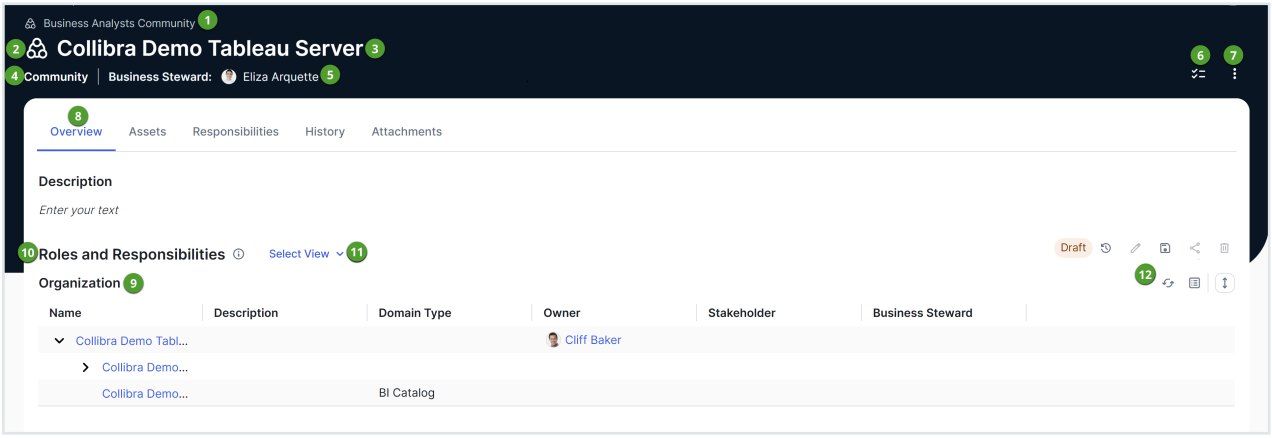
A community is a grouping of other communities (subcommunities) and domains. It often corresponds to the functional divisions in a company and works best if it is aligned with a company's governance organization.

Each community can contain any number of subcommunities. You can recognize a community by the icon.

In this topic

Community page overview

A community page provides a complete overview of all information related to the community.



Number	Section	Description
1	Breadcrumbs	Navigation path of the current community.
2	Community representation	Icon of the community.
3	Community name	Name of the community.

Number	Section	Description
4	Type of resource	Community.
5	Business Steward	Names of up to three Business Stewards of the community. You can view all Business Stewards on the **Responsibilities** tab.
6	(Tasks)	Open tasks for the community.
7	⋮ (More)	Options to edit, move, and delete the community.
8	Tab bar	Horizontal tabs that allow you to navigate to specific sections on the community page. **Show more information** • **Overview:** Description and organization of the community. This tab also contains the comments added to the community, unless the new commenting experience is enabled. • **Assets:** Assets within the community. • **Responsibilities:** Users or user groups assigned to a resource role for the community. • **History:** Community's life cycle, from its creation to the most recent action. • **Attachments:** Images, reference material, or other files relevant to the community.
9	Organization	Current community and all the subcommunities and domains within it.
10	Community view	Name of the selected view for the community's organization.
11	Select View	Option to select a different view and also see all available views for the organization.

Number	Section	Description
12	Toolbar	Options to manage the view. The text **Draft** indicates that you have edited the view. discards the draft and replaces it with the last published version of the view. edits the view's name and description. saves the current view or creates its copy. shares the view. deletes the view. refreshes the table. customizes the columns. You can rename the column headings, show or hide columns, and define the order in which the columns are shown in the table. shows the full text (wraps) or trims the text in all the cells of the table.

Open a community page

1. On the main toolbar, click .
   » The browse pane appears.
2. On the **Organization** tab, click the community.

> **Tip** You can search for the community using the search box within the browse pane.

Related topics

Manage a community

Manage a community

A community is a grouping of other communities (subcommunities) and domains. It often corresponds to the functional divisions in a company and works best if it is aligned with a company's governance organization.

In this topic

Out-of-the-box communities

Collibra uses some out-of-the-box communities that you can edit but can't delete. If required, you can hide them by restricting their view permissions.

Community name	Community ID
Business Analysts Community	00000000-0000-0000-0001-000100000001
Schemas	00000000-0000-0000-0001-000100000002
Data Governance Council	Randomly generated ID

Permissions

The following table lists the resource permissions required to manage a community.

> **Note** If you have the **Resources** > **Manage all resources** global permission, you can perform all the actions listed in the table, even without the specific resource permissions.

Action	Resource permission
Create a community	Community > Add
Edit a community name	Community > Update

Action	Resource permission
Move a community to a parent community	• Community > Update (on the main community) • Community > Add (on the parent community)
Delete a community	Community > Remove

Create a community

You can create your own community at the top level of your organization or under another community (as a subcommunity).

Prerequisites

You have a resource role that has the **Community > Add** resource permission.

Steps

1. On the main toolbar, click ＋.
   » The **Create** dialog box appears.
2. Click the **Organization** tab.
3. In the **Community** section, select **Community**.
   » The **Create Community** dialog box appears.

4. Enter the required information.

Field	Description
Community	Optional parent community under which the new community will be located. **Tip** ◦ If you are currently on a community page, this field shows that community by default. ◦ If you select a community in this field, the new community is created (as a subcommunity) under the selected community. ◦ If you leave this field empty, the new community is created (as a community) at the top level of your organization.
Community name	Name of the new community. **Tip** ◦ You can create multiple communities together. To do so, enter the first name, click the drop-down or press `Enter`, and then enter the next name. ◦ Community names must be globally unique. You can't create identically named communities even if their parent communities are different.

5. Click **Create**.

Edit a community name

You can change the name of a community.

Prerequisites

You have a resource role that has the **Community > Update** resource permission.

Steps

1. Open the community.
2. Click ⋮ → **Edit**.
   » The **Edit Community** dialog box appears.

3. In the **Name** field, enter the new name for the community.

   > **Note** Community names must be globally unique.

4. Click **Save**.

> **Tip** You can also edit the community name via the organization table on the **Overview** tab of the community page. To do so, double-click the **Name** cell of the community, enter the new name, and then click ✓.

Move a community

If a community has a parent community, you can change its parent community by moving the community to a different parent community.

If a community doesn't have a parent community (meaning it is a top-level community), you can move the community to a parent community to make it a subcommunity.

> **Note** If a community is moved to a parent community in another scope, the assignment of the community's assets may change. If moving a community causes a conflict of scopes, the conflicting resources are removed from their original scope.

Prerequisites

- You have a resource role that has the **Community > Update** resource permission on the community you want to move.
- You have a resource role that has the **Community > Add** resource permission on the parent community to which you want to move the community.

Steps

1. Open the community.
2. Click ⋮ → **Move**.
   » The **Move Community** dialog box appears.

3. In the **Name** field, enter the name of the new parent community.

   > **Note** Community names must be unique within their parent community. If you try to move the community to a parent community that already contains a community with the same name, an error message appears after you click **Save**.

4. Click **Save**.

Delete a community

> **Warning** Deleting a community also deletes its views, domains, and assets.

You can delete a community if you no longer need it.

Prerequisites

You have a resource role that has the **Community > Remove** resource permission.

Steps

1. Open the community.
2. Click ⋮ → **Delete**.

Related topics

- Add domains to a community by creating a new domain or moving an existing domain.
- Add a responsibility to assign a resource role to a user or group for a community

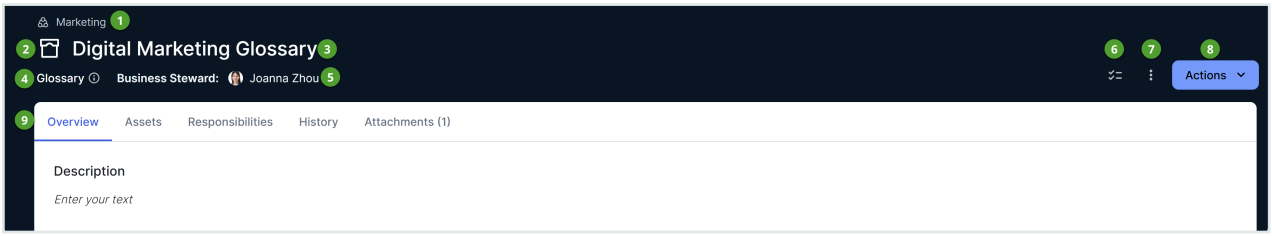
Domains

A domain is a logical grouping of assets. It always has a domain type and belongs to only one community. You can recognize a domain by the icon.

In this topic

Domain page overview

A domain page provides a complete overview of all information related to the domain.



Number	Section	Description
1	Breadcrumbs	Navigation path of the current domain.
2	Domain representation	Icon of the domain.
3	Domain name	Name of the domain.
4	Type of resource	Domain.
5	Business Steward	Names of up to three Business Stewards of the domain. You can view all Business Stewards on the **Responsibilities** tab.
6	(Tasks)	Open tasks for the domain.
7	⋮ (More)	Options to edit, move, and delete the domain.
8	Actions	Actions you can perform on the domain. They are preconfigured for the domain type, and they depend on workflow configuration and your permissions.

Number	Section	Description
9	Tab bar	Horizontal tabs that allow you to navigate to specific sections on the domain page. **Show more information** • **Overview:** Description of the domain. This tab also contains the comments added to the domain, unless the new commenting experience is enabled. • **Assets:** Assets within the domain. • **Responsibilities:** Users or user groups assigned to a resource role for the domain. • **History:** Domain's life cycle, from its creation to the most recent action. • **Attachments:** Images, reference material, or other files relevant to the domain.

Open a domain page

1. On the main toolbar, click .
   » The browse pane appears.
2. On the **Organization** tab, expand the community of the domain, and then click the domain.

> **Tip** You can search for the domain using the search box within the browse pane.

Related topics

Manage a domain

Manage a domain

A domain is a logical grouping of assets. It always has a domain type and belongs to only one community.

In this topic

Out-of-the-box domains

Collibra uses some out-of-the-box domains that you can edit but can't delete. If required, you can hide them by restricting their view permissions.

Domain name	Domain type	Domain ID	Domain URL
New Data Sets	Data Usage Registry	00000000-0000-0000-0001-000200000001	<your environment>/domain/00000000-0000-0000-0001-000200000001
Data Quality Dimensions	Business Asset Domain	00000000-0000-0000-0000-000000006019	<your environment>/domain/00000000-0000-0000-0000-000000006019
Issue Classification	Issue Classification	00000000-0000-0000-0000-000000006011	<your environment>/domain/00000000-0000-0000-0000-000000006011
New Applications	Technology Asset Domain	00000000-0000-0000-0000-000000006018	<your environment>/domain/00000000-0000-0000-0000-000000006018
New Business Terms	Glossary	00000000-0000-0000-0000-000000006013	<your environment>/domain/00000000-0000-0000-0000-000000006013
New Data Assets	Data Asset Domain	00000000-0000-0000-0000-000000006015	<your environment>/domain/00000000-0000-0000-0000-000000006015
New Policies & Business Rules	Governance Asset Domain	00000000-0000-0000-0000-000000006016	<your environment>/domain/00000000-0000-0000-0000-000000006016
New Processes	Business Asset Domain	00000000-0000-0000-0000-000000006017	domain/00000000-0000-0000-0000-000000006017
New Reference Data	Codelist	00000000-0000-0000-0000-000000006014	<your environment>/domain/00000000-0000-0000-0000-000000006014

Permissions

The following table lists the resource permissions required to manage a domain.

> **Note** If you have the **Resources** > **Manage all resources** global permission, you can perform all the actions listed in the table, even without the specific resource permissions.

Action	Resource permission
Create a domain	Domain > Add
Edit a domain name and domain type	Domain > Update
Move a domain to a different community	• Domain > Update • Community > Update (on the parent community)
Delete a domain	Domain > Remove

Create a domain

You can create your own domain in a community.

Prerequisites

You have a resource role that has the **Domain > Add** resource permission.

Steps

1. On the main toolbar, click +.
   » The **Create** dialog box appears.
2. Click the **Organization** tab.

3. Select a domain type from the list.

   Tip
   - To create a Process Register domain, select the **Process Register** domain type.
   - If you selected the wrong domain type, you can still change it in the **Domain type** field in the next step.

   » The **Create Domain** dialog box appears.
4. Enter the required information.

Field	Description
Domain type	Domain type of the domain. **Tip** - This field shows the domain type you selected in the previous step. You can change it if needed. - If a default domain view (in preview) is set for the domain type, the default view is applied to the domain.
Community	Community under which the domain will be located.
Domain name	Name of the new domain. **Tip** - You can create multiple domains together. To do so, enter the first name, click the drop-down or press `Enter`, and then enter the next name. - Domain names must be unique within their parent community.

5. Click **Create**.

Edit a domain name and domain type

You can change the name and domain type of a domain.

Prerequisites

You have a resource role that has the **Domain > Update** resource permission.

Steps

1. Open the domain.
2. Click ⋮ → **Edit**.
3. Enter the required information.

Field	Description
Name	New name for the domain. **Note** Domain names must be unique within their community.
Type	New domain type for the domain.

4. Click **Save**.

Tip You can also edit the domain name and type via the organization table on the **Overview** tab of the domain's community page. To do so, double-click the **Name** or **Domain Type** cell of the domain, enter the new name or select a domain type, and then click ✔.

Move a domain

You can change the community of a domain by moving the domain to a different community.

Note If a domain is moved to a community in another scope, the assignment of the domain's assets may change. If moving a domain causes a conflict of scopes, the moved domain is removed from its original scope.

Prerequisites

- You have a resource role that has the **Domain > Update** resource permission on the domain you want to move.
- You have a resource role that has the **Domain > Update** resource permission on the community to which you want to move the domain.

Steps

1. Open the domain.
2. Click ⋮ → **Move**.
3. In the **Community** field, select the new community.

   > **Note** Domain names must be unique within their community. If you try to move the domain to a community that already contains a domain with the same name, an error message appears after you click **Save**.

4. Click **Save**.

Delete a domain

> **Warning** Deleting a domain also deletes its views and assets.

You can delete a domain if you no longer need it.

Prerequisites

You have a resource role that has the **Domain > Remove** resource permission.

Steps

1. Open the domain.
2. Click ⋮ → **Delete**.

About asset types

Asset types are fundamental building blocks in Collibra. They act as templates to define the structure and behavior of your assets. An asset type ensures consistency by determining the following through one or more assignments:

- Attribute types, relation types, and statuses that an asset can have.
- Articulation rules, data quality rules, and validation rules that apply to an asset.
- Domain types in which you can create an asset.

Certain asset types can be created only in a specific Collibra application and in a specific domain type. For example, you can create Validation Rule assets only in a Validation Rule domain and KPI assets only in a Report Catalog domain. In an asset type's assignment, you can find the domain type required for the asset type.

Certain asset types are managed by Collibra, meaning they are system-managed and you can't edit their public ID, delete them, or change their parent. You can, however, edit their names (for example, to translate them into your preferred language).

Related topics

Manage an asset type

Out-of-the-box asset types

The following table shows the out-of-the-box asset types and their description.
Collibra contains multiple main asset types. All other asset types descend from these. The main asset types are:

-

Business Asset
-

Data Asset
-

Governance Asset
-
Issue
-

Technology Asset

> **Tip** For an interactive overview of all out-of-the-box asset types, including the relevant domain types and applications, see the online version of this guide.

Asset type	Description
Business Asset	An asset type 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 such as Business Term, Business Process, and Line of Business, which help build the semantics of any organization with insufficient details to build an actual business application.
AI Agent	A system or program that can autonomously perform tasks, such as make decisions based on predefined rules or learned patters, or take actions to achieve specific goals.
Azure AI Foundry Agent	A subtype of AI Agent that represents AI agents in Azure AI Foundry.
AI Model	A statistical model that is trained on datasets in order to make predictions on new data.
AWS Bedrock AI Model	A subtype of AI Model that represents AI models in Amazon Bedrock.

Asset type	Description
AWS SageMaker AI Model	A subtype of AI Model that represents AI models in Amazon SageMaker.
Azure AI Foundry Model	A subtype of AI Model that represents AI models in Azure AI Foundry.
Azure AI Model	A subtype of AI Model that represents AI models in Microsoft Azure AI.
Databricks AI Model	A subtype of AI Model that represents AI models in Databricks Unity Catalog.
MLflow AI Model	A subtype of AI Model that represents AI models in MLflow.
SAP AI Model	A subtype of AI Model that represents AI models in SAP.
Vertex AI Model	A subtype of AI Model that represents AI models in Google Vertex AI.
AI Use Case	A specific application of artificial intelligence (AI) and AI Models trained on specific data in order to solve a business problem and deliver business value. Implementing AI Use Case may result in automating a task, improve decision-making, or develop new products and services.
Business Dimension	A set of reference information that categorizes and describes a Business Term in such a way that it provides context and meaningful answers to business questions. Examples: Business Process, Line of Business, Region, Business Capability
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.

Asset type	Description
Power BI Folder	A collection of Power BI Report Server Dashboards, Reports, and Data Models.
SSRS Folder	A collection of SQL Server Reporting Services Dashboards, Reports, and Data Models.
Power BI Workspace	A collection of Power BI dashboards, reports, and semantic models.
SAC Folder	A folder structure that is the parent of Story and SAC Data Model assets.
Tableau Project	A collection of Tableau workbooks and data sources.
Tableau Site	A collection of content (workbooks, data sources, users, and so on) that is isolated 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
Data Concept	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 organization).
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.)

Asset type	Description
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
Data Subject Category	A way in which a user can manually interact with data at rest to manipulate or consolidate it.
Jurisdiction	A hierarchical representation of how a business divides its market on the basis of geography, such as regions and countries. For example, North America is segmented into USA and Canada.
Party	An association, corporation, partnership, proprietorship, trust, or individual that has legal standing. A Party has legal capacity to enter into agreements or contracts, assume obligations, incur and pay debts, sue and be sued in its own right, and to be held responsible for its actions.
Vendor	A provider of goods or services.
Processing Category	A category of processing activities determined by the actions taken during the processing activity.
Business Qualifier	An asset type that is used to 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
Data Product	A piece of data, packaged with everything that is needed to be able to use that data as a person that is not necessarily a domain expert in a secure and easy way.

Asset type	Description
SAP Data Product	A pre-packaged dataset, along with necessary documentation and tools, designed to be easily consumed by non-experts. It provides access to valuable business information in a user-friendly format.
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
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	Collection of queries displayed as visualizations on a page.
Looker Look	Saved report that can be retrieved by name and shared with other people in the organization.
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 Document	A detailed view of a MicroStrategy data model, with visualisations of findings and insights.
MicroStrategy Dossier	A collection of MicroStrategy chapters and pages.
MicroStrategy Report	A detailed view of a MicroStrategy data model, with visualizations of findings and insights.

Asset type	Description
Power BI Dashboard	A collection of Power BI tiles with metrics from one or more reports and semantic models.
Power BI KPI	A key performance indicator of Power BI Report Server.
Power BI Report	A detailed view of a Power BI semantic model, with visualizations of findings and insights.
SSRS Report	A detailed view of an SQL Server Reporting Services Data Set, with visualizations of findings and insights.
Power BI Tile	An element representing data on the Power BI dashboard.
SAC Insight	A representation of the displayed data source with filters, the navigation state as well as the presentation state of the table.
SAC Story	The primary data reporting and analysis medium. It is often referred to as a report or a dashboard.
SSRS KPI	A key performance indicator of SQL Server Reporting Services.
Tableau View	A representation of your data in a Tableau worksheet or dashboard.
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	A collection of sheets. A sheet can be a worksheet, dashboard, or story.
Data Notebook	An executable, rich document that can be used for data exploration or knowledge sharing.
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

Asset type	Description
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
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 semantic model.
SSRS Column	A column in an SQL Server Reporting Services Report Data Set.

Asset type	Description
SAC Data Attribute	SAC Data Attribute assets have the attribute Source Type, with one of the following values: • Dimension • Measure
Tableau Data Attribute	A specification that defines a property of a Tableau data entity. Examples: CustomerBirthDate, EmployeeFirstName.
SAP Datasphere Data Attribute	Measures and dimensions used in a SAP Datasphere Model.
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. Examples: ExpenseAmount, RiskAmount
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 Report Attribute	A detailed view of a MicroStrategy visualization, with findings and insights.
MicroStrategy Visualization	A detailed view of a MicroStrategy visualization, with findings and insights.
Power BI Parameter	A column that is part of a Power BI Report Server Data Model and that is used in a KPI.
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
Data Product Port	Defines the interface through which a data product interacts with the broader ecosystem. A data product can feature multiple ports, each categorized based on its relation to the the data product.

Asset type	Description
Data Product Input Port	A functional representation of the source data that is used by a data product. A data product can use multiple data sources, each represented by an input port. One input port can be related to multiple assets in the data source, such as linking to multiple tables in the same database.
Data Product Output Port	Represents the way the output of a data product is exposed to data consumer. A data product can have multiple output ports, each one representing a different way of exposing the data.
Data Quality Job	Representation of a job executed in Data Quality & Observability Classic.
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.
Data structure	A logical grouping of data elements, where the data structure is the whole and the data elements are parts of that whole. Example: cfPerson is a Data Structure that contains the data elements cfBirthDate, cfPersonFullName
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 semantic model.
SSRS Table	A table in an SQL Server Reporting Services Report Data Set.

Asset type	Description
SAC Data Entity	A unit of data in an SAC model that can be classified and can have a stated relationship to other units of data.
Tableau Data Entity	An abstraction from the physical implementation of database tables, used for Tableau report creation.
Model	A conceptual framework that defines how data is structured, organized, and related. It provides a standardized way to represent data elements, their data structures, and the relationships between them.
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
BI Data Model	An abstraction of data structures such as databases, schemas and files, used to create BI reports.
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 datamart in Power BI Service.
Power BI Data Model	A collection of data that is used to create a Power BI report.
SSRS Data Model	A collection of data that is used to create an SQL Server Reporting Services Report.
SAC Data Model	A representation of a large amount of data. SAC Data Model assets have the attribute Source Type, with one of the following values: • Planning • Analytic

Asset type	Description
Tableau Data Model	An abstraction from the physical implementation of database, schema, file, etc., used for Tableau report creation.
Transformation Model	Transformation models document how data is processed, combined, and altered through various stages, to become usable information.
SAP Datasphere Analytic Model	A representation of a Datasphere model.
SAP Datasphere Intelligent Lookup	An object that merges data from two entities.
SAP Datasphere Perspective	A reusable configuration that contains a subset of consumption model attributes, measures and parameters.
Schema	An organized structure described in a formal language supported by implementing technology that defines the objects in the technology assets (Table and columns in a relational database, fields in a file). Examples: CRM_001_PRD, HDP_CNT_CLD
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 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
Dataplex Lake	A lake is a centralized repository for managing enterprise data across the organization.
Dataplex Zone	A zone represents a logical group of related assets within a Dataplex lake.
Foreign Key	An asset type that is used to model the Primary key - Foreign key relations in relational databases.

Asset type	Description
Mapping Specification	Mapping between two or more data structures.
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.
Control	A measure taken to mitigate a risk. Any process, policy, device, practice, or other conditions and/or actions that maintain and/or modify risk.
Data Contract	Documents the objectives for the structure, format, service level, quality, and terms of use for exchanging data between a data provider and their consumers. This terminology is often used in data mesh context and tries to make the analogy to a contract but it should not necessarily be seen as a legally binding document. Often it is just used internally in a company to set the expectations between data producer and data consumer.
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.
Legal Basis	The lawfulness of processing, as defined by Article 6 of GDPR. Personal data may be processed only if, and to the extent that, at least one legal basis applies.

Asset type	Description
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.
Regulation	A directive made and maintained by an authority, for example, BCBS and Solvency.
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.
Purpose	An asset that describes the reason for which another asset is created or for which another asset exists.
Risk	An uncertain event that could create damage, injury, liability, loss or any other negative occurrence that is caused by external or internal vulnerabilities (Risk Sources), which can be avoided through controls.
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.

Asset type	Description
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
File	A collection of data that is treated by a computer as a unit, for the purposes of input and output. Examples: businessGlossary.xls, dataDictionary05220.csv, datacatalogv25.txt
File Group	A collection of physical files which together represent a single logical file.
GCP Project	An asset type representing a Google Cloud Platform Project.
Server	A computer program or device that supports other computer programs and their users
BI Server	A visual analytic 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 semantic models.

Asset type	Description
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 visualizations
SAP Tenant	The tenant of your SAP system connected to SAP Datasphere Catalog.
Storage Container	An asset type that represents a Storage Container
ADLS Container	An asset type that represents an Azure Data Lake Container, which is a logical unit of storage containing Azure Data Lake Storage objects.
ADLS Storage Account	An asset type that represents an Azure Data Lake Storage Account, which is a logical unit of storage containing Azure Data Lake Container objects.
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.
SAP Container	A collection of SAP Datasphere data.
SAP Datasphere Space	A collection of SAP Datasphere models, tables and views.
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.
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.

Asset type	Description
File Storage	An asset type that represents a Cloud File Storage bucket.
ADLS File System	An asset type that represents Azure Data Lake Storage file system.
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.

In the latest UI, you can view the associated product by adding the **Products** column to the **Asset types** table on the **Operating Model** tab of Collibra settings. The **Products** column also shows if the product is active in your environment.

Manage an asset type

You can create, edit, move, and delete an asset type, including how it is represented.

In this topic

Create an asset type

You can create your own asset type if the out-of-the-box asset types don't meet your needs.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- Your Collibra environment is licensed to create custom asset types.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings open.

3. Click **Add**.
   » The **Create Asset Type** dialog box appears.
4. Enter the required information.

Field	Description
Name	Unique name to identify the asset type.
Description (optional)	Description for the asset type.
Parent asset type	Parent asset type from which the new asset type will inherit its characteristics.

5. Click **Create**.

> **Note** By default, an asset type inherits the assignments of its parent asset type. As a result, the asset page shows the parent's assignments. If, however, the asset type has its own assignments, the asset page shows those assignments instead of the parent's.

Edit an asset type

You can change the name and other properties of an asset type. You can also change the color and icon by which an asset is represented in Collibra. This helps users quickly identify a specific asset type in a diagram.

> **Note** Certain asset types are managed by Collibra, meaning they are system-managed and you can't edit their public ID, delete them, or change their parent. You can, however, edit their names (for example, to translate them into your preferred language).

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.

   Show more information

   a. On the main toolbar, click → **Settings**.

      » The **Settings** page opens.

   b. Click the **Operating Model** tab.

      » The Operating Model settings are shown.

   c. On the **Asset types** tab, click the name of the asset type.

      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. Click **Edit**.

   » The **Edit <asset type>** dialog box appears.

3. Enter the required information.

Field	Description
Name	Unique name to identify the asset type.
Allow identical asset names per domain	Identifies if identical asset names are allowed in the same domain.
Enable ratings	Identifies if users can rate assets. **Tip** Ratings enable users to subjectively rate the quality of an asset using a five-star rating system and enter a free-text review of the asset to support their rating.
Display options	The fields in this section allow you to edit how assets of this type are represented on asset pages and in diagrams.
Color	Color for assets. **Tip** For a custom color, use the **Color hex value** field instead.
Color hex value	Hexadecimal code of the color for assets. **Tip** For a list of colors and their hexadecimal codes, go to ColorHexa.
Symbol	Graphical representation for assets of this type. You can select one of the following values: ◦ **None:** No graphical representation is used for assets. ◦ **Code:** Assets are represented with a code before them. You can specify the required code in the **Code** field. ◦ **Icon:** Assets are represented with an icon before them. You can select the required icon in the **Icon reference** field.
Code	Code shown before assets. This code is also shown in the legend of diagrams. By default, this field contains the initials of the selected asset type. **Note** This field is shown only if you selected **Code** in the **Symbol** field.

Field	Description
Icon reference	Icon shown before assets. This icon is also shown in the legend of diagrams. **Note** This field is shown only if you selected **Icon** in the **Symbol** field.
Preview	Two previews of your asset type configuration: ◦ The first preview is the title bar on asset pages. ◦ The second preview is a diagram node.

4. Click **Save**.

Move an asset type

You can change the parent asset type of a custom asset type by moving the asset type to a different parent. When you move an asset type, it inherits the assignment of the new parent asset type.

> **Note** Certain asset types are managed by Collibra, meaning they are system-managed and you can't move them. You can move only custom asset types.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click the **Operating Model** tab.
   » The Operating Model settings are shown.

3. In the row containing the asset type you want to move, click .

> **Tip** Alternatively, you can click the name of the asset type, and then, on the **More** menu, click **Move**.

   » The **Move <asset type>** dialog box appears.
4. In the **Parent asset type** field, select the new parent asset type, and then click **Save**.

Delete an asset type

You can delete a custom asset type if you no longer need it.

> **Note** Certain asset types are managed by Collibra, meaning they are system-managed and you can't delete them. You can delete only custom asset types.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- Assets of the asset type you want to delete don't exist. If they do, either edit their asset type or delete the assets.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click the **Operating Model** tab.
   » The Operating Model settings are shown.
3. In the row containing the asset type you want to delete, click .

> **Tip** Alternatively, you can click the name of the asset type, and then, on the **More** menu, click **Delete**.

Enable or disable ratings

You can allow users to rate assets by enabling ratings for the associated asset type. Enabling ratings for an asset type doesn't automatically enable ratings for its child asset types. You need to manually enable ratings for each child asset type.

For certain out-of-the-box asset types such as **Data Set** and **Report**, ratings are enabled by default, For the asset types you create, ratings are disabled.

> **Warning** Ratings can't be disabled for an asset type if user ratings already exist for any assets of that asset type. To disable ratings then, you need to manually delete those ratings.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The Settings page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. Click **Edit**.
   » The **Edit <asset type>** dialog box appears.
3. Select or clear the **Enable ratings** checkbox, and then click **Save**.

Enable or disable identical asset names per domain

By default, the Identical asset names per domain feature is enabled to ensure clarity and avoid confusion when searching for or referencing assets. This practice helps maintain data quality and prevents ambiguity, especially in large and complex data environments. From a technical standpoint, it ensures that the full names and display names of assets are in synchronization.

In cases where you need to use a different naming convention or require different assets to have the same display name, you can enable the Identical Asset Names Per Domain feature by asset type.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. Click **Edit**.
   » The **Edit <asset type>** dialog box appears.
3. Select or clear the **Allow identical asset names per domain** checkbox, and then click **Save**.

Asset type groups

This feature is **available only** in the latest UI.

Asset type groups allow multiple asset types to be grouped based on a shared function or purpose. If you have a global role that has the **System administration** global permission, you can customize asset type groups to include specific asset types, depending on your organizational needs.

Asset type groups help make relation types more meaningful by enabling relation types to be defined at a group level. Rather than configuring relations solely between individual asset types, you can set relation types between entire asset type groups, providing clearer and more relevant connections between related assets.

Asset type groups have a global assignment, which defines a set of relation types. When you add an asset type to a group, the assignments of the asset type and any child asset types inherit the group's relation types.

> **Note** Asset type groups are system-managed and their properties can't be edited:
>
> - Asset type group assignments contain only relation types and no other characteristic types. Therefore, you can't add a column with attributes in a relation table that references an asset type group.
> - You can't create your own custom asset type groups.
> - You can't add asset type groups as the source or target of a custom relation type.
> - You can choose which asset types to add to an asset type group, based on your specific organizational needs.

Managing asset type groups

You can choose which asset types are part of the asset type groups from the asset type group page or the asset type page.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Manage asset type groups from the asset type group page

1. Open an asset type group.
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click **Operating Model**.
      » The Operating Model settings page opens.
   c. On the **Asset type groups** tab page, click the name of an asset type group.
      » The asset type group **Overview** page opens.
2. In the **Included asset types** section, select one or more of the available asset types.

> **Note** The changes are applied immediately.

Manage asset type groups from the asset type page

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

> **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

> **Note** The asset type must have a global assignment.

2. On the **Overview** tab page, in the **Can be used as (Asset Type Group)** section, select one or more of the available asset type groups.
3. Click **Save**.

Assignments

In Collibra, every asset type has an assignment that controls its characteristics and statuses, determines which asset types can belong to which domain types, and ensures consistency and adherence to organizational policies.

An assignment is a configuration object that links a collection of governance elements to a specific asset type, and optionally to its child asset types. These elements include:

- Characteristics: Determining the attribute types, relation types, and complex relation types that you can assign to assets of this type.
- Domains: Defining which asset types can belong to which domain types.
- Statuses: Controlling the valid statuses for assets of this type.
- Articulation score rules: Specifying the properties of articulation scores that contribute to the completeness of assets of this type.
- Data quality rules: Defining the data quality rules that contribute to the quality of assets of this type.
- Validation rules: Defining validation rules that determine if the assets of this type are valid or not.

> **Note** Certain assignments have system-managed attribute types, relation types, or statuses that cannot be removed because they are necessary for the proper functioning of the Collibra Platform. For example, in the global assignment of the Column asset type, you cannot remove the relation type that links it to a table.

Global and scoped assignments

You can apply an assignment globally, creating a global assignment, or to a scope, creating a scoped assignment.

A global assignment applies to all assets that are not in a scope. A scoped assignment only applies to assets located in a domain or community that belongs to the scope. An asset type can have only one global assignment but may have many scoped assignments.

Before adding a scoped assignment, an asset type must have a global assignment. Add the global assignment by going to the asset type page and clicking the "Add Global Assignment" button.

> **Note** Out-of-the-box relation types where the same asset type is both the head and the tail of the relation are listed on separate lines in the assignment table.

Inheritance

If an asset type does not have an assignment, it inherits all assignments from its parent asset type. If an asset type has at least one assignment, it does not inherit any assignments from its parent asset type.

Add an assignment

Adding a global or scoped assignment to an asset type allows you to tailor governance responsibilities to specific contexts. This targeted approach improves data quality within specific areas, and facilitates more effective data governance across the organization.

You can add an assignment to an asset type if you want to change the behavior of assets of this type in Collibra. For example, you may do this to make a specific attribute type available only for assets of a certain type.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- For scoped assignment, you have created the scope.

Steps

1. Open the asset type.

   Show more information

   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

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 if you want to add a specific attribute type to assets of a certain type.

> **Note** Certain assignments have system-managed attribute types, relation types, or statuses that cannot be removed because they are necessary for the proper functioning of the Collibra Platform. For example, in the global assignment of the Column asset type, you cannot remove the relation type that links it to a table.

If you want hide a characteristic on asset pages, use the layout editor to remove that characteristic from the page. However, you cannot remove it from the assignment.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. In the tab pane, click the name of the assignment.
3. Do one of the following:

Component	Steps
Characteristics	Assign one or more characteristic types to the asset type. a. Select **Characteristics**. b. Above the table, to the right, click **Add a characteristic**. » The **Add a Characteristic** dialog box appears. c. Select the characteristic type that you want to add. **Tip** ■ Use the filter to search for a specific characteristic type. ■ Characteristic types in gray are already assigned to the asset type. ■ Repeat this step for every characteristic type you want to assign. » The characteristic type appears at the bottom of the table. d. If required, restrict the target asset types available for an assigned relation type to one of its child asset types using the **Asset Type Filter**. e. If required, edit the minimum or maximum number of occurrences of the characteristic:

Option	Description
Cardinality Min	The minimum number of occurrences of the characteristic. Set this option to *1* or greater to make the characteristic appear automatically on the asset page.
Cardinality 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. **Note** If you ingest assets via Edge set the maximum cardinality to at least *1*.

Component	Steps
Domain types	Assign one or more domain types to the asset type. a. Select **Domain Types** b. Above the table, to the right, click **Edit Model**. c. Select the checkboxes next to the domain types you want to assign to the asset type. > **Tip** To unassign a domain type from the asset type, clear the checkbox next to the domain type. Once unassigned, the asset type no longer appears in filters for asset views in domains of that domain type or their communities. d. Click **Save**.
Statuses	Assign one or more statuses to the asset type. a. In the tab pane, click **Statuses**. b. Above the table, to the right, click **Add a Status**. c. In the **Add a Status** dialog box, select the status to add to the asset type. > **Tip** > ■ Statuses in gray are already assigned to the asset type. > ■ Repeat this step for every status you want to assign.
Articulation	Assign one or more articulation rules.
Data quality rules	Assign one or more data quality rules. a. In the tab pane, click **Data quality rules**. b. Above the table, to the right, click **Add a Data Quality Rule**. c. In the **Add data quality rule** dialog box, select a data quality rule. > **Tip** > ■ Data quality rules in gray are already assigned to the asset type. > ■ Repeat this step for every data quality rule you want to assign.

Component	Steps
Validation rules	Assign one or more validation rules to the asset type. a. In the tab pane, click **Validation rules**. b. Above the table, to the right, click **Add a Validation Rule**. c. In the **Add a Validation Rule** dialog box, select the validation rule to add to the asset type. **Tip** ■ Validation rules in gray are already assigned to the asset type. ■ Repeat this step for every validation rule you want to assign. d. If required, change the order of the validation rules.

Delete an assignment

You can delete an assignment, for example 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 the Collibra Platform.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

> **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. In the tab pane, click next to the assignment you want to delete.

> **Note**
> - If you want to delete the global assignment, you must first delete all scoped assignments.
> - You cannot delete a global assignment if the asset type is part of an asset type group.

3. In the delete confirmation dialog box, click **Delete**.

> **Note** If you delete the global assignment, the asset type inherits all assignments of its parent asset type.

Assign a characteristic type to an asset type

Assigning a characteristic type to an asset type allows you to enforce consistent data governance and standardization across your data landscape. By defining which characteristics are required or recommended for specific asset types, you ensure that critical metadata is captured and maintained, improving data discoverability, understanding, and overall data quality. This structured approach facilitates better data lineage, impact analysis, and compliance with data regulations.

You can assign a characteristic type to an asset type by adding it to the asset type assignment. This allows you to view and add characteristics of this type to assets of this type on the asset page, depending on the page layout and the scope of the domain.

> **Tip** You can also assign a characteristic type to an asset type when editing the asset type layout.

Note

- Via the Import API, the import functionality or a workflow, you can add characteristics of 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 **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.

   Show more information

   a. On the main toolbar, click → **Settings**.

      » The **Settings** page opens.

   b. Click the **Operating Model** tab.

      » The Operating Model settings are shown.

   c. On the **Asset types** tab, click the name of the asset type.

      » The asset type page opens.

   Tip You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. In the tab pane, click the name of the assignment.
3. Select **Characteristics**.
4. Above the table, to the right, click **Add a characteristic**.

   » The **Add a Characteristic** dialog box appears.

5. Select the characteristic type that you want to add.

   Tip

   - Use the filter to search for a specific characteristic type.
   - Characteristic types in gray are already assigned to the asset type.
   - Repeat this step for every characteristic type you want to assign.

   » The characteristic type appears at the bottom of the table.

6. If required, restrict the target asset types available for an assigned relation type to one of its child asset types using the **Asset Type Filter**.
7. If required, edit the minimum or maximum number of occurrences of the characteristic:

Option	Description
Cardinality Min	The minimum number of occurrences of the characteristic. Set this option to *1* or greater to make the characteristic appear automatically on the asset page.
Cardinality 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. > **Note** If you ingest assets via Edge set the maximum cardinality to at least *1*.

Restrict relations for an assignment

You can restrict the target asset types available for an assigned relation type to one of its child asset types. This allows you to limit the possible assets for relations of that type to assets of the selected type and its descendants. By reducing the list of available asset types, you can minimize 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 the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The Settings page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.

c. On the **Asset types** tab, click the name of the asset type.
   » The asset type page opens.

> **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. In the tab pane, click the name of the assignment.
3. Select **Characteristics**.
4. Go to the row of a relation you want to restrict.
5. In the **Asset Type Filter** column, double-click to select one of the available asset types.

> **Note** You can only apply asset type filters to relations that are not system-managed.

6. Click to save your changes.

> **Note**
> Not all Collibra features work with assignment relation restriction, as some take in consideration the relation definition instead:
>
> - Asset table views
> - Asset hierarchy tables
> - Data Quality Rule (legacy)

Assign a domain type to an asset type

Assigning a domain type to an asset type provides a crucial layer of organizational context and scope. It allows you to specify which domains are responsible for managing specific asset types. This clarifies ownership and accountability, ensuring that the right teams are involved in governing and maintaining the data within those domains. By linking asset types to relevant domains, you improve data governance alignment, facilitate domain-specific data quality initiatives, and enable more targeted data stewardship efforts.

You can assign a domain type to an asset type by adding the domain type to the asset type assignment. This allows assets of that asset type to be created in domains of the assigned domain type, as long as the domain is in the scope of the assignment.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The Settings page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. In the tab pane, click the name of the assignment.
3. Select **Domain Types**
4. Above the table, to the right, click **Edit Model**.
5. Select the checkboxes next to the domain types you want to assign to the asset type.

   > **Tip** To unassign a domain type from the asset type, clear the checkbox next to the domain type. Once unassigned, the asset type no longer appears in filters for asset views in domains of that domain type or their communities.

6. Click **Save**.

Assign a status to an asset type

Assigning a status to an asset type provides a clear and consistent way to manage the lifecycle of data assets. By defining statuses you gain better visibility into the quality, reliability, and relevance of data. This enables improved data governance, facilitates informed decision-making, and ensures that the organization is working with trusted and up-to-date information.

You can assign a status to an asset type by adding it to the asset type assignment. This allows you to give assets of this type this status on the asset page, if the asset is in the scope of the assignment.

> **Note** You cannot add a status to the AI Use Case asset type, which is specific to Collibra AI Governance.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

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 **Add a Status**.
5. In the **Add a Status** dialog box, select the status to add to the asset type.

   > **Tip**
   > - Statuses in gray are already assigned to the asset type.
   > - Repeat this step for every status you want to assign.

Assign a validation rule to an asset type

Assigning validation rules to an asset type ensures data quality and consistency by enforcing specific criteria for the attributes of those assets. These rules help prevent errors and inconsistencies. This leads to more reliable data, improved data governance, and increased trust in the information used for critical business processes and decision-making.

You can assign a validation rule to an asset type by adding it the asset type assignment. This allows you to 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 **Product Rights** > **System administration** global permission.
- You have created a Validation Rule asset.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

2. In the tab pane, click the name of the assignment.
3. In the tab pane, click **Validation rules**.
4. Above the table, to the right, click **Add a Validation Rule**.

5. In the **Add a Validation Rule** dialog box, select the validation rule to add to the asset type.

   Tip
   - Validation rules in gray are already assigned to the asset type.
   - Repeat this step for every validation rule you want to assign.

6. If required, change the order of the validation rules.

Assign a data quality rule to an asset type

Assigning data quality rules to an asset type ensures that assets of that type meet predefined quality standards. This proactive approach helps identify and prevent data quality issues early in the lifecycle. It leads to more reliable data, improved decision-making, and reduced risks associated with inaccurate or incomplete information. By enforcing consistent data quality checks, you build trust in your data and enhance the overall effectiveness of your data governance program.

You can assign a data quality rule to an asset type by adding it to the asset type 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. You can assign one data quality rule per scope. If you want an asset type to use multiple data quality rules, add additional scopes for each data quality rule.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- You have created a data quality rule.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.

c. On the **Asset types** tab, click the name of the asset type.
   » The asset type page opens.

> **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

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 **Add a Data Quality Rule**.
5. In the **Add data quality rule** dialog box, select a data quality rule.

> **Tip**
> - Data quality rules in gray are already assigned to the asset type.
> - Repeat this step for every data quality rule you want to assign.

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.

Characteristic types

Characteristic types is a generic term for attribute types, relation types, and complex relation types.

Attribute types

Attribute types define the specific characteristics or properties that an attribute can contain.

When you associate attribute types with asset types through an assignment, you can add attributes of that type to assets of that type and enrich the information of an asset.

Certain attribute types are managed by Collibra, meaning they are system-managed and you can't edit their public ID or delete them. You can, however, edit their names (for example, to translate them into your preferred language).

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
Frequency	The rate at which an asset changes over a particular period of time.	Daily

Attribute type	Description of the attribute	Example of an attribute
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 out-of-the-box attribute types

Collibra includes a number of out-of-the-box attribute types that provide a strong foundation upon which you can build your specific data governance models. They cover the most common needs and allow you to focus your customization efforts on the unique aspects of your data landscape rather than reinventing essential metadata elements.

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

Type	Description	Assigned to asset type	Kind
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
Access instructions	Instructions on how to access the data.	Data Product Port	Text
Access method	Indicates what method can be used to access the data.	Data Product Port	Selection
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	Text
Automation Level	The nature and degree of automation of an AI use case.	AI Use Case	Text
Background	Background information on the asset.		Text
Business Case	Refers to the business problem you want to solve with a AI use case.	AI Use Case	Text

Type	Description	Assigned to asset type	Kind
Business Risks	A summary of the business risks associated with implementing the AI use case.	AI Use Case	Text
Business Value	Refers to how an AI use case can improve your organization.	AI Use Case	Text
Business Sponsor	Refers to the Business Owner or Executive Sponsor of the AI Use Case in your organization.	AI Use Case	Text
Calculation Rule	The rule that specifies how the KPI or metric is calculated.	KPI, Tableau Report Attribute	Text
Categorical Data	Data is considered categorical if it can only take a limited set of different values.	Column	True/False
Category	A possible value for Categorical Data.	Column	Text
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

Type	Description	Assigned to asset type	Kind
Data Privacy Risk Score	Number calculated from Risk Assessment.	AI Use Case	Number
Data Privacy Risks	Any data privacy risks that may result from processing the AI model within the context of this AI use case and either putting it on the market for external customer use or internal use.	AI Use Case	Text
Data product category	This attribute type helps categorizing the data products in for example more business user specific derived data products, versus more technical/foundational base data products targeted at the more technical users that are building the derived data products.	Data Product	Selection
Data Retention Protocols	Any data retention standards already in place or projected to be implemented for the AI use case.	AI Use Case	Text
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 Storage	Refers to whether any data is stored, and if so, where and how the data is stored.	AI Use Case	Text
Data Type	The logical Data type detected by Collibra profiling.	Column	Text
Data Type Precision	The precision of the data type. For example how many characters it can contain.	Data Attribute, Data Element, Report Attribute	Numeric

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,	Text

Type	Description	Assigned to asset type	Kind
		Standard, System, Table, Tableau Data Source, Tableau Project, Tableau Report Attribute, Tableau Server, Tableau Site, Tableau View, Tableau Workbook, Technology Asset, Validation Rule, Workflow Definition, Dataplex Lake, Dataplex Zone, Databricks AI Model, Vertex AI Model, Data Product	
Description From Source System	The description from the source system of the asset.	Table, Column, Database, Schema, Dataplex Lake, Dataplex Zone, Databricks AI Model	String

Type	Description	Assigned to asset type	Kind
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
Document modification date	Date the document was last edited.	Looker Look, Tableau Data Source, Tableau View, Tableau Workbook	Date
Document size	Size of the document in megabytes.	File, File Group, Tableau Workbook	Numeric

Type	Description	Assigned to asset type	Kind
Effective End Date	Date as of which an asset is scheduled to end.	Business Rule, Code Set, Code Value, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Rule	Date
Effective Start Date	Date on which asset takes effect.	Business Rule, Code Set, Code Value, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Rule	Date
Empty Values Count	The number of empty values for that column	Column	Numeric
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
Ethical Risks	Any ethical risks that may result from processing the AI model within the context of this AI use case and either putting it on the market for external customer use or internal use.	AI Use Case	Text

Type	Description	Assigned to asset type	Kind
Exception Scenario	The exception scenario.	Business Rule, Data Quality Metric, Data Quality Rule, Data Sharing Agreement, Governance Asset, Issue Category, Policy, Rule, Standard	Text
External System Label	The label from external system.	File, GCS Bucket, Storage Container	String
Favorites count	The number of Looker Looks and Looker Dashboards that are marked as favorite.	Looker Dashboard, Looker Look	Number
Feature Importance	Feature Importance refers to how important a feature is to a machine learning model.	AI Model, Databricks AI Model, Vertex AI Model	Text
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	The rate at which an asset changes over a particular period of time.	Report, Report Attribute	Text
General Purpose AI	Refers to whether the model used in your AI use case is using a General Purpose AI (GPAI).	AI Use Case	Text

Type	Description	Assigned to asset type	Kind
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
Inference Data Description	An explanation of the input or inference data the AI model(s) uses to create output data.	AI Use Case	Text
Inferred Data Type	The data type of a data asset that was automatically inferred by profiling corresponding instance data.		Text
Intellectual Property Risks	Inherent Intellectual Property Risks resulting from processing AI Models within this use case and placing them on the market or putting into service for own use.	AI Use Case	Text
Internal Model	Refers to the existing or upcoming internally built model(s) your AI use case may use.	AI Use Case	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

Type	Description	Assigned to asset type	Kind
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
Legal Approval Date	Date your legal team approved or rejected the AI use case.	AI Use Case	Date
Legal Approval Renewal Date	Date of the expected periodical review of the Use Case's approval.	AI Use Case	Date
Legal Description of Model	Description of the AI model provided by your legal team.	AI Use Case	Text
License	The current license.	Data Set	Text
Loaded Rows	The number of rows that were loaded.	Business Rule, Data Quality Metric	Numeric

Type	Description	Assigned to asset type	Kind
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
Maintenance Cost	Indicates the overall expected cost of running the Use Case over selected period of time.	AI Use Case	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
Mean Absolute Error	Mean Absolute Error (MAE) refers to a model quality metric that evaluates the performance of regression models.	AI Model, Databricks AI Model, Vertex AI Model	Numeric

Type	Description	Assigned to asset type	Kind
Mean Squared Error	Mean Squared Error (MSE) refers to a model quality metric that measures the quality of the model's predications.	AI Model, Databricks AI Model, Vertex AI Model	Numeric
Measurement	The measurement of the asset.	Business Rule, Data Quality Rule, Governance Asset, Issue Category, Policy, Rule	Numeric
Median	The data median value	Column	Text
Minimum Text Length	The length of the shortest text value in this column	Column	Numeric
Minimum Value	The minimum value, using alphabetical order for text	Column	Text
Min Length	The minimum length of any value corresponding to the data asset.		Numeric
Mode	The value with the highest frequency for a categorical feature.	Column	Text
Model Accuracy	Model Accuracy refers to how well the model performs on a given task.	AI Model, Databricks AI Model, Vertex AI Model	Text
Model Monitoring	Refers to how your organization will ensure an AI model is meeting accuracy and performance expectations.	AI Use Case	Text
Model Output	An explanation of the output data that the AI model(s) is expected to create.	AI Use Case	Text
Model Precision	Model Precision refers to how accurate positive model predictions are.	AI Model, Databricks AI Model, Vertex AI Model	Text
Model Type	Type of AI model.	AI Model, Databricks AI Model, Vertex AI Model	Selection

Type	Description	Assigned to asset type	Kind
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 Attrib-utes	The number of attributes of the data entity.		Numeric
Number of distinct values	The number of different values stored in this column	Column	Numeric
Number of Files	The number of files in a File Group.	File Group	Numeric
Number Of Fractional Digits	The number of fractional digits.	Column	Numeric
Number of Values	The number of distinct instance values in the data corresponding to the data asset.		Numeric

Type	Description	Assigned to asset type	Kind
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
Other Risks	Other Risks resulting from processing AI Models within this use case and placing them on the market or putting into service for own use.	AI Use Case	Text
Overall Risk Analysis	Details and the result of any risk analysis performed on the AI use case.	AI Use Case	Text
Overall Risk Rating	Risk level calculated based on predefined thresholds in the default Risk Assessment.	AI Use Case	Selection
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, Database, Schema, Table, Database View	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

Type	Description	Assigned to asset type	Kind
Predicate	The logical formula that will be executed to implement the rule.	Data Quality Rule	Text
Primary Key Name	The name of the primary key composed by the column.	Column	Text
Priority	The priority of this issue.	Issue	Text
Profiled Row Count	The number of rows from the data set that were selected for profiling.		Numeric
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
Protective Measures	Any additional required or recommended actions that have been identified based on regulations, industry standards or dedicated frameworks.	AI Use Case	Text
Purpose	The reason why the asset exists.	Business Rule, Data Sharing Agreement, Data Usage, File, Governance Asset, Issue Category, Policy, Rule, Standard	Text
Rating	The current rating.		Numeric
Refresh Conflict	Provides the information about the conflict detected on the Data Asset during a Schema refresh if any.	Column, Table	Text
Refresh Frequency	The frequency of refresh.		Text

Type	Description	Assigned to asset type	Kind
Report Image	Image of the report view	Looker Look, Tableau View, Tableau Workbook	Text
Repository	Reference to the repository where the code behind the model is stored.	AI Model, Databricks AI Model, Vertex AI Model	Text
Request Rate Limit	Specifies the maximum number of API requests that are allowed per minute.	AI Model, Azure AI Foundry	Number
Resolution	The solution of how this issue can or is resolved.	Issue	Text
Result	The result.	Business Rule, Data Quality Metric	True/False
Retrain Cycle	The frequency with which the model is retrained.	AI Model, Databricks AI Model, Vertex AI Model	Text
Role	Relationship name from head to tail.		Text
Role in Report	The use of Report Attribute in Report (for example, measure or dimension)	Tableau Report Attribute	Text
Row Count	The number of rows inside the data set, possibly including duplicated or missing values	Column	Numeric
Rows Failed	The amount of rows that failed the rule.	Data Quality Metric	Numeric
Rows Passed	The amount of rows that passed the rule.	Data Quality Metric	Numeric
Rule	The description of the rule.		Text
Schema Name	The name of the schema.		Text

Type	Description	Assigned to asset type	Kind
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
Security Protocols	Any general security protocols that may result from the implementation of the AI use case.	AI Use Case	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.	Database, Schema, Table, Database View, Column	Text
Standard Deviation	The statistical standard deviation of values (numeric only)	Column	Numeric
Start Date	The date on which the assessment was started.	Assessment Review	Date
State	The current state.		Text
State Changed by	The cause of the state change.	Power BI Workspace	Text
State Changed Date	The date the state was changed.	Data Sharing Agreement	Text
Submission Date	The date on which the assessment was submitted.	Assessment Review	Date

Type	Description	Assigned to asset type	Kind
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
Target delivery date	The date when the requested resource should be made available.	Data Product, Data Product Port	Date
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
Third Party Model	Refers to the vendor of your AI model (s) and what kind of model you are using.	AI Use Case	Text
Threshold	The minimum percentage of all rows or entities that must pass the rule.	Data Quality Metric	Numeric
Token Rate Limit	Specifies the maximum number of tokens that can be processed by the API per minute.	AI Model, Azure AI Foundry	Number
Training Data Description	The training or re-retraining data used to teach the AI model(s).	AI Use Case	Text
Transformation Logic	The transformation logic.		Text
Transparency Disclosure Requirements	Transparency Disclosure Requirements refers to identified requirements, if any, for AI use case transparency.	AI Use Case	Text

Type	Description	Assigned to asset type	Kind
URL	Uniform Resource Locator, also colloquially known as web address.	Directory, File, File Group, Looker Look, S3 Bucket, Table, Tableau Server, Tableau Site, Tableau View, Dataplex Lake, Dataplex Zone, Database View	Text
Use Case Application	Indicates that the AI use case will be used by an external audience or internally by your organization.	AI Use Case	Text
Validation Result	The results of validation.		True/False
Validation Script	Contains the validation logic to evaluate the content of an asset.	Validation Rule	Script
Value Distribution	The distribution percentage of the values		Numeric
Variance	The statistical variance of values (numeric only)	Column	Numeric
Version	If this asset is versioned (manually or in an external system), this represents the asset version.	AI Model, Databricks AI Model, Vertex AI Model	Text
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

Type	Description	Assigned to asset type	Kind
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 out-of-the-box attributes types do not meet your needs.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Attribute types**.
4. Above the table, to the right, click **Add**.

» The **Create Attribute Type** dialog box appears.

5. 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 create multiple objects together. To do so, enter the first name, click the drop-down or press `Enter`, and then enter the next name.
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.

6. Click **Create**.

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 cannot change the kind of the attribute type.

Tip If you want to change the kind of an attribute type, you have to delete the attribute type first and then create a new one. Keep in mind that the new attribute type has a new resource ID.

Note Certain attribute types are managed by Collibra, meaning they are system-managed and you can't edit their public ID or delete them. You can, however, edit their names (for example, to translate them into your preferred language).

Before you begin

You have a global role that has the **Product Rights** > **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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Attribute types**.
4. In the table, double-click a name field.
5. Type the new name.
6. Click outside of the field to save your changes.

Delete an attribute type

You can delete custom attribute types.

Note Certain attribute types are managed by Collibra, meaning they are system-managed and you can't delete them. You can delete only custom attribute types.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Attribute types**.
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 **Delete**.

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. A relation type defines the specific connections or associations that can exist between two asset types.

When you associate relation types with asset types through an assignment, you can add relations of that type to assets of that type and build a rich, interconnected graph of your data assets, making it easier to understand dependencies, impact, and the overall lineage of information across your organization.

Certain relation types are managed by Collibra, meaning they are system-managed and you can't edit their public ID or delete them. You can, however, edit their names (for example, to translate them into your preferred language).

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.

Element	Description
Tail	Asset type of assets that can be the tail of the relation.
Role	Description of the relation type going from the head asset to the tail asset.
Co-role	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 out-of-the-box relation types

Collibra includes a number of out-of-the-box relation types that provide the foundational vocabulary and structure for building a cohesive and understandable network of data assets. They ensure consistency, accelerate implementation, and facilitate the effective use of the platform.

> **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 out-of-the-box relation types, see the online version of this information in the Documentation Center.

Head	Role	Co-role	Tail
AI Model	trained by	trains	Asset
AI Model	infers from	used to infer	Asset
AI Model	has output	is output	Asset
AI Model	is provided by	provides	Vendor
AI Model	uses	is used by	AI Model

Head	Role	Co-role	Tail
AI Use Case	uses	used in	AI Model
AI Use Case	infers from	used to infer	Asset
AI Use Case	trained by	trains in	Asset
AI Use Case	has output	is output	Asset
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
Asset	is assessed by	assesses	Assessment Review
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

Head	Role	Co-role	Tail
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
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 Attribute	represents	represented by	Column
Data Category	categorizes	is categorized by	Data Asset
Data Contract	governs functioning of	should operate according to	Data Product Port

Head	Role	Co-role	Tail
Data Contract	information to be provided	is mentioned in the terms of	Data Attribute
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 Model	contains	is used in	Table
Data Product	exposes data as	is output port for	Data Product Port
Data Product	relates to	is related to	Measure
Data Product	relates to	is related to	Business Term
Data Product	relates to	is related to	Data Domain
Data Product	is explained in	explains	Data Notebook
Data Product Input	implements	is implemented as	Data Product Input Port
Data Product Port	is input port for	consumes data through	Data Product
Data Product Port	is implemented as	implements	Data Product Output
Data Quality Rule	allowed value	allowed value for	Code Value

Head	Role	Co-role	Tail
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
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
Database	is queried by	queries	Data Notebook
Dataplex Zone	contains	is part of	Schema
Directory	contains	is part of	Directory
Directory	contains	is part of	File Group
File	contains	is part of	Table
File Group	contains	is part of	Table
File Storage	contains	is part of	Storage 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

Head	Role	Co-role	Tail
Issue	has duplicate	is duplicate for	Issue
Issue	impacts	impacted by	Asset
Line of Business	associates	is associated with	Business Asset
Policy	is enforced by	enforces	Rule
Report	groups	is grouped into	Report
Report	related to	is impacted by	Business Asset
Report	uses	used in	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
SAP Data Product	belongs to	has data product	[[[Undefined variable technical-lineage.SAP Datasphere]]] Space
[[[Undefined variable technical-lineage.SAP Datasphere]]] Space	contains	is part of	Data Asset
Schema	contains	is part of	Table
Server	hosts	is hosted in	Business Dimension
Standard	is included in	includes	Policy

Head	Role	Co-role	Tail
Storage Container	contains	is contained in	File
Storage Container	contains	is part of	Storage Container
System	implements	is implemented in	Data Set
System	implements	is implemented in	Data Product Port
Table	is part of	contains	Database
Table	is source for	is derived from	Database View
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
Technology Asset	system of use for	system of use	Data Asset

Create a relation type

You can create a new relation type, for example if the out-of-the-box relation types do not meet your needs.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Relation types**.
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	Description of the relation type going from the head asset to the tail asset.
Co-role	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**.

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.

> **Note** Certain relation types are managed by Collibra, meaning they are system-managed and you can't edit their public ID or delete them. You can, however, edit their names (for example, to translate them into your preferred language).

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Relation types**.
4. In the table, double-click in the role or co-role field.
5. Edit the role or co-role.
6. Click outside of the field to save your changes.

> **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 custom relation types.

> **Note** Certain relation types are managed by Collibra, meaning they are system-managed and you can't delete them. You can delete only custom relation types.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Relation types**.
4. In the row of the relation type that you want to delete, click 🗑.
   » The **Delete <relation type>** dialog box is shown.
5. Click **Delete**.

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

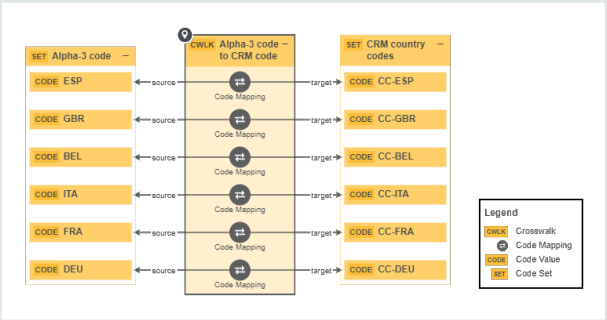
A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The complex relation's type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

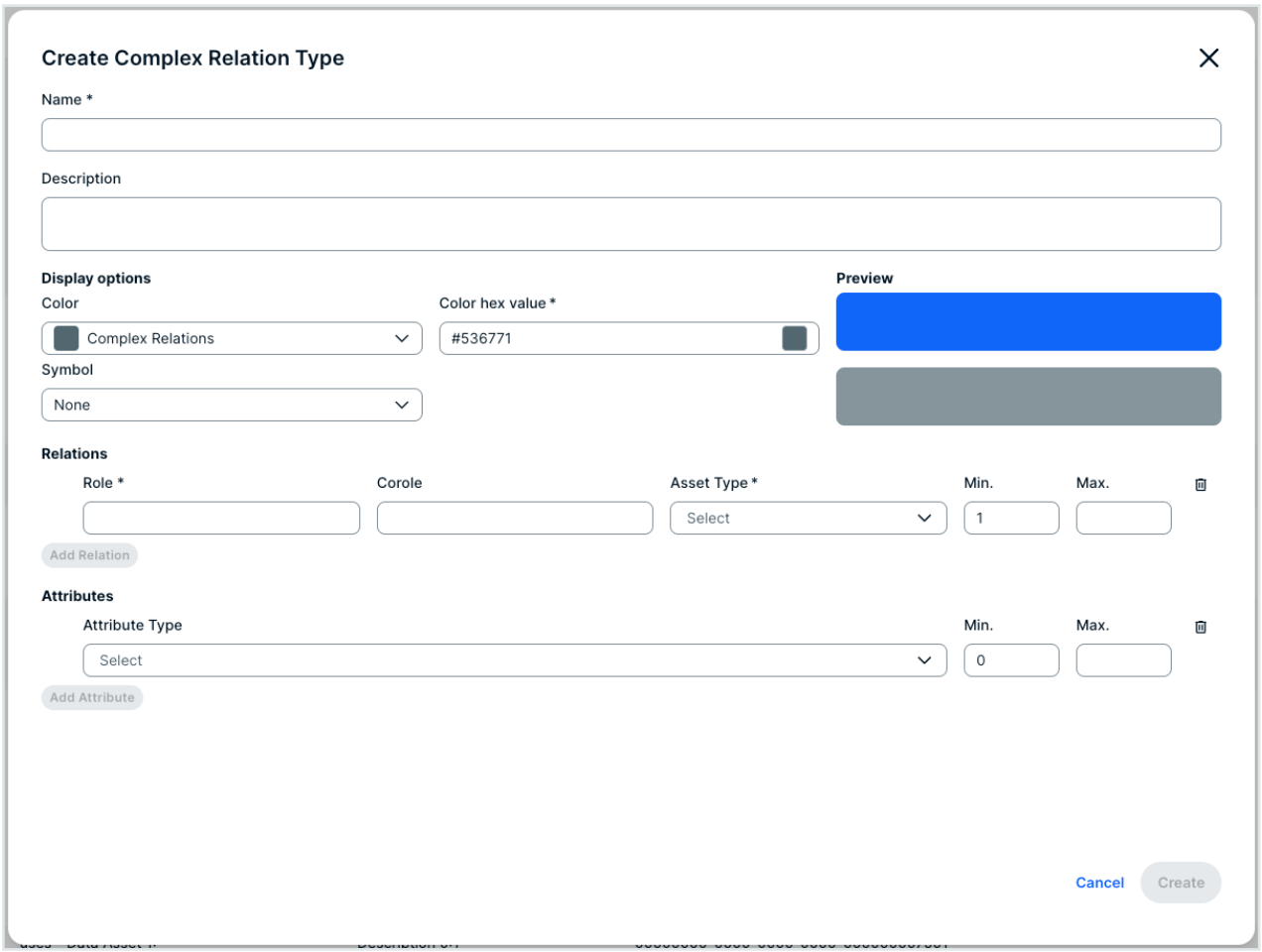
> **Note** A complex relation cannot have more than 32,767 relations to assets.

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*).



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 out-of-the-box 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:-) Target - Code Value (1:-) Crosswalk - Crosswalk (1: 1)	• Description (0:1) • Transformation Logic (0:1)	• Code Value • Crosswalk

Name	Description	Relation types	Attribute types	Assigned asset types
Data Usage	Data Usage	Uses - Data Asset (1:-) Used in - Business Asset (1:-) Governed by - Rule (1:-)	• Description (0:1) • Materiality (0:1)	
Fact Type		Head - Asset (1: 1) Tail - Asset (1: 1)	• Role (1:-) • Co-role (1:-)	
Field Mapping	Complex mapping between two or more data fields	Source - Data Element (1:-) Target - Data Element (1:-) Mapping specification - Mapping Specification (1: 1)	• Description (0:1) • Transformation Logic (0:1)	• Column • Data Attribute • Data Element • Field • Mapping Specification • Report Attribute
Foreign Key Mapping	Complex mapping between two columns representing a primary key and a foreign key	Constrains - Column (1: 1) References - Column (1: 1) Is part of - Foreign Key (1: 1)	• Key sequence (1:1)	• Column • Foreign Key

Create a complex relation type

You can create a complex relation type. For example, if the out-of-the-box complex relation types do not meet your needs.

Before you begin

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Complex relation types**.
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	The fields in this section allow you to edit how complex relations of this type are represented in diagrams.
Color	Color for complex relation nodes. **Tip** For a custom color, use the **Color hex value** field instead.
Color hex value	Hexadecimal code of the color for complex relations. **Tip** For a list of colors and their hexadecimal codes, go to ColorHexa.

Field	Description
Symbol	Graphical representation for complex relations of this type. You can select one of the following values: ◦ **None:** No graphical representation is used for complex relations. ◦ **Code:** Complex relations are represented with a code before them. You can specify the required code in the **Code** field. ◦ **Icon:** Complex relations are represented with an icon before them. You can select the required icon in the **Icon reference** field.
Code	Code shown before complex relations. This code is also shown in the legend of diagrams. **Note** This field is shown only if you selected **Code** in the **Symbol** field.
Icon reference	Icon shown before complex relations. This icon is also shown in the legend of diagrams. **Note** This field is shown only if you 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	Description of the relation type going from the head asset to the tail asset.
Co-role	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.

Field	Description
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 **Create**.

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.

Before you begin

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.

2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Complex relation types**.
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.
Description	The description of the complex relation type.
Display options	The fields in this section allow you to edit how complex relations of this type are represented in diagrams.
Color	Color for complex relation nodes. **Tip** For a custom color, use the **Color hex value** field instead.
Color hex value	Hexadecimal code of the color for complex relations. **Tip** For a list of colors and their hexadecimal codes, go to ColorHexa.
Symbol	Graphical representation for complex relations of this type. You can select one of the following values: ◦ **None:** No graphical representation is used for complex relations. ◦ **Code:** Complex relations are represented with a code before them. You can specify the required code in the **Code** field. ◦ **Icon:** Complex relations are represented with an icon before them. You can select the required icon in the **Icon reference** field.

Field	Description
Code	Code shown before complex relations. This code is also shown in the legend of diagrams. **Note** This field is shown only if you selected **Code** in the **Symbol** field.
Icon reference	Icon shown before complex relations. This icon is also shown in the legend of diagrams. **Note** This field is shown only if you 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	Description of the relation type going from the head asset to the tail asset.
Co-role	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.

Field	Description
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 out-of-the-box complex relation types.

Before you begin

- You have a global role that has the **Product Rights** > **System administration** global permission.
- The complex relation type is not an out-of-the-box complex relation type.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Complex relation types**.
4. In the row of the complex relation type that you want to delete, click 🗑.
   » The **Delete <complex relation type>** dialog appears.
5. Click **Delete**.

Domain types

A domain type is a property that defines the purpose and content of a domain. Through assignments, it specifies which asset types the domain can contain, enforcing consistency and structure for your data governance efforts. For example, a Business Glossary domain type would primarily contain assets of the Business Term type, while a Data Quality Rules domain type would contain Data Quality Rule assets. This association ensures that domains are used for their intended purpose and helps organize your Collibra environment.

Certain asset types can be created only in a specific Collibra application and in a specific domain type. For example, you can create Validation Rule assets only in a Validation Rule domain and KPI assets only in a Report Catalog domain. In an asset type's assignment, you can find the domain type required for the asset type.

Certain domain types are managed by Collibra, meaning they are system-managed and you can't edit their public ID, delete them, or change their parent. You can, however, edit their names (for example, to translate them into your preferred language).

Overview of out-of-the-box domain types

A domain type is a property that defines the purpose and content of a domain. Through assignments, it specifies which asset types the domain can contain, enforcing consistency and structure for your data governance efforts. For example, a Business Glossary domain type would primarily contain assets of the Business Term type, while a Data Quality Rules domain type would contain Data Quality Rule assets. This association ensures that domains are used for their intended purpose and helps organize your Collibra environment.

The table below contains all out-of-the-box domain types and their description. You can find out about domain types that are not available out of the box on their dedicated pages, such as Process Register, which is part of Data Privacy.

> **Tip** For an interactive overview of all out-of-the-box domain types, including the relevant asset types and applications, see the online version of this documentation.

Type	Type	Description
BI Catalog	BI Catalog	A collection of Tableau assets with the list of related attributes.
Business Asset Domain	Business Asset Domain	
Business Dimensions	Business Asset Domain ▸ Business Dimensions	A set of business dimensions that categorize and describe business terms.
Report Catalog	Business Asset Domain ▸ Report Catalog	A collection of reports and their definitions with the list of related report characteristics.
Codelist	Codelist	Any kind of data that is used solely to categorize other data found in a database, or solely for relating data in a database to information beyond the boundaries of the enterprise.

Type	Type	Description
Hierarchies	Codelist ▸ Hierarchies	A Code list with a hierarchical structure in its Code Values
Data Asset Domain	Data Asset Domain	
Data Usage Registry	Data Asset Domain ▸ Data Usage Registry	A collection of data usage agreements and related data structures.
Logical Data Dictionary	Data Asset Domain ▸ Logical Data Dictionary	Represents details of organizational data, independent of any particular technology, and uses vocabulary of a business area to communicate with non-technical stakeholders.
Mapping Domain	Data Asset Domain ▸ Mapping Domain	Groups data assets of the crosswalk type (to map between code sets) and mapping specification (used to map between data structures).
Physical Data Dictionary	Data Asset Domain ▸ Physical Data Dictionary	A collection of physical objects, such as tables, columns, file fields, views and APIs, to describe how data is stored, arranged and related to each other in a data storage technology/location.
Glossary	Glossary	A prioritized list of business terms and acronyms, and their meanings.
Governance Asset Domain	Governance Asset Domain	
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 polices and standards related to an organization.
Rulebook	Data Governance Domain ▸ Rulebook	A set of rules that are used as a basis for making decisions and governing programs or policies.
Issue Classification	Issue Classification	A domain type that contains Issue Categories. For information on where issue categories are used, go to Create a data issue.
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.
Issues Vocabulary Type	Issues Vocabulary Type	A domain type that contains issues. Every community has a domain of this type, called Issues. This domain is hidden, which means it does not appear in the Collibra Browser. You can view all assets in the hidden Issues domains through the Data Helpdesk.

Create a domain type

You can create new domain types to tailor the Collibra platform to your specific data governance needs, create a more organized environment, and reflect your unique data landscape information architecture.

Consider creating new domain types to:

- Support new asset types: In Collibra, every asset ultimately resides in a domain. If you created a new, custom asset type that doesn't fit neatly into an existing domain type, create a new domain type specifically for it.
- Improve organization and usability: Domain types allow you to logically group domains and their contained assets. Instead of having a general Data Governance domain, you can create more specialized types such as a Business Glossary domain, a Data Quality Rules domain, a Technical Asset domain, and so on. This helps other users find specific types of information. Each domain type explicitly communicates the intended purpose and the asset types it was designed to hold, reducing confusion, improving user adoption, and helping maintain consistency.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Domain Types**.
   » A table containing all the domain types assigned to the asset type is shown.
4. Above the table, to the right, click **Add**.
   » The **Create Domain Type** dialog box appears.
5. Enter the required information.

Option	Description
Name	Type a name for the domain type.
Description	Optionally, enter a description that details the purpose and intended usage of the domain type.
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.

> **Note** Certain domain types are managed by Collibra, meaning they are system-managed and you can't edit their public ID, delete them, or change their parent. You can, however, edit their names (for example, to translate them into your preferred language).

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Domain Types**.
   » A table containing all the domain types assigned to the asset type is shown.
4. In the **Name** or **Description** column, hover your pointer over the cell, and double click.
   » The cell editor appears.
5. Edit the name or description.
6. Press `Enter` or click outside of the field to save your edit.

What's next?

When you edit a domain type, you can set or remove a default domain view. For details, go to Set a domain type default view (in preview) or Remove a default domain view (in preview).

Set a domain type default view (in preview)

This topic is **applicable only** to the latest UI.

You can set a default view for a domain type across communities to provide a consistent experience.

Prerequisites

- Enable the Domain type default view (in preview) setting.
- Create and configure the view you want to set as the domain type default view. Ensure that the view is visible to everyone.

- You have a global role with the **Manage Shared Views**, **Dashboards**, and **Search Filters** global permission, for example, **Sysadmin**.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Domain Types**.
4. In the row of the domain type for which you want to set the default view, hover your pointer over the cell, and double click in the **Domain Type Default View** column.
   » The **Edit... Domain Type Default View** dialog box appears.
5. In the **Edit... Domain Type Default View** dialog box, select the view you created and configured from the drop-down menu to set it as the default.
6. Optional: If a default domain type view exists, you can select the **Override currently selected default domain view** option to replace it.
7. Click **Save**.

What's next?

When a view is set as the default view for a domain type, you cannot delete the view or change the **Visible To** field option again when sharing the view. To change the **Visible To** field option or delete the view, you must first remove it as the default view.

If you disable the Domain type default view (in preview) setting after you set the default domain type view, the default view remains available for all domains of the domain type. However, you cannot remove the default domain type view while the setting is disabled.

Remove a default domain view (in preview)

This topic is **applicable only** to the latest UI.

You can remove a default view for a domain type.

Prerequisites

- Enable the Domain type default view (in preview) setting.
- You have a global role with the **Manage Shared Views**, **Dashboards**, and **Search Filters** global permission, for example, **Sysadmin**.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Domain Types**.
4. In the row of the domain type for which you want to remove the default view, double-click in the **Domain Type Default View** column.
   » The cell editor appears.
5. Remove the default view by clicking ✕.
6. Click **Save**.

Move a domain type

You can move a domain type to another parent domain type in the domain type table.

> **Note** Certain domain types are managed by Collibra, meaning they are system-managed and you can't move them. You can move only custom domain types.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Domain Types**.
   » A table containing all the domain types assigned to the asset type is shown.
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.

> **Note** Certain domain types are managed by Collibra, meaning they are system-managed and you can't delete them. You can delete only custom domain types.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Domain Types**.
   » A table containing all the domain types assigned to the asset type is shown.
4. At the end of a row, click 🗑.
   » The **Delete <domain type>** dialog box appears.
5. Click **Delete**.

Asset statuses

The status indicates the condition of an asset or workflow.

Overview of out-of-the-box 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	UUID
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.	00000000-0000-0000-0000-000000005009
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.	00000000-0000-0000-0000-000000005024
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.	00000000-0000-0000-0000-000000005023

Status	Description	Use	UUID
Approved		Currently not in use.	00000000-0000-0000-0000-000000005025
Archived			00000000-0000-0000-0000-000000005084
Candidate	The initial status of an asset.	Newly created assets receive this status.	00000000-0000-0000-0000-000000005008
Deployed	The initial status of a workflow.	Refers to workflow definitions. This is a system status. It can't be deleted.	00000000-0000-0000-0000-000000005053
Disabled	The workflow is currently not in use.	Refers to workflow definitions. This is a system status. It can't be deleted.	00000000-0000-0000-0000-000000005052
Enabled	The workflow is currently active.	Refers to workflow definitions. This is a system status. It can't be deleted.	00000000-0000-0000-0000-000000005051
Ideation	An idea is being explored or researched.		00000000-0000-0000-0000-000000005081
Implemented	The Implemented status has a different meaning depending on where it is used.	Assets integrated into the Data Catalog from sources like Databricks are initially marked as Implemented. S3-integrated assets, however, receive the Candidate status. The Implemented status is also used for Review Request assets in Data Privacy.	00000000-0000-0000-0000-000000005055

Status	Description	Use	UUID
In Progress	The assignee is solving the issue.	The status is used in the Issue Management workflow.	00000000-0000-0000-0000-000000005019
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.	00000000-0000-0000-0000-000000005022
Missing from source	The status of an asset that is no longer present in the data source.		00000000-0000-0000-0000-000000005066
Monitored		Currently not in use.	00000000-0000-0000-0000-000000005054
Monitoring			00000000-0000-0000-0000-000000005083
New	The initial status of an issue.	Newly created issues receive this status.	00000000-0000-0000-0000-000000005058
Obsolete		Currently not in use.	00000000-0000-0000-0000-000000005011
Pending	The requester is providing more information about an issue.	The status is used in the Issue Management workflow.	00000000-0000-0000-0000-000000005059
Rejected	The approvers rejected the data usage request.	The status is used in the Request Assets Access workflow.	00000000-0000-0000-0000-000000005010
Resolution Pending	The reviewer is validating the asignee's solution to an issue.		00000000-0000-0000-0000-000000005056

Status	Description	Use	UUID
Resolved	The issue is resolved.	The status is used in the Issue Management workflow.	00000000-0000-0000-0000-000000005057
Reviewed		Currently not in use.	00000000-0000-0000-0000-000000005021
Submitted for Approval	The stakeholders are verifying the proposed solution to an issue.	The status is used in the Issue Management workflow.	00000000-0000-0000-0000-000000005060
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.	00000000-0000-0000-0000-000000005020

Create a status

Collibra 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 **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
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 **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Statuses**.
4. In the **Name** or **Description** column, hover your pointer over the cell, and then 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** Certain statuses are managed by Collibra, meaning they are system-managed and you can't delete them. You can delete only custom statuses.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- The status that you want to delete is not used by any asset.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
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.

In this section you will learn more about how the articulation score is calculated and how you can manage the articulation score rules.

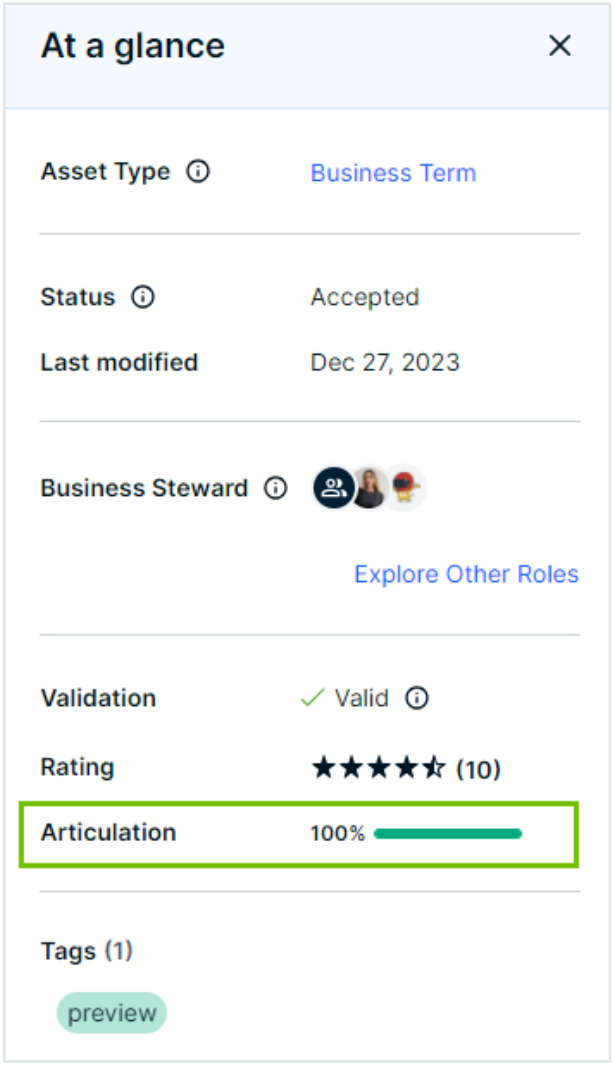
Articulation scores

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 following locations:

- In the **At a glance** sidebar of the asset page.



- In the **Articulation Score** column in a table of assets.
- As a field on the tiles of assets.

> **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	Condition Value	Score	Score Value
	Characteristic	Definition	Increase by	33
2	Condition	Condition Value	Score	Score Value
	Status	Candidate	Sets to	0

3	Condition	Condition Value	Score	Score Value
	Status	In progress	Sets to	10
4	Condition	Condition Value	Score	Score Value
	Status	Under review	Sets to	50
5	Condition	Condition Value	Score	Score Value
	Status	Reviewed	Sets to	80
6	Condition	Condition Value	Score	Score Value
	Status	Accepted	Sets to	100
7	Condition	Condition Value	Score	Score Value
	Characteristic	Note	Increase by	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

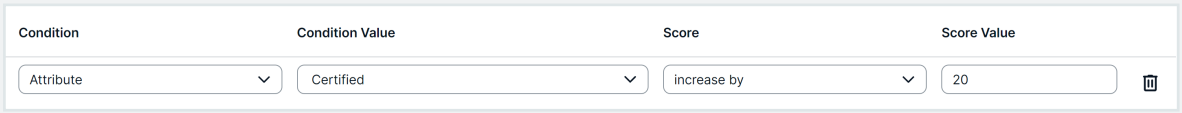
1. Open the scope of an asset type.
    a. On the main toolbar, click → **Settings**.
        » The **Settings** page opens.
    b. Click **Operating Model**.
        » The Operating Model settings page opens.
    c. Click the name of an asset type.
2. In the tab pane, click <name of the scope>, then 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:



Result: The articulation calculator is added to the articulation table and is assigned to the given asset types.

Note
- 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.

Edit an articulation score rule

You can edit 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 toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click **Operating Model**.
      » The Operating Model settings page opens.
   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**.

Note

- 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.

Delete an articulation score rule

You can delete an articulation score rule. For example, you can do this if you no longer need an existing articulation score rule.

Steps

1. Open the scope of an asset type.
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click **Operating Model**.
      » The Operating Model settings page opens.
   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. Click 🗑 next to the rule that you want to delete.
5. Click **Save**.

Note

- 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.

Asset data quality

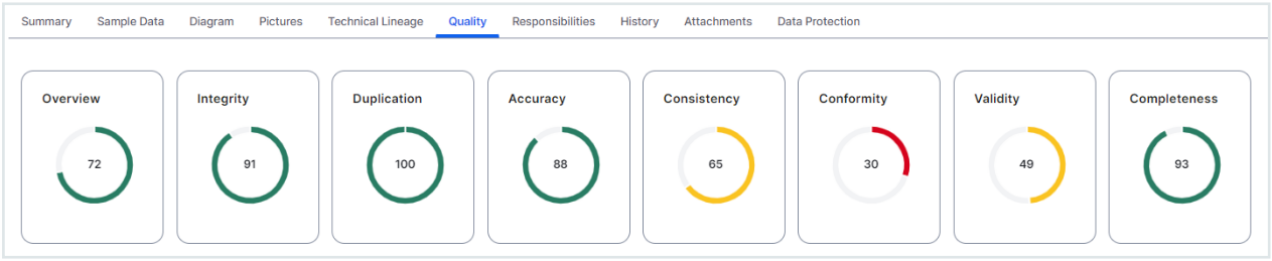
The **Quality** page of an asset delivers the available results of an asset to business stakeholders. The dashboard collects and displays the following values which are:

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

The assets that have these data quality dashboards available and how these values are aggregated are defined in data quality rules. These rules 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**.

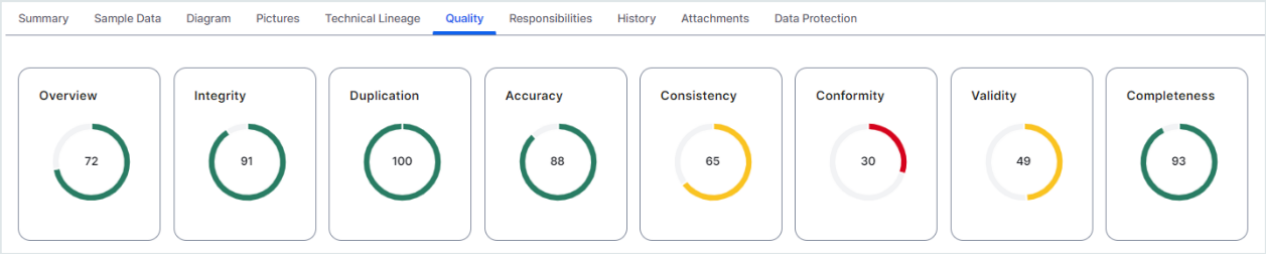
Underneath the top pane, three selection boxes are available. They display an extra overview, details and history pane, respectively.

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.



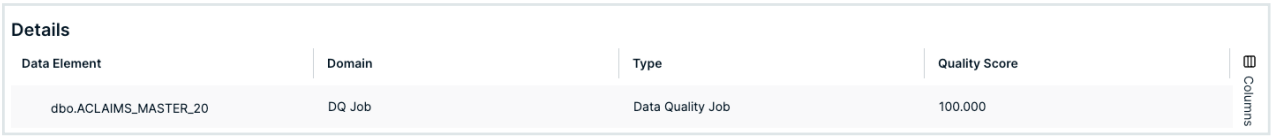
Asset quality details pane

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:

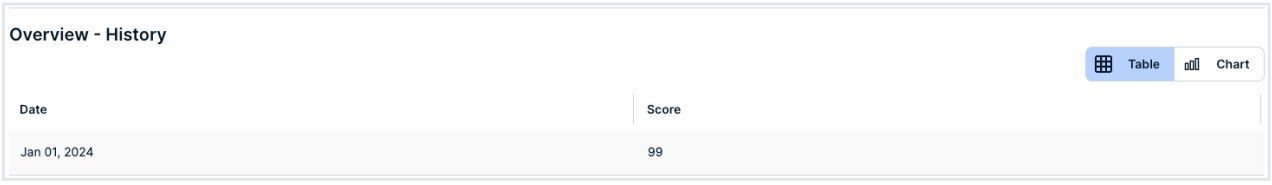
- **Full name**: The unique full name of the asset.
- **Domain**: The domain to which the asset belongs.
- **Type**: The type of the asset.
- **Dimension**: The dimension that applies to these assets, if any. Dimensions are used to calculate the subscores, as mentioned earlier.

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.

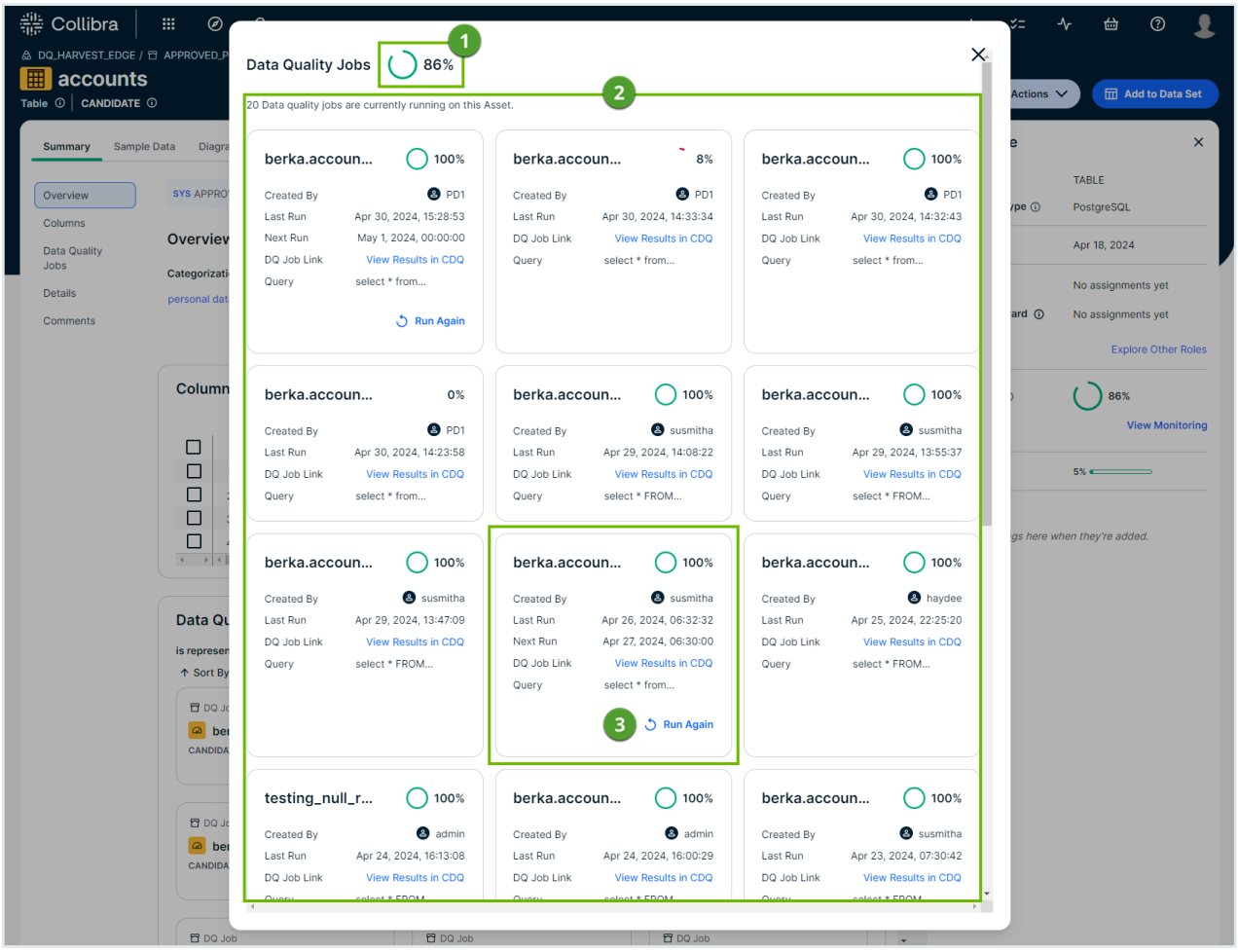


Asset quality monitoring

Important

- This feature is available only in the latest UI.
- This feature is available only when you have an active integration with Data Quality & Observability Classic.

The **View Monitoring** link in the **At a glance** sidebar opens a modal that shows key data points of data quality jobs running on a Table asset. If this sidebar is hidden, click ⓘ.



Number	Section	Description
1	Aggregate data quality score	The aggregate score of all jobs running on the Table asset. When a new job runs on this asset, this score updates to include the score from that run in its aggregation.

Number	Section	Description
2	Total data quality jobs	The total number of data quality jobs running on the Table asset.
3	Data quality job overview	Each tile represents an individual data quality job running on the Table asset. By default, each tile shows the following details: • Job name: When the name is truncated because it exceeds the allotted width in the tile, you can hover your cursor over it to display its full name. • Data quality score: The data quality score of the job run. This contributes to the aggregated data quality score at the top of the modal. • Created By: The user who created the job in Data Quality & Observability Classic • Last Run: The timestamp of the previous run of the data quality job. • DQ Job Link: A hyperlink that opens the Findings page in Data Quality & Observability Classic of the most recent run of the data quality job. • Query: The underlying SQL query of the data quality job that executed during the most recent run. When a job is configured in Data Quality & Observability Classic to run on a schedule, the tile shows the default information about the job along with the following details: • Next Run: The timestamp of the next scheduled run of the data quality job. • Run Again: You can click this button to re-run the data quality job in Data Quality & Observability Classic.

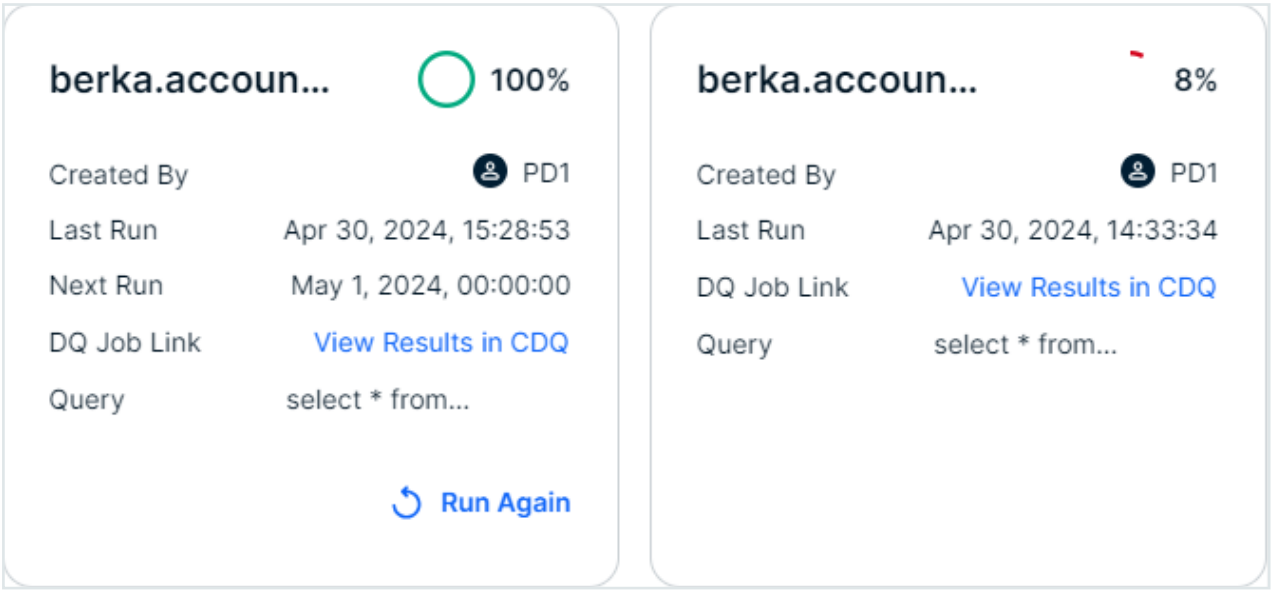
Re-run a data quality job

> **Important**
> - This feature is available only in the latest UI.
> - This feature is available only when you have an active integration with Data Quality & Observability Classic.

You can re-run data quality jobs on Table assets when they are configured in Data Quality & Observability Classic to run on a schedule.

The following screenshot shows two data quality job tiles. The job represented in the tile on the left is configured in Data Quality & Observability Classic to run on a schedule, showing when

the job will run next and allowing users to re-run it directly from the Data Quality Jobs modal. Since the job in the tile on the right is not scheduled, it only shows information from the previous run. The steps outlined in this guide only apply to scheduled jobs, such as the one on the left side of the screenshot.



Prerequisites

- You have a data quality job configured in Data Quality & Observability Classic to run on a schedule.
- You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. In the global Search box, enter the name of your **Table asset**, and then click it to open it.
   » The Table asset page opens.
2. In the **At a glance** sidebar, click **View Monitoring**. If this sidebar is hidden, click ⓘ.
   » The Data Quality Jobs modal appears.
3. From a data quality job configured to run on a schedule, click **Run Again**.
   » A success message appears.
4. Click **View Results in CDQ** to navigate to the Findings page in Data Quality & Observability Classic to view the results of the job run.
   » The Findings page in Data Quality & Observability Classic opens in a new tab.

Working with quality score aggregations

This section shows you how to establish a link between data quality monitors and physical data assets in Data Catalog, and create custom aggregation paths to show data quality scores on Business, Data, and Governance assets.

About quality score aggregations

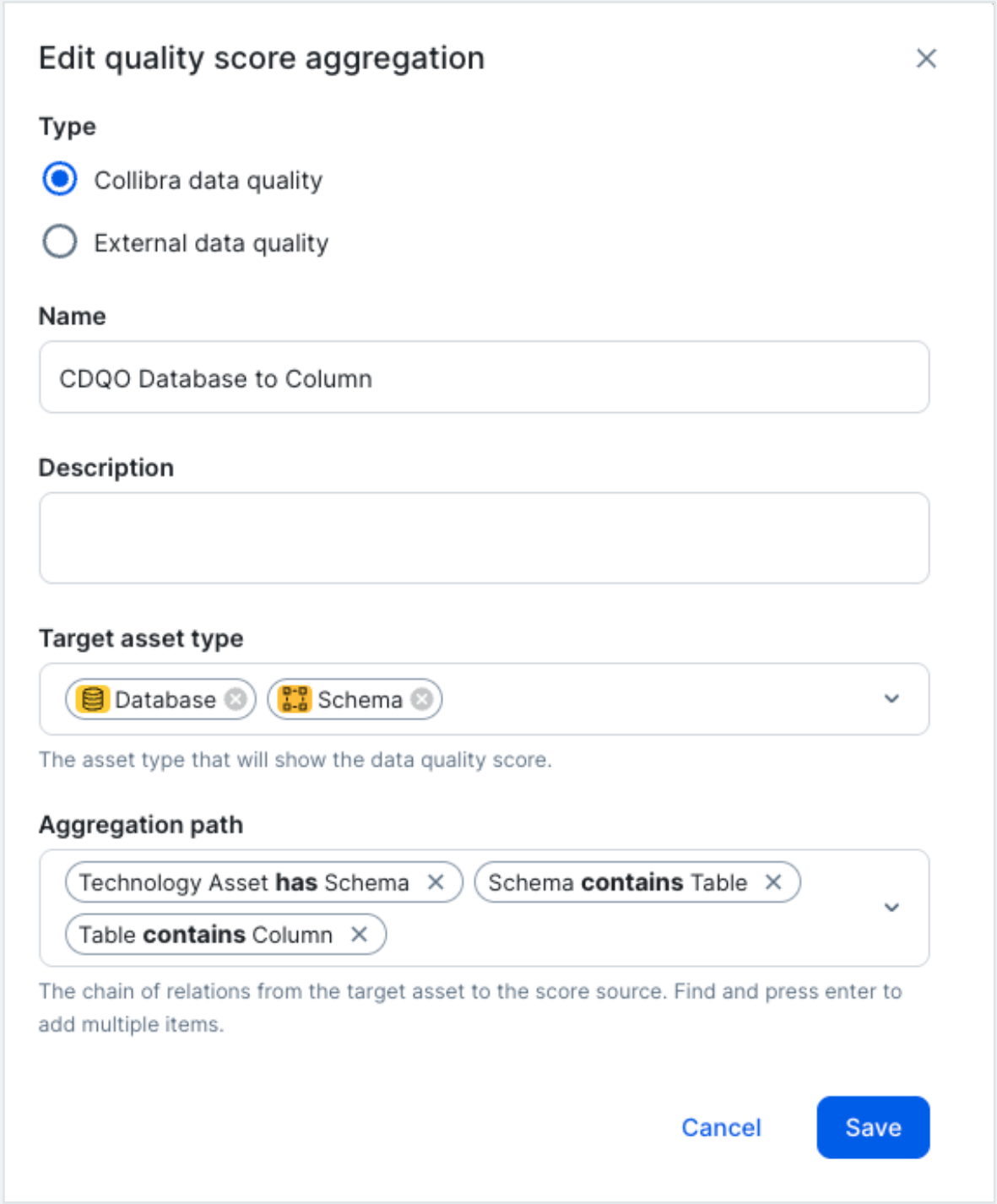
A quality score aggregation is a chain of relations from the target asset to the source of the data quality score that instructs Collibra how to calculate scores. The source of the data quality score can be via Data Quality & Observability or an external data quality tool.

Quality score aggregations allow you to:

- View data quality scores on physical data assets in Data Catalog.
- View data quality scores on Business, Data, and Governance assets.
- Control how data quality is compiled across assets.
- View the health of your assets regardless of the source of your data quality insights.

Quality scores on assets in Data Catalog require a mapping between data quality monitors from a data quality tool, such as Data Quality & Observability, and a corresponding Column or Column subtype asset. Scores from Column and Table assets are aggregated out-of-the-box. However, relation types between assets and non-asset objects require custom aggregation paths for quality scores to be shown.

Example
This example shows the score aggregation **CDQO Database to Column** and its fields are explained in the following sections.



Type

The source data quality tool from which quality scores and results come.

In the example above, both **Collibra data quality** and **External data quality** are shown. However, in your environment, you might see only one. Support for the Data Quality & Observability capability and enabling external data quality tools are controlled via settings in Collibra Console. To edit these settings, please create a support ticket.

Name and Description

The quality score aggregation consists of a unique name and a description that is shown in the Settings page and in the assignments of an asset type.

Target asset type

The asset type that will show the data quality score when the aggregation path is created.

In the example above, Database and Schema Assets will show the data quality score.

Aggregation path

The quality score aggregation 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 quality score aggregation is assigned, to the asset containing the actual values.

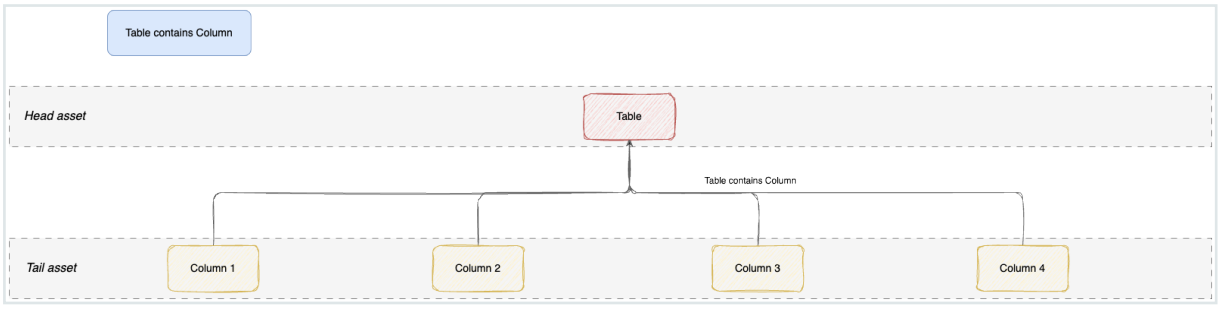
In the example above, values from Column Assets are aggregated for Database Assets by looking up:

- The Schema Assets that these Database Assets have.
- The Table Assets that these Schema Assets contain.
- The Column Assets that these Table Assets contain.

Examples of aggregation paths

Table to Column

In the following example, the chain of relations in the aggregation path is **Table contains Column**.



Database to Column

In the following example, the chain of relations in the aggregation path is **Technology Asset has Schema**, **Schema contains Table**, and **Table contains Column**.

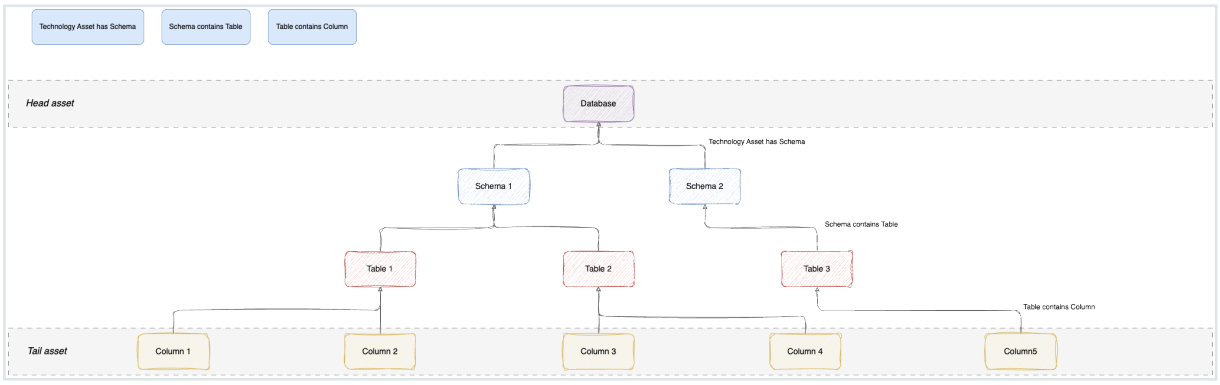
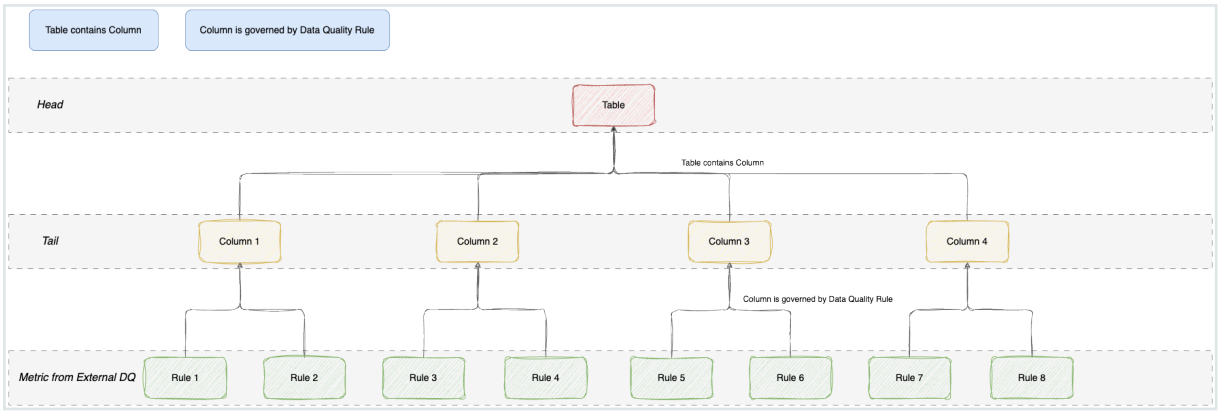


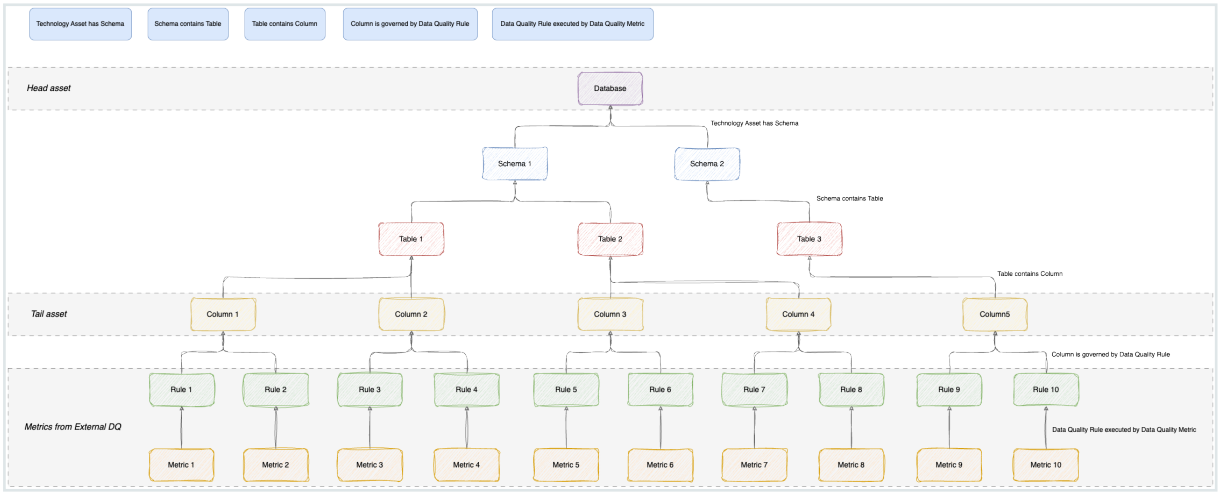
Table to Rule

In the following example, the chain of relations in the aggregation path is **Table contains Column** and **Column is governed by Data Quality Rule**.



Database to Metric

In the following example, the chain of relations in the aggregation path is **Technology Asset has Schema**, **Schema contains Table**, **Table contains Column**, **Column is governed by Data Quality Rule**, and **Data Quality Rule executed by Data Quality Metric**.



What's next?

- Review the out-of-the-box aggregation paths.
- Create a custom quality score aggregation.

Overview of out-of-the-box aggregation paths

Out-of-the-box aggregation paths for asset types in the physical data layer allow Collibra to automatically calculate their data quality scores in Data Catalog. The following tabs show the out-of-the-box aggregation paths of the target asset types in the physical data layer for Data Quality & Observability and external data quality tools.

Target asset type	Aggregation path	Assigned to
Database	• Technology Asset has Schema • Schema contains Table • Table contains Column	Database asset type
Schema	• Schema contains Table • Table contains Column	Schema asset type
Table	Table contains Column	Table asset type
Database View	Table contains Column	Database View asset type
Column	N/A **Note** Column assets do not have an aggregation path. Instead, they are calculated automatically based on the relationship between the Column asset and the data quality monitoring objects, such as min and max values, uniqueness, and so on.	Column asset type

Target asset type	Aggregation path	Assigned to
Database	• Technology Asset has Schema • Schema contains Table • Table contains Column • Column is governed by Data Quality Rule	Database asset type

Target asset type	Aggregation path	Assigned to
Schema	• Schema contains Table • Table contains Column • Column is governed by Data Quality Rule	Schema asset type
Table	• Table contains Column • Column is governed by Data Quality Rule	Table asset type
Database View	• Table contains Column • Column is governed by Data Quality Rule	Database View asset type
Column	Column is governed by Data Quality Rule	Column asset type

Tip You can edit or delete out-of-the-box aggregation paths. For more information, go to Edit or delete a quality score aggregation.

Create a quality score aggregation

You can establish a link between data quality monitors and assets in Data Catalog with a quality score aggregation.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- Data Quality & Observabilityor a third-party tool for Collibra to source data quality scores.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.

2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Quality score aggregations**.
4. Above the table, to the right, click **Create score aggregation**.
5. Enter the required information.

Field	Description
Name	The name of the data quality score aggregation path.
Description	The description of the data quality score aggregation path.
Target asset type	The asset type that will show the data quality score. Click the drop-down list and select one or more target assets.
Aggregation path	The chain of relations from the target asset to the score source. Click the drop-down list and select one or more chains of relations. **Important** The tail asset in the aggregation path must be a Column.

6. Click **Save**.

Tip See Data quality rules for more information.

Note After you configure an aggregation path, quality scores are calculated in Data Quality & Observability and then sent to relevant assets in Data Catalog.

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Quality score aggregations**.

4. Above the table, to the right, click **Create score aggregation**.
5. Enter the required information.

Field	Description
Name	The name of the data quality score aggregation path.
Description	The description of the data quality score aggregation path.
Target asset type	The asset type that will show the data quality score. Click the drop-down list and select one or more target assets.
Aggregation path	The chain of relations from the target asset to the score source. Click the drop-down list and select one or more chains of relations.
Categorization	The relation type that links the score to the Dimension asset type, which can slice the score. Click the drop-down list and select an option.

6. Click **Save**.

> **Tip** See Data quality rules for more information.

> **Note** After you configure an aggregation path, quality scores are calculated in the knowledge graph.

Edit or delete a quality score aggregation

You can edit or delete custom and out-of-the-box data quality score aggregations.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.

- Data Quality & Observabilityor a third-party tool for Collibra to source data quality scores.

Edit a quality score aggregation

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Quality score aggregations**.
4. Click on the far-right side of the row containing the quality score aggregation. You may need to scroll horizontally to access it.
   » The **Edit quality score aggregation** dialog box appears.
5. Enter the required information.
6. Click **Save**.

Delete a quality score aggregation

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Operating Model**.
   » The Operating Model settings page opens.
3. In the tab pane, click **Quality score aggregations**.
4. Click on the far-right side of the row containing the quality score aggregation. You may need to scroll horizontally to access it.
   » The **Delete this quality score aggregation** confirmation appears.
5. Click **Delete** to confirm the permanent deletion of the quality score aggregation.

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 **Product Rights** > **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. Click the **Assets** tab, then click an asset type from the list.
   » The **Create Asset** dialog box appears.

> **Tip** The **Recent** tab next to the Assets tab displays the 5 most recent asset types created within the last month. You can select asset types here and create assets more efficiently.

1. 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.
Asset name	A name to identify the asset. Asset names have a character limit of 2000 characters. **Tip** ◦ You can create multiple assets together. To do so, enter the first name, click the drop-down or press `Enter`, and then enter the next name. ◦ Depending on the settings, asset names may need to be unique within their domain.

2. 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 **Product Rights** > **System administration** global permission.

Steps

1. Open a validation rule asset.
   » The asset page appears.
2. Switch the **Show Empty Optional Values** option on.
   » All fields become available.
3. Fill in the required information.
   For information on the validation script attribute, go to Validation scripts.
4. Click **Save**.

Delete a validation rule

You can delete validation rules in the same way as normal assets.

> **Note** You can't delete a validation rule if it is assigned to an asset type.

Before you begin

- You have unassigned the validation rule from asset types.
- You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. Open the Validation Rule domain to which the validation rule belongs.
2. Select the checkbox in front of the validation rule.
3. Click **Delete**.
   » A confirmation dialog box appears.
4. Click **Delete**.

> **Tip** You can also search for or navigate to the validation rule, and click ⋮ → **Delete**.

Change the order of validation rules

The order of the validation rules will determine the order in which they are executed and shown on the asset page.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.

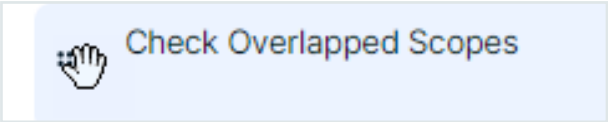
Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

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. Hover over a validation rule.
   The move icon appears in front of the validation rule.

6. Click the move icon and hold down the mouse button.



7. Move your mouse to the desired location in the order.
8. Release the mouse button.
9. 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 **Product Rights** > **System administration** global permission.

Steps

1. Open the asset type.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Operating Model** tab.
      » The Operating Model settings are shown.
   c. On the **Asset types** tab, click the name of the asset type.
      » The asset type page opens.

   > **Tip** You can also open the asset type from the asset page by clicking the asset type name in the upper-left corner of the asset page.

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.

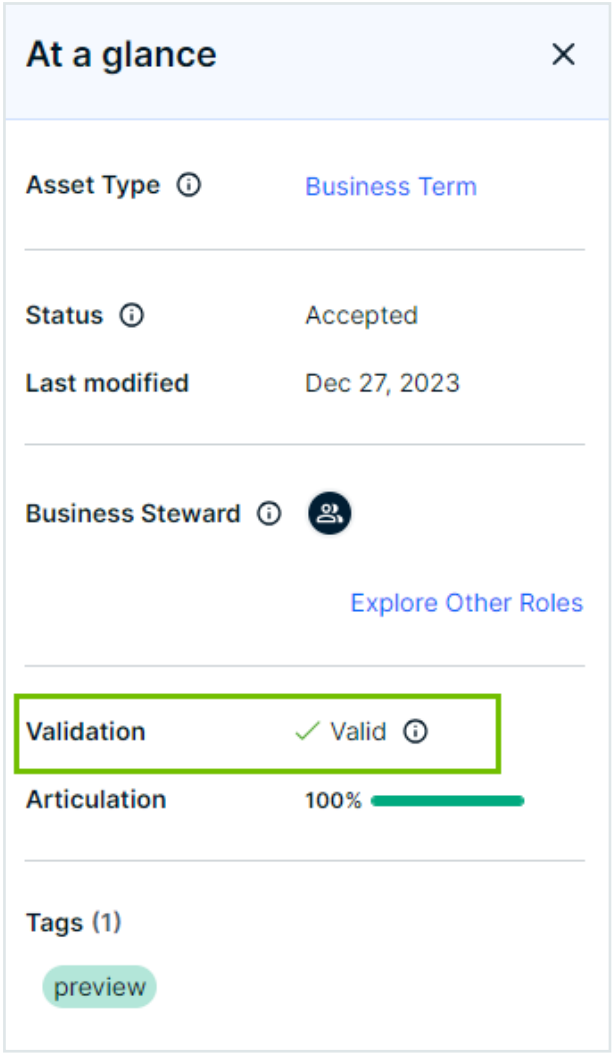
For more information on how to configure validation logging, see Logging.

> **Tip** When contacting support regarding a problem with validation, attach the log file to the ticket.

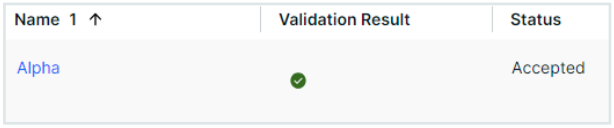
Validate assets

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 in the following locations:

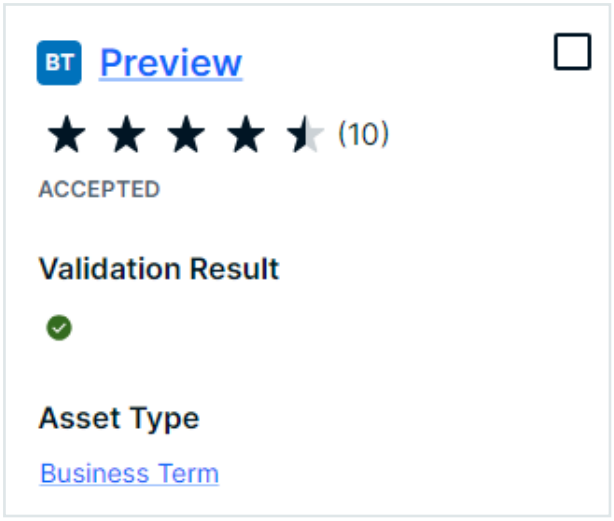
- In the **At a glance** sidebar of an asset. If this sidebar is hidden, click ⓘ.



- As a column, **Validation Result**, when viewing assets in table display mode.



- As a field, **Validation Result**, when viewing assets in tiles display mode.



- As an overlay in a traceability diagram.

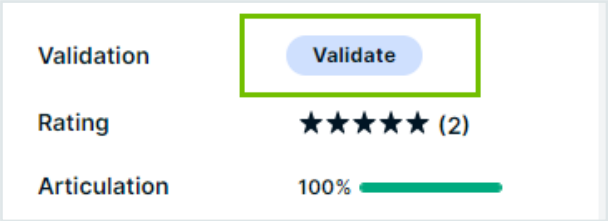
> **Note**
> - After validation, the **dgc.log** file will also contain more extensive messages. For more information on how to configure validation logging, see Logging.
> - By default, validation is not automatically triggered when an asset is edited, so you have to revalidate it after editing an asset. However, you can create a workflow for this. To configure validation on certain events, see Getting started with workflows.

Prerequisites

- 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. In the **At a glance** pane, click **Validate**.



   You can also use **Actions** → **Validate**.

Validate one or more assets from an asset table

1. Open a set of assets in table display mode.
2. Select the checkboxes in front of the assets you want to validate.
3. Click **Validate**.
   » The validation activity starts.
4. Once the validation is completed, refresh the page.

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. Click **Validate**.
   » The validation activity starts.
4. Once the validation is completed, refresh the page.

Revalidate an asset

You can revalidate assets that were previously validated to see whether they still 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. For information on where you can see the validation result, go to Validate an asset.

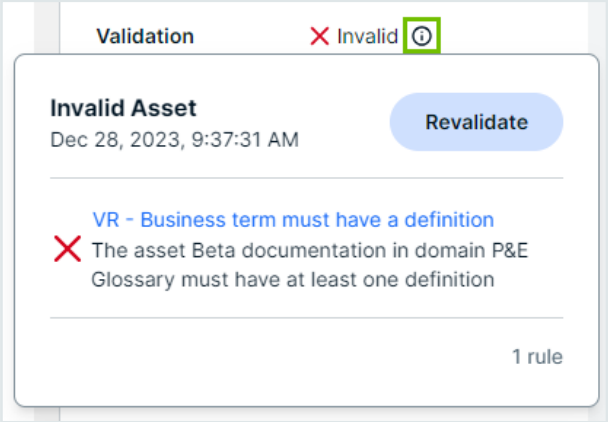
> **Note** You can create a workflow to automatically revalidate assets. To configure validation on certain events, see Getting started with workflows.

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 validation result, click the info icon.
   » The validation result details appear. You see the validation result for each validation rule.

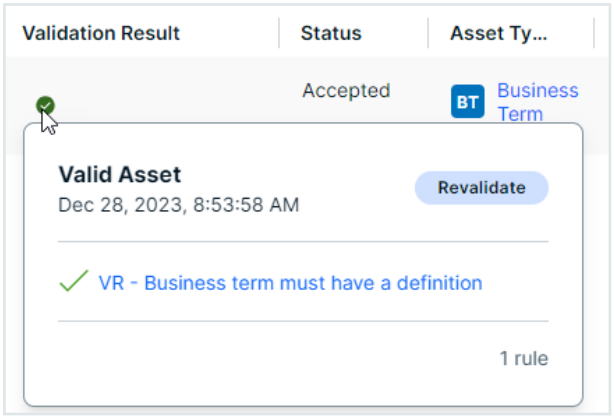


3. Click **Revalidate**.

Revalidate one asset from an asset view

1. Open a set of assets in table display mode.
2. If you don't see the **Validation Result** column, add it to the table.
   For more information on adding columns, go to Customizing tables.

3. Click ✓ or ✕ for the asset.
   » The validation result details appear. You see the validation result for each validation rule.
4. Click **Revalidate**.



Revalidate one or more assets from an asset view

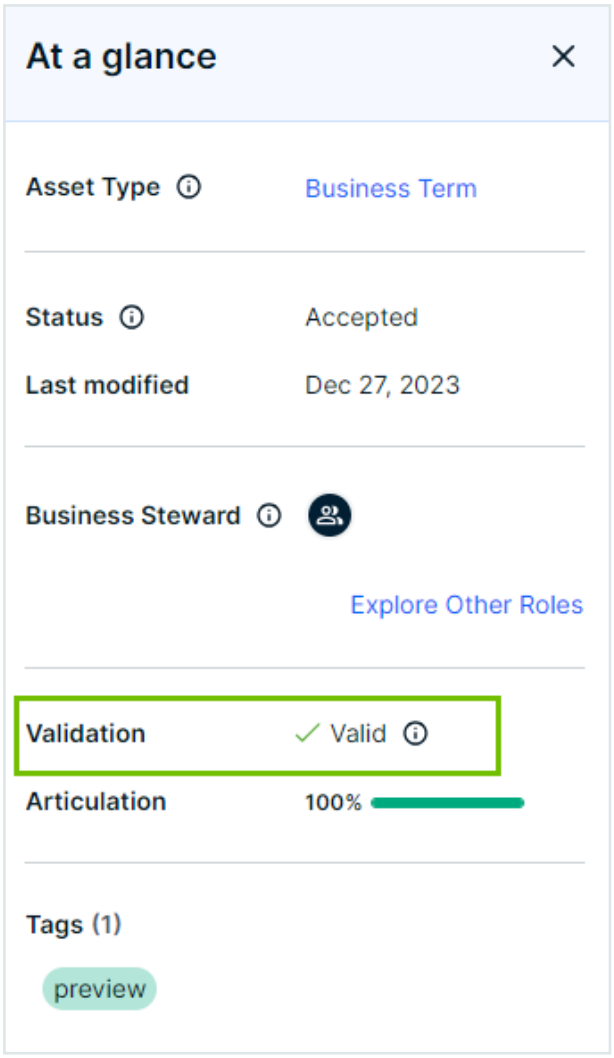
1. Open a set of assets in table display mode.
2. Select the checkboxes in front the assets you want to revalidate.
3. Click **Validate**.

View the validation result

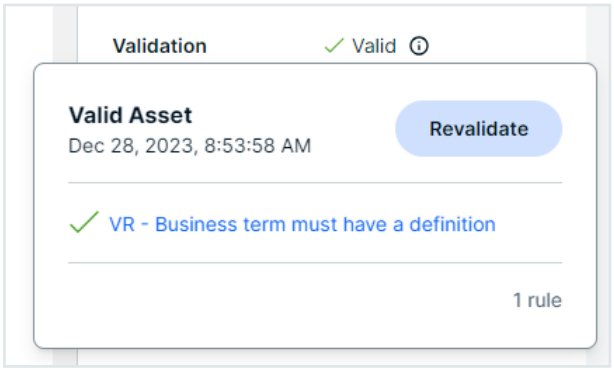
After validating or revalidating assets, you can view the result and make changes where necessary.

View the validation result on the asset page

1. Open an asset page.
   » In the **At a glance** sidebar, you see a ✓ **valid** icon or ✕ **invalid** icon. If this sidebar is hidden, click ⓘ.

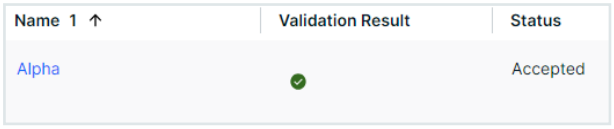


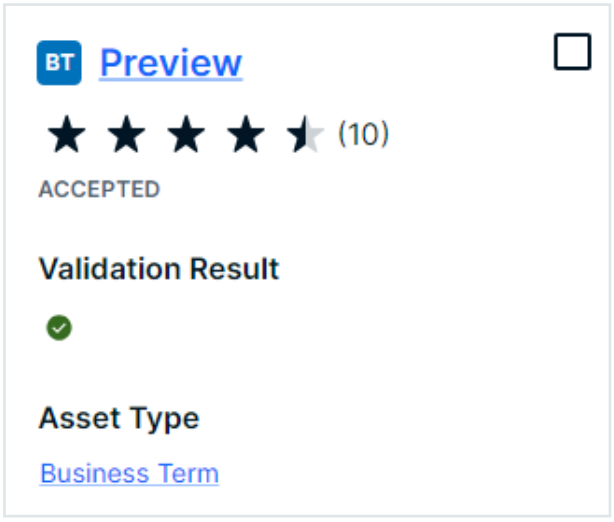
2. Click the info icon.
   » The validation result details appear. You see the validation result for each validation rule.



View the validation result in an asset table

1. Open a set of assets in table or tile display mode.
2. If you don't see the **Validation Result** column, add it to the table.
   For more information on adding columns, go to Customizing tables.





3. Click ✓ or ✕ for the asset.
   » The validation result details appear. You see the validation result for each validation rule.

Validation scripts

A validation script is an attribute of a Validation Rule asset. The script contains the validation logic, which expresses a single condition to evaluate the asset. The outcome of the evaluation is binary:

- **valid:** The validated asset meets the condition.
- **invalid:** The validated asset doesn't meet the condition.

Depending on the result, a custom message can also be shown.

Validation scripts are written using a syntax that is based on Groovy, but enhanced specifically for validation rules in the Collibra Platform.

> **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 in validation script
- Closures

Validation script structure

The structure of validation scripts can be basic or advanced. More information:

- Basic script structure
- Advanced validation script structure

Basic script structure

The basic script structure only contains the pure validation logic in a `rule`. More information: Validation logic.

```
rule {

}
```

Example
The following script checks that the asset name is not empty and contains more than two characters.

```
rule {
   isNotEmpty(attributes.'Definition', message: "Definition cannot be
empty") &&
   isLengthMore(attributes.'Definition'?.first(), 20, message:
"Description should have more than 20 characters")
}
```

Advanced validation script structure

The advanced script structure contains up to three sections, which are all contained in a `rule`.

```
rule {
   given {
   }
   when {
   }
   then {
   }
}
```

Example

```
rule {
   given {
       definitions = attributes['Definition']
   }
   when {
       isEqual(type.id,\
                   '00000000-0000-0000-0000-000000011001')
   }
   then {
       isNotEmpty(definitions, \
                   message: "The asset ${name} \
           in domain ${vocabulary.name} must have
                   at least one definition")
   }
}
```

Given-section

You can use this optional section to define variables that you can re-use in the rest of the script. Variables can make the rest of the validation script more readable. It allows you to separate data creation from the actual constraint-checking validation logic.

Each line of the given-section contains a variable name, an equal sign and an asset property. More info: Asset model.

Example
The following given-section creates the variable *definitions* , which contains a list of the values of the **Definition** attributes.

```
given {
    definitions = attributes['Definition']
}
```

When-section

You can use this optional section if certain conditions have to be met before the rule is executed. If you do not use this section, the validation logic is applied to all assets.

If an asset does not meet these conditions, the validation logic is not executed and the outcome of the rule is **valid**.

If the conditions are met, the validation logic is executed. The outcome of the rule will then depend on the actual validation logic in the **then**-section.

Each line of the **when**-section typically contains:

1. A validation function. More info: Validation functions.
2. An attribute from the given-section, an asset property or a constant value that you entered in the script.

Example
The following when-section only allows assets to be validated if they are of a specific asset type.

```
when {
    isEqual(type.id,'00000000-0000-0000-0000-000000011001')
}
```

Then-section

The **then**-section contains the pure validation logic. More information: Validation logic.

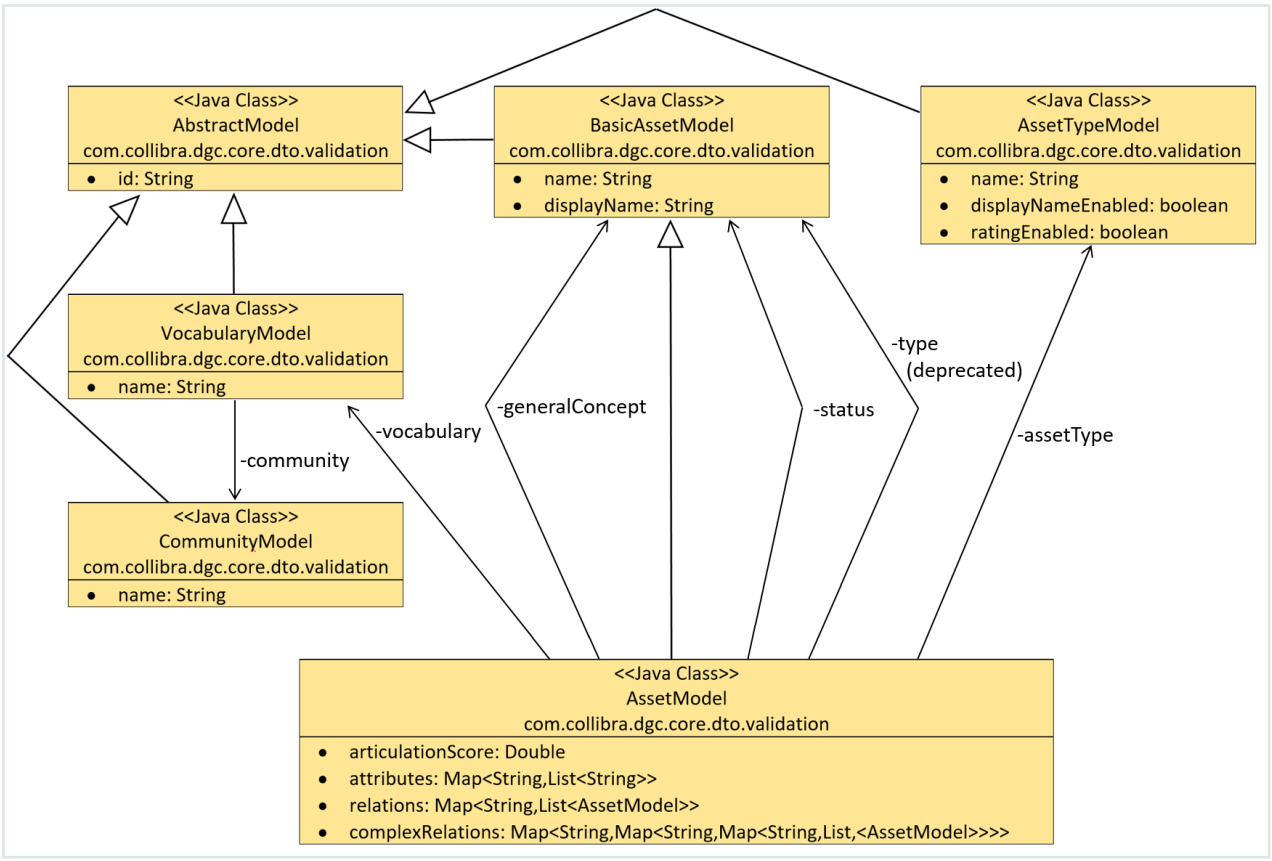
Asset model

The asset model is the technical structure of assets. You can use the asset model to refer to specific fields of assets: its attributes and properties. This is required for optimal use of validation rules.

> **Note** This information does not apply to worfklows and APIs.

Graphical representation

The asset model can be represented graphically. Further below you can find explanations on each individual field.



General

Field	Explanation
articulationScore	The articulation score of the asset.
id	The resource ID. Every resource that can be retrieved using the asset model has this property.
name	The full name of an asset. All resources have this property (community, vocabulary and asset).

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

Field	Explanation
generalConcept.id	The ID of the general concept. **Note** This field is deprecated.
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['00000000-0000-0000-0000-000000000202']	Identical to **attributes.'Definition'**, but using the resource ID of the **Definition** attribute type.
attributes.'00000000-0000-0000-0000-000000000202'.first()	The first attribute value within the list of all the **Definition** attributes.

Field	Explanation
attributes.'00000000-0000-0000-0000-000000000202'?.first()	Identical to **attributes.'00000000-0000-0000-0000-000000000202'.first()**, but null-safe. **Tip** `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute.
attributes['Definition'][1]	The second **Definition** attribute value of the asset. **Note** This uses index-based navigation of the list, and the first element has index 0.

Relations

Relations allow you to retrieve the list of target assets through a given relation, and each target is an asset model in itself. Navigation is done in a similar way as for attributes.

Note (Complex) Relations are only available one level deep. This means that when your script refers to a target asset through a (complex) relation, that referred asset will contain all the aspects of the asset that are mentioned above (name, attributes, etc), but without the (complex) relations of the referred asset.

Field	Explanation
relations['Related To']	The list of target assets of all **Related To** relations.
relations['Related To']?.first().name	The name of the first target asset using the **Related To** relation in a null-safe way. **Tip** `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute.

Complex relations

Complex relations are a type of relation. However, because they are less predictable, not all possible relations can be listed here.

Field	Explanation
complexRelations.<complexRelationType (Name/Id)>.<firstrelationname>.<secondrelationname>	Similar to the relations, the end result will be an asset model.

Example

If you have a complex relation type

- with name **CRT** and id **1**,
- containing four relation types **up**, **down**, **left** and **right**,
- all sides referencing a business term.

These are the complex relations:

Field	Explanation
complexRelations.CRT.up.right	The list of the complex relations from **up** to **right**.
complexRelations['CRT']['up']['right']	Identical to **complexRelations.CRT.up.right**.
complexRelations.'CRT'?.'up'?.'right'	Identical to **complexRelations.CRT.up.right**, but does not fail in case the list of **CRT** is empty, nor if the **up** side is empty. **Tip** `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute.
complexRelations['1'].down.up	The list of the complex relations from **down** to **up**.

Asset type model

Field	Description
name	The full name of the asset type.
displayEnabled	Parameter that determines whether the Identical asset names per domain feature is enabled for the asset type.
ratingEnabled	Parameter that determines whether ratings are enabled for the asset type.
id	The resource id.
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 in validation script
    - Closures

What's next?

If an asset does not meet the validation logic, the outcome of the rule is invalid.
If the asset meets the validation logic, the outcome of the rule is valid.

Example

```
then {
    isNotEmpty(attributes['Definition'],
        message: "The asset ${name} in domain ${vocabulary.name} \
                  must have at least one definition")
}
```

Validation functions

Validation functions are the functions in a validation script that check for a condition. The result is a Boolean: `true` or `false`.

To make the validation script more readable, there are many out-of-the-box 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 aClosures.

General functions

The following table describes the general functions.

> **Warning** Using negation (!) at the beginning of any function can cause unexpected validation results.

Function	Description
isEmpty (value)	Checks whether the value is empty, null, or doesn't contain any element.
isNotEmpty (value)	Checks whether the value isn't empty.
isEqual (value1, value2)	Checks whether the first value is the same as the second value.
isNotEqual (value1, value2)	Checks whether the value isn't the same as the second value.

Function	Description
isIn (value, Collection)	Checks whether the value is part of a collection.
areIn (Collection values, Collection collection)	Checks whether the collection is part of another collection.
isAny (Collection, Closure)	Checks whether any value in a collection meets the criteria of a validation closure.
isEvery (Collection, Closure)	Checks whether all values in a collection meet the criteria of a validation closure.
isFalse (value)	Checks whether the value is false, empty, or null according to the Groovy truth. Examples: • `isFalse (something)` returns true if `something` is false. • `isFalse (something)` returns false if `something` is true. • `isFalse (false)` returns true. • `isFalse (null)` returns true.
isTrue (value)	Checks whether the value is true, empty, or null according to the Groovy truth. Examples: • `isTrue (something)` returns false if `something` is false. • `isTrue (something)` returns true if `something` is true. • `isTrue (false)` returns false. • `isTrue (null)` returns true.

Function	Description
isUnique (Collection, Closure)	Checks whether all values in a collection are unique. Examples: • `isUnique ([1,2,3])` returns true. • `isUnique ([1,2,3,1])` returns false. The closure `{it % 2}` allows only one even and one odd element in the list. • `isUnique ([3, 4], {it % 2})` returns true. • `isUnique ([1, 3, 4], {it % 2})` returns false because both 1 and 3 are odd.
validate (value)	Checks whether the value is a valid function, accepting any closure that is capable of returning true or false. 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>}`. For more information on asset properties, go to 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 won't be considered.

String functions

The following table describes the string functions.

> **Warning** Using negation (!) at the beginning of any function can cause unexpected validation results.

Function	Description
isEmpty (value)	Checks whether the value is empty or null.
isNotEmpty (value)	Checks whether the value isn't empty.
startsWith (value, prefix)	Checks whether the value starts with the specified prefix.
contains (value, substring)	Checks whether the value contains the specified substring.
doesNotContain(value, substring)	Checks whether the value doesn't contain the specified substring.
endsWith (value, suffix)	Checks whether the value ends with the specified suffix.
isLengthBetween (value, minLength, maxLength)	Checks whether the value has a length between the specified range. The range is inclusive. For example, `isLengthBetween ('Hello', 2, 5)` returns true because `Hello` has a length of 5.
isLengthLess (value, maxLength)	Checks whether the value has a length less than the specified length.
isLengthMore (value, minLength)	Checks whether the value has a length longer than the specified length.
isLengthEq (value, length)	Checks whether the value has a length equal to the specified length.
isAlpha (value)	Checks whether the value contains only alphabetical characters. This is done through the regular expression `[a-zA-Z]+`.

Function	Description
isAlphaSpace (value)	Checks whether the value contains only alphabetical characters and spaces.
isAlphanum (value)	Checks whether the value contains only alphabetical characters and digits.
isAlphanumSpace (value)	Checks whether the value contains only alphabetical characters, digits, and spaces.
matches (value, regular expression)	Checks whether the value matches the specified regular expression. A regular expression must be placed between two forward slashes (`/`). Examples: • `matches ("stream", /str.*/)` returns true because `stream` matches the pattern `str.*`. • `matches ("stream", /srl.*/)` returns false because `stream` doesn't match the pattern `srl.*`.

Number functions

The following table describes the number functions.

> **Warning** Using negation (!) at the beginning of any function can cause unexpected validation results.

Function	Description
isEven (number)	Checks whether the number is even.
isOdd (number)	Checks whether the number is odd.
isGreater (number1, number2)	Checks whether the number is greater than the second number.
isGreaterEq (number1, number2)	Checks whether the number is greater than or equal to the second number.
isLess (number1, number2)	Checks whether the number is less than the second number.

Function	Description
isLessEq (number1, number2)	Checks whether the number is less than or equal to the second number.
isPositive (number)	Checks whether the number is greater than zero.
isNonnegative (number)	Checks whether the number is greater than or equal to zero.
isNegative (number)	Checks whether the number is less than zero.
isBetween (number1, number2, number3)	Checks whether the number is greater than the second number but less 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.

> **Warning** Using negation (!) at the beginning of any function can cause unexpected validation results.

Implementation	Purpose
`Long toTimestamp(String dateConstant) { LocalDateTime.of( LocalDate.from(DateTimeFormatter.ISO_LOCAL_DATE.parse(dateConstant)), LocalTime.of(0, 0, 0) ).atOffset(ZoneOffset.UTC).toInstant().toEpochMilli() }`	Converts the date constant to the time stamp. • `@param dateConstant`: The date in the `yyyy-MM-dd` format. • `@return`: The time stamp of the date constant.

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

Date functions

The functions for attributes with datatype **Date** require a long value as time stamp, in the UNIX Epoch time format `1234567890000`, and a string value as calendar date, in the ISO extended

format `YYYY-MM-DD`.

> **Warning** Using negation (!) at the beginning of any function can cause unexpected validation results.

Function	Description
now()	Checks whether the time stamp returns the current date.
isPast (Timestamp)	Checks whether the time stamp is in the past (before the system date).
isFuture (Timestamp)	Checks whether the time stamp is in the future (after the system date).
isEqual (Timestamp, Date)	Checks whether the time stamp is the same as the date.
isLess (Timestamp, Date)	Checks whether the time stamp is less than the date.
isLessEq (Timestamp, Date)	Checks whether the time stamp is less than or equal to the date.
isGreater (Timestamp, Date)	Checks whether the time stamp is greater than the date.
isGreaterEq (Timestamp, Date)	Checks whether the time stamp is greater than or equal to the date.
isBetween(Timestamp, Date1, Date2)	Checks whether the time stamp is greater than the first date but smaller than the second date.

Aggregate functions

Aggregate functions allow you to extract a value from a collection. They aren't validation functions in itself, but they can help you in retrieving data you want to refer to more easily in the rest of your validation script.

Function	Result
max (Collection)	The maximum of the given collection of values.
min (Collection)	The minimum of the given collection of values.
avg (Collection)	The average of the given collection of number values.
sum (Collection)	The sum of the given collection of number values.

Multi-line boolean expressions

The validation script of a validation rule may consist of multiple boolean expressions. To increase legibility, you can use specific constructs.

Using the constructs makes your rule a little more verbose, but more readable in most cases.

Constructions

Expression	Purpose
allOf	All the conditions have to be valid (= `AND`).
anyOf	One or more of the conditions have to be valid (= `OR`).
condition	Capture the result of a boolean to re-use in other constructs.

Examples

The examples below give the same result but are formulated in a single line, multi-line or in a hybrid construct.

Single-line expression:

```
rule {
((isNotEmpty (name) && isEqual (name, 'doesnotequal2', message:
'shouldfail')\
 || isEqual (name, 'doesnotequal')) && isNotEmpty (id)
}
```

Multi-line expression:

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

```
    }
}
```

Hybrid expression:

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

Closures

A closure is a function that you can pass as an argument to another function.

It is contained by curly brackets, `{<closure>}`.

You can also define variables before the arrow `->`

> **Tip** For more extensive documentation about closures, please refer to the Groovy closure documentation.

Examples

Closure	Purpose
{a, b -> a + b}	1. Define two variables of an undefined type. 2. Add them up. 3. Show the result.
{String a -> isNotEmpty (a) }	1. Define a variable of the type `String`. 2. Apply the validation function `isNotEmpty` on it. More info: isNotEmpty (value).

Closure	Purpose
{isNotEmpty (it)}	1. Apply the validation function `isNotEmpty` on any variable that has `it` as its name. More info: isNotEmpty (value). **Tip** Naming an argument is not necessary when there is only one.

Collections in validation script

A collection is a list of data. Usually you create it when retrieving attributes or relations.

You can refer to a specific element in the collection in multiple ways.

Note If a reference points to a value that doesn't exist, the rule will crash. For example, retrieving the fifth value of a list that only contains four values causes a crash.

Reference	Result
mylist.first()	The first value in the list `mylist`.
mylist.last()	The last value from the list `mylist`.
mylist[1]	The second element from the list `mylist`. The number is the index of the value you want to retrieve from the list. **Note** The first element has index zero. As a consequence, `mylist.first()` is equivalent to `mylist.[0]`.
mylist.get(1)	The second element from the list my list. It is very similar to the example above.
mylist?.get(1)	The second element from the list. However, this syntax is null-safe. `?.` is the null-safe getter of Groovy. You cannot combine the `?.` with the `[ ... ]` notation. This means that if the referenced attribute is not present, the result is null, whereas the expression without the question mark fails to execute.

Using the *. operator in collections

When using relations, you sometimes only need to have one value of the target assets, such as the name. You can use the `*.` operator for this.

Script	Purpose
isIn ('expectedTargetName', relations['Is Related To']*.name)	Check whether `expectedTargetName` is in the list of all names of the target assets. The `*.` operator applies the `.name` on every target asset and creates a new list.
isEvery (relations['Is Related To']*.name, {targetName -> startsWith (targetName, 'S')})	This will check that every target asset related to the current asset has a name that starts with `S`.

Validate the first element of a collection

In many situations, the first element is the only element you actually want to validate. For example, if you want to check if the first **Description** attribute is equal to a certain value, you can do this:

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

Validation script examples

These are examples of real validation scripts of validation rules.

- An asset must have at least one definition.

```
rule {
    isNotEmpty (attributes.'Definition'?.first(), \
        message:"The Asset ${name} in domain ${vocabulary.name}
\
   must have at least one Definition")
}
```

- An attribute must comply to a given pattern (defined using a regular expression).

```
rule {
    given {
    codes = attributes.'Code'
    }
    when {
    isNotEmpty (codes)
    }
    then {
    matches (codes.first(), /S\d\d\d\d\d000/,\
    message: "The asset ${name} in domain \
       ${vocabulary.name} Code must start with\
           an S, then 5 digits, then 000")
    }
}
```

- All assets with a `related to` relation must have at least one `uses` relation.

```
rule {
    given {
    relatedTo = relations.'Related To'
    uses  = relations.'Uses'
    }
    when {
    isNotEmpty (relatedTo)
    }
    then {
    isNotEmpty (uses, message: "Asset ${name}\
       has Related To relation, so it must \
       also have a Uses relation")
    }
}
```

- An asset must comply to the following naming rule, defined by a regular expression: starts with T, followed by 4 digits, 2 zeroes and exactly one 0, 1 or 2.

```
rule {
    matches (name, /T(\d{4})0{2}[0,1,2]/, \
        message: "Asset ${name} does not comply to naming
rule")
}
```

- An asset name must consist of one or more words in capitals.

```
rule {
    matches(name, /(\p{Upper}+|\p{Space}*)*/, \
        message: "Name ${name} should be words in capitals")
}
```

- All codes for a given asset must be in a different code list.

```
rule {
    given {
    code_domains = \
       relations.'Code'?.vocabulary?.name
    }
    then {
    isUnique (code_domains)
    }
}
```

- A code must be related to only one business term.

```
rule {
    given { terms = relations.'Business Term'
    }
    when { isNotEmpty (terms)
    }
    then { isEmpty (terms[1] )
    }
}
```

- All target assets using the `Transform` complex relation following the `from` and `to` branch, must have the same name as the current asset.

```
rule {
    isEvery (\
   complexRelations.'Transform'.from.to.name, \
      {isEqual(name, it)}, \
       message: "Not all From and To names of the \
      Transform relation are equal")
}
```

- The total score of each asset related to the current asset through an `Impacted By` relation may not exceed 100.

```
rule {
    given {
    impacted = relations.'Impacted By'.
    totalScoresForEachRelatedAsset = impacted?.collect\
       {it.attributes['Score'].sum {it.toIteger()}}
    }
```

```
    when {
    isNotEmpty (totalScoresForEachRelatedAsset)
    }
    then {
    isEvery (totalScoresForEachRelatedAsset, \
            { isLessEq (it, 100)}, \
            message: 'Not all related assets have a \
            total score smaller or equal to 100')
    }
}
```

- When the first target asset of the current asset using the `Is Grouped By` relation is inactive, then the current asset must be inactive. Whether or not the current asset is active or not, is based on the boolean attribute `Active`.

```
rule {
    given {
    reference = relations.'Is Grouped By'?.first()
    active = reference.attributes.'Active'?.first()
    }
    when {
    isNotEmpty (reference) && isFalse (active)
    }
    then {
    isFalse (active, message: "The node '${name}' in\
       '${vocabulary.name}' should also be inactive, \
       since it parent is inactive.")
    }
}
```

Scopes

A scope in Collibra Platform 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

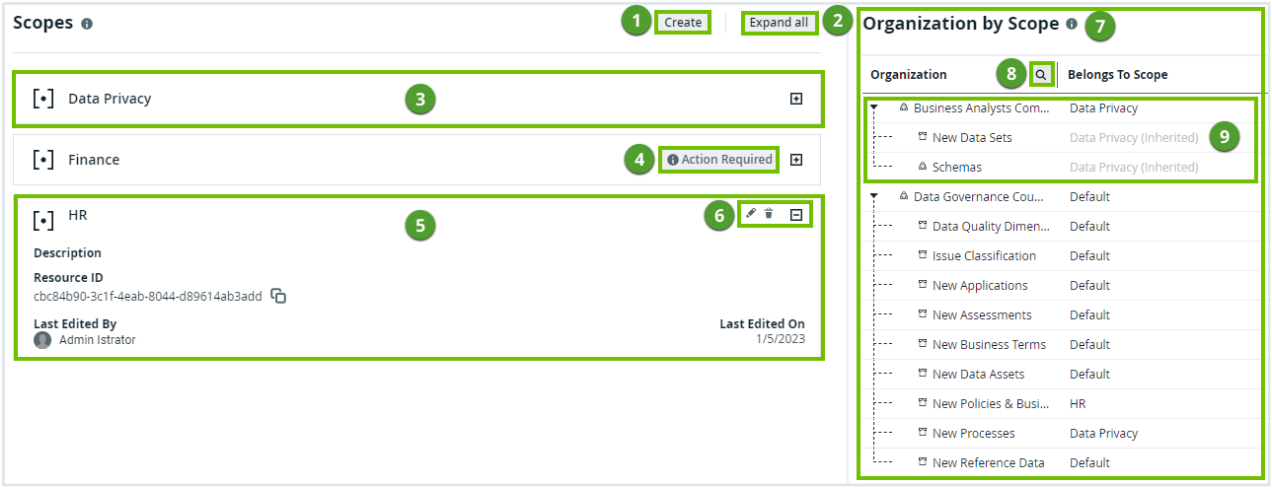
Collibra always has a default scope. Initially, all communities and domains are part of the default scope.

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.



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 **Product Rights** > **System administration** global permission.
- Scope use is enabled in your Collibra environment.

Steps

1. Open the Scopes page.
   a. On the main toolbar, click → **Settings**.
      » The **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 **Product Rights** > **System administration** global permission.
- Scope use is enabled in your Collibra environment.

Steps

1. Open the Scopes page.
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. In the **Operating model** section, click **Scopes**.
      » The Scopes page opens.

2. If required, edit the name and description of a scope:
   a. Click ✎ in the tile of the scope.
      » The **Edit Scope** dialog box appears.
   b. Enter the required information.

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

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

What's next?

If required, create a scoped assignment for one or more asset types.

Delete a scope

You can delete a scope, for example, if you want an asset type to use the default assignment.

When you delete a scope, the asset types that used this scope, revert to other custom scopes or, if there are no other custom scopes, to the default assignment.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- Scope use is enabled in your Collibra environment.

Steps

1. Open the Scopes page.
   a. On the main toolbar, click → **Settings**.
      » The **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.

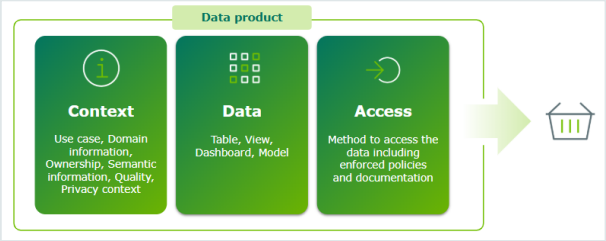
Data product basics

In this topic

About data products

A data product is a reusable package that provides data to answer a business question or solve a specific business problem. It includes everything you need to understand, access, and use the data. This makes it actionable and ready to support business decisions. A data product is secure, easy to use, and designed for anyone, including those who are not domain experts.

A data product includes not only the data elements but also context about the data and how to access it. It consists of 3 main components: Context, Data, and Access.

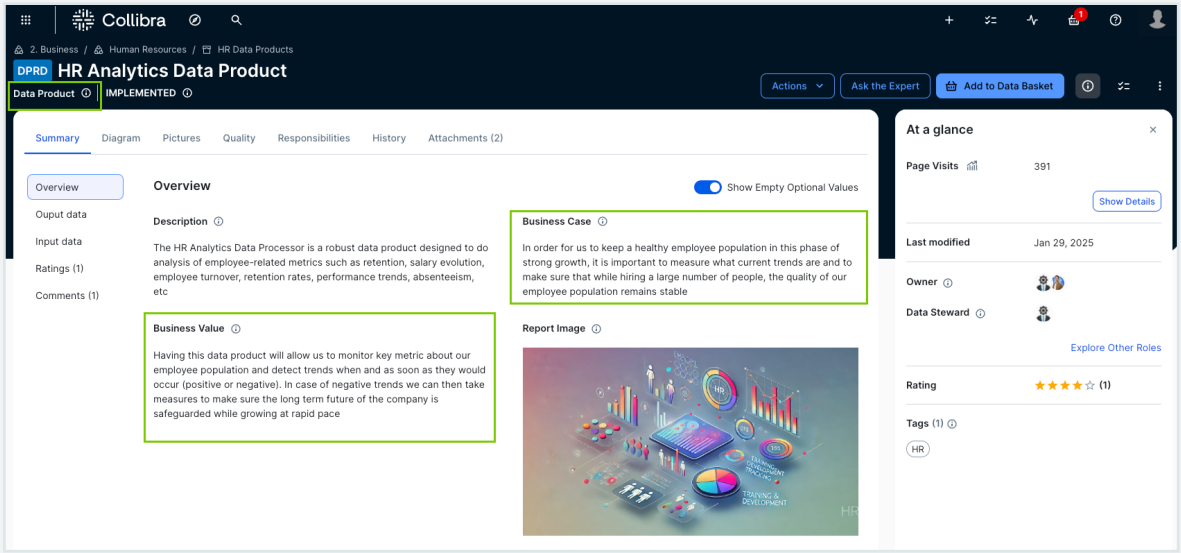


Context	The context includes background information, such as why the data product was created, who owns it, and details related to quality and privacy.

Data	The data can refer to a table, view, or a business asset such as a report or a model.
Access	The access information includes details on how to access the data and the policies that govern access.

Show an example.

Example



Data product asset types and operating model

Data products use specific operating model asset types, relations, and attributes.

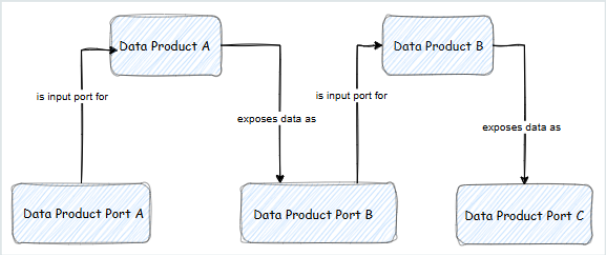
> **Tip** Using the specific data product operating model allows you to scale as Collibra data product features grow over time.

Show the full data product operating model details and a diagram view.

- Asset types
  - **Data Product**
    A data product is a reusable package that provides data to answer a business

question or solve a specific business problem.

- **Data Product Port**
  A data product port defines the interface through which a data product interacts with the broader ecosystem. A link between a Data Product Port and a Data Product via the "exposes data as" relation can be considered an "output port" and a link with the "consumes data through" relation can be considered an "input port".



In advanced governance use cases, you can use the child asset types **Data Product Output Port** and **Data Product Input Port**, and their relations.

- **Data Contract**
  A data contract defines the commitments a data product owner makes to data consumers. The data contract documents the structure, format, service level, quality, and terms of use.

> **Example** The contract can outline service-level objectives (SLOs) related to system uptime and latency for a data product. It can also include details about pipelines or data delivery mechanisms and provide information about the data, such as schema and expected quality metrics.

- Asset type groups
  - Data Product Output: Groups the physical data for a data product.
  - Data Product Input: The physical input for a data product.

> **Note** Use this asset type group only in advanced governance use cases that involve the Data Product Input Port asset type.

- Relations
  - Data Product exposes data as/is output port for Data Product Port
  - Data Product Port is input port for/consumes data through Data Product

- Data Product Port is implemented as/implements Data Product Output

  > **Note** When you create a diagram, you can add this relation type from the Data Product Port asset type to each asset type assigned to the Data Product Output asset type group.

- Data Product Input implements/is implemented as Data Product Input Port

  > **Note** Although this relation is still available, we recommend using Data Product Port is implemented as/implements Data Product Output instead.

- Data Contract governs functioning of / should operate according to Data Product Port
- Data Contract information to be provided / is mentioned in the terms of Data Attribute
- System implements/is implemented in Data Product Port
- Data Product relates to/is related to Measure
- Data Product relates to/is related to Business Term
- Data Product relates to/is related to Data Domain
- Data Product is explained in/explains Data Notebook

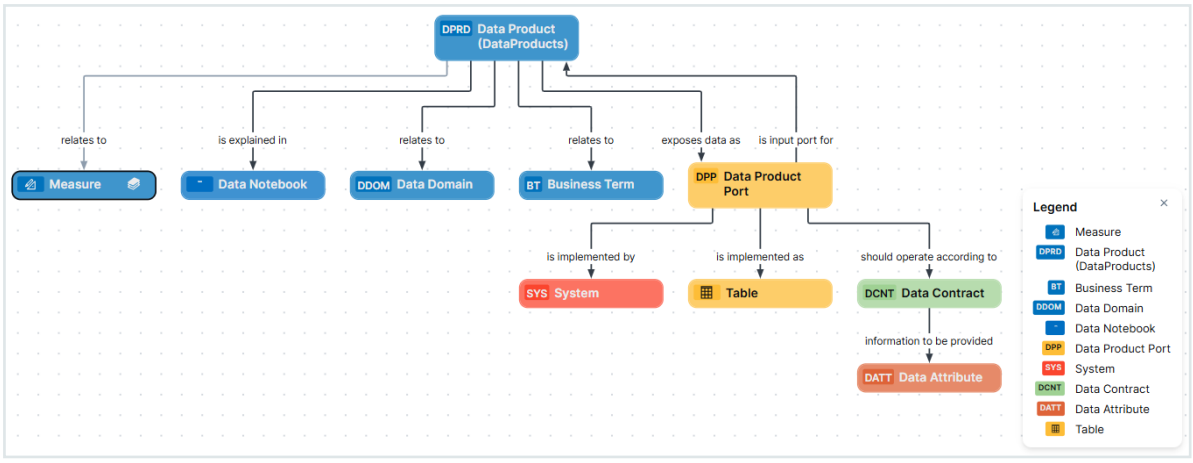
- Data attributes

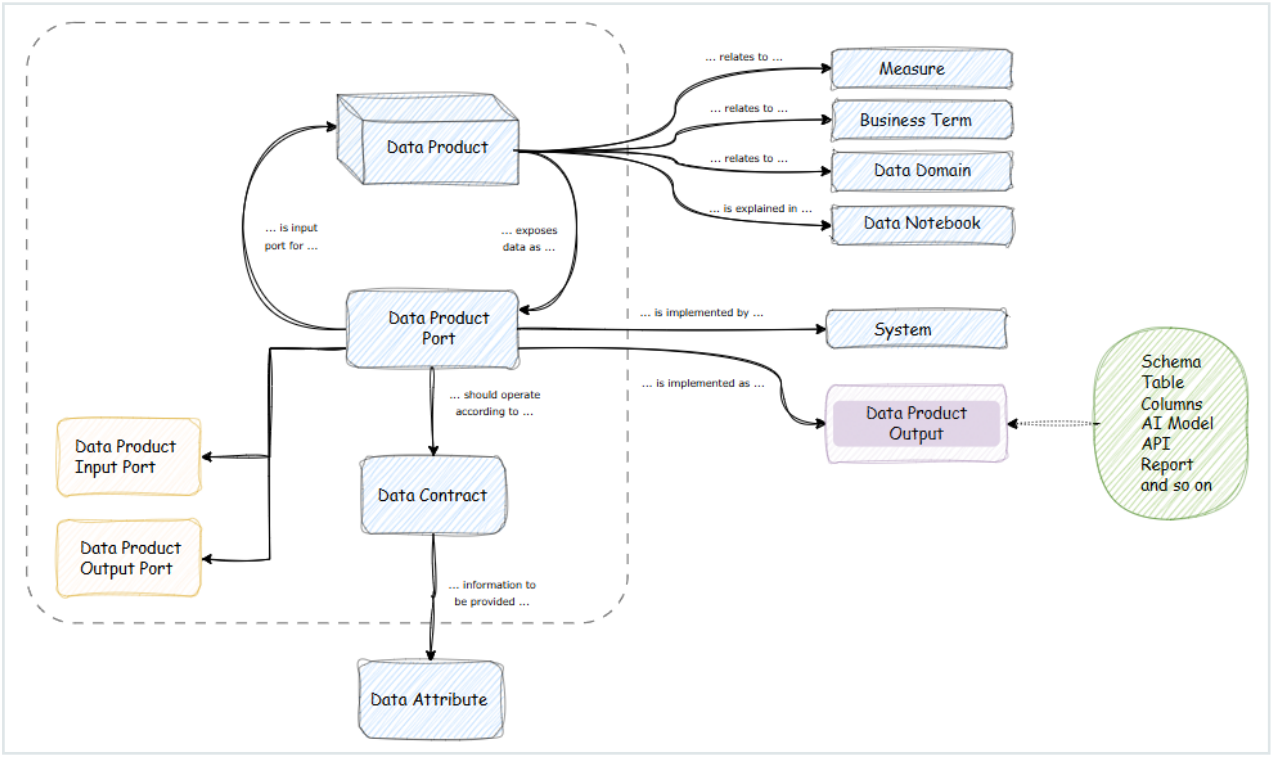
  Some specific attributes have been defined, such as:

  - **Data product category**: Defines whether a data product is targeting business users or more technical users. The out-of-the-box values are Derived (for business users) and Foundational (for more technical users).
    This attribute is available for Data Product.
  - **Target delivery date**: Indicates the date when the requested resource should be made available.
    This attribute is available for Data Product and Data Product Port.
  - **Access method**: Indicates the method that can be used to access the data.
    This attribute is available for Data Product Port.

    > **Tip** This attribute can be used in workflows to create output port assets per access method.

  - **Access instructions**: Provides instructions on how to access the data.
    This attribute is available for Data Product Port.

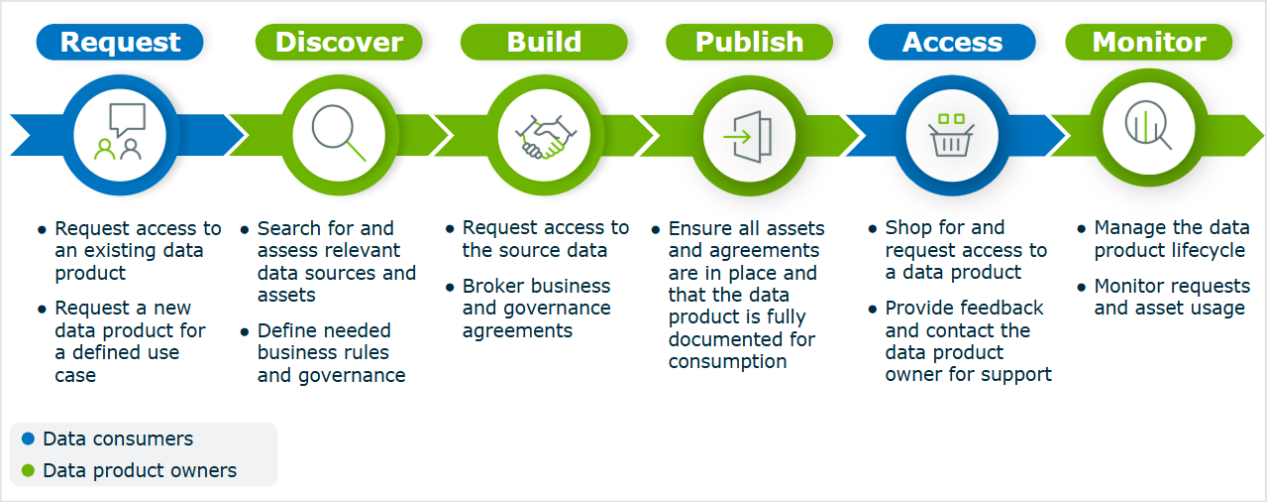




Data product lifecycle and workflows

The detailed lifecycle of a data product can look like this:

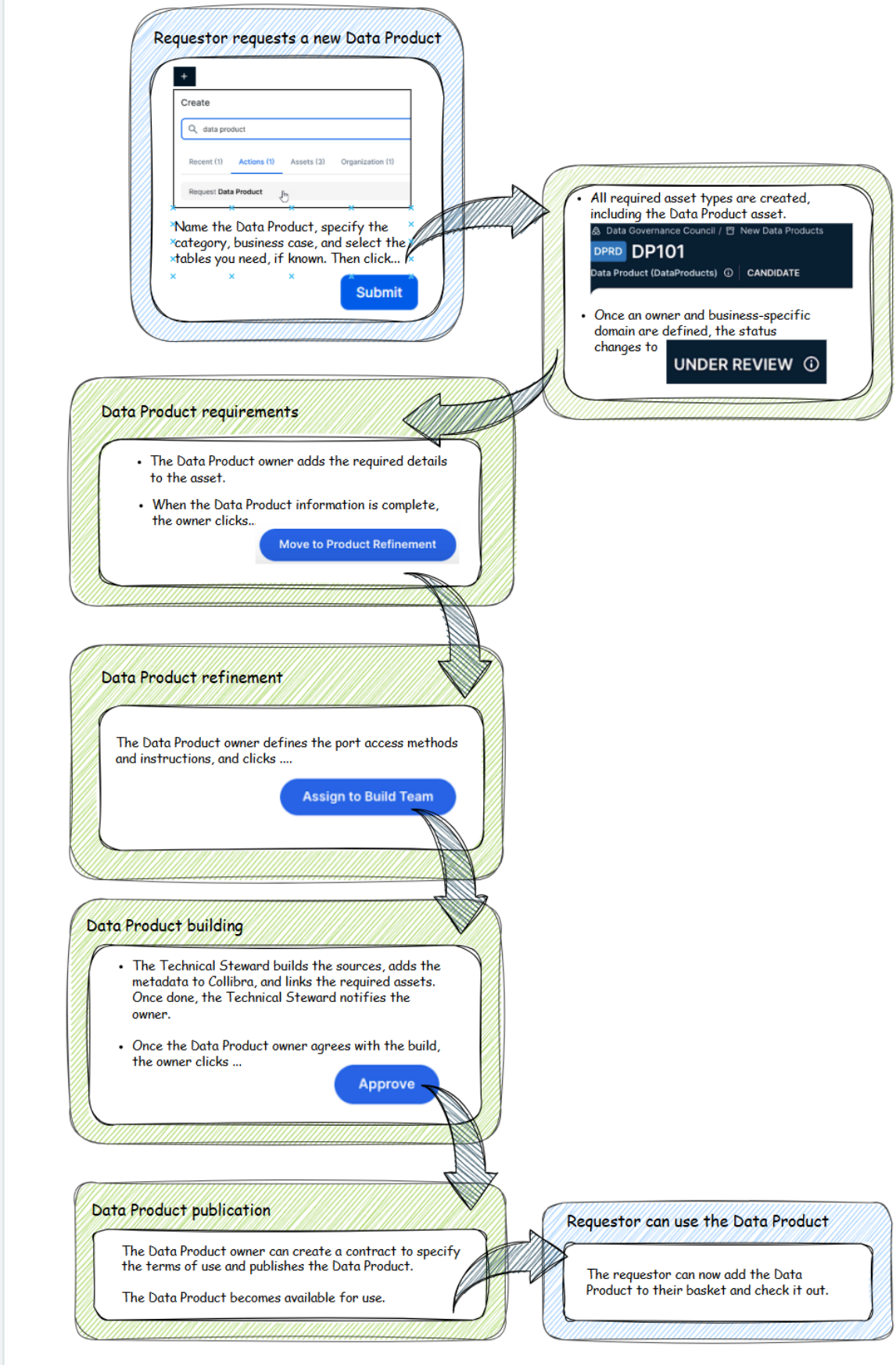
1. Data products can be created beforehand or requested by consumers. (Request)
2. The data product is built and published.
    a. The requirements are defined. (Discover)
    b. The port details are refined. (Discover)
    c. The sources are prepared. (Build)
    d. The data product is published and made available as curated data. (Publish)
3. The requestor or any data consumer can find and use the data product. (Access)
4. The data product is monitored and updated when needed. (Monitor)



Workflows can help with the data product request, creation, and access request.

> **Tip** You can find some data product-specific workflows in Collibra Marketplace. These workflows are published as community offerings and include dedicated documentation.

Example
The following example is based on the community workflows:


Requestor requests a new Data Product
Create
data product
Recent (1)
Actions (1)
Assets (3)
Organization (1)
Request Data Product
Name the Data Product, specify the category, business case, and select the tables you need, if known. Then click...
Submit
All required asset types are created, including the Data Product asset.
Data Governance Council / New Data Products
DPRD DP101
Data Product (DataProducts)
CANDIDATE
Once an owner and business-specific domain are defined, the status changes to
UNDER REVIEW
Data Product requirements
The Data Product owner adds the required details to the asset.
When the Data Product information is complete, the owner clicks..
Move to Product Refinement
Data Product refinement
The Data Product owner defines the port access methods and instructions, and clicks ....
Assign to Build Team
Data Product building
The Technical Steward builds the sources, adds the metadata to Collibra, and links the required assets. Once done, the Technical Steward notifies the owner.
Once the Data Product owner agrees with the build, the owner clicks ...
Approve
Data Product publication
The Data Product owner can create a contract to specify the terms of use and publishes the Data Product.
The Data Product becomes available for use.
Requestor can use the Data Product
The requestor can now add the Data Product to their basket and check it out.

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- Videos:
  - What's a data product?
  - What is a data contract?
  - Webinar
- Courses on Collibra University:
  - Introduction to data products
  - Set up data product workflows
  - Manage data products in Collibra
- Ebook: Six best practices for building and deploying effective data products

About homepage

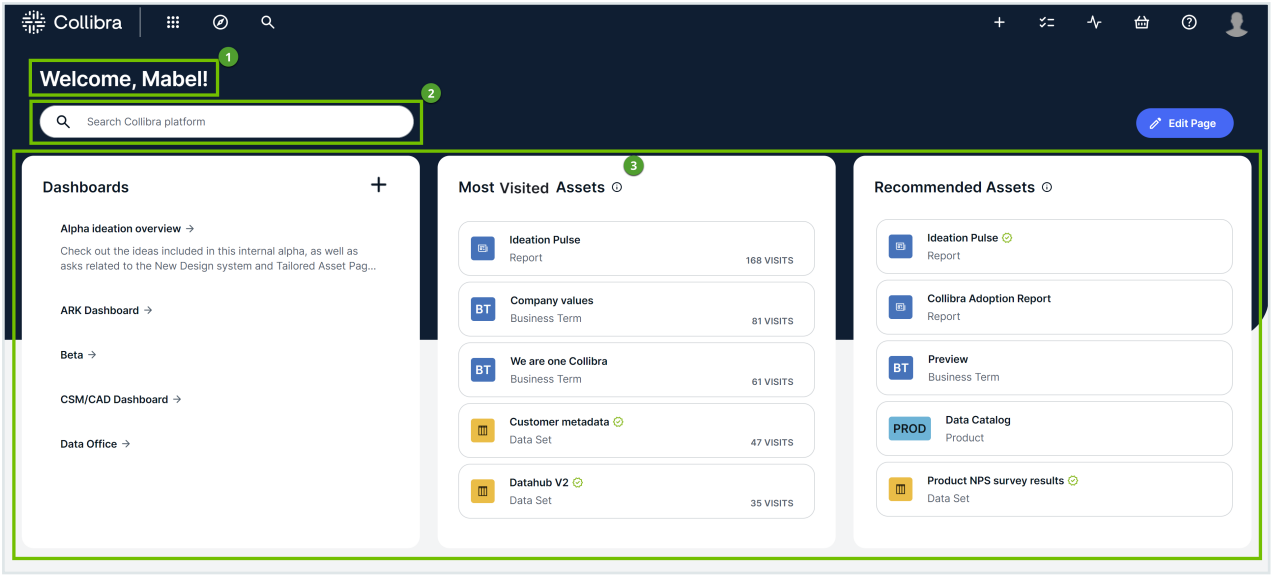
The Collibra homepage is the default page that is shown when you sign in to Collibra Platform or when you click the application logo on any page in Collibra. The homepage guides you within Collibra by showing information that is relevant to you, such as your dashboards, the most visited assets, and the recommended assets. The homepage also allows you to search for a resource.

You can open all your dashboards via the **Dashboards** card on the homepage or via the **Dashboards** tab in the browse pane. If you are an administrator, you can customize the homepage by defining the headings and the content shown in each section of the homepage, and thus create a homepage that can meet user needs.

In this topic

Homepage overview

The following table describes the sections shown on the homepage.



No.	Description
1	Shows a greeting.
2	Enables you to perform a search, directing you to the search page.
3	Helps you to find content and perform your daily tasks. Depending on how the homepage is edited, this section shows any 3 of the following cards: • **Dashboards:** A list of dashboards you can open, shown in alphabetical order. You can also create a dashboard using +. • **Most Visited Assets:** A list of assets everyone visited the most in the last 30 days. • **Your Quick Links:** A list of links to the pages you can quickly open. You can add, edit, rearrange, and delete quick links. • **Your Tasks:** A list of tasks assigned to you. • **Recommended Assets:** A list of assets you might like based on your search history and the assets you previously visited.

> **Note**
> - The **Most Visited Assets** and **Recommended Assets** cards aren't supported in Collibra Platform for Government and Collibra Platform Self-Hosted (CPSH) environments.
> - Data on the **Most Visited Assets** and **Recommended Assets** cards is available only if the **Collect Application Usage Data** setting in Collibra Console is enabled. To change this setting, you need to create a support ticket.

Related topics

- Enable or disable homepage
- Edit homepage

Enable or disable homepage

The Collibra homepage is disabled by default. This means that when users sign in to Collibra or click the application logo in Collibra, their default dashboard is shown, instead of the homepage. This topic describes how to enable or disable the homepage.

Prerequisites

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

Steps

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

Value	Description
✔ True	When you sign in to Collibra or click the application logo, the homepage is shown, instead of your default dashboard.
✖ False (default)	When you sign in to Collibra or click the application logo, your default dashboard is shown, instead of the homepage.

4. Click **Save all**.

Edit homepage

You can edit the homepage for the users of Collibra to encourage exploration by providing relevant and contextual content. When you edit the homepage, your changes are automatically saved (but not published) each time you click outside the section where you made the changes.

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

Prerequisites

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

Steps

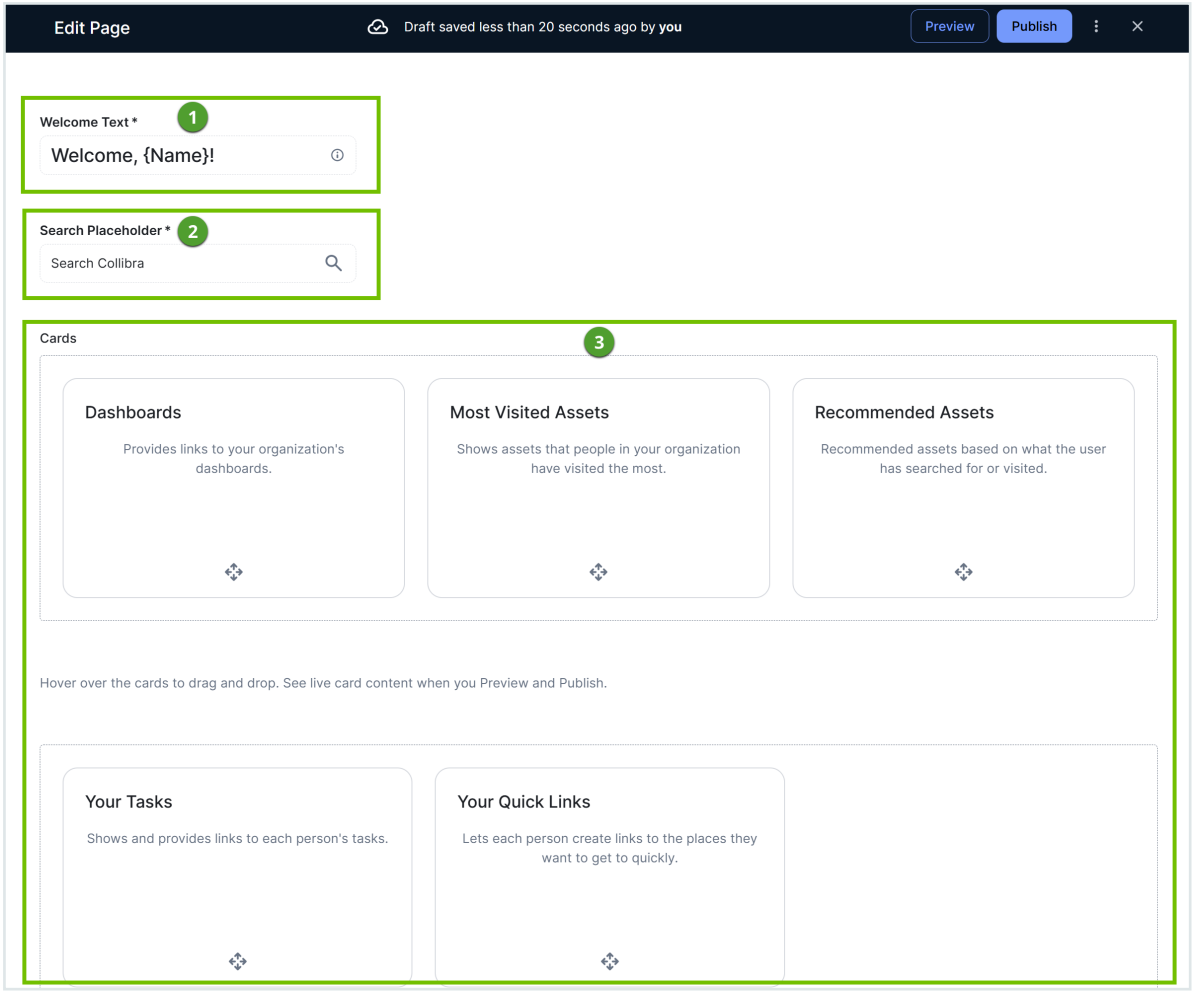
1. Open the homepage.

   > **Tip** The homepage opens when you sign in to Collibra, or when you click the application logo from any page in Collibra.

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

   > **Tip** If another administrator has edited or is editing the homepage, a message indicating so appears on the homepage, for example, **Draft saved 8 minutes ago by Mabel**. You can, however, still edit the homepage.

3. Edit the sections.
   How to edit the sections



No.	Description
1	Enter a greeting. If you want the first name of a user to show in the greeting, enter *{Name}*. For example, if you enter *Hello {Name}*, when a user named Mabel Cable signs in, the following greeting is shown to her: **Hello Mabel**. If the user doesn't have a first name, their username is shown.
2	Enter the text you want to show in the search field to guide users, for example, *Search in Collibra*.

No.	Description
3	The top section contains cards that will be shown on the homepage, whereas the bottom section contains cards that will be hidden from the homepage. To move a card from one section to another, drag the card to where you want it in the section. While a total of 5 cards are available, you can show only up to 3 cards on the homepage. **Tip** On the **Your 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, in the upper-right corner of the page, click **X** → **Close Editor**. This action saves all your changes but shows the last published homepage in the view mode.
- If you want to discard all your changes and see the last published version, click ⋮ → **Delete Draft**. You can then continue to make new changes to the homepage.
- If you want to discard all your changes and see the Collibra version of the homepage, which is the original version, click ⋮ → **Restore Collibra Version**. You can then continue to make new changes to the homepage. Instead of making new changes, if you want to publish the Collibra version, click **Publish**.

4. To preview the homepage, 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 and becomes available to all the users.

Manage a quick link

You can add, edit, rearrange, and delete quick links shown on the **Your Quick Links** card on the homepage.

In this topic

Add a quick link

You can add up to 6 links to the **Your Quick Links** card on the homepage. The links you add to the card are shown only to you.

Steps

1. On the **Your Quick Links** card, click **Add a Quick Link**.
   » The **Add a Quick Link** dialog box appears.
2. Enter the required information.

Field	Description
URL	Enter the address of the webpage you want to be able to quickly access from the **Your Quick Links** card. **Tip** An external quick link opens in a new browser tab, whereas an internal quick link opens in the same browser tab.
Text to Display	Enter the text you want to show in place of the address on the card.

3. Click **Save**.
   » The link is shown on the **Your Quick Links** card.

Edit a quick link

Steps

1. On the **Your Quick Links** card, click **Edit**.
2. Click ✎ next to the link you want to edit.
   » The **Edit Quick Link** dialog box appears.
3. Enter the required information.

Field	Description
URL	Enter the address of the webpage you want to be able to quickly access from the **Your Quick Links** card. **Tip** An external quick link opens in a new browser tab, whereas an internal quick link opens in the same browser tab.
Text to Display	Enter the text you want to show in place of the address on the card.

4. Click **Save**.
5. On the **Your Quick Links** card, click **Save**.
   » The edited link is shown on the **Your Quick Links** card.

Rearrange a quick link

Steps

1. On the **Your Quick Links** card, click **Edit**.
2. Hover your pointer over the link whose position you want to change.
3. Drag to the required position.
4. Click **Save**.
   » The link is rearranged.

Delete a quick link

Steps

1. On the **Your Quick Links** card, click **Edit**.
2. Click 🗑 next to the links you want to delete.
3. Click **Save**.
   » The links disappear from the **Your Quick Links** card.

Dashboards

A dashboard is a customizable Collibra page that can provide an overview of different aspects of a product. For example, you can create an orientational dashboard that focuses on a specific use case or department. Or you can create an operational dashboard that presents users with key performance indicators that are relevant to specific goals or business operations.

A dashboard comprises widgets, some of which are capable of showing text, providing quick access to the search function, navigating the organization browser, or starting workflows.

You can create as many dashboards as you want, each with a specific purpose. Dashboards can't be assigned to a community or any other resource.

Permissions

The following table describes the global permissions specific to dashboards.

Global permission	Description
Manage Your Own Views, Dashboards, Search Filters	Create dashboards or duplicate existing dashboards.
Share Your Own Views, Dashboards, Search Filters	Share any of the dashboards that you created or duplicated.
Manage and Share Anyone's Views, Dashboards, Search Filters	• Create dashboards or duplicate existing dashboards. • Edit the properties of any dashboard. • Share any dashboard. • Delete any dashboard.

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Collibra University course: Designing dashboards (Latest UI)

Manage a dashboard

This section describes the actions you can perform on a dashboard by using the toolbar on a dashboard or the dashboard navigation panel if the Dashboard Ordering setting is enabled.

Open a dashboard

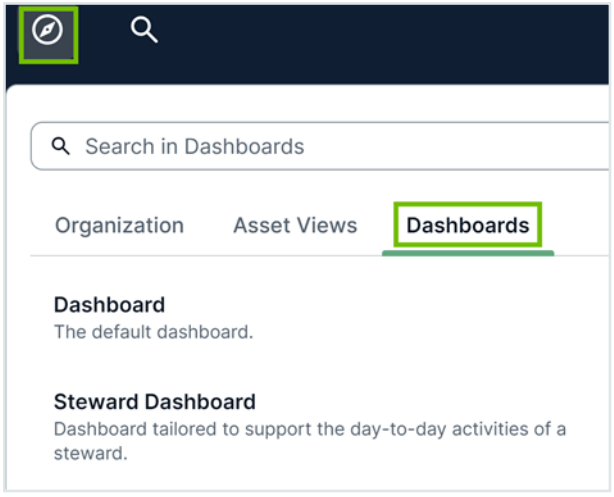
How you open a dashboard depends on whether the homepage is enabled. You can open or modify a dashboard by using the toolbar on the dashboard. If the Dashboard Ordering setting is enabled, a dashboard navigation pane shows on the left side of any opened dashboard. With the appropriate permissions, you can open or modify multiple dashboards by using the dashboard navigation pane.

In this topic

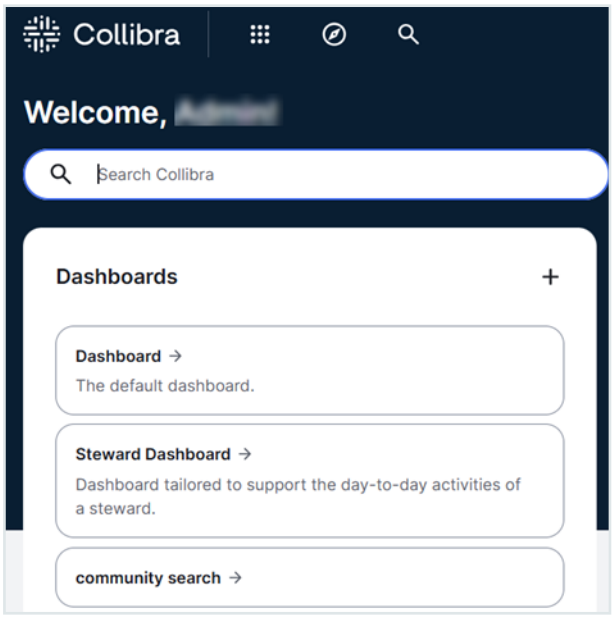
Open a dashboard with the homepage enabled

If the homepage is enabled, you can open a dashboard via the following:

- The **Dashboards** tab in the browse pane. Click the name of the dashboard you want to open.



- The Dashboards card on the homepage. Click the name of the dashboard you want to open.

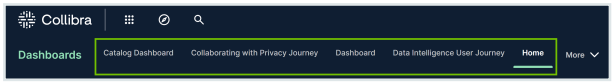


Open a dashboard with the homepage disabled

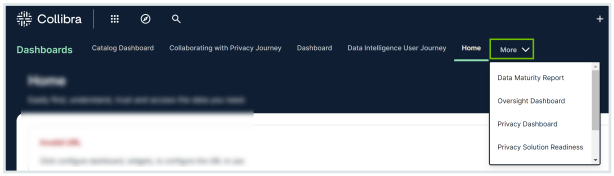
If the homepage is disabled, you can open a dashboard from the **Dashboards** tab in the browse pane. Alternatively, you can open a dashboard on the page that is shown either when you sign in to Collibra or when you click the Home button. This page contains the following:

- The dashboard tab bar, which shows up to 5 dashboards. The tab bar includes pinned dashboards in alphabetical order, followed by unpinned dashboards in alphabetical order. If the active dashboard is not among the first 4 dashboards in alphabetical order, it

replaces the fifth dashboard to ensure it is shown.



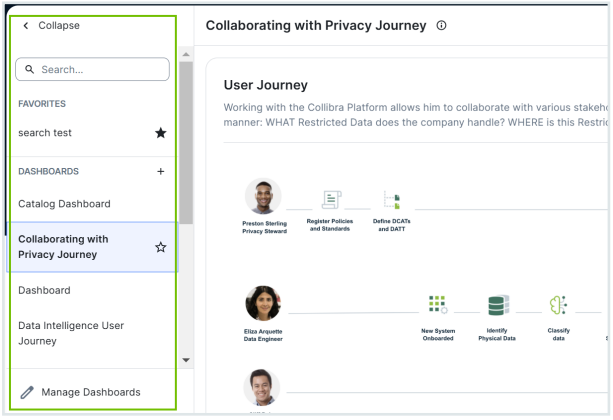
- The **More** menu, which shows all the remaining dashboards.



> **Note** If you never visited a dashboard, the default dashboard is opened by default. Otherwise, the dashboard you last visited is opened.

Open a dashboard with the dashboard navigation pane enabled

If the dashboard navigation pane is enabled, a pane is shown on the left side of any dashboard page. Click the name of a dashboard to open it.



You can bookmark dashboards to quickly access them later. Bookmarked dashboards are saved on a user by user basis. No special permissions are required to bookmark dashboards.

To bookmark a dashboard, click ☆ next to the dashboard in the dashboard navigation pane, or click ☆ on the dashboard. The dashboard moves to the **FAVORITES** section, above the **DASHBOARDS** section in the dashboard navigation pane. You can drag and drop dashboards in your **FAVORITES** section to order them.

To remove a bookmark from a dashboard, click ☆ next to the dashboard again in the dashboard navigation pane, or click ☆ again on the dashboard.

> **Note** When you add and order dashboards in your **FAVORITES** section, the order remains unchanged if other users reorder the shared dashboards by using the **Manage Dashboards** page.

Depending on your permissions, you can modify a dashboard by using the toolbar on the dashboard or modify multiple dashboards by using the **Manage Dashboards** page in the dashboard navigation pane. For more information, go to Edit a dashboard.

Create a dashboard

You can create a dashboard and then add and edit widgets as needed.

You can create a dashboard from any existing dashboard, your Dashboard home page, or the dashboard navigation panel if the Dashboard Ordering setting is enabled.

> **Tip** For optimal performance and searchability, create no more than 300 dashboards in each environment.

Prerequisites

- You have a global role that has the **Manage your own Views, Dashboards, Search filters** global permission, for example, **Sysadmin**.
- To create a dashboard from the dashboard navigation panel, enable the Dashboard Ordering setting.

Steps

- Create a dashboard from an existing dashboard when the Dashboard Ordering setting is not enabled:
  a. Access any dashboard.
  b. Click **More** → **Create a Dashboard**.
     » The **Edit Dashboard** page opens.

c. Enter the required information.

Field	Description
Name	A name to identify your dashboard.
Description	A description for the dashboard.
Layout	The number of columns to be shown in the dashboard.
Pin	Select this checkbox if you want to pin the dashboard.

> **Tip** A dashboard bar shows up to 5 pinned dashboards in alphabetical order. For details, go to Open a dashboard with the homepage disabled.

d. Click **Save**.

- Create a dashboard from the dashboard navigation panel:
  a. Access any dashboard.
  b. In the dashboard navigation panel, click the + icon next to **DASHBOARDS**.
     » The **Edit Dashboard** page opens.
  c. Enter the required information.

Field	Description
Name	A name to identify your dashboard.
Description	A description for the dashboard.
Layout	The number of columns to be shown in the dashboard.

  d. Click **Save**.
- Create a dashboard from your Dashboard home page. In the left pane, click the + icon and create your dashboard.

What's next?

Add widgets to the dashboard.

Duplicate a dashboard

If, for example, you want to reconfigure one of the widgets of a certain dashboard, you can duplicate that dashboard, instead of creating one.

> **Tip** For optimal performance and searchability, create no more than 300 dashboards in each environment.

Prerequisites

Ensure that you have a global role that has the **Manage your own Views, Dashboards, Search filters** global permission (for example, **Sysadmin**).

Steps

- If the Dashboard Ordering setting is not enabled:
  a. Open the dashboard you want to duplicate.
  b. Click ⋮ → **Save as**.
     » The **Save Dashboard As** dialog box opens.

c. Enter the required information.

Field	Description
Name	A name to identify the new dashboard.
Description	A description for the new dashboard.

Visible To	Options that determine who can see the new dashboard:
	■ **Everyone:** Everyone can see the dashboard.
	■ **Only You:** Only you can see the dashboard.
	■ **Specific Roles, Groups, and Users:**
	  ■ **Roles:** Only the roles you select can see the dashboard.
	  ■ **Groups:** Only the groups you select can see the dashboard.
	  ■ **Users:** Only the users you select can see the dashboard.

Promote	Options that determine how and where the new dashboard is shown: ■ **Default:** The dashboard is shown as the first page when you sign in to Collibra, unless the homepage is enabled. ■ **Pin:** The dashboard is prioritized in the tab bar. For details about how dashboards are ordered in the tab bar, go to Open a dashboard with the homepage disabled.

d. Click **Save**.

- If the Dashboard Ordering setting is enabled:
  a. Open the dashboard you want to duplicate.
  b. Click ⋮ → **Create a copy**.
     » The **Copy Dashboard** dialog box opens.

Field	Description
Name	A name to identify the new dashboard.
Description	A description for the new dashboard.

Visible To	Options that determine who can see the new dashboard:
	◦ **Everyone**: Everyone can see the dashboard.
	◦ **Only You:** Only you can see the dashboard.
	◦ **Specific Roles, Groups, and Users:**
	  ■ **Roles:** Only the roles you select can see the dashboard.
	  ■ **Groups:** Only the groups you select can see the dashboard.
	  ■ **Users:** Only the users you select can see the dashboard.

c. Click **Save**.

What's next?

Edit the dashboard and widgets.

Edit a dashboard

You can edit the name, description, and layout of a dashboard by using the toolbar on the dashboard. If the Dashboard Ordering setting is enabled and you have the appropriate permissions, you can also edit the name, description, owner, and sharing rules of multiple dashboards by using the **Manage Dashboards** page in the dashboard navigation panel.

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.
- To use the dashboard navigation panel:
  - Enable the Dashboard Ordering setting.
  - You have a global role with the **Manage Shared Views**, **Dashboards**, and **Search Filters** global permission.

Steps

- Edit a dashboard from the dashboard when the Dashboard Ordering setting is not enabled:
  a. Open the dashboard.
  b. Click ⋮ → **Edit Dashboard**.

c. Enter the required information.

Field	Description
Name	A name to identify your dashboard.
Description	A description for the dashboard.
Layout	The number of columns to be shown in the dashboard.
Pin	Select this checkbox if you want to pin the dashboard.

> **Tip** A dashboard bar shows up to 5 pinned dashboards in alphabetical order. For details, go to Open a dashboard with the homepage disabled.

d. Click **Save**.

- Edit a dashboard from the dashboard when the Dashboard Ordering setting is enabled:
  a. Open the dashboard.
  b. Click **Edit**.
  c. Enter the required information.

Field	Description
Name	A name to identify your dashboard.
Description	A description for the dashboard.
Layout	The number of columns to be shown in the dashboard.

  d. Click **Save**.
- Edit one or more dashboards from the dashboard navigation panel:
  a. Open any dashboard.
  b. In the dashboard navigation panel, click **Manage Dashboards**.
     » The **Manage Dashboards** page opens.
  c. Update any of the following fields for the dashboards:

Field	Description
Dashboard	A name to identify your dashboard.

Field	Description
Description	A description for the dashboard.
Owner	The owner of the dashboard. For more information, go to Change the owner of a dashboard.
Shared With	The sharing rules for the dashboard. For more information, go to Share a dashboard.

Change the owner of a dashboard

This topic is **applicable only** to the latest UI.

You can change the owner of a dashboard from the dashboard. If the Dashboard Ordering setting is enabled and you have the appropriate permissions, you can also change the owners of multiple dashboards by using the dashboard navigation panel.

Prerequisites

- Enable the Dashboard Ordering setting.
- To change the owner of your own dashboards, you have one of the following:
  - You have a global role with the **Manage Shared Views**, **Dashboards**, and **Search Filters** global permission.
  - You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters**, and **Share your own Views** global permission.
- To change the owner of shared dashboards: You have a global role with the **System Administration**, **Manage Shared Views**, **Dashboards**, and **Search Filters** global permission.

Steps

- Change from a dashboard:
  a. Open a dashboard.
  b. Click Click ⋮ → **Change Owner**.
     » The **Change Owner** dialog box opens.

c. In the **Change Owner** dialog box, select the new owner from the drop-down menu.
d. Click **Save**.

- Change from the dashboard navigation panel:
  a. Open a dashboard.
  b. In the dashboard navigation panel, click **Manage Dashboards**.
     » The **Manage Dashboards** page opens.
  c. In the **Owner** column, double click next to the current owner name for the dashboard you want to update.
     » The **Change Owner** dialog box opens.
  d. In the **Change Owner** dialog box, select the new owner from the drop-down menu.
  e. Click **Save**.

Switch to a dashboard

You can switch from one dashboard to another. You can switch by using the toolbar on a dashboard, the browse pane, or the dashboard navigation panel if the Dashboard Ordering setting is enabled.

Prerequisites

To use the dashboard navigation panel, enable the Dashboard Ordering setting.

Steps

1. Open any dashboard.
2. Take one of the following actions:
   - In the dashboard bar, click the name of the dashboard to which you want to switch.
   - From the browse pane, click the name of the dashboard to which you want to switch.
   - In the dashboard navigation panel, click the name of the dashboard to which you want to switch.

Share a dashboard

You can share a dashboard with other users if the widgets in the dashboard contain information that is useful to them. You can share a dashboard from a dashboard. If the Dashboard Ordering setting is enabled and you have the appropriate permissions, you can change the sharing rules of multiple dashboards from the dashboard navigation panel.

Prerequisites

- To share a dashboard from a dashboard:
  - If you want to share your own dashboard: Ensure that you have a global role that has the **Share Your Own Views, Dashboards, Search Filters** global permission.
  - If you want to share another user's dashboard: Ensure that you have a global role that has the **Manage Shared Views, Dashboards, Search Filters** global permission.
- To share a dashboard by using the **Manage Dashboards** page opened from the dashboard navigation panel:
  - Enable the Dashboard Ordering setting.
  - You have a global role with the **Manage Shared Views**, **Dashboards**, and **Search Filters** global permission.

Steps

- Share a dashboard from a dashboard when the Dashboard Ordering setting is not enabled:
  a. Open the dashboard.
  b. Click .
     » The **Share** dialog box appears.
  c. Specify with whom you want to share the dashboard and whether you want to make the dashboard the default dashboard for the users with whom you are sharing it.

     > **Tip** For more information about these options, go to Duplicate a dashboard.

  d. Click **Save**.

- Share a dashboard from a dashboard when the Dashboard Ordering setting is enabled:
  a. Open any dashboard.
  b. Click .
     » The **Share** dialog box opens.
  c. Specify with whom you want to share the dashboard.

     > **Tip** For more information about these options, go to Duplicate a dashboard.

  d. Click **Save**.
- Share a dashboard from the dashboard navigation panel:
  a. Open any dashboard.
  b. In the dashboard navigation panel, click **Manage Dashboards**.
     » The **Manage Dashboards** page opens.
  c. In the **Shared With** column, double click next to the current sharing rule for the dashboard you want to update.
     » The **Update Sharing Rules of** dialog box opens.
  d. Specify with whom you want to share the dashboard.

     > **Tip** For more information about these options, go to Duplicate a dashboard.

  e. Click **Save**.

Order dashboards

This topic is **applicable only** to the latest UI.

You can customize the order of dashboards.

Prerequisites

- Enable the Dashboard Ordering setting.
- You have a global role with the **Manage Shared Views**, **Dashboards**, and **Search Filters** global permission.

Steps

1. Open a dashboard.
2. In the dashboard navigation panel, click ✎ **Manage Dashboards**.
   » The **Manage Dashboards** page opens.
3. Use to drag and drop the dashboards to order them.
   » The dashboards are ordered for all users.

> **Note** If you have bookmarked dashboards in your **FAVORITES** section, the order in the **FAVORITES** section remains unchanged if other users reorder the shared dashboards. For more information about bookmarking a dashboard, go to Open a dashboard.

Delete a dashboard

If a dashboard is no longer useful, you can delete it. You can delete a dashboard from a dashboard. If the Dashboard Ordering setting is enabled and you have the appropriate permissions, you can delete multiple dashboards by using the dashboard navigation panel.

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.
- To delete a dashboard from the dashboard navigation panel: Enable the Dashboard Ordering setting.

Steps

- Delete a dashboard from the dashboard:
  a. Open the dashboard.
  b. Click ⋮ → **Delete**.
     » The **Delete This Dashboard?** dialog box opens.
  c. Click **Delete**.

- Delete a dashboard from the dashboard navigation panel:
  a. Open any dashboard.
  b. In the dashboard navigation panel, click **Manage Dashboards**.
     » The **Manage Dashboards** page opens.
  c. In the **Actions** column, click in the row of the dashboard that you want to delete.
     » The **Delete This Dashboard?** dialog box opens.
  d. Click **Delete**.

Dashboard widgets

A dashboard widget is an individual pane on a dashboarddashboard. Depending on its type, it has a different purpose. For example, it can contain quick links to important or useful information, statistics in a bar chart, or a button to start a workflow.

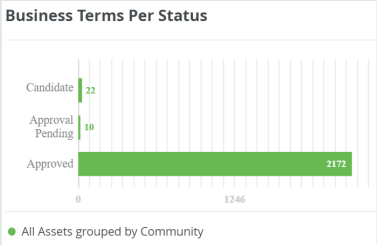
The following table describes the widgets that are available to add to a dashboard.

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.
Embedded Webpage	A webpage. **Note** This widget is available out of the box with Collibra only in the latest UI.
Most Viewed	A list of the 10 most viewed assets over the last week, month, or year.
Recent	A list of your 10 most recently viewed assets.
Search	A search field by which users can search for resources.
Text	A message.
Tasks and Issues	An overview of open tasks and issues.

Widget	Description
Workflow	A collection of workflow buttons by which users can start workflows.

Bar Chart widget

The Bar Chart widget shows advanced metrics as a bar chart on a dashboard.



Configure the Bar Chart widget

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the widget for configuration.
   Show more information
   a. Open the dashboard for which you want to configure the widget.
   b. Click ⋮ → **Edit Dashboard**.
   c. If needed, drag the widget from the **Widgets** section to the dashboard.
   d. On the widget, click ⋮ → **Configure**.
2. On the **Chart** tab, click **Create Template**.
3. In the **Bar Chart Configuration** wizard, click the type of data you want to use.

- **Assets:** Shows metric information about assets.
- **Tasks:** Shows metric information about tasks.

4. In the **By** field, select how you want to group the data.

> **Note** If you group the data by **Attribute Value**, you can select only 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.

5. Optional, add a set of filtered data:
    a. Click **Refine Data**.
        » The **Data Subset Editor** opens.
    b. In the **Data Subset Label** field, enter a label name for the bar chart legend. For example, *Business terms*.
    c. In the **Data Color** field, set the color of the bar chart data by either:
        a. Entering the color HEX code.
        b. Using the color picker to manually select a specific color.
            a. Click the colored box on the right of the field.
            b. Use the circles on the bottom and right to adjust the color shade and tone.
            c. Click anywhere outside of the color picker to confirm the color.
    d. Optional, add filters to your bar chart:
        ◦ Click **Apply Filter**.

> **Note** Each filter is identified by a letter. The first filter is A, if you add a second filter it is B, and so on. These letters are used in the filter formula to create the filter formula logic.

        ◦ To create filter A:
            ■ In the first field, select the Property, Attribute, Relation, or Role type.
            ■ In the second field, select the value (the Property, Attribute, Relation, or Role) of the first field.

> **Example** *Asset Type equals Business Term*

        ◦ Click **Add a Filter** to add more filters to the bar chart.
        ◦ Optional, adjust the **Filter Formula** logic as needed, using brackets ( ), AND, or OR logic. This field automatically populates based on the filters you added

in the previous steps using AND logic.

> **Example** If filter A is Community equals Community 1 and filter B is Domain equals Domain 3, then the filter formula logic is A AND B. In this case, the Community in the bar chart is always Community 1, and the Domain is always Domain 3.

Operator	Description
AND	A result must fit all filter conditions. **Example** A AND B AND C means that only a resource that fits all three filter conditions is added to the results.
OR	A result must fit one of the filter conditions. **Example** A OR B OR C means that whenever a resource fits one of the three filter conditions, it is added to the results.
( )	A result must be a combination of something inside of the brackets and something outside of the brackets. **Example** A AND (B OR C) means that whenever a resource fits either B or C, and it also fits A, it is added to the results. Results can be a combination of either B and A or C and A resources.

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

i. Operations inside parentheses
ii. AND operations
iii. OR operations

> **Important** There are limitations to the filter formula logic that can be added to the bar chart widget.

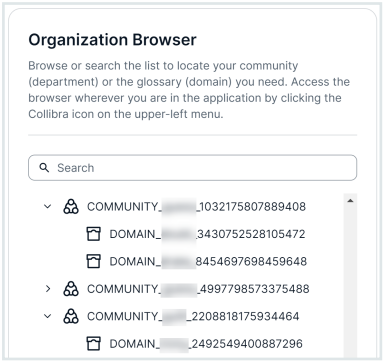
- The AND operator can only be used on the top level of the filter formula, outside of any parenthesis. For example:
  - Unsupported logic:
    - A OR (B AND C)
  - Supported logic:
    - A AND B AND C
- The OR operator can only be used for filters that are looking at the same type of data. This means that the type selected in the first field must be the same for each filter surrounding the OR operator. For example:
  - Unsupported logic:
    - Filter A: Community equals Community 1
    - Filter B: Domain equals Domain 2
    - Formula: A OR B
  - Supported logic:
    - Filter A: Community equals Community 1
    - Filter B: Community equals Community 2
    - Formula: A OR B
- You can mention each filter only once in the filter formula.
  - Unsupported logic:
    - ((A AND B) OR (A AND C)) OR (A AND D)
  - Supported logic:
    - A AND (B OR C OR D)

    - Click **Save**.
6. Click **Next**.
7. In the **Template Name** field, enter a name to identify the template.
8. Select how you want the items in the bar chart to be sorted:
   - Alphabetical: groups are sorted by their names.
   - Numerical: groups are sorted by their value (the length of the bar).
9. Click **Save**.
10. On the **Widget** tab, enter the required information.
11. On the widget, click **Save**.
12. In the upper-right corner of the page, click **Save**.

Browser widget

The Browser widget on a dashboard can serve as both a knowledge tool and a navigation tool. By enabling you to browse through communities and domains, the Browser widget helps you

to better understand the structure of your organization, as well as to find your team or department's content. The widget also contains a search box to quickly find a community or domain.



This widget has no specific configuration settings. Like all other widgets, common configuration settings for this widget are available on the **Widget** tab.

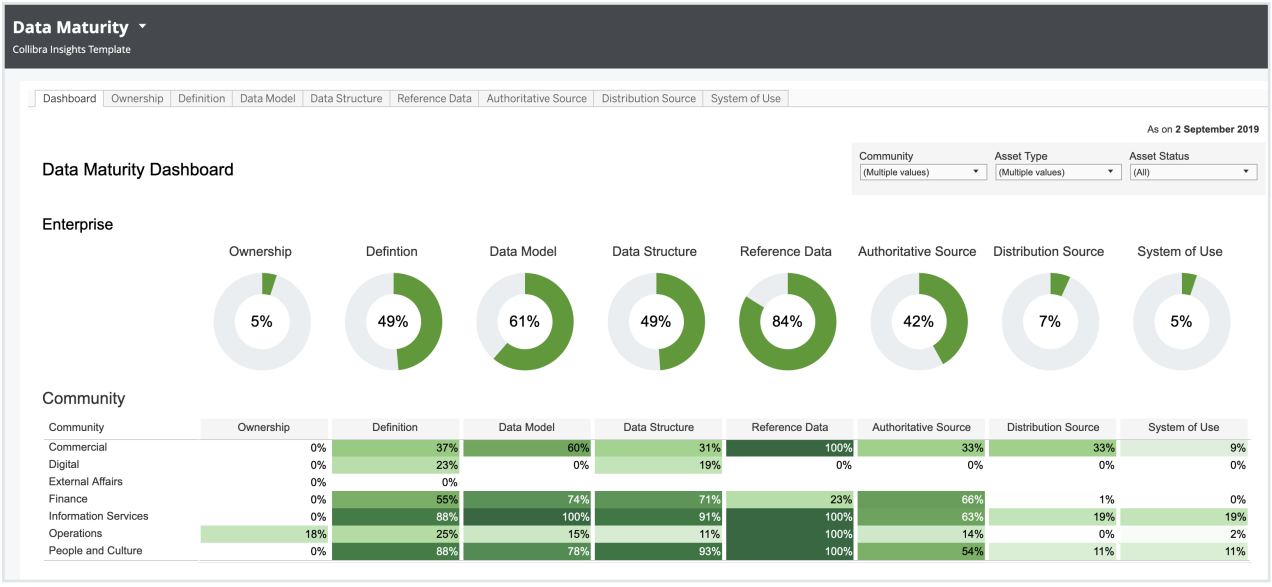
> **Tip**
> - Consider placing the Browser widget on the left side of your dashboard, because a tree-style navigation is typically most intuitive when positioned there.
> - Consider using the widget description to explain what a community and a domain are.

Collibra Insights widget

The Collibra Insights widget is a reporting widget that shows a dashboard report on a dashboard, such as Privacy Risk Readiness, Data Maturity Dashboard, Process Register, or any report from a webpage.

> **Important** Whether or not a third-party webpage can be embedded is determined by the security settings of the third party.

> **Note** If you are using the Collibra Insights widget in a dashboard to show asset views, you can't add more than one view of the same page to the dashboard. For example, you can't add two different views of a Global View to the same dashboard.



Configure the Collibra Insights widget

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.
- Before configuring dashboard reports, you need to set up Insights Data Access. You can then configure dashboard reports via the Collibra Platform settings, or generate the dashboard reports via a URL from tools such as Tableau Online, Power BI, Qlik, or ThoughtSpot. Note that Insights Data Access is not a free, out-of-the-box product. For more information, go to Insights Data Access.

Steps

1. Open the widget for configuration.
   Show more information
   a. Open the dashboard for which you want to configure the widget.
   b. Click ⋮ → **Edit Dashboard**.
   c. If needed, drag the widget from the **Widgets** section to the dashboard.

d. On the widget, click ⋮ → **Configure**.

2. On the **Report** tab, enter the required information.

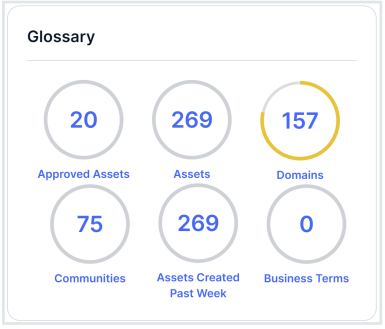
Field	Description
URL	Address of the webpage that contains the report you want to show on the dashboard.
Run in sandbox	**Warning** To reduce security risks, we recommend leaving this checkbox selected. Running the webpage in the sandbox mode ensures the following: ◦ The webpage will not run potentially harmful scripts. ◦ The webpage blocks APIs in the frame. ◦ The webpage cannot access your files and systems.
Trust this iFrame source	If you're a custom dashboard developer, use this option to pass the CSRF token as a parameter in the URI when using custom HTML.

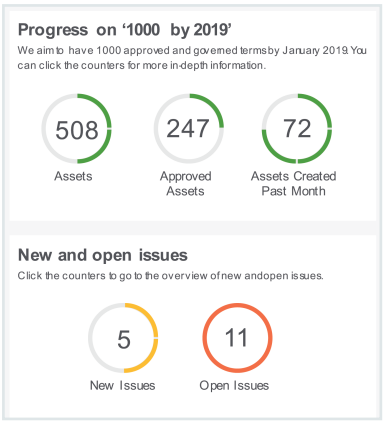
3. On the **Widget** tab, enter the required information.
4. On the widget, click **Save**.
5. In the upper-right corner of the page, click **Save**.

Counters widget

The Counters widget shows the count statistics on a dashboard. It provides information such as the number of assets in your environment or the number of open tasks or issues.

Note The counters for asset types also include their respective child asset types. Therefore, the count shown on the widget for a given asset type may be more than the count shown elsewhere for the same asset type.





Templates

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 available 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 24 hours.
Assets Created Past Month	Number of assets created in the last 28 days.
Assets Created Past Week	Number of assets created in the last 7 days.
Business Terms	Number of Business Term assets.
Code Values	Number of Code Value assets.
Columns	Number of Column assets.
Communities	Number of communities.

Template	Description
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 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, Issue assets are counted once every 24 hours. The counting interval can be edited in Collibra Console. Increasing the frequency of the counts, however, may negatively affect performance.
Issues Resolved Past Week	Number of Issue assets whose status became Resolved within the last 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, Issue assets are counted once every 7 days. The counting interval can be edited in Collibra Console. Increasing the frequency of the counts, however, may negatively affect performance.
KPIs	Number of Key Performance Indicators.
Your Open Tasks	Number of unfinished tasks for the user. **Note** **Unfinished** is the status of the task, as documented in the workflow.
New Issues	Number of Issue assets whose status is **New**.

Template	Description
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.
Tableau Views	Number of Tableau View assets.

Template	Description
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 one active session.

Configure the Counters widget

When configuring the Counters widget, it is important that you clearly define realistic goals or danger levels (thresholds).

> **Tip** Similar to the Workflow widget, you can use multiple Counter widgets to group counters that belong together.

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the widget for configuration.

   Show more information

   a. Open the dashboard for which you want to configure the widget.

   b. Click ⋮ → **Edit Dashboard**.

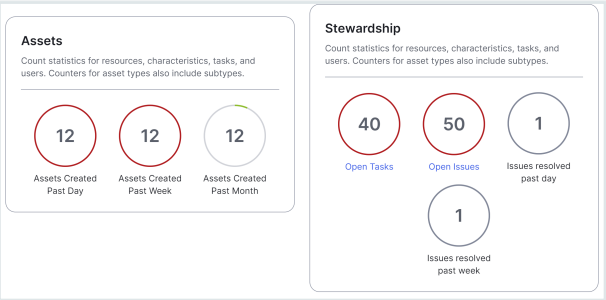
c. If needed, drag the widget from the **Widgets** section to the dashboard.
d. On the widget, click ⋮ → **Configure**.

2. On the **Counters** tab, click **Add Counter**.
3. Enter the required information.

Field	Description
Template	Template of the count statistic to show.
Title	Title to show on the counter.
Optional: Warning Level and Danger Level	Values that represent warning and danger thresholds. **Note** The threshold settings are designed for use with the following issue-related templates: ◦ New Issues ◦ Open Issues ◦ Issues Resolved Past Day ◦ Issues Resolved Past Week
Optional: URL	Webpage address linked to the counter title. The address should lead to a page in your Collibra environment. **Tip** You can use the URL field to make the widget interactive. For example, when users click the URL, they are directed to a page where they can explore the content associated with the number shown on the widget or take remedial actions.

Tip

- You can change the position of a counter by dragging to the required position.
- You can remove the counter you don't want to show on the widget by clicking 🗑.
- You can use multiple Counters widgets to group counters that belong together.



4. On the **Widget** tab, enter the required information.

   Tip You can use the Description field to communicate the goal to users, for example, what you want to achieve and by when.

5. On the widget, click **Save**.
6. In the upper-right corner of the page, click **Save**.

Warning and danger thresholds

The warning and danger thresholds are optional settings that are shown as **Warning Level** and **Danger Level** when configuring the Counters widget. These thresholds enable you to visually communicate certain risk or tolerance levels for Issue assets.

The two threshold settings can be configured independently or in combination with each another.

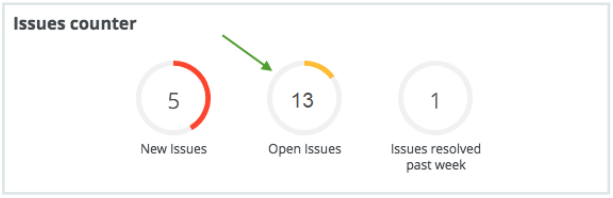
> **Note** The threshold settings are designed for use with the following issue-related templates:
>
> - New Issues
> - Open Issues
> - Issues Resolved Past Day
> - Issues Resolved Past Week

Example

Suppose that your organization has established that 20 open issues—meaning Issue assets with a status other than Resolved—will exceed its risk appetite. To give this visibility within the appropriate community of Collibra users, you can 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 can set the warning level to 10 and the danger level to 20.

The following image shows the resulting **Counters** widget and, specifically, the **Open Issues** counter:



Understanding the counter colors

The color of the arc on a counter depends on the value given to one or both of the threshold settings. The following table contains the meaning of each color for a counter.

Color	Meaning
Entirely gray	Warning and danger thresholds are not set.
Green	The issue count is lower than both thresholds, or if only one threshold is set, it is lower than that.

Color	Meaning
Orange	The issue count is higher than the warning threshold, but it is lower than the danger threshold if set.
Red	The issue count is higher than the warning threshold if no danger threshold is set, or it is higher than the danger threshold if set.

Embedded Webpage widget

> **Important** New setup of this feature is **only supported** in the latest UI. If you already have the Embedded Webpage widget downloaded in the old UI, you can continue to use it.

If you are an administrator, you can use the Embedded Webpage widget to embed a webpage on a dashboard by using an iframe.

> **Note** If you are using the Embedded Webpage widget in a dashboard to show asset views, you can't add more than one view of the same page to the dashboard. For example, you can't add two different views of a Global View to the same dashboard.

Configure the Embedded Webpage widget

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the widget for configuration.
   Show more information

a. Open the dashboard for which you want to configure the widget.
b. Click ⋮ → Edit Dashboard.
c. If needed, drag the widget from the **Widgets** section to the dashboard.
d. On the widget, click ⋮ → **Configure**.

2. On the **Content** tab, enter the required information.

Field	Description
URL	Address of the webpage you want to show on the dashboard.
Run in sandbox	**Important** This option is selected by default. Although optional, it does add an extra layer of security. Running the webpage in the sandbox mode ensures the following: ◦ Access to your local files and computer system are blocked. ◦ Form submissions are blocked. ◦ Scripts cannot run. ◦ APIs are disabled. ◦ Links cannot target other browsing contexts. ◦ Plugins (like `<embed>`, `<object>`, or `<applet>`) are not allowed. ◦ The content cannot navigate to the top-level browsing context, or the primary browser window or tab. ◦ Automatically triggered features, like videos or form controls, are blocked.
Trust this iFrame source	If you're a custom dashboard developer, use this option to pass the CSRF token as a parameter in the URI when using custom HTML.

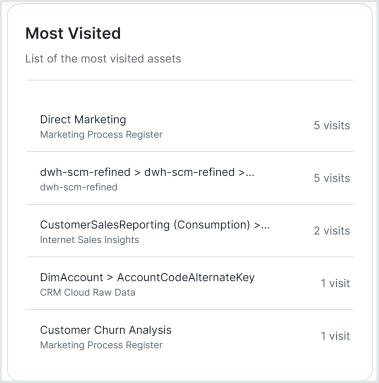
3. On the **Widget** tab, enter the required information.
4. On the widget, click **Save**.
5. In the upper-right corner of the page, click **Save**.

Most Visited widget

The Most Visited widget shows on a dashboard the 10 assets that the signed-in user visited the most within the last week, month, or year.

You can use this widget to highlight consistently popular assets over the course of a year or trending assets within a shorter period. For example, you can add two Most Visited widgets: one titled **Most Used**, for showing the most visited assets over a year, and another titled **Trending**, for showing assets gaining traction over a month or a week. By reflecting user

engagement, this widget also acts as positive reinforcement for those who created the popular or trending assets.



On the widget, the domain for each asset is shown under the asset name. You can:

- Click an asset name to go to that asset page.
- Click a domain name to go to that domain page.

Configure the Most Visited widget

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the widget for configuration.
   Show more information
   a. Open the dashboard for which you want to configure the widget.
   b. Click ⋮ → **Edit Dashboard**.
   c. If needed, drag the widget from the **Widgets** section to the dashboard.
   d. On the widget, click ⋮ → **Configure**.
2. On the **Range** tab, select the time period for which you want to show the most visited assets: last week, last month, or last year.

3. On the **Widget** tab, enter the required information.
4. On the widget, click **Save**.
5. In the upper-right corner of the page, click **Save**.

Recent widget

The Recent widget shows on a dashboard the 10 assets that the signed-in user visited recently.

On the widget, the domain for each asset is shown under the asset name. You can:

- Click an asset name to go to that asset page.
- Click a domain name to go to that domain page.

This widget has no specific configuration settings. Like all other widgets, common configuration settings for this widget are available on the **Widget** tab.

Search widget

The Search widget on a dashboard works like the global search box. When you enter text in the widget's search box and press `Enter`, you are taken to the same search page as the global search box, with identical results.

Configure the Search widget

Configuring the Search widget involves the following:

- **Filters:** Adding filters to define the scope. These filters refer to the saved search filters that are shared with everyone.

Tip
- If you have the **Data Marketplace** global permission, you can also use the **Data Marketplace** and other search tabs (related to Data Marketplace) as filters. Search suggestions for these other search tabs don't include recently visited assets.
- When a user with the **Data Marketplace** global permission searches in the widget using a search tab, they are taken to the same tab on the search page. Searching using any other tab takes them to the **All Results** tab on the search page.

- **Results:** Selecting which characteristics (such as name and status) are shown in the search results. The asset type is shown by default.
- **Widget:** Adding a title and description to provide context for users.

Prerequisites

The **Improved Search Widget on Dashboard** setting in Collibra Console is enabled.

Steps

1. Open the dashboard containing the Search widget.
2. Click **Edit**.
3. On the widget, click ⋮ → **Configure**.
4. On the **Filters** tab, click **Add filter**.
5. In the drop-down list, select a filter.

   Tip
   - The list includes only search filters that are shared with everyone. If you have the **Data Marketplace** global permission, the list also includes **Data Marketplace** and other search tabs.
   - You can add multiple filters using **Add filter**.
   - The filters you add are shown as tabs in the widget.
   - If you add more than one filter, users can switch between them when searching in the widget.

6. On the **Results** tab, switch on the characteristics you want to be shown in the search results.

7. On the **Widget** tab, enter a title to identify the widget and a description about the widget.
8. Click **Save**.
9. In the upper-right corner of the page, click **Save**.

> **Warning** If the **Improved Search Widget on Dashboard** setting is disabled, any filters previously added to a Search widget are still applied to the widget. If you want to remove the filters, enable the **Improved Search Widget on Dashboard** setting, remove the filters from the widget, and then disable the setting.

Text widget

The Text widget enables you to show text on a dashboard. It offers a rich text editor, allowing you to format text with bold formatting, italics, headings, lists, and more. Additionally, it offers an HTML Editor for advanced styling.

You can use the Text widget to share a variety of information, from the latest news and updates in data governance to providing helpful links for users to explore specific views or resources.

> **Note**
> - To add code, use the **HTML Editor** tab in the **Text** widget.
> - In the latest UI, you can't inject CSS files into Collibra to customize multiple dashboards at once, as you did with the classic UI. You need to manually style each dashboard instead.

Configure the Text widget

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the widget for configuration.

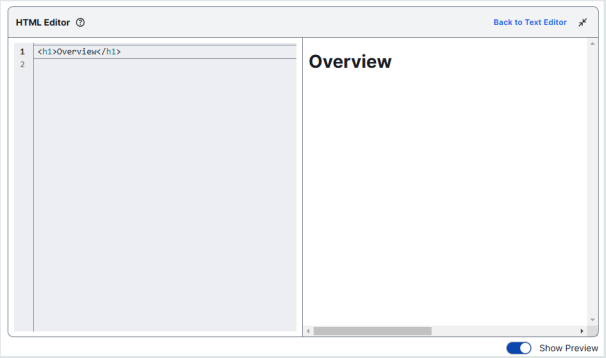
   Show more information

   a. Open the dashboard for which you want to configure the widget.
   b. Click ⋮ → **Edit Dashboard**.
   c. If needed, drag the widget from the **Widgets** section to the dashboard.
   d. On the widget, click ⋮ → **Configure**.
2. To add code or HTML text, click **HTML Editor**, and then enter or paste your code in the box.

   Tip

   - The **HTML Editor** in the Text widget supports most HTML elements, including iframes.
     However, this can potentially allow an attacker to run an XSS attack by injecting malicious HTML. To improve security, you can have the following HTML elements automatically removed via the **Prevent advanced html features in text dashboard** setting in Collibra Console.
     - frame
     - frameset
     - iframe

     Event handlers, including JavaScript, are always removed.
     For more information, go to Security configuration.
   - You can maximize the **HTML Editor**. In the full screen view, you can see a preview of your code.

   - When you switch between the HTML Editor and Rich Text Editor, the content in the HTML Editor is analyzed. If the HTML Editor contains elements not supported in the Rich Text Editor, a warning message appears. If you continue, the message "Your content may not display correctly" is shown above the Text widget configuration.

3. To add plain text, click **Rich Text Editor**, and then enter or paste your text in the box.

   Tip
   - You can format the text in the box using the text formatting options. For more formatting options, click **...**.
   - For more information, go to About text editors.
   - If you see the message "Your content may not display correctly" above the Text widget configuration, the code in the HTML Editor may include unsupported tags that affect the final display.

4. On the **Widget** tab, enter the required information.
5. On the widget, click **Save**.
6. In the upper-right corner of the page, click **Save**.

HTML tags in text editors and text widgets

You can add HTML tags in the following places:

- Dashboard text widgets, using the HTML Editor
- Text editors, if the HTML Editor is available

The HTML Editor allows for advanced styling and supports most HTML tags. Certain tags, however, aren't supported in the HTML Editor, and such tags are automatically ignored when you save the HTML code. The list of unsupported tags depends on the sanitizer enforced by your administrator.

In this topic

Sanitizers

- **Legacy sanitizer:** Applies less strict rules to HTML tags compared to the new sanitizer. The legacy sanitizer is enabled and enforced by default.
- **New sanitizer:** Applies stricter rules to HTML tags compared to the legacy sanitizer. These stricter rules are for improving platform security.

Both sanitizers remove HTML tags that don't meet certain specifications or violate security rules for allowed tags and attributes. For more information, go to Enforce legacy sanitizer.

Supported HTML tags with legacy sanitizer enabled

The following is a list of all the supported HTML tags with the legacy sanitizer enabled.

- a
- b
- big
- blockquote
- br
- button
- center
- cite
- code
- col
- colgroup
- dd
- div
- dl
- dt
- em
- fieldset
- font
- form
- h1
- h2
- h3
- h4
- h5
- h6
- hr
- i
- img
- input
- label
- legend
- li

- link
- map
- no-hyperlink
- ol
- option
- p
- pre
- samp
- select
- small
- span
- strike
- strong
- style
- sub
- sup
- table
- tbody
- td
- textarea
- tfoot
- th
- thead
- tr
- u
- ul

Unsupported HTML tags with legacy sanitizer enabled

The following is a list of some of the unsupported HTML tags with the legacy sanitizer enabled.

- body
- head
- html
- meta
- script

- svg
- title

Supported HTML tags with new sanitizer enabled

The following is a list of all the supported HTML tags with the new sanitizer enabled.

- a
- b
- big
- blockquote
- br
- center
- code
- col
- colgroup
- div
- em
- fieldset
- font
- h1
- h2
- h3
- h4
- h5
- h6
- hr
- i
- img
- label
- legend
- li
- ol
- p
- pre
- small
- span

- strike
- strong
- style
- table
- tbody
- td
- th
- thead
- tr
- u
- ul

Unsupported HTML tags with new sanitizer enabled

The following is a list of some of the unsupported HTML tags with the new sanitizer enabled.

- body
- button
- form
- head
- html
- input
- link
- meta
- script
- select
- svg
- textarea
- title

Tip

- The HTML Editor in dashboard text widgets supports iframes. However, this can potentially allow an attacker to run an XSS attack by injecting malicious HTML. To improve security, you can have the following HTML elements automatically removed via the **Prevent advanced html features in text dashboard** setting in Collibra Console.
  - frame
  - frameset
  - iframe
  - Any event handlers

  For more information, go to Security configuration.
- The <style> tag affects only elements in the related text editor area, such as the text widget or attribute.

Tasks and Issues widget

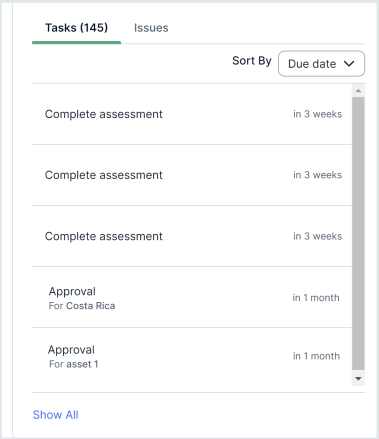
The Tasks and Issues widget shows an overview of open tasks and issues on a dashboard. On the widget, you can click the **Tasks** and **Issues** tabs to switch between tasks and issues.

On the **Tasks** tab:

- Click the **Sort By** list to sort the open tasks by their name, due date, and associated asset.
- Click **Show All** to see either all open tasks or the open tasks assigned to you, depending on the widget configuration.

On the **Issues** tab:

- Click the **Sort By** list to sort the open issues by their name and creator.
- Click **Go to Data Helpdesk Page** to see either all open issues or the open issues you created, depending on the widget configuration.



> **Note** Open issues do not include issues in the following statuses:
>
> - Resolved
> - Invalid
> - Obsolete
> - Disabled
>
> You cannot edit this list.

Configure the Tasks and Issues widget

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the widget for configuration.

   Show more information

   a. Open the dashboard for which you want to configure the widget.
   b. Click ⋮ → **Edit Dashboard**.
   c. If needed, drag the widget from the **Widgets** section to the dashboard.

d. On the widget, click ⋮ → **Configure**.

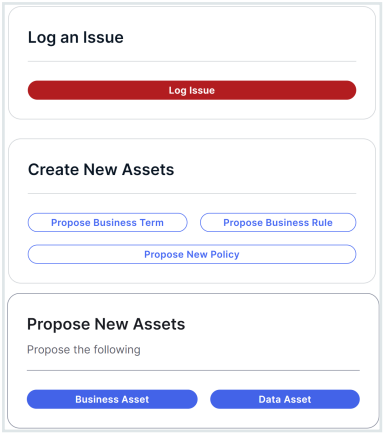
2. Enter the required information.

Tab	Field	Explanation
Tasks	Show Tasks	◦ **True:** Shows open tasks on the widget. If you select this check-box, select one of the following options: ▪ **All Tasks:** Shows all open tasks. ▪ **My Tasks:** Shows only the open tasks that are assigned to the signed-in user. ◦ **False:** Does not show any tasks on the widget. **Tip** Remember your selection because you can use this information in the next step, when you edit the title and description on the **Widget** tab.
Tasks	Maximum Number of Tasks	Select the maximum number of tasks you want to show on the widget.
Issues	Show Issues	◦ **True:** Shows open issues on the widget. If you select this check-box, select one of the following options: ▪ **All Issues:** Shows all open issues. ▪ **Issues Created by User:** Shows only the open issues that the signed-in user created. ◦ **False:** Does not show any issues on the widget. **Tip** Remember your selection because you can use this information in the next step, when you edit the title and description on the **Widget** tab.
Issues	Maximum Number of Issues	Select the maximum number of issues you want to show on the widget.

3. On the **Widget** tab, enter the required information.
4. On the widget, click **Save**.
5. In the upper-right corner of the page, click **Save**.

Workflows widget

The Workflows widget on a dashboard enables you to start global workflows via buttons.



Configure the Workflows widget

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the widget for configuration.

   Show more information

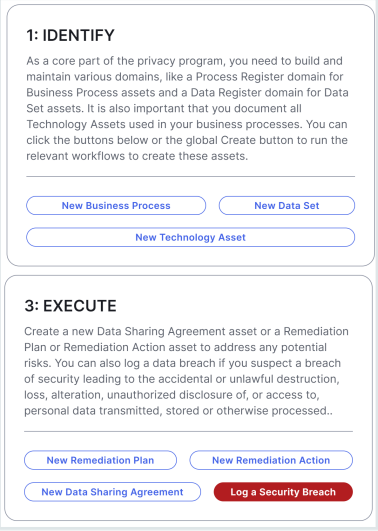
   a. Open the dashboard for which you want to configure the widget.
   b. Click ⋮ → **Edit Dashboard**.
   c. If needed, drag the widget from the **Widgets** section to the dashboard.
   d. On the widget, click ⋮ → **Configure**.
2. On the **Workflow Buttons** tab, select a workflow, and then enter the required information.

Field	Description
Title	Label for the workflow button when it is shown on the widget.
Workflow	Global workflow that you want to start when the button is clicked.

Field	Description
Button	Style for the button, based on the type of workflow. The following styles are available: ◦ **Outlined:** A button typically used for secondary or less prominent actions. It has a visible border and a transparent background, unless the secondary button is customized via the Collibra settings. ◦ **Alert:** A button typically used for negative actions or warnings. It has a red background, and it can't be customized. ◦ **Solid:** A button typically used for primary or most prominent actions. It has a blue background, unless the primary button is customized via the Collibra settings.

Tip

- You can change the position of a workflow button by dragging to the required position.
- You can remove the workflow button you don't want to show on the widget by clicking 🗑.
- You can use multiple Workflows widgets to group workflows that belong together, or to highlight important assets.



3. On the **Widget** tab, enter the required information.

   > **Tip** You can use the Description field to explain to users why and when a certain action is required, or to set expectations on what happens after an action is triggered and completed. For example, you can specify the processing timeframe for a new term suggestion, indicating that it will be addressed within X business days, or communicate that you'll follow up via email to provide further updates.

4. On the widget, click **Save**.
5. In the upper-right corner of the page, click **Save**.

Manage a dashboard widget

This section describes the actions you can perform on a dashboard widget.

Widget tab

Most dashboard widgets (for example, Bar Chart and Text) contain the **Widget** tab for configuring their appearance. The fields shown on the **Widget** tab are the same for those widgets.

Access the Widget tab

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the dashboard containing the widget.
2. Click ⋮ → **Edit Dashboard**.
3. On the widget, click ⋮ → **Configure**.
   » The **Widget** tab is shown.

Widget tab fields

The following table describes the fields shown on the **Widget** tab.

Field	Description
Show title	• **True:** Shows the default title on the widget. You can also enter your own title. • **False:** Does not show the title on the widget.
Show description	• **True:** Shows the default description on the widget, below the title. You can also enter your own description. • **False:** Does not show the description on the widget.
Refresh	This field is shown only for the following widgets: Bar Chart, Collibra Insights, Counters, Most Visited, Tasks and Issues, and Text. • **True:** Automatically refreshes the counter according to the refresh rate you select. • **False:** Does not automatically refresh the counter.
Remove padding and border	This field is shown only for the following widgets: Collibra Insights, Embedded Webpage, and Text. **Tip** Padding refers to the space between the content and the border of the container. If your widget contains an iframe, extra padding may not be needed because it could create a nested or confined appearance for the widget. • **True:** Extra padding is removed and full size of the container is used to show content. • **False:** Extra padding and the border are not removed.

Add a widget

You can create an information-rich dashboard by adding widgets to it.

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the dashboard to which you want to add a widget.
2. Click ⋮ → **Edit Dashboard**.
3. Drag the required widget from the **Widgets** section to the dashboard.

   > **Tip** You can vertically resize the **Collibra Insights**, **Embedded Webpage**, and **Text** widgets by using the bi-directional arrow located at the bottom of those widgets.

4. On the widget, click ⋮ → **Configure**.
5. Edit the widget as needed.
6. Click **Save**.
7. In the upper-right corner of the page, click **Save**.

Move a widget

You can move a widget if the widget belongs in a different location on the dashboard.

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the dashboard containing the widget you want to move.
2. Click ⋮ → **Edit Dashboard**.
3. Drag ⋮ on the widget to where you want it on the dashboard.
4. Click **Save**.

Delete a widget

If a widget is no longer useful on a dashboard, you can delete it from the dashboard.

Prerequisites

- To manage your own dashboards: You have a global role with the **Manage Your Own Views**, **Dashboards**, **Search Filters** global permission.
- To manage another user's dashboards: You have a global role with the **Manage Shared Views**, **Dashboards**, **Search Filters** global permission.

Steps

1. Open the dashboard containing the widget you want to delete.
2. Click ⋮ → **Edit Dashboard**.
3. On the widget, click ⋮ → **Delete**.
4. Click **Save**.

About notifications

This feature is **available only** in the latest UI.

Notification features such as the Slack integration help you stay informed and collaborate effectively. Slack integration enables seamless communication and collaboration by bringing Collibra notifications and actions directly into your Slack workspace.

About Slack integration

This feature is **available only** in the latest UI.

You can integrate the Slack communication application with Collibra Platform to instantly collaborate with your colleagues on Collibra data. After setting up the integration, you can:

- Receive Collibra notifications.
- Reply to comments.
- Search Collibra data.
- Share assets.

> **Note**
> - You can map only one Collibra Platform instance to one Slack workspace at a time.
> - When the integration is complete, you will continue to receive existing Collibra email notifications in addition to Slack messages.
> - If needed, review Collibra's privacy policy.

What's next?

Set up your Slack integration and then start using Slack with your Collibra data.

Set up Slack integration

Slack integration must be prepared by an administrator and be configured and confirmed by each Slack user who wants to benefit from the integration.

Steps for administrators

Administrators are users who have the **SysAdmin** global role. Before any user can complete the Slack integration, administrators must connect Collibra Platform to the Slack workspace.

Prerequisites

- A Slack workspace is available.
- Appropriate Collibra user accounts are added to the Slack workspace.
- You have coordinated with your internal IT department to complete your internal approval process. This may involve application, security, and privacy reviews, depending on your organization's policies.

Steps

1. On the main toolbar, click → **Settings**.
2. In the **General** section, click **External Apps**.
3. For the Slack app, click **Activate**.
   » The **Slack Request Permissions** page opens, requesting permission to access a Slack workspace for Collibra Platform.
4. In the upper-right corner, select the Slack workspace from the drop-down list. If the workspace isn't shown:
   a. Select **Add another workspace** from the drop-down list.
      » The **Sign in to your workspace** page opens.
   b. Enter your workspace's Slack URL and click **Continue**.
      » The **Sign in to <workspace name>** page opens.

» A request is sent to your IT administrator for approval. Please work with your IT team to complete the approval process.

> **Note** Notifications aren't sent to users when Slack is integrated with Collibra.

Steps for users

Prerequisites

- Your Collibra Platform is connected to the Slack workspace.
- You have an account for a Slack workspace.
- Your Collibra Platform isn't already connected to a different Slack workspace.

Steps

1. On the main toolbar, click your avatar → **Profile**.
2. Click the **Notification Settings** tab.
3. In the **Slack** section, click **Connect**.
   » A confirmation message appears. You also receive a Slack notification in the connected workspace indicating that Collibra is set up.

What's next?

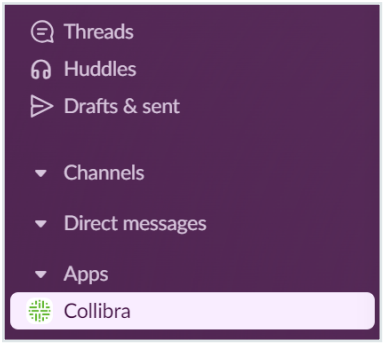
Use Slack with Collibra.

Use Slack with Collibra

Once the Slack integration is set up, you can start using Slack with Collibra to:

- Receive Collibra notifications in Slack.
- Reply to Collibra comments in Slack.
- Search Collibra data in Slack.
- Share Collibra assets in Slack.

These features are available in the Collibra app in Slack in the **Apps** section.



> **Note** For more information about using Slack with Collibra data, enter `/collibra help` in the Slack message bar.

In this topic

Receive notifications

You receive notifications in the Collibra app in Slack for task-assigned workflows, mentions, and comment threads. The text in a Slack notification is the same as that in a Collibra email.

> **Note**
> - Slack doesn't send notifications for workflow approvals or rejections, or when a comment is edited.
> - Slack removes any unsupported formatting from a comment, but it remains visible in Collibra.

Reply to comments

You can reply to resource and assessment comments via Slack.

> **Note**
> - You can’t reply to a deleted message.
> - If a comment is resolved, you must reopen it in Collibra before replying.

1. In the Collibra app in Slack, click **Reply** next to the comment.
   » A dialog box appears.

2. Enter your comment and click **Submit**.
   » A green checkmark is shown in Slack to indicate that you replied. Your reply is shown on the resource or assessment page in Collibra.

Search Collibra data

You can search for Collibra data in Slack using the `/collibra search` prompt in a direct message or channel. The search results are identical to those from the search page in Collibra Platform. You can search only for asset categories. You can't search for users, user groups, domains, or communities.

1. In the Slack message bar, enter `/collibra search` and a search parameter, for example, `/collibra search report`.
   » A dialog box shows the results.
2. If needed, filter the results by asset type or tag.
3. To share the results, click **Share**. Otherwise, click **Close**.

Share assets

When you share an asset, a link to the asset is shown in the Slack notification. You can share only assets. You can't share users, user groups, domains, or communities.

1. In the Slack message bar, enter `/collibra search` and a search parameter, for example, `/collibra search report`.
   » A dialog box shows the results.
2. If needed, filter the results by asset type or tag.
3. Click **Share**.
   » A notification is sent to the Collibra app in the Slack workspace indicating which asset was shared and by whom.

Disconnect Slack integration

Users can disconnect Slack integration to no longer send or receive Slack notifications through Collibra for themselves. Administrators can also deactivate Slack integration so all users can no longer send or receive Slack notifications through Collibra.

Steps for administrators

1. On the main toolbar, click → **Settings**.
2. In the **General** section, click **External Apps**.
3. For the Slack app, click **Deactivate**.

Steps for users

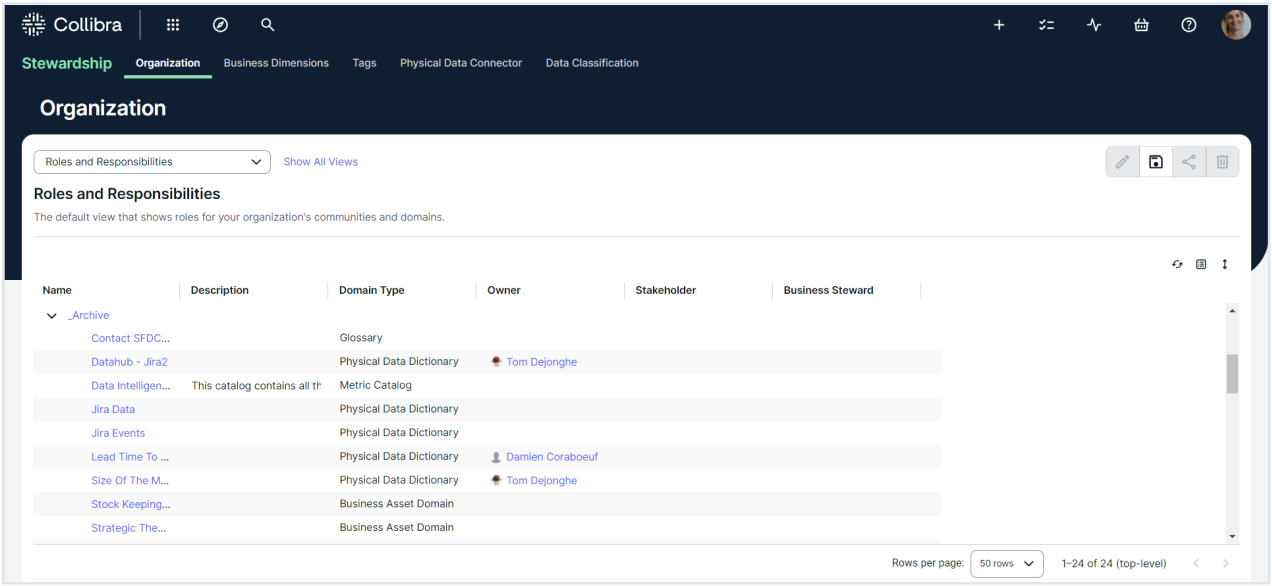
1. On the main toolbar, click your avatar → **Profile**.
2. Click the **Notification Settings** tab.
3. In the **Slack** section, click **Disconnect**.

What's next?

If needed, set up Slack integration again.

Stewardship

The Collibra Stewardship application helps data stewards manage their daily tasks. It also helps the administrators to manage the stewards.
In Stewardship, stewards can monitor and maintain their own space in the company's data governance ecosystem. This space gives a clear picture of the responsibilities inside the data governance structure.



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.

Page	Description
Physical Data Connector	Contains a table with high-level database information.
Data Classification	Shows the available data classes in your Collibra environment.

For information on the guide stewardship operating model, go to Guided Stewardship operating model.

Using workflows

Workflows in Collibra Platform 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 in the Workflows documentation.

Start a global workflow **660**

Start an asset workflow from an asset page **661**

Start an asset workflow from an asset table or set of tiles **661**

Working with tasks **662**

Start a global workflow

You can start a workflow that is not linked to an asset from a dashboard if the workflow definition settings allow you to.

Requirements and permissions

- You have a global role with the **Start workflow** global permission.

  > **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require this permission explicitly.

- You have one of the roles defined in the **Start workflow** definition setting or there is no role defined.

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.
   - 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

Requirements and permissions

- You have a global role with the **Start workflow** global permission.

> **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require this permission explicitly.

- You have one of the roles defined in the **Start workflow** definition setting or there is no role defined.

Steps

1. In the title bar, select **Actions** → the name of the workflow you want to start.
2. If necessary, fill in and submit the start form.

» A notification confirms that the workflow started or indicates any errors that might prevent the workflow from starting.

Start an asset workflow from an asset table or set of tiles

Requirements and permissions

- You have a global role with the **Start workflow** global permission.

> **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require this permission explicitly.

- You have one of the roles defined in the **Start workflow** definition setting or there is no role defined.

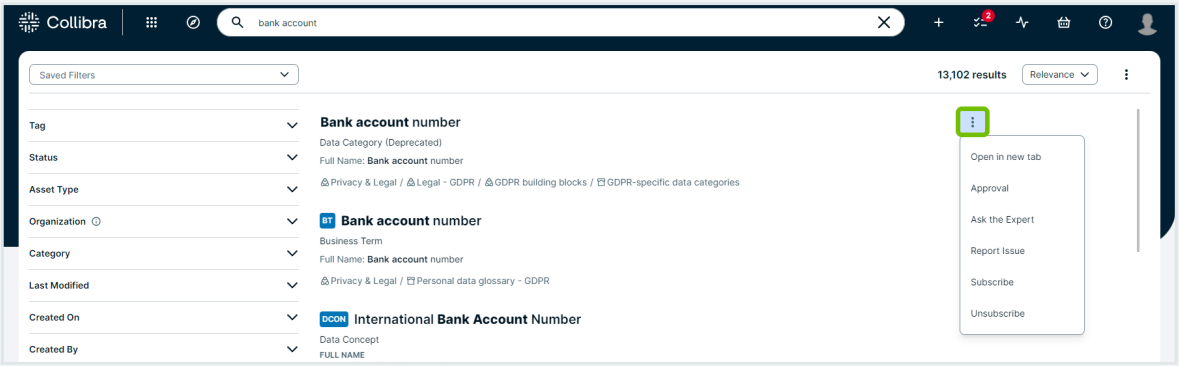
Steps

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.
3. In the menu above the selected assets, click the name of the workflow you want to start.

   > **Note** Only workflows that can be started for all selected assets at once are available.

4. If necessary, fill in and submit the start form.

> **Tip** On the search page, you can also start an asset workflow by selecting **More** → the name of the workflow you want to start for the relevant asset.



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.

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.

Viewing all your tasks

You can view all the tasks that have been assigned to you on the **Tasks** page.

To access the **Tasks** page, click the **Tasks** icon in the main menu.

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:

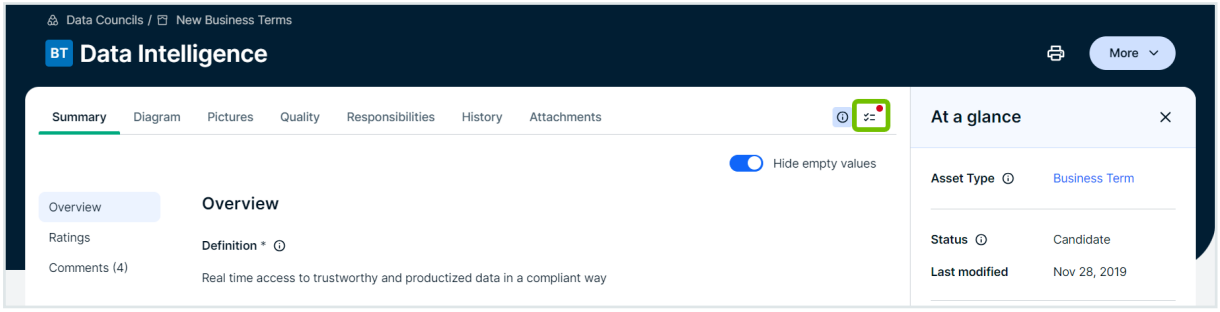
- Consult all other open tasks, on the **All Tasks** page. This view shows all your tasks and tasks for other users, for which you have permission to view.
- Cancel or reassign the tasks on the **All Tasks** page. When you cancel a task, you have to provide a reason in the dialog box that is displayed. 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.

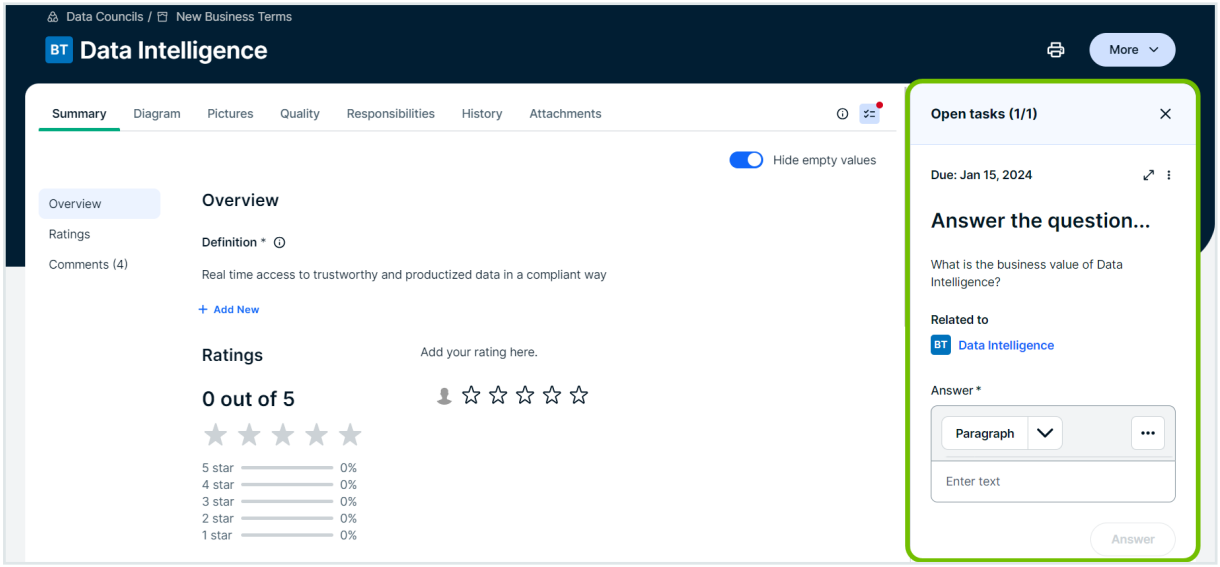
Viewing a resource task

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.

On asset pages, the **Tasks** icon shows whether you have any tasks related to the asset you are viewing.



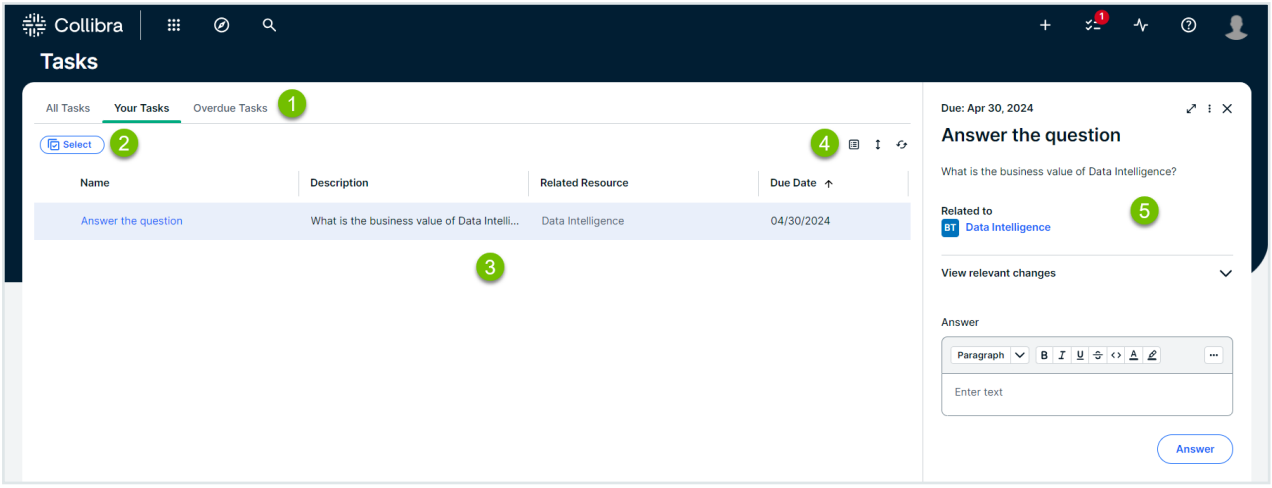
By default, the sidebar displays **At a glance** information about the asset. If this sidebar is hidden, click . Unless you are accessing the asset page from the Tasks page or an email notification, select the **Tasks** icon to display the task in the sidebar. You can complete all task actions from the sidebar.



The Tasks page

To access the **Tasks** page, click the **Tasks** icon in the main menu.

The following image shows the different parts of the **Tasks** page:



Element	Name	Description
1	Tasks submenu	Contains the following sections: • **All Tasks**: Shows all the tasks for which you have permission to view. • **Your Tasks**: Shows all the tasks that have been assigned to you. • **Overdue Tasks**: Shows the tasks that have been assigned to you that are past their due date.
2	Select button	Allows you to select 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 the details of the selected workflow task.

Completing workflow tasks

Workflows create tasks that ask users to provide input or to perform certain actions. You can complete the tasks that are currently assigned to you in different locations, in different contexts.

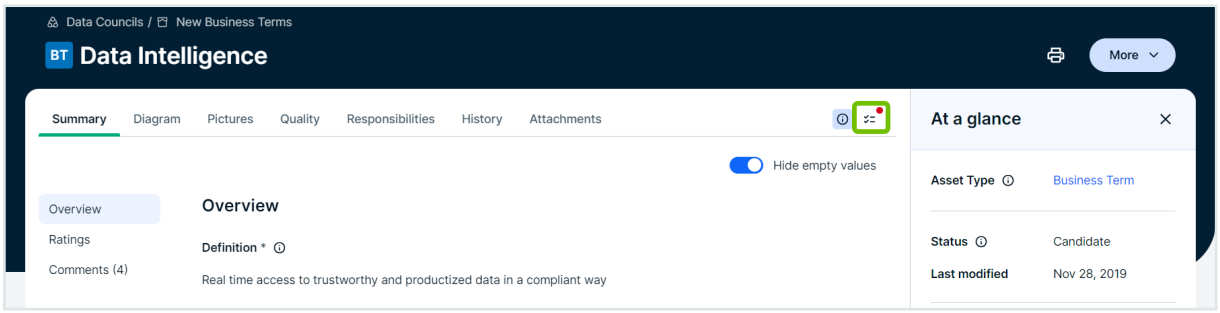
Requirements and permissions

You have a global role with the **Participate in workflow** global permission.

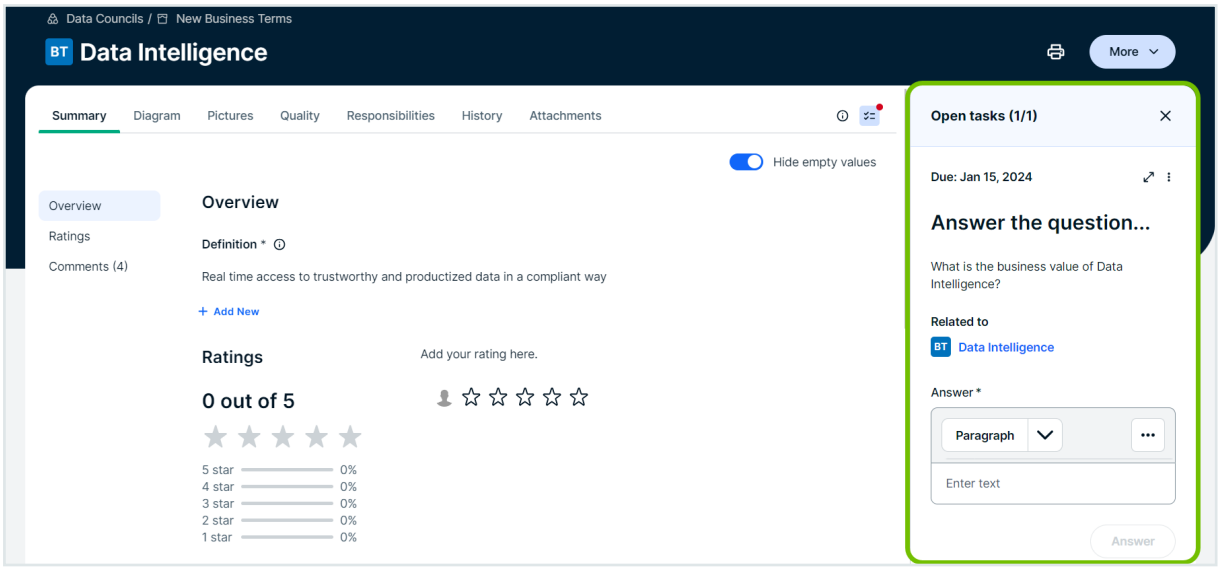
> **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require this permission explicitly.

Completing a task on the asset page

On asset pages, the **Tasks** icon shows whether you have any tasks related to the asset you are viewing.



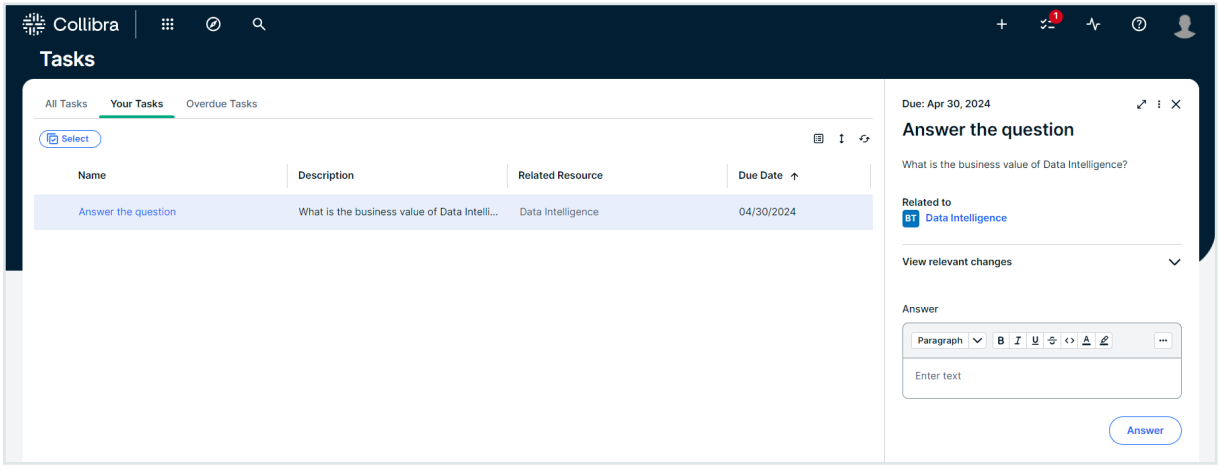
By default, the sidebar displays **At a glance** information about the asset. If this sidebar is hidden, click ⓘ. Unless you are accessing the asset page from the Tasks page or an email notification, select the **Tasks** icon to display the task in the sidebar. You can complete all task actions from the sidebar.



Completing a task on the Tasks page

On the Tasks page, the **Your Tasks** section contains a table with all of your active tasks.

Click to select one of the rows to display the task information in the sidebar. You can complete all task actions from the sidebar.



Tip You can click the name of the task or the related resource to view the task on the corresponding resource page.

To complete multiple tasks simultaneously:

1. Click the **Select** button.
2. Select more than one task.

> **Note** Only the common actions that are possible for the selected tasks appear above the table. 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. When there are no common actions for the selected tasks, only the **Cancel** button is available.

3. Select one of the actions to complete the tasks.
4. If 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.

Reassign a task

You can reassign a task that is assigned to you or that you can access if the workflow definition settings allow you to.

Requirements and permissions

- You have a global role with the **Participate in workflow** global permission.

> **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require this permission explicitly.

- You have one of the roles defined in the **Reassign tasks** definition setting or there is no role defined.
- Any user you reassign the task to must have a global role with the **Participate in workflow** global permission.

Task sidebar enabled

1. View the task you want to reassign.
2. In the upper-right corner of the sidebar, select → **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

This feature **isn't available** in the latest user interface.

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.

Cancel a task

You can cancel a task that is assigned to you or that you can access if the workflow definition settings allow you to.

> **Important** Canceling a task cancels the entire workflow.

Requirements and permissions

- You have a global role with the **Participate in workflow** global permission.

> **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require this permission explicitly.

- You have one of the roles defined in the **Stop workflow** definition setting or there is no role defined.

Steps

1. On the main toolbar, click the **Tasks** icon.
2. Click to select the row of the task to cancel.

> **Note** Clicking the task name or resource name opens the task details or the asset page respectively.

» The row is highlighted and the task appears in the sidebar.

3. At the top of the sidebar, select → **Cancel Task**.
4. Fill in an optional reason to cancel the task and click **Cancel Task**.

View a workflow diagram

Each task is part of a workflow. You can open the full workflow diagram and see in which stage of the workflow the task is located.

Requirements and permissions

You have a global role with the **Participate in workflow** global permission.

> **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require this permission explicitly.

Task sidebar enabled

1. On the main toolbar, click the **Tasks** icon.
2. Click the row of task for which you want to see the diagram. 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 upper-right corner of the sidebar, select → **View in workflow diagram**.
   » A rendering of the current position of the task in the workflow is displayed.

Task sidebar disabled

This feature **isn't available** in the latest user interface.

1. On the main toolbar, click the **Tasks** icon.
2. Click the row of task for which you want to see the diagram. 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 **More** → **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.

> **Tip** For information on how we leverage AI in our products, including how we handle data used for training and input, please visit the Collibra Trust Site.

Where can you find Collibra AI in Collibra?

- Asset recommender
- Collibra AI Copilot
- Asset description recommendations
- Data similarity
- DAX analysis for Power BI technical lineage
- Picture description in Diagrams
- SQL assistant for data quality

Collibra AI Copilot (in preview)

- This feature is **available only** in the latest UI.
- This feature isn't available for Collibra Platform for Government and CPSH.

In this topic

About Collibra AI Copilot

Collibra AI Copilot is a chat-based assistant that includes several AI agents, which can help you:

- Find the data you need for analysis, reporting, or building AI models.
- Get definitions for terms, acronyms, and KPIs.
- Receive guidance based on the latest Collibra product documentation.

> **Example** You can ask:
>
> - "Search a data set to build a training compliance dashboard"
> - "What does CC mean?"
> - "What is Usage Analytics?"
> - How do I share my collection with my team?
>
> For more examples, go to the Collibra AI Copilot prompt tips.

With the correct permissions, administrators can tailor Collibra AI Copilot to align with your organization's needs. They can, for example, define which AI agents are enabled and what their content scope is.

If at least one AI agent is enabled and configured and you have the required permission, you can use Collibra AI Copilot from the menu bar.

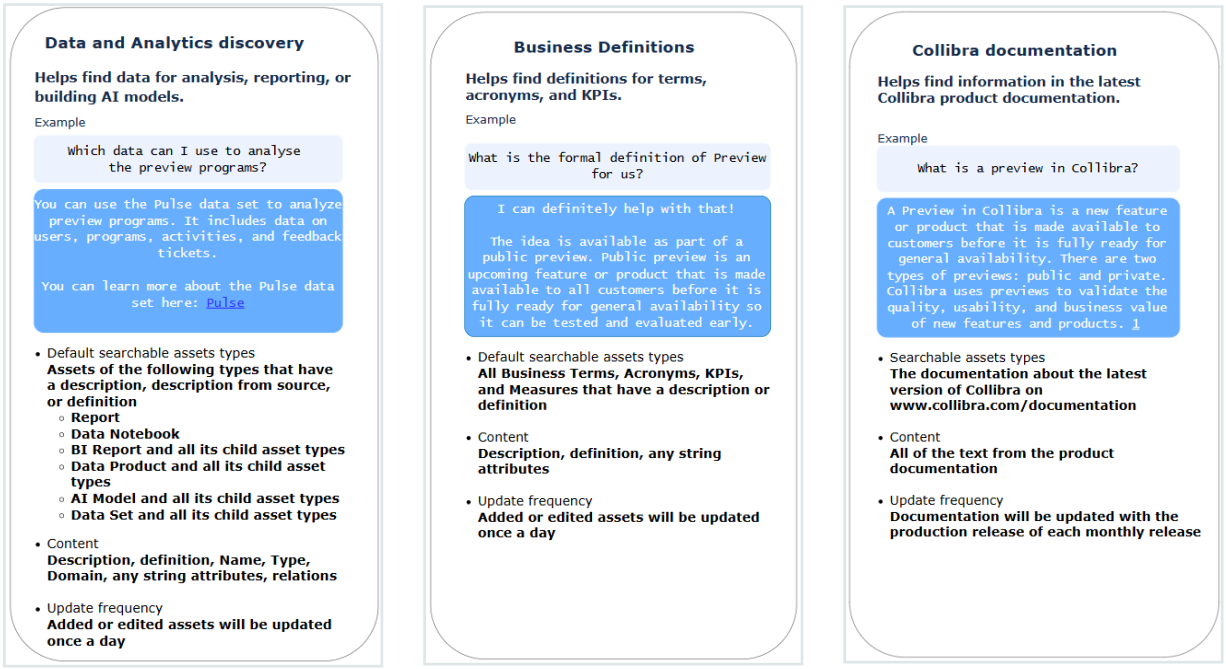
About AI agents in Collibra AI Copilot

Collibra AI Copilot includes the following AI agents:

- **Data and Analytics Discovery**, which helps find data for analysis, reporting, or building AI models.
  By default, this agent finds several asset types if those assets have a description, a description from source, or a definition.
  - Report
  - Data Notebook
  - BI Report and all its child asset types
  - Data Product and all its child asset types
  - AI Model and all its child asset types
  - Data Set and all its child asset types

  The content scope of this agent can be customized.
- **Business Definitions**, which helps find definitions for terms, acronyms, and KPIs.
  By default, this agent finds Business Term, Acronym, KPI, and Measure assets if they have a description or definition. The content scope of this agent can be customized.

- **Collibra Documentation**, which helps find information in the latest Collibra product documentation.
  This agent always references the Collibra product documentation for the latest release on Production environments. For example, if the latest production release is 2025.06, then Collibra AI Copilot refers to that documentation. It doesn't consider the release version of your specific environment.



Collibra AI Copilot knowledge base

Collibra AI Copilot uses its own knowledge base. Changes in your environment are added daily and the latest product documentation is added once per release.

- When the **Data and Analytics Discovery** or **Business Definitions** AI agent is enabled, it takes 1 to 2 days to build your Collibra AI Copilot knowledge base based on your environment and AI agent configuration.
  Once the initial knowledge base is created, updates to assets and new assets within scope are processed daily. These updates are typically searchable within 24 hours.

> **Note** Daily updates to the knowledge base are processed overnight. Until the data is processed, Collibra AI Copilot can't answer questions about new assets. For modified assets, Collibra AI Copilot uses older data to locate the asset but retrieves the latest attributes and relations when answering questions. This means questions about updated information can be answered immediately, unless the asset's name and description have been entirely changed.

- If enabled, the **Collibra Documentation** AI agent is updated once a month with the latest release documentation. This starts together with the Production deployment of the release.

Collibra AI Copilot configuration

Enable and configure Collibra AI Copilot

> **Note** Before you enable Collibra AI Copilot consider the following:
>
> - Collibra AI Copilot is optimized for English.
> - Collibra AI Copilot leverages Google Gemini.
>
> For details about the Collibra AI Copilot process flow, go to How does Collibra AI Copilot work. For information on how we leverage AI in our products, go to the Collibra Trust Site.

Complete the following steps to enable and configure Collibra AI Copilot.

1. Enable Collibra AI Copilot by changing the value of the **Beta** > **Collibra AI Copilot** setting to **True**.

   Show how to do this.

   ### Prerequisites

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

Steps

a. Open the DGC service settings for editing:
   i. Open Collibra Console.
      » Collibra Console opens with the **Infrastructure** page.
   ii. In the tab pane, expand an environment to show its services.
   iii. In the tab pane, click the Collibra Platform service of that environment.
   iv. Click **Configuration**.
   v. Click **Edit configuration**.
b. In the **Beta** section, enable the **Collibra AI Copilot** setting.
   The options are:
   - ✓ True: Collibra AI Copilot is enabled and can be configured. The following global permissions become available:
     - **AI Agents** > **Manage all agents**.
     - **Product Rights** > **AI Copilot**

     By default, these global permissions aren't assigned to any global role.
   - ✕ False (default): Collibra AI Copilot isn't available.

c. Click **Save all**.

2. Allow some users to tailor Collibra AI Copilot and activate AI agents by adding the **Manage all agents** global permission to the relevant global roles.
   Show how to do this.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

In Collibra, add the **AI Agents** > **Manage all agents** global permission to the relevant global roles.
Only users with a global role that includes this global permission can activate AI agents and tailor Collibra AI Copilot.

For information on global roles and permissions, go to Manage global role permissions.

3. Configure Collibra AI Copilot by activating and configuring the 3 AI agents and adding a welcome message for users in the **AI Agents** settings.
   Show how to do this.

Prerequisites

You have a global role that has the **AI Agents** > **Manage all agents** global permission.

Steps

a. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
b. Click **AI Agents**.
   » The **AI Agents** tab pane opens.
c. To activate an AI agent:
   i. Double-click the **Active** column for the AI agent.
   ii. Select **Yes**.
   iii. Click outside the column.
   The update is saved.
d. To configure an AI agent:
   i. Click the Agent name hyperlink.
   A dedicated page AI agent opens.
   ii. Make the desired changes.
   For more information on the available options per AI agent, go to AI Agents settings.
e. To add an Collibra AI Copilot welcome message for users:
   i. In the tab pane, click **AI Copilot**.
   The **AI Copilot configuration** page opens.
   ii. In **Welcome message**, type the text you want to show.

> **Tip** Use the welcome message to set user expectations based on the AI agents you have activated.

If you have enabled and configured an AI agent, Collibra starts the process of building your Collibra AI Copilot knowledge base based on your data. This process is called embedding. Depending on your environment size, this can take up to 2 days. After that, Collibra AI Copilot is ready to search through the defined content scope or product documentation.

4. Give users access to Collibra AI Copilot by adding the **AI Copilot** global permission to the relevant global roles.
   Show how to do this.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

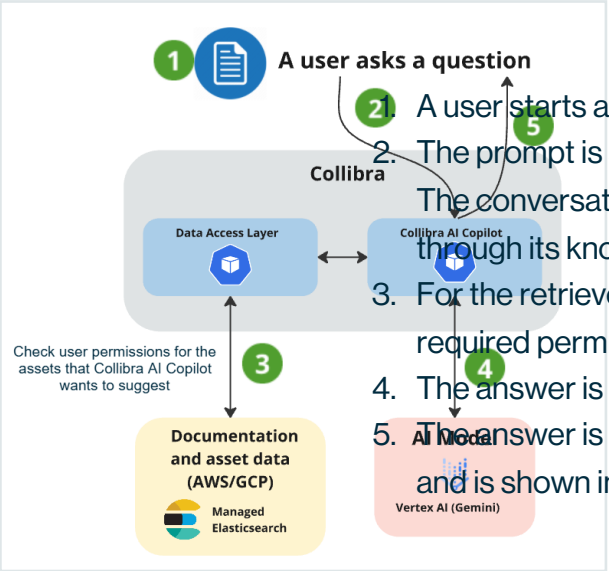
Steps

In Collibra, add the **Product Rights** > **AI Copilot** global permission to the relevant global roles.
Only users with this global permission can view the Collibra AI Copilot icon in the menu bar and start a chat.

- Limit your audience while configuring the AI agents.
- Collibra AI Copilot takes the asset access permissions into account. This means that a user receives only information they have access to.

For information on global roles and permissions, go to Manage global role permissions.

Collibra AI Copilot flow



1. A user starts a chat with Collibra AI Copilot.
2. The prompt is sent to the Collibra AI Copilot service.
   The conversation starts and Collibra AI Copilot starts a search through its knowledge base.
3. For the retrieved information, it checks if the user has the required permissions.
4. The answer is getting formulated.
5. The answer is routed back to the Collibra AI Copilot service and is shown in the UI.

For information on how we leverage AI in our products, go to the Collibra Trust Site.

Using Collibra AI Copilot

Start a Collibra AI Copilot chat

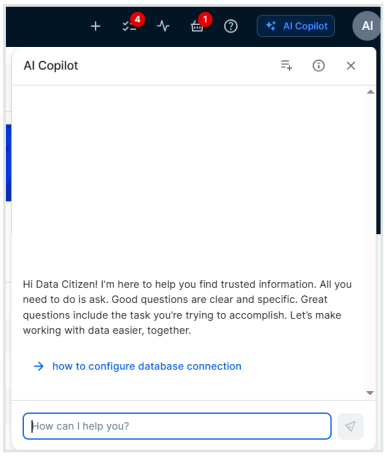
Prerequisites

You have a global role with the **Product Rights** > **AI Copilot** global permission.

Steps

1. Click **AI Copilot** to start a chat with Collibra AI Copilot.
   » A **Collibra AI Copilot** chat dialog box opens.
   Collibra AI Copilot can show up to 3 clickable example questions. These questions help users understand the types of queries they can ask and allow them to click to see how the AI responds.
   For details about the dialog box, go to Chat dialog box.

   Show image



> **Tip** If you start Collibra AI Copilot in another Collibra tab, it starts a new chat. This means it won't remember the other conversation if you switch tabs.

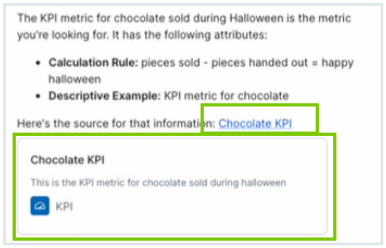
2. Click an example question, or type your question and press Enter or click the **Post** icon .
   - You can add up to 5,000 characters in one question, also known as a prompt.
   - Collibra AI Copilot uses your last 10 prompts and the last 10 answers as context to generate an answer.
   - The chat is limited. Once you get to the limit, you'll receive a message and you can start a new chat.

> **Tip** To get the best out of Collibra AI Copilot, go to the Collibra AI Copilot prompt tips.

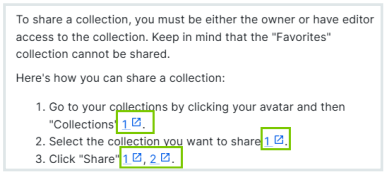
» Collibra AI Copilot provides an answer. For information on how this works, go to Collibra AI Copilot flow.

3. Read and validate the answer.
   You can then:
   - Ask a follow-up question.
   - Respond to the question asked by Collibra AI Copilot.

- Click the provided link to an asset in Collibra or click the provided asset card.



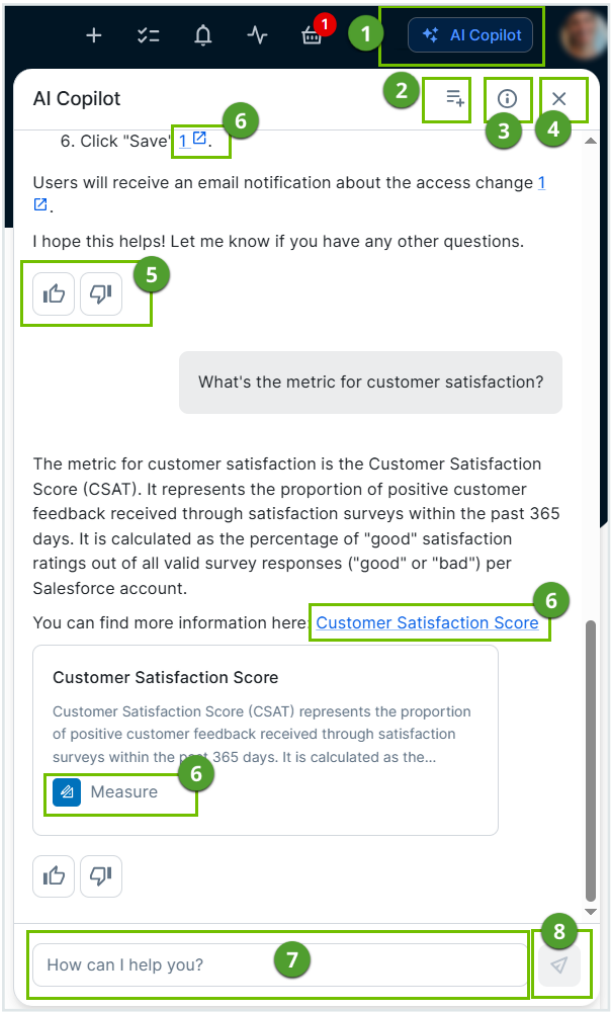
- Click a provided link to a page in the Documentation Center.



- Give feedback on the provided answer.

- Click the **Start new chat** icon to remove the chat history and start over.

Collibra AI Copilot chat dialog box



The Collibra AI Copilot chat dialog box consists of the following elements:

Element	Description
1	Open to open and close the Collibra AI Copilot chat dialog box.
2	Option to reset the co-pilot: Clear the chat history and start a new session.
3	Option to view information about the version and details about Collibra AI Copilot.
4	Option to close the chat dialog box.

Element	Description
5	Feedback option: Provide feedback on the response to help improve Collibra AI Copilot. For more information, go to Give feedback on an answer.
6	Link to open a relevant asset or documentation page: Navigate directly to the suggested asset or documentation.
7	Area to add a prompt: Type your question or request here. For more information, go to Tips to get the best out of Collibra AI Copilot.
8	Button to submit your question: Click to send your prompt to Collibra AI Copilot.

Tips to get the best out of Collibra AI Copilot

Collibra AI Copilot works best when you provide context and enough details. Use the following tips to get better results:

Tip	Prompt example
Include your role Including your role when asking questions helps Collibra AI Copilot tailor its answer to your specific needs.	As a data steward, how do I manage data sets?
Break down complex questions If your question involves multiple parts, split it into smaller, simpler questions. Splitting up a question helps Collibra AI Copilot focus on what you want to know.	First ask: "What is a Business Term asset?". Then follow up with: "How do I create a Business Term asset?"
Use "Tell me about..." to get a global overview With "Tell me about..." , Collibra AI Copilot will give you a summary on a specific topic.	Tell me about classification in Collibra.
Be explicit when you needed detailed guidance If you're looking for instructions, explicitly ask for step-by-step instructions.	Provide step-by-step instructions to create a work-flow.

Tip	Prompt example
When Collibra AI Copilot is stuck or provides an incorrect or incomplete answer: • Rephrase your question or be more specific. Collibra AI Copilot may not fully understand your question. • Click **Start new chat** to clear the chat history. It allows Collibra AI Copilot to start fresh without considering previous prompts.	Instead of asking, "How do I use Collibra?" ask, "How do I create a Business Term in Collibra?" or add an example: "How do I classify data, for example to tag sensitive data in a Data Set."

> **Important** Collibra AI Copilot may not be aware of the specific information you're looking for. In such cases, it may direct you to other resources. For more information, go to Collibra AI Copilot basics

Give feedback on an answer

At the end of each answer, you can click the thumbs up or thumbs down icon to give feedback.

If you click thumbs down, add your comment or suggestion in the text field and click **Submit**. You can add up to 500 characters in the text field.

Your feedback helps us understand how we can improve Collibra AI Copilot. For more information about how we use the feedback, go to the Collibra Trust Site.

Related topics

AI Agents settings page (in preview)

[[[Undefined variable CollibraGeneral.additional-resources]]]

Watch a video on Collibra.com

Data similarity

Data similarity is a feature that proposes similar assets. This can be useful for data consumers because:

- It simplifies data discovery: Quickly find relevant data based on connectivity and similarity to existing tables.
- It saves times and effort: Uncover valuable data sources without extensive manual searching or relying on experts.
- It builds trust in data: Check the data similarity score to assess the suitability of data for specific needs.

> **Note**
> This feature is powered by Collibra AI.

About Data similarity

Data similarity is a feature that proposes similar assets. This can be useful for data consumers because:

- It simplifies data discovery: Quickly find relevant data based on connectivity and similarity to existing tables.
- It saves times and effort: Uncover valuable data sources without extensive manual searching or relying on experts.
- It builds trust in data: Check the data similarity score to assess the suitability of data for specific needs.

Currently, this feature is available in Data Marketplace to show similar Table assets.

> **Tip**
> This feature is powered by Collibra AI. To calculate the similarity between tables, Collibra AI compares the tables and their columns, and calculates a similarity score. This similarity score indicates how similar assets are. For information on how we leverage AI in our products, including how we handle data used for training and input, please visit the Collibra Trust Site.

> **Important**
> Data similarity is a cloud-only Edge feature. It is not available for Collibra Platform for Government (FedRAMP) and Self-Hosted (CPSH) environments.

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.

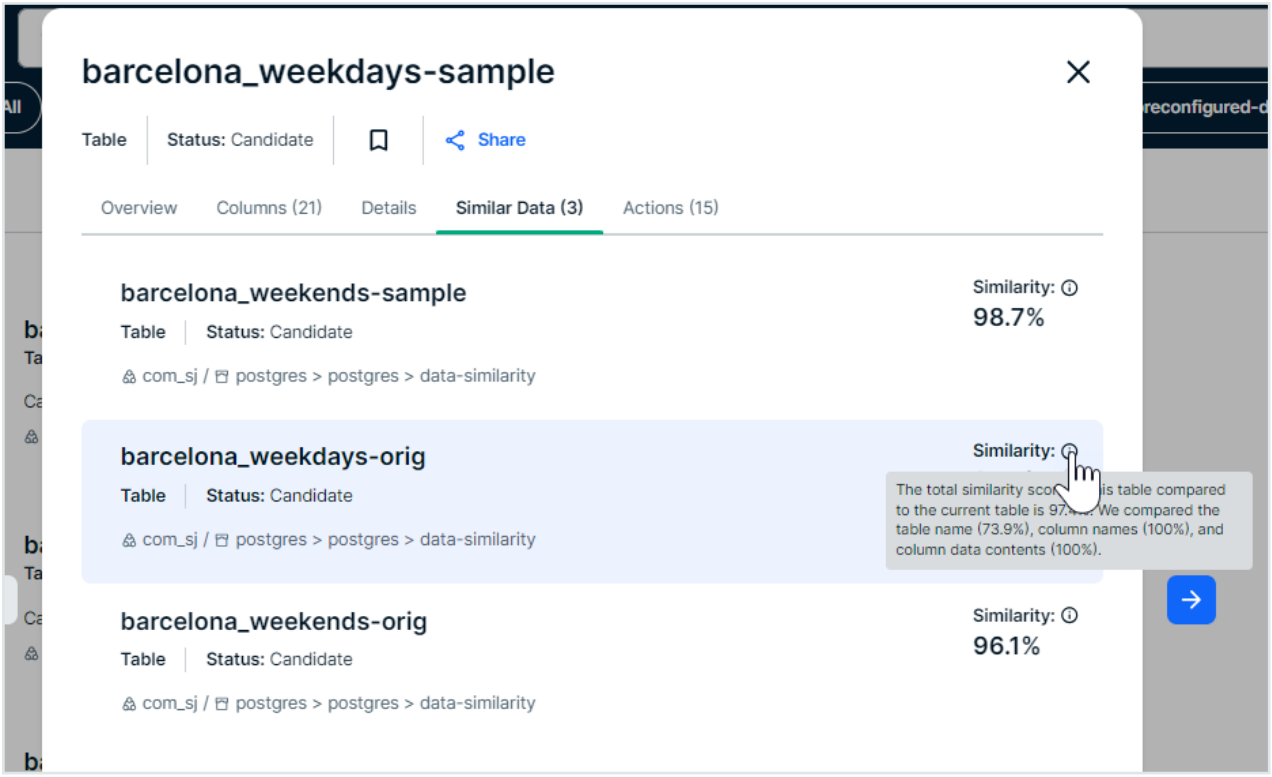
Once the metric scores are known, the following formula is used:

```
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** tab is shown in Table asset previews. The tab is shown only if tables with a similarity score higher than the defined threshold exist for the table. Up to five Table assets are shown. For information on the Table asset preview, go to Asset preview.



FAQ on data similarity

- Which data is used for similarity comparisons?
  Currently, Collibra 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** tab.
- How does data similarity work?
  During data profiling, we irreversibly hash your table and column data on Edge before sending the data to Collibra. Collibra AI only uses a subset of the actual data, maximum 10,000 rows, to create these hashes These summaries are stored in Collibra. 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 Collibra Account Team.

Enable and calculate data similarity

The Data similarity feature requires some setup to calculate similarity scores for your data during profiling.

> **Tip** Even if data similarity is enabled, 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.

- You are using Edge.
- If you want to use standalone Data Marketplace, Data Marketplace is enabled.

Steps

Step		More details
1	In the **Service Configuration** settings, enable the **Calculate Data Similarity** and define the **Data similarity threshold** profiling settings. » Data similarity scores can be calculated when you profile a data source via Edge.	Show how

Requirements and permissions

- 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 Collibra Platform service of that environment.
   d. Click **Configuration**.
   e. Click **Edit configuration**.
2. In the **Data profiling** section,
   a. Make sure the **Calculate Data Similarity** setting is enabled. This setting is enabled by default for cloud environments, except for Public sector.
   b. In **Data similarity threshold**, define from which similarity score Table assets must be displayed as similar data.
   The default value is 0.5, which means that Table assets with a similarity score higher than 50% will show up as similar data.
   Enter a value between 0.1 and 0.9.
3. Click **Save all**.

Step		More details
2	In the Collibra settings, enable the **Data Similarity** setting for Data Marketplace. » If, for the Table asset, some assets have a similarity score higher than the defined threshold, the **Similar Data** tab is visible in the Data Marketplace asset preview.	Show how ## Before you begin The Settings landing page is enabled. ## Requirements and permissions You are an administrator in Data Marketplace. ## Steps 1. On the main toolbar, click → **Settings**. » The **Settings** page opens. 2. In the **Search** section, click **Actions and Preview**. 3. Click the **Data Similarity** tab. 4. Make sure the **Show Similar Data** checkbox is selected. This checkbox is selected by default for cloud environments, except for Public sector. 5. 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 AI for asset descriptions

Collibra AI helps you accelerate the creation of descriptions for your assets in Collibra, making your data easier to understand.

- Collibra AI can help you to create a description for a Column, Table, Database View, or Data Set asset.
- In Table assets, Collibra AI can also help you to create descriptions for all columns in the table in a single action.

> **Important** Enabling Collibra AI to generate descriptions does not automatically change or impact existing descriptions. Existing descriptions are updated only if someone removes a description manually, then uses the AI feature to generate a new suggestion, and approves it.

About creating asset description recommendations with Collibra AI

> **Important**
> - This feature is available only in the latest UI.
> - This is a cloud-only feature. It is not available for Collibra Platform for Government (FedRAMP) and Self-Hosted (CPSH) environments.

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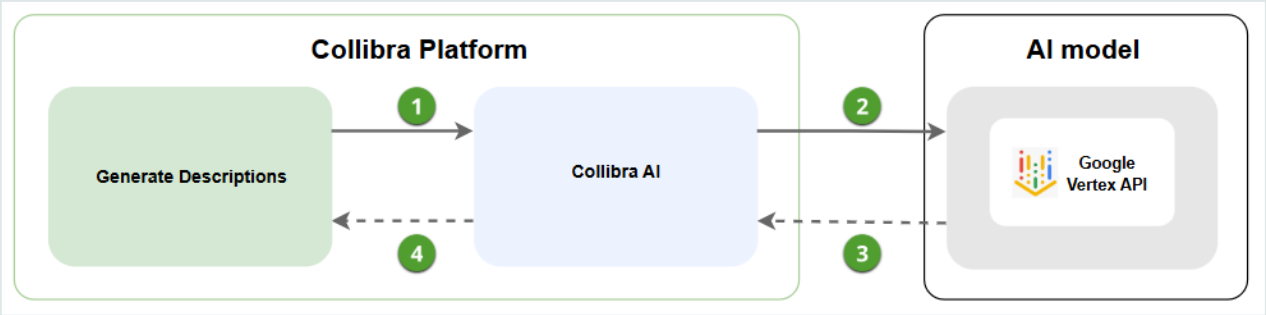
removes a description manually, then uses the AI feature to generate a new suggestion, and approves it.

The general Collibra AI flow is as follows:



1. When a user requests a description of an asset in Collibra, we send the request to a proxy.
2. The Collibra AI proxy checks that the rate limit of a customer instance has not been reached and sends the request to the AI model.
3. The AI model responds to the Collibra AI proxy.
4. The Collibra AI proxy sends the answer to Collibra, where the answer is shown to the user.

Tip

- You can create up to 20 requests per minute per instance.
- This feature is powered by Collibra AI. For information on how we leverage AI in our products, including how we handle data used for training and input, please visit the Collibra Trust Site.

Enable or disable Collibra AI for asset description recommendations

Collibra AI helps you accelerate the creation of descriptions for your assets in Collibra, making your data easier to understand.

- Collibra AI can help you to create a description for a Column, Table, Database View, or Data Set asset.

- In Table assets, Collibra AI can also help you to create descriptions for all columns in the table in a single action.

Important Enabling Collibra AI to generate descriptions does not automatically change or impact existing descriptions. Existing descriptions are updated only if someone removes a description manually, then uses the AI feature to generate a new suggestion, and approves it.

Prerequisites

Note
- This feature is available only in the latest UI.
- This is a cloud-only feature. It is not available for Collibra Platform for Government (FedRAMP) and Self-Hosted (CPSH) environments.

- 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 Collibra Platform service of that environment.
   d. Click **Configuration**.
   e. Click **Edit configuration**.
2. In the **Generative AI** section, go to the **Generate descriptions with Collibra AI** setting.

3. Select the required value.

Value	Description
✔ True	Allows users to ask Collibra AI for description suggestions for the following asset types: ◦ Column ◦ Table ◦ Database View ◦ Data Set
✖ False	Disables Collibra AI for descriptions.

4. Click **Save all**.
5. Ensure that the Catalog asset page where you want to allow AI-generated descriptions includes the correct **Description** field.

   The required **Description** field is available in the following asset layout widgets **Catalog Overview** and **Catalog Relation**. By default, these widgets are included in the global assignment of Table and Column asset types. If you have a scoped assignment, ensure that you add one of these widgets to the asset type page layout for that assignment.

What's next?

Ask Collibra AIfor a description for one asset
Ask Collibra AI for multiple column descriptions

Create a description for one asset with Collibra AI

If Collibra AI for asset descriptions has been enabled, you can ask Collibra AI to generate a description suggestion for Column, Table, Database View, and Data Set assets.

> **Important**
> - This feature is available only in the latest UI.
> - The AI provided descriptions are always considered suggestions. It is important to validate each suggestion before accepting it. You accept a suggestion by saving the description.

Prerequisites

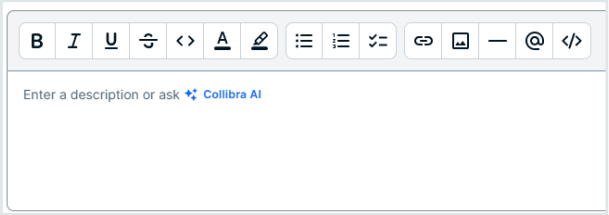
- You have a resource role with the **Asset** > **Attribute** > **Add** resource permission.
- You have a global role with the **Catalog** global permission, for example, **Catalog Author**.

Steps

1. Navigate to the Column, Table, Database View, or Data Set asset for which you want to add an AI generated description.

   > **Note**
   > Collibra AI doesn't impact existing descriptions. If you want to update a description with Collibra AI, manually remove the description and follow the below steps to create a new description with Collibra AI.

2. Go to the **Summary** tab.
3. Switch the **Show Empty Optional Values** option on.
   » Empty fields become available.
4. In **Description** → **From This Asset**, click **Enter a description or ask Collibra AI**.

5. Click **Collibra AI**.
   Collibra AI analyzes the metadata of the asset and makes a suggestion.

   > **Tip**
   > To make a suggestion, Collibra AI looks at the asset's metadata, the metadata of connected assets, and the location of the asset in the organizational structure. Hence, to ensure Collibra AI creates an accurate description, it is important to add a description for the following assets:
   >
   > - For a Table asset, make sure the Schema has a description.
   > - For a Column asset, make sure the Table has a description.

6. Validate the suggested description.
   You can:

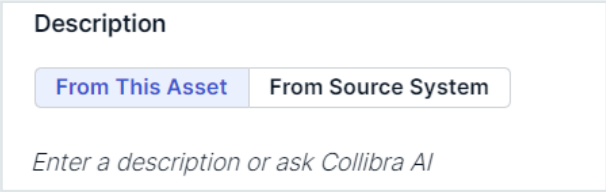
- Edit the suggestion manually.
- Ask Collibra AI to make the suggested description shorter or longer.
- Ask Collibra AI to create a completely new suggestion by clicking **Start Over**.

> **Tip** To remove a suggestion, click **Dismiss Description**.

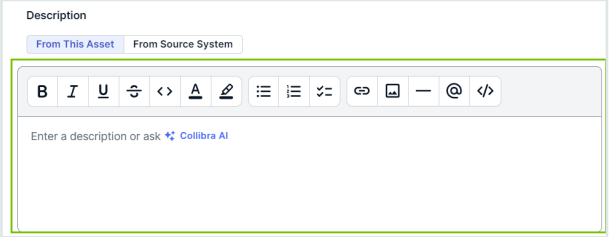
7. Once you agree with the description, click **Save Description**.

Example: Create a description for a column

1. Navigate to a column, in this case County.
   » The **Description** field is not visible in the asset page.
2. Switch the **Show Empty Optional Values** option on.
   » The **Description** field becomes available.

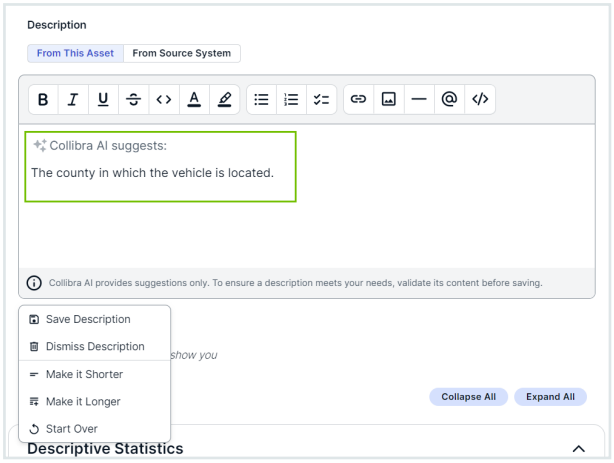


3. In **Description** → **From This Asset**, click **Enter a description or ask Collibra AI**.
   » The text area becomes available.

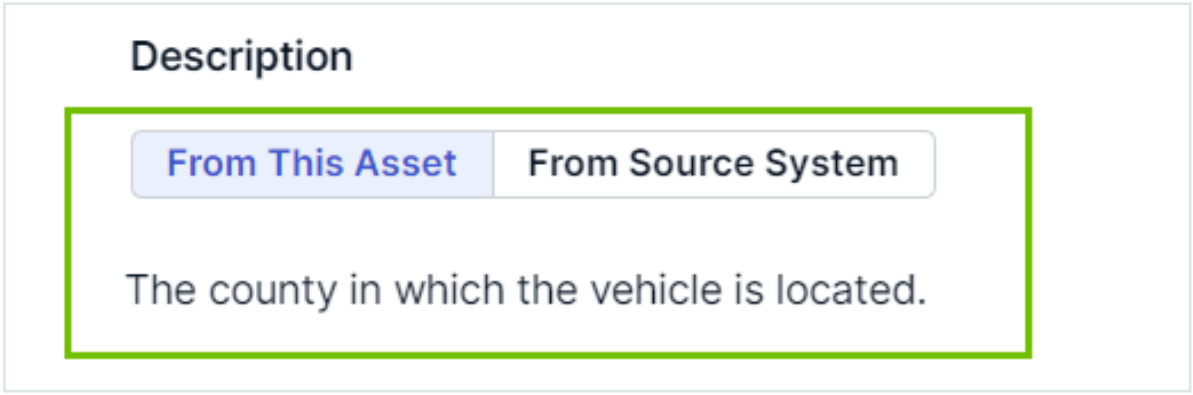


4. Click **Collibra AI**.
   Collibra AI analyzes the metadata for the asset and makes a suggestion. In this case, because Collibra AI has access to the metadata of the related assets, Collibra AI under-

stands this location is related to vehicles.



5. Because we agree with this description, we click **Save Description**.
   » The description is now saved and available for data consumers.



Create descriptions for columns in a table with Collibra AI

If Collibra AI for asset descriptions has been enabled, you can ask Collibra AI to generate description suggestions for the columns in a table.

Important

- This feature is available only in the latest UI.
- The AI provided descriptions are always considered suggestions. It is important to validate each suggestion before accepting it. You accept a suggestion by saving the description.

Requirements and permissions

- You have a resource role with the **Asset** > **Attribute** > **Add** resource permission.
- You have a global role with the **Catalog** global permission, for example, **Catalog Author**.

Steps

1. Navigate to a Table asset for which you want to add AI generated descriptions to its columns.
2. Make sure the Table asset has a description.
   To add a description to a table, go to Create a description with Collibra AI.
3. In the **Summary** tab, navigate to **Columns**.
   » All columns in the Table asset are shown.
4. Click **Create Descriptions**.
   » Collibra AI immediately starts analyzing the metadata of the columns in the table that don't yet have a description, and makes a suggestion for each of them.

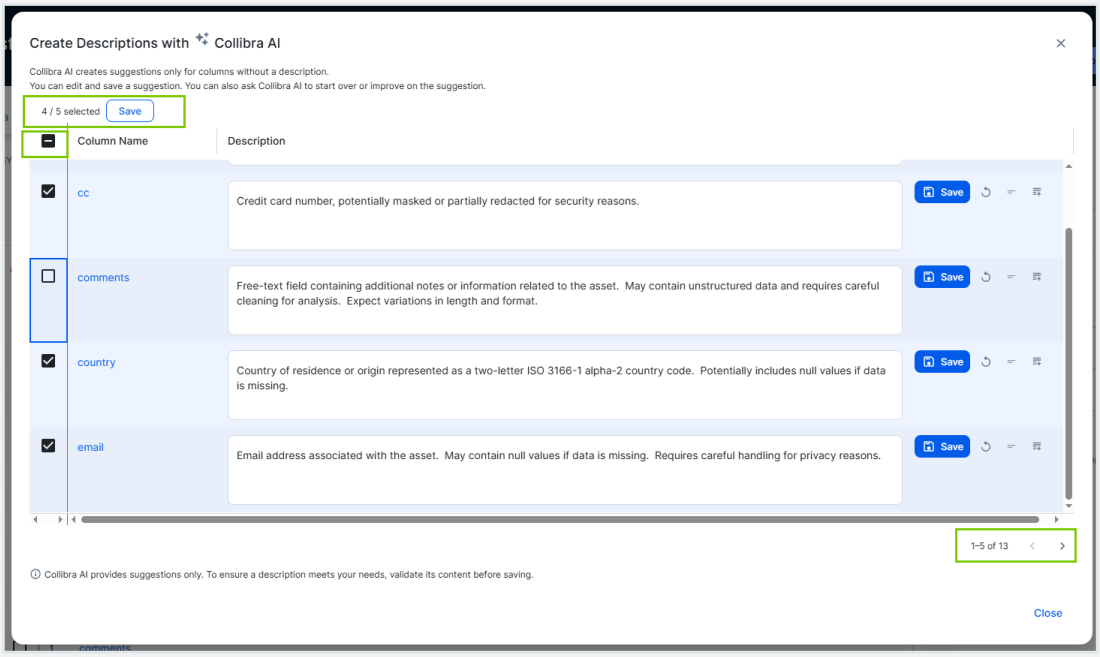
   > **Tip** To make a suggestion, Collibra AI looks at the asset's metadata, the metadata of connected assets, and the location of the asset in the organizational structure. That's why it is important to have a description for the Table.

5. For each suggested description:
   a. Validate the suggestion.
      If needed, you can:
      - Edit the suggestion manually.
      - Ask Collibra AI to make the suggested description shorter or longer .
      - Ask Collibra AI to create a completely new suggestion by clicking .

      > **Tip** If you don't want to accept the suggestion, ignore the description.

   b. Once you agree with the description, click **Save**.

Tip
You can select the checkbox at the top of the dialog box to select all suggestions on the current page. Then, click **Save** to approve the selected suggestions in one action. You need to repeat this process for each page.



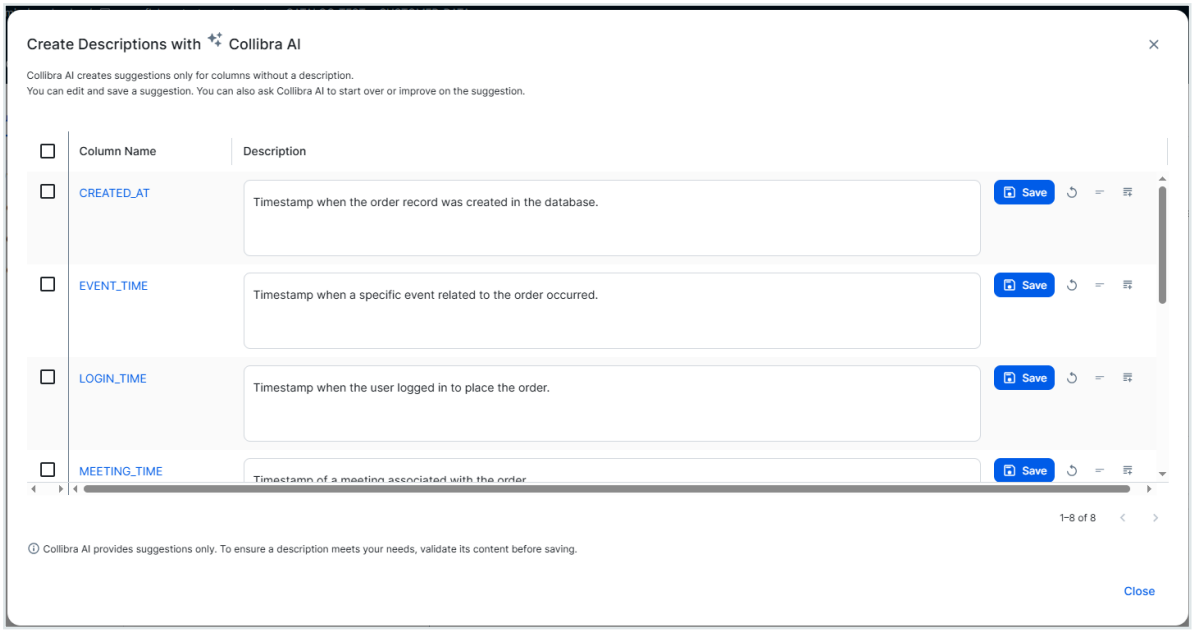
6. Click **Close**.
   » All saved descriptions are available. The suggestions that were not saved are ignored.

Example: Create descriptions for columns

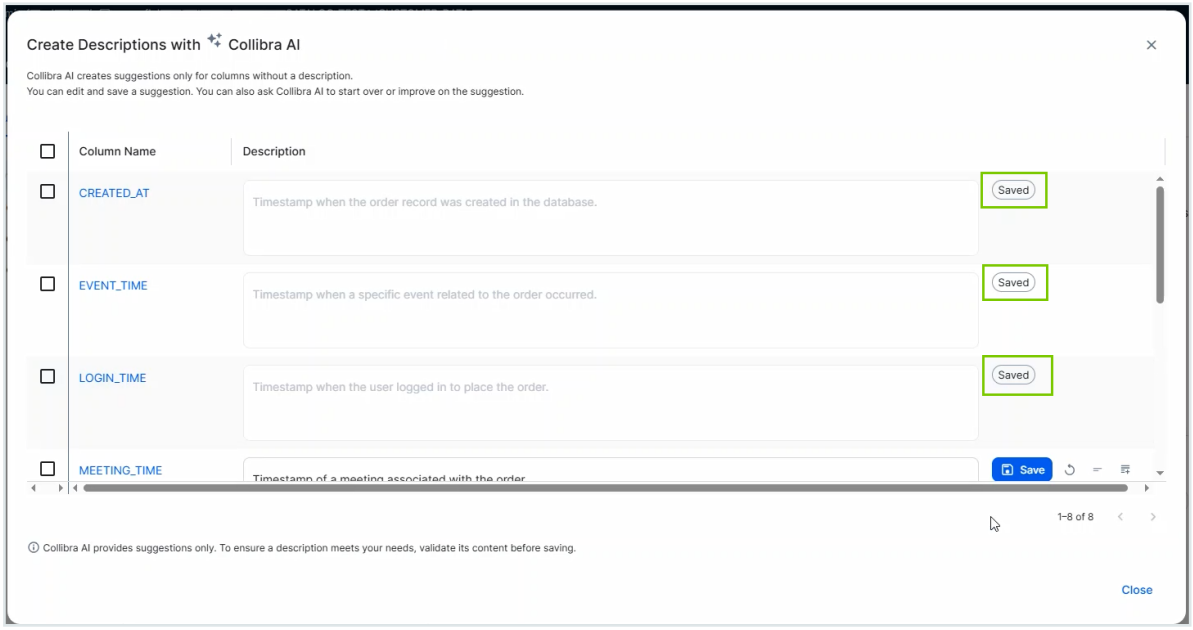
1. Navigate to a Table asset.
2. In the **Summary** tab, navigate to **Columns**.
   » Some columns may have a description, others don't.

3. Click **Create Descriptions**.
   » The **Create Descriptions with Collibra AI** dialog box appears and shows only the columns without a description. The columns are sorted alphabetically. Collibra AI

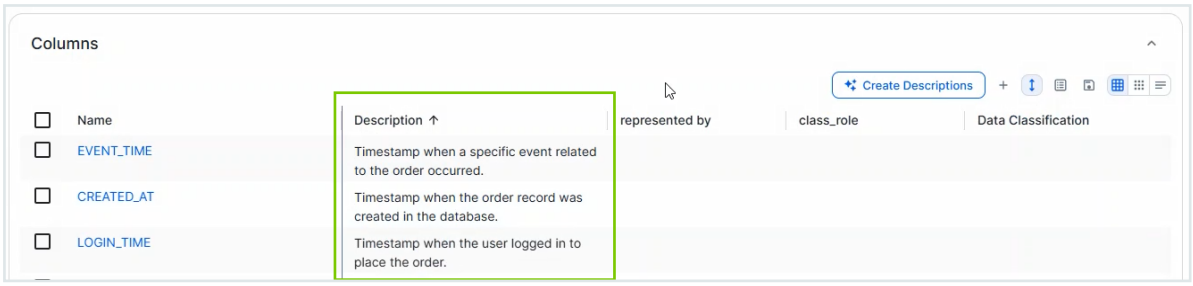
immediately starts making suggestions.



4. Verify each column and make changes where needed.
   Once a suggestion is to your liking, click **Save**.



5. Click **Close**.
   » All saved descriptions are available.



Insights Data Access

The objective of Insights Data Access is to make reporting easier for you. It captures all your reporting data from Collibra and enables you to build reports to visualize the data.

Insights Data Access can retrieve vast amounts of data while retaining history and without jeopardizing the front-end performance of Collibra. You can then use the Collibra Insights widget to show Tableau reports or any report that can be shown as an iframe on your Collibra dashboard. If you are not using Tableau, you can still leverage the definition of the SQL view.

> **Note** Insights Data Access is not a free, out-of-the-box product.

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Reporting data

Storing your reporting data

Each night, Collibra stores a copy of your reporting data—all assets, attributes, relations, and responsibilities, for all domains and communities, including your operating model customizations—in Collibra. The copy includes both real and delta data values.

Additionally, the Usage Analytics view events data for your Collibra is stored each night. This includes data from every page visited during a user's session, such as assets and communities.

> **Note** Collibra Usage Analytics shows data that may be subject to access restrictions within your organization. Please ensure you follow your organization's policies and have approval to access this data.

Each data record includes the date on which the data was copied. These time-stamped data records are copied each day and stored for a rolling period of 31 days. A copy of the data is also taken on the last day of each month, and these monthly snapshots are stored in Collibra indefinitely.

Processing and availability of the previous day's reporting data

Reporting data is processed in the Coordinated Universal Time (UTC) time zone.

> **Note**
> - The time at which the reporting data is ready (as identified in the last column of the following table) can vary depending on the amount of data.
> - In the following table, "local time" refers to the time (daylight saving time, if applicable) in the relevant region. For example, when considering the time for London, "02:00 local time" means 02:00 in London.

Cloud provider	Location	Data dump (UTC)	Processing begins (UTC)	Reporting data is ready (UTC)
AWS	Singapore	14:00 (22:00 local time)	16:00 (00:00 (midnight) local time)	20:00 (04:00 local time)
AWS	Sydney	14:00 (00:00 (midnight) local time)	16:00 (02:00 local time)	20:00 (06:00 local time)
AWS	Frankfurt	00:00 (midnight) (02:00 local time)	02:00 (04:00 local time)	06:00 (08:00 local time)
AWS	Ireland	00:00 (midnight) (00:00 local time)	02:00 (02:00 local time)	06:00 (06:00 local time)
AWS	London	00:00 (midnight) (01:00 local time)	02:00 (03:00 local time)	06:00 (07:00 local time)
AWS	Central Canada	05:00 (01:00 local time)	06:00 (02:00 local time)	10:00 (06:00 local time)
AWS	Northern Virginia	05:00 (01:00 local time)	06:00 (02:00 local time)	10:00 (06:00 local time)
AWS	Northern California	08:00 (01:00 local time)	09:00 (02:00 local time)	13:00 (06:00 local time)
AWS	United Arab Emirates (UAE)	20:00 UTC (00:00 local time)	Between 21:00 and 00:00 UTC (Between 01:00 and 04:00 local time)	01:00 UTC (05:00 local time)
GCP	Tokyo	05:00 (14:00 local time)	05:00 (14:00 local time)	10:00 (19:00 local time)

Cloud provider	Location	Data dump (UTC)	Processing begins (UTC)	Reporting data is ready (UTC)
GCP	Singapore	07:00 (15:00 local time)	07:00 (15:00 local time)	12:00 (noon) (20:00 local time)
GCP	Sydney	14:00 (00:00 (midnight) local time)	14:00 (00:00 (midnight) local time)	19:00 (05:00 local time)
GCP	Belgium	00:00 (midnight) (02:00 local time)	00:00 (midnight) (02:00 local time)	05:00 (07:00 local time)
GCP	London	00:00 (midnight) (01:00 local time)	00:00 (midnight) (01:00 local time)	05:00 (06:00 local time)
GCP	Quebec	05:00 (01:00 local time)	05:00 (01:00 local time)	10:00 (06:00 local time)
GCP	South Carolina	05:00 (01:00 local time)	05:00 (01:00 local time)	10:00 (06:00 local time)
GCP	Virginia	05:00 (01:00 local time)	05:00 (01:00 local time)	10:00 (06:00 local time)
GCP	Iowa	06:00 (01:00 local time)	06:00 (01:00 local time)	11:00 (06:00 local time)

Downloading your data

Due to security considerations, you can't access the data directly in Collibra. A REST API is created to enable you to download your reporting data to a local server or your computer. If you specify the snapshot date that you want in the REST API, a zip file of your reporting data for the specified date is downloaded to your hard disk.

You can use one of the following URLs to download the data.

- *<your-Collibra-environment-URL>/rest/2.0/reporting/insights/directDownload?snapshotDate=<snapshot_date>&format=zip*

  Note
  - The directDownload endpoint downloads the zip file containing reporting data directly from cloud storage, bypassing the Collibra network.
  - To use the endpoint, ensure that your application allows redirects.
  - The endpoint uses a temporary pre-signed URL that is valid for 60 seconds by default.
  - The endpoint is compatible with both AWS and GCP.

- *<your-Collibra-environment-URL>/rest/2.0/reporting/insights/download?snapshotDate=<snapshot_date>&format=zip*

  Note The download endpoint will be deprecated soon.

Connecting your data with your business intelligence tool

After you have downloaded your reporting data, you must establish a connection between your data and your organization's business intelligence tool. This guide describes the procedures to do so via Amazon Web Services and Google Cloud Platform.

Tip If you need assistance, contact your internal IT infrastructure team, who can advise you as to where to store the downloaded files and how to establish the connection with your organization's business intelligence tool.

Insights tables

Insights Data Access contains the following tables, which reflect the data that can be accessed through the Collibra user interface:

- Community hierarchy
- All domains
- All assets, including assets of custom asset types
- All asset tags
- All attributes related to these assets, such as Definition, Description, and custom attributes types
- All relations related to these assets, such as **categorizes** and **is categorized by**, including custom relation types
- All complex relations
- Usage Analytics view events
- Responsibilities, such as Owner and Stakeholder, for a given resource

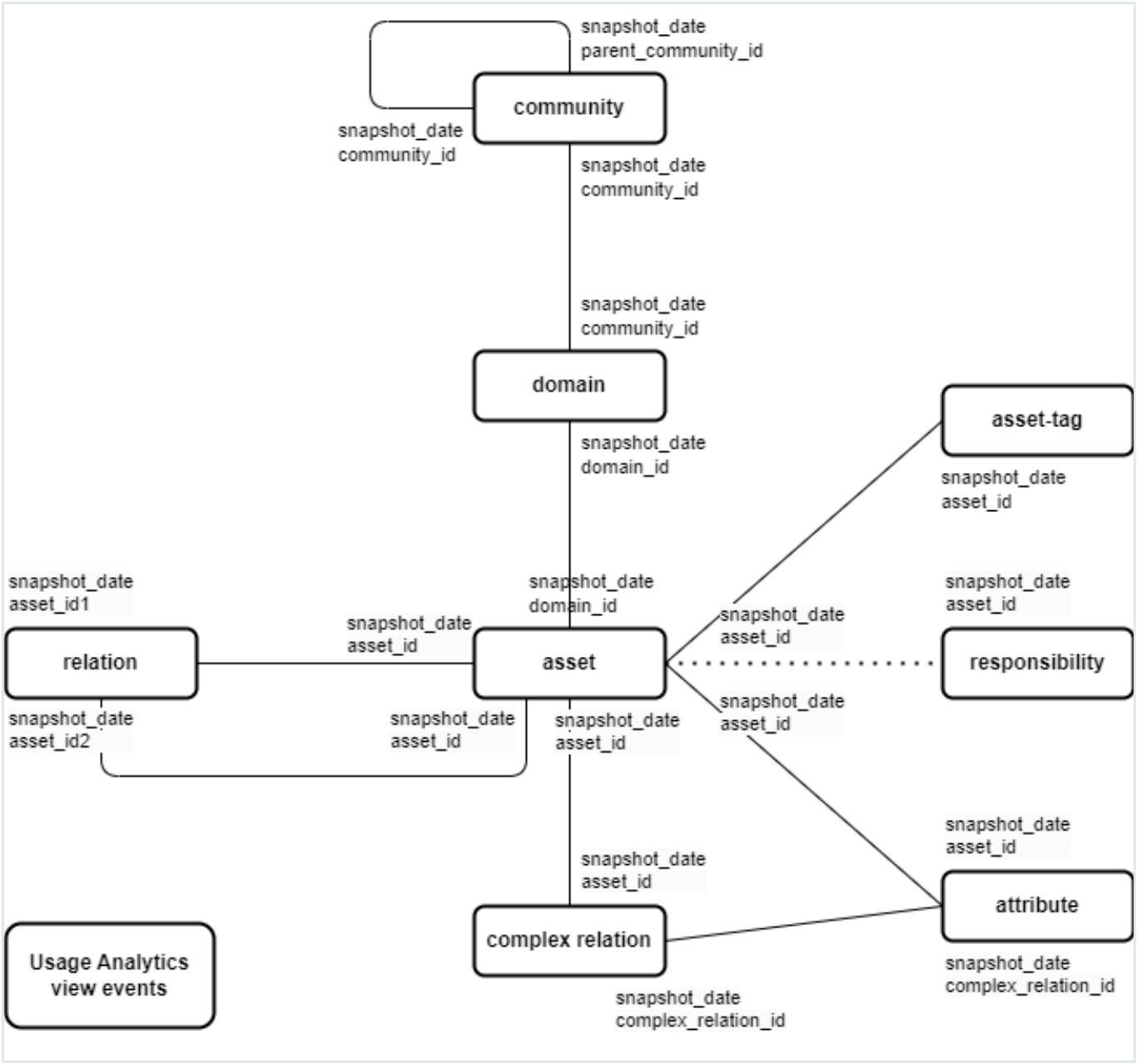
> **Note** Only responsibilities that are directly assigned to assets are included in Insights Data Access. Responsibilities that are inherited by assets or are assigned to domains and communities are excluded and unavailable in Insights Data Access.

Entity relationship diagram

The following Entity Relationship Diagram shows how the different Insights Data Access tables can be linked. All tables contain both out-of-the-box variants and custom variants of the concept.

> **Note** Nested communities can be identified via the parent-child relation. Subcommunities also have the ID of the stored community next to them.

To combine data for a given date, each table link clause must include **snapshot_date**.



Tables

table_name	Description
Asset	Contains all of the assets in your Collibra Platform environment, including the type of each asset and current status.
Asset_tag	Contains all of the tags attached to the assets in your Collibra environment.

table_name	Description
Attribute	Contains all of the asset attributes in your Collibra environment.
Community	Contains all of the communities in your Collibra environment, including subcommunities and domains.
Complex_ relation	Contains all of the relation legs for all of the complex relations in your Collibra environment.
Domain	Contains all of the domains in your Collibra environment that contain assets.
Relation	Contains all of the relations in your Collibra environment, from head to tail and vice versa.
Responsibility	Contains all of the responsibilities in your Collibra environment that are directly assigned at the asset level or domain level. **Note** Inherited responsibilities from the community level are not included in Insights Data Access.
usage analytics view events	Contains all of the view events in your Collibra environment.

Asset

column_name	ordinal_ position	data_type	Description
snapshot_date	1	date	The date on which the snapshot was created. This is synchronized with the snapshot table.
asset_id	2	character varying	The resource UUID of the asset. This is a unique identifier.
asset_full_name	3	character varying	The full name of the asset.
asset_display_ name	4	character varying	The display name of the asset.

column_name	ordinal_ position	data_type	Description
domain_id	5	character varying	The resource UUID of the domain. This is a unique identifier.
asset_type_id	6	character varying	The resource UUID of the asset type. This is a unique identifier.
asset_type_name	7	character varying	The name of the asset type.
status_id	8	character varying	The resource UUID of the status.
status_name	9	character varying	The name of the status.
articulation	10	double precision	The articulation score of the asset.
ratings_average	11	double precision	The aggregated average of the ratings of the asset.
ratings_count	12	integer	The number of ratings of the asset.
is_asset_system	13	boolean	An indicator of whether the asset is a system asset.
creator_user_id	14	character varying	The UUID of the user who created the asset.
creator_user-name	15	character varying	The username of the user who created the asset.
creation_date	16	timestamp with time zone	The date on which the asset was created.
editor_user_id	17	character varying	The UUID of the user who last edited the asset.
editor_username	18	character varying	The username of the user who last edited the asset.
edited_date	19	timestamp with time zone	The date on which the asset was last edited.

Asset_tag

column_name	ordinal_position	data_type	Description
snapshot_date	1	date	The date on which the snapshot was created.
tag_id	2	character varying	The resource UUID of the tag attached to the asset.
asset_id	3	character varying	The resource UUID of the asset to which the tag is attached.
tag_name	4	character varying	The display name of the tag attached to the asset.
creator_user_id	5	character varying	The UUID of the user who created the tag.
creator_user-name	6	character varying	The username of the user who created the tag.
creation_date	7	timestamp with time zone	The date on which the tag was created.
editor_user_id	8	character varying	The UUID of the user who last edited the tag.
editor_username	9	character varying	The username of the user who last edited the tag.
edited_date	10	timestamp with time zone	The date on which the tag was last edited.
is_tag_system	11	boolean	An indicator of whether the tag is a system tag.

Attribute

column_name	ordinal_position	data_type	Description
snapshot_date	1	datetime	The date on which the snapshot was created. This is synchronized with the snapshot table.
attribute_id	2	character varying	The UUID of the attribute.

column_name	ordinal_ position	data_type	Description
asset_id	3	character varying	The UUID of the related asset
asset_type_name	4	character varying	The name of the asset type of the relation asset.
attribute_type_id	5	character varying	The UUID of the attribute type.
attribute_type_ name	6	character varying	The name of the attribute type.
attribute_type_ description	7	character varying	The description of the attribute type.
kind	8	character varying	The kind of attribute.
is_attribute_ integer	9	boolean	An indicator of whether the attribute is an integer.
expression_long	10	character varying	The value of the attribute.
boolean_value	11	boolean	The value of the attribute converted to a Boolean value.
datetime_value	12	datetime	The value of the attribute converted to a date_ time value.
numeric_value	13	numeric	The value of the attribute converted to a numeric value.
creator_user_id	14	character varying	The UUID of the user who created the attribute.
creator_user- name	15	character varying	The username of the user who created the attrib- ute.
creation_date	16	timestamp with time zone	The date on which the attribute was created.
editor_user_id	17	character varying	The UUID of the user who last edited the attrib- ute.
editor_username	18	character varying	The username of the user who last edited the attribute.

column_name	ordinal_position	data_type	Description
edited_date	19	timestamp with time zone	The date on which the attribute was last edited.
complex_relation_id	20	character varying	The UUID of the complex relation for which the attribute is defined.

Community

column_name	ordinal_position	data_type	Description
snapshot_date	1	date	The date on which the snapshot was created. This is synchronized with the snapshot table.
community_id	2	character varying	The UUID of the community.
community_name	3	character varying	The name of the community.
community_description	4	text	The description of the community.
is_community_system	5	boolean	An indicator of whether the community is a system community.
uri	6	character varying	The URI of the community.
parent_community_id	7	character varying	The UUID of the community containing this community.
level	8	integer	The level of the community containing this community. The top level starts at 1.
level_community_id	9	character varying	The UUID of the community containing this community at a certain level.
level_community_name	10	character varying	The name of the community containing this community at a certain level.

column_name	ordinal_position	data_type	Description
level_community_description	11	text	The description of the community containing this community at a certain level.
level_community_uri	12	character varying	The URI of the community containing this community at a certain level.
creator_user_id	13	character varying	The UUID of the user who created the community.
creator_username	14	character varying	The username of the user who created the community.
creation_date	15	timestamp with time zone	The date on which the relation was edited.
editor_user_id	16	character varying	The UUID of the user who last edited the community.
editor_username	17	character varying	The username of the user who last edited the community.
edited_date	18	timestamp with time zone	The date on which the community was last edited.

Complex_relation

column_name	ordinal_position	data_type	Description
snapshot_date	1	date	The date on which the snapshot was created. This is synchronized with the snapshot table.
complex_relation_type_id	2	character varying	The UUID of the complex relation type.
complex_relation_type_name	3	character varying	The name of the complex relation type.

column_name	ordinal_position	data_type	Description
complex_relation_type_description	4	character varying	The description of the complex relation type.
complex_relation_id	5	character varying	The UUID of the complex relation.
relation_type_id	6	character varying	The UUID of the relation leg type.
relation_role	7	character varying	The role of the relation leg.
asset_id	8	character varying	The UUID of the related asset.
creator_user_id	9	character varying	The UUID of the user who created the complex relation.
creator_username	10	character varying	The username of the user who created the complex relation.
creation_date	11	timestamp with time zone	The date on which the complex relation was created.
editor_user_id	12	character varying	The UUID of the user who last edited the complex relation.
editor_username	13	character varying	The username of the user who last edited the complex relation.
edited_date	14	timestamp with time zone	The date on which the complex relation was last edited.

Domain

column_name	ordinal_position	data_type	Description
snapshot_date	1	date	The date on which the snapshot was created. This is synchronized with the snapshot table.
domain_id	2	character varying	The UUID of the domain.

column_name	ordinal_position	data_type	Description
domain_name	3	character varying	The name of the domain.
domain_description	4	text	The description of the domain.
domain_uri	5	character varying	The URI of the domain. **Note** If you create a community or domain in a development environment and you restore a backup of the development environment on your production environment, the URI for the community or domain in the report will reflect that of the development environment, not the production environment.
is_domain_system	6	boolean	An indicator of whether the domain is a system domain.
domain_type_id	7	character varying	The UUID of the domain type.
domain_type_name	8	character varying	The name of the domain type.
domain_type_description	9	character varying	The description of the domain type.
community_id	10	character varying	The UUID of the community.
creator_user_id	11	character varying	The UUID of the user who created the domain.
creator_username	12	character varying	The username of the user who created the domain.
creation_date	13	timestamp with time zone	The date on which the domain was created.
editor_user_id	14	character varying	The UUID of the user who last edited the domain.

column_name	ordinal_ position	data_type	Description
editor_username	15	character varying	The username of the user who last edited the domain.
edited_date	16	timestamp with time zone	The date on which the domain was last edited.

Relation

column_name	ordinal_ position	data_type	Description
snapshot_date	1	date	The date on which the snapshot was created. This is synchronized with the snapshot table.
relation_id	2	character varying	The UUID of the relation. This column, in combination with the **direction** column, is a unique identifier and can be used to uniquely identify each row.
relation_type_id	3	character varying	The UUID of the relation type.
role_or_corole	4	character varying	The role of the relation in the direction from head to tail, co-role of the relation in the direction from head to tail.
direction	5	character varying	The direction of the relation, which can be either: • Head-to-tail, in which the first asset is the head and the second asset is the tail. • Tail-to-head, in which the first asset is the tail and the second asset is the head.
asset_id1	6	character varying	The UUID of the first asset in the relation.
asset_type_id1	7	character varying	The UUID of the asset type of the first asset in the relation.
asset_type_ name1	8	character varying	The name of the asset type of the first asset in the relation.

column_name	ordinal_ position	data_type	Description
asset_id2	9	character varying	The UUID of the second asset in the relation.
asset_type_id2	10	character varying	The UUID of the asset type of the second asset in the relation.
asset_type_ name2	11	character varying	The name of the asset type of the second asset in the relation.
is_relation_gen- erated	12	boolean	An indicator of whether the relation is generated.
creator_user_id	13	character varying	The UUID of the user who created the relation.
creator_user- name	14	character varying	The username of the user who created the rela- tion.
creation_date	15	timestamp with time zone	The date on which the relation was created.
editor_user_id	16	character varying	The UUID of the user who last edited the rela- tion.
editor_username	17	character varying	The username of the user who last edited the relation.
edited_date	18	timestamp with time zone	The date on which the relation was last edited.

Responsibility

column_name	ordinal_ position	data_type	Description
snapshot_date	1	date	The date on which the snapshot was created. This is synchronized with the snapshot table.
role_id	2	character varying	The UUID of the role of the responsible user or user group.

column_name	ordinal_ position	data_type	Description
role_name	3	character varying	The name of the resource role of the responsible user or user group.
asset_id	4	character varying	The UUID of the asset.
user_id	5	character varying	The UUID of the responsible user. This field is used only if the responsibility is assigned to a user.
username	6	character varying	The username of the responsible user. This field is used only if the responsibility is assigned to a user.
user_firstname	7	character varying	The first name of the responsible user. This field is used only if the responsibility is assigned to a user.
user_lastname	8	character varying	The last name of the responsible user. This field is used only if the responsibility is assigned to a user.
user_email	9	character varying	The username of the responsible user. This field is used only if the responsibility is assigned to a user.
user_language	10	character varying	The language of the responsible user. This field is used only if the responsibility is assigned to a user.
is_user_guest	12	boolean	An indicator of whether the responsible user is a guest user.
is_user_api	13	boolean	An indicator of whether the responsible user is an API user.
is_user_activated	14	boolean	An indicator of whether the responsible user's account is activated.
is_user_enabled	15	boolean	An indicator of whether the responsible user's account is enabled.

column_name	ordinal_position	data_type	Description
is_responsibility_system	16	boolean	An indicator of whether the responsibility is a system responsibility.
creator_user_id	17	character varying	The UUID of the user who created the responsibility.
creator_username	18	character varying	The username of the user who created the responsibility.
creation_date	19	timestamp with time zone	The date on which the responsibility was created.
editor_user_id	20	character varying	The UUID of the user who last edited the responsibility.
editor_username	21	character varying	The username of the user who last edited the responsibility.
edited_date	22	timestamp with time zone	The date on which the responsibility was last edited.
group_id	23	character varying	The UUID of the user group to which the responsibility is assigned.
group_name	24	character varying	The name of the user group to which the responsibility is assigned.
user_licensetype	11	character varying	The license type of the responsible user. This field is used only if the responsibility is assigned to a user.

Usage Analytics view events

column_name	ordinal_position	data_type	Description
snapshot_date	1	Date	The date when the view event occurred.
event_id	2	UUID	The UUID of the view event.

column_name	ordinal_ position	data_type	Description
user_id	3	UUID	The UUID of the person who created the view event.
username	4	Character varying	The username of the person who created the view event.
event_time	5	timestamp	The time when the view event occurred, in UTC timezone.
session_id	6	UUID	The UUID of the http session that the person who created the view vent was logged into in JSSSIONID format.
asset_id	7	UUID	The UUID of the asset that was viewed during the view event.
asset_full_ name	8	Character varying	The name of the asset that was viewed during the view event.
asset_display_ name	9	Character varying	
domain_id	10	UUID	The UUID of the domain that was viewed during the view event.
domain_name	12	Character varying	The name of the domain that was viewed during the view event.
community_id	13	UUID	The UUID of the community that was viewed during the view event.
community_ name	14	Character varying	The name of the community that was viewed during the view event.
diagram_id	15	UUID	The UUID of the diagram that was viewed during the view event.
diagram_name	16	Character varying	The name of the diagram that was viewed during the view event.
dashboard_id	17	UUID	The UUID of the dashboard that was viewed during the view event.

column_name	ordinal_ position	data_type	Description
dashboard_ name	18	Character varying	The name of the dashboard that was viewed during the view event.
view_id	19	UUID	The UUID of the view that was viewed during the view event.
view_name	20	Character varying	The name of the view that was viewed during the view event.
page_para- meters	21	Character varying	The query parameters part of the URL for the page where the view event occurred. Example: '?tab- bar=ResourceRoles'
page_path	22	Character varying	The page path of the URL for the page where the view event occurred. For example: '/apps/usage-analytics' or '/community/5aa77065-af23-4cb5-a887- 5b41294607fd'
tab_name	23	Character varying	The tab on the asset or domain page where the view event occured. Example: 'Overview' or 'History'

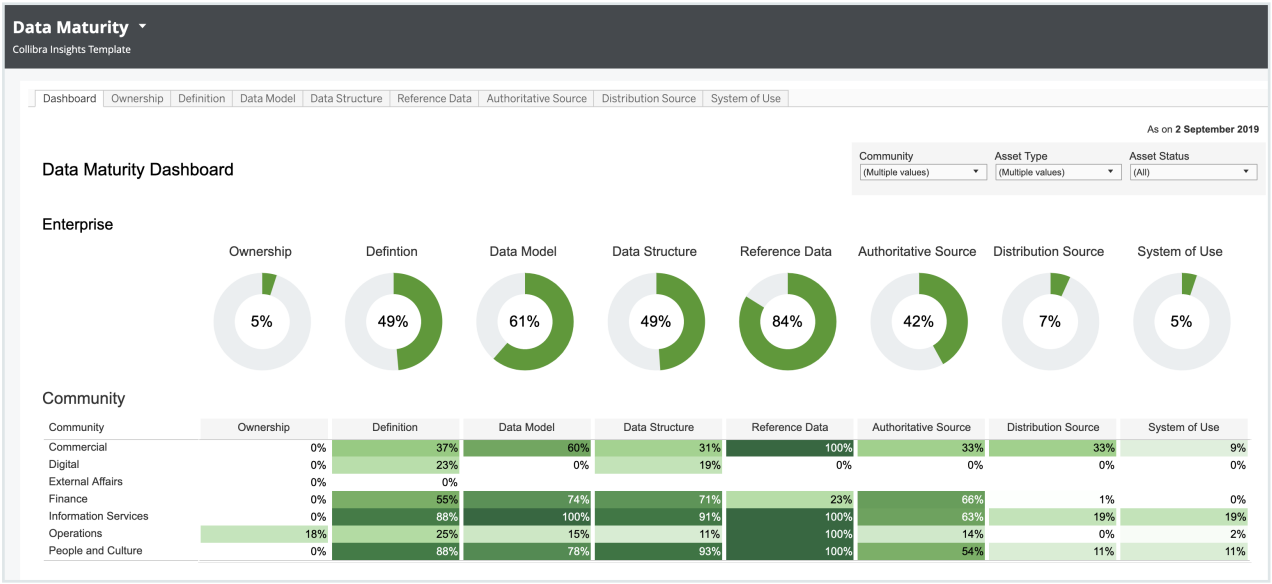
Dashboard reports

You can configure the following dashboard reports:

- Data Maturity
- Privacy & Risk Readiness
- Process Register

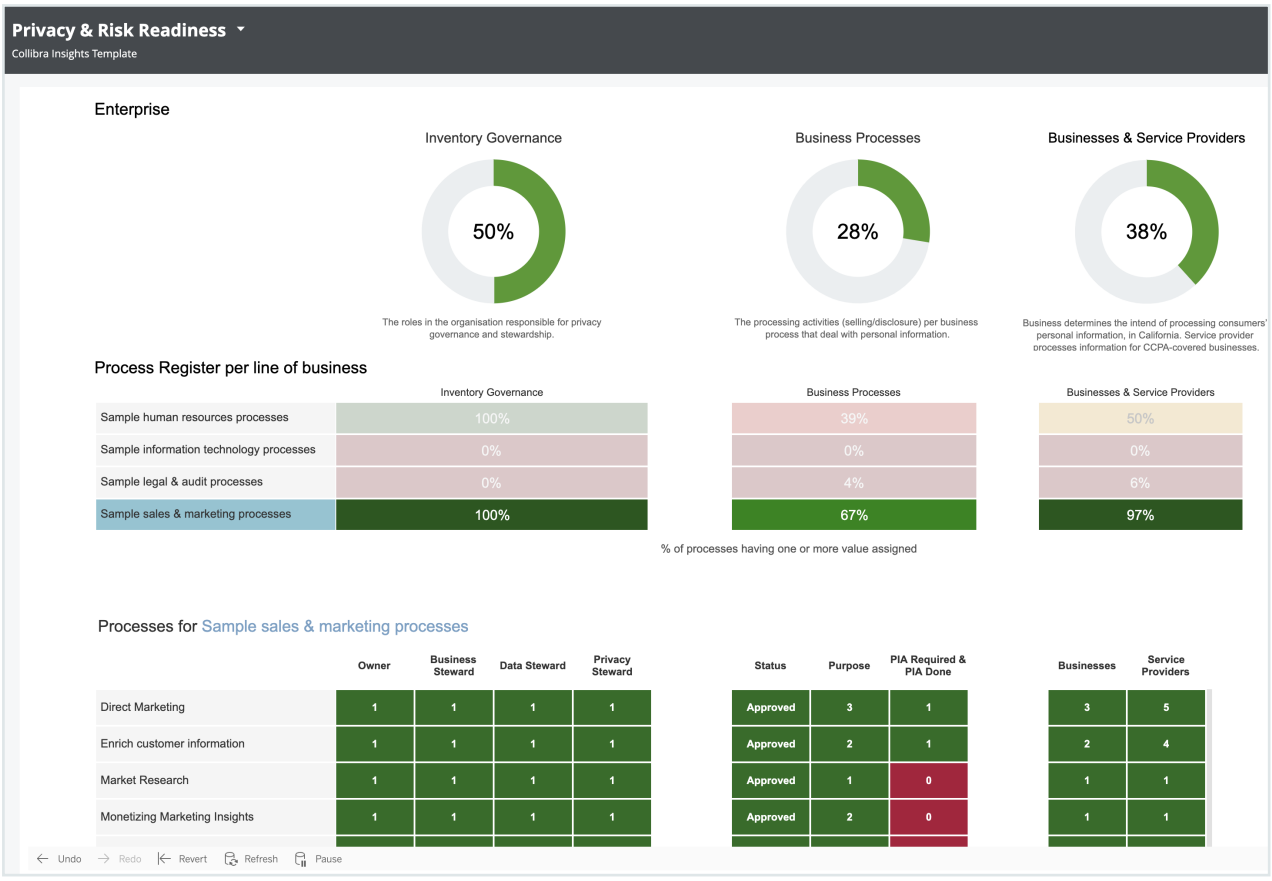
Data Maturity

The Data Maturity report helps you to track the completeness of critical assets based on the business dimensions used in an organization.

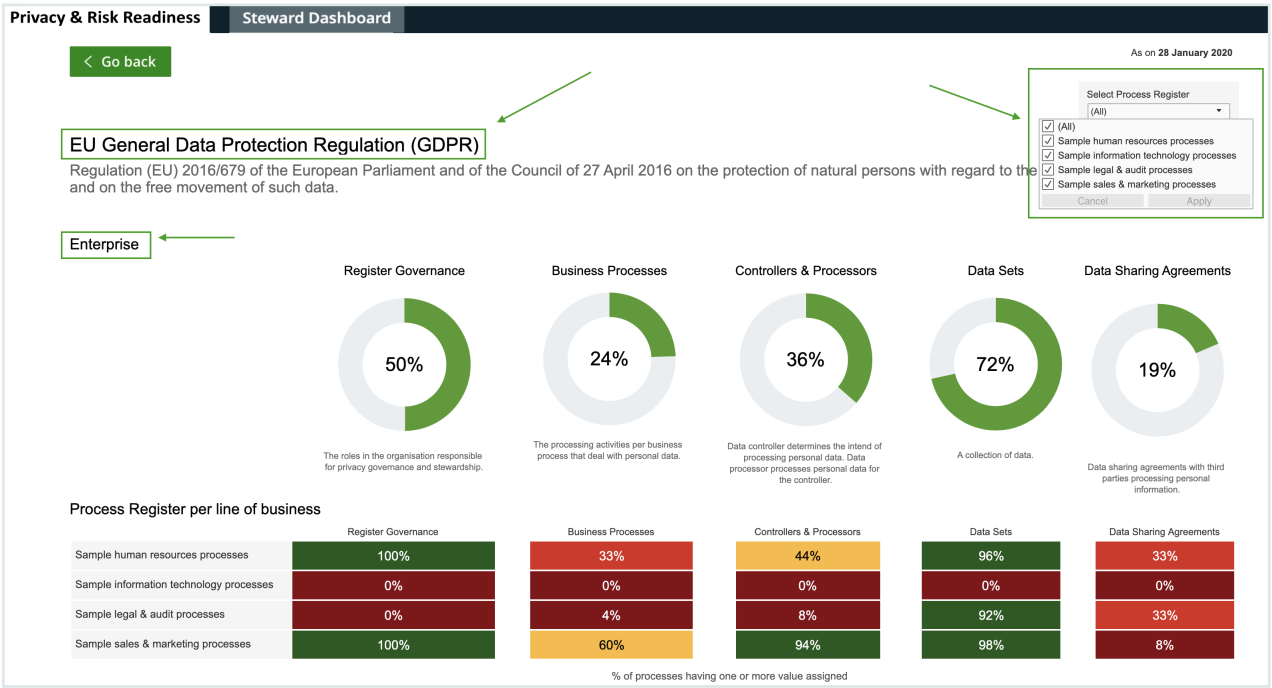


Privacy & Risk Readiness

The Privacy & Risk Readiness report helps you to track the development of your organization's data and progress towards compliance with the relevant regulation.



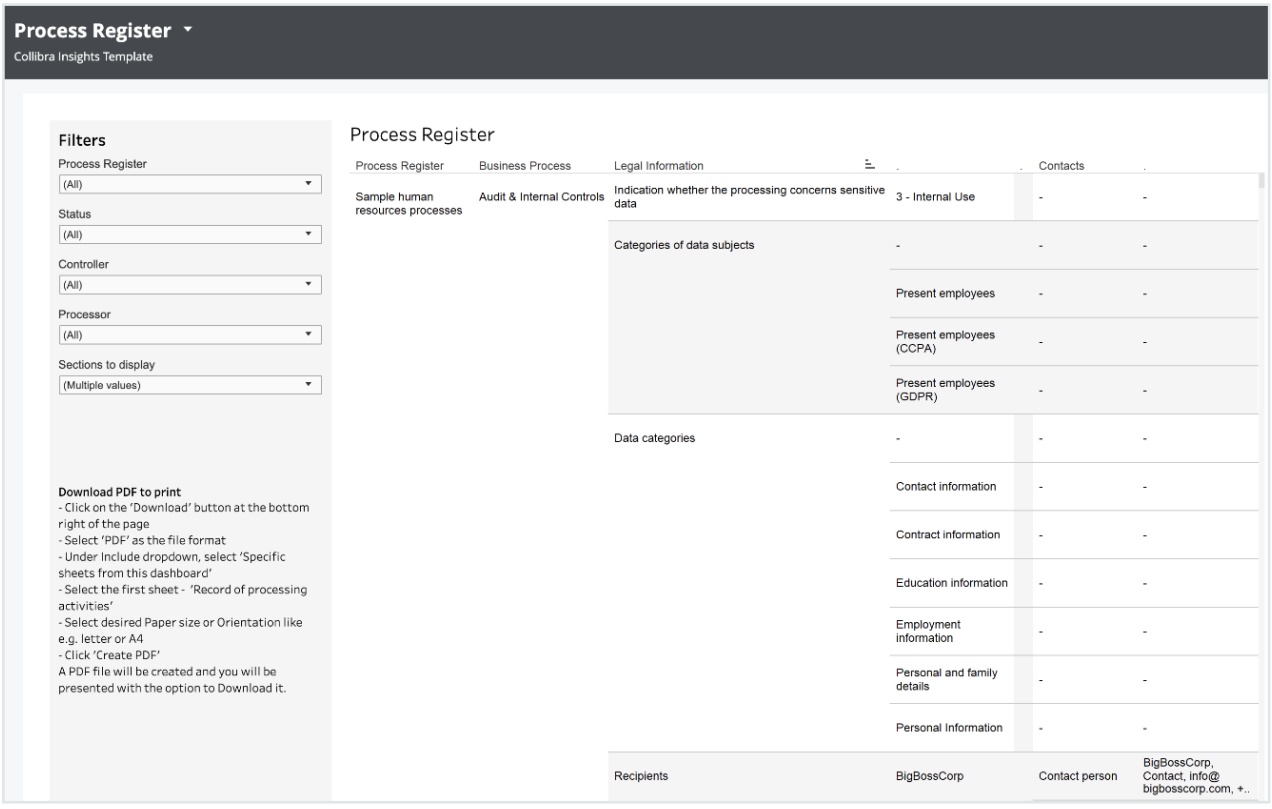
You can drill down to view the details relative to a specific regulation for a specific community and select the process registers you want to monitor.



Drilling down further, you can monitor the process registers of specific lines of business, including the business processes, data sets, and third-parties related to a specific process register.

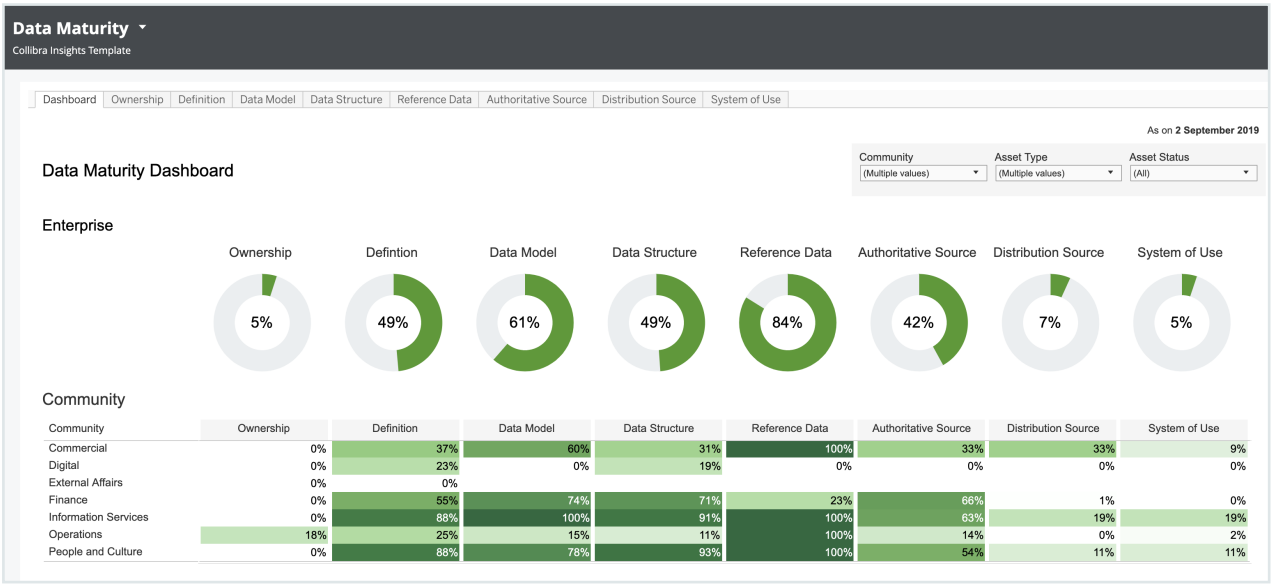
Process Register

The Process Register report shows the important information of every Business Process asset of every Process Register domain in your Collibra environment. You can download the report as a printable PDF.

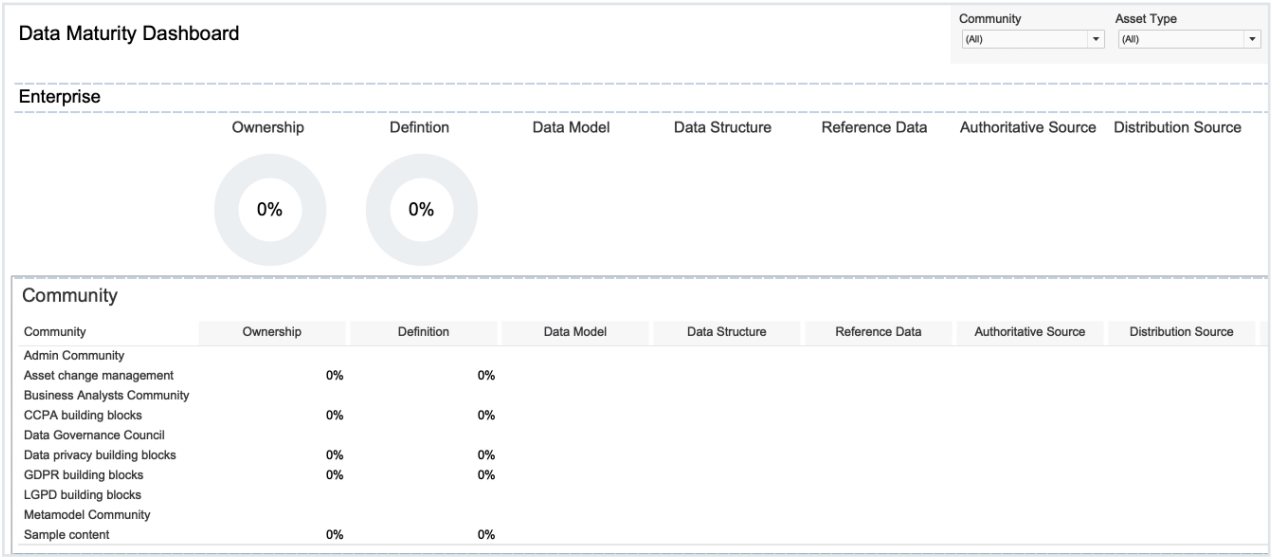


Improve the Data Maturity report

The following image shows a well-configured Data Maturity report.



It is possible that you have correctly configured the Data Maturity report; however, it appears to resemble the following image more closely.

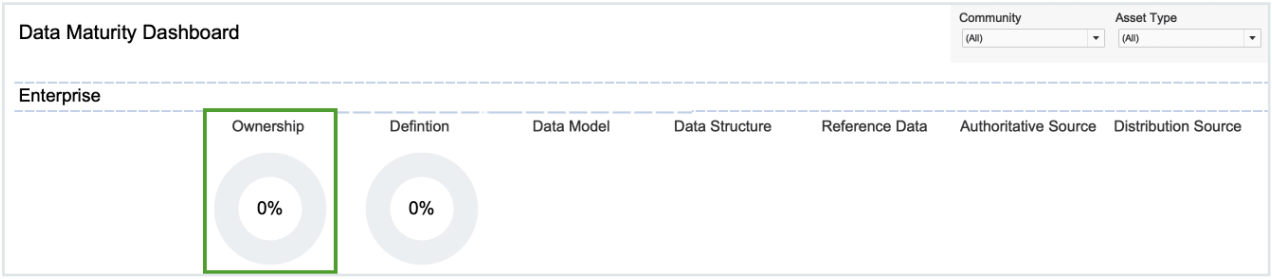


Common scenarios and tips

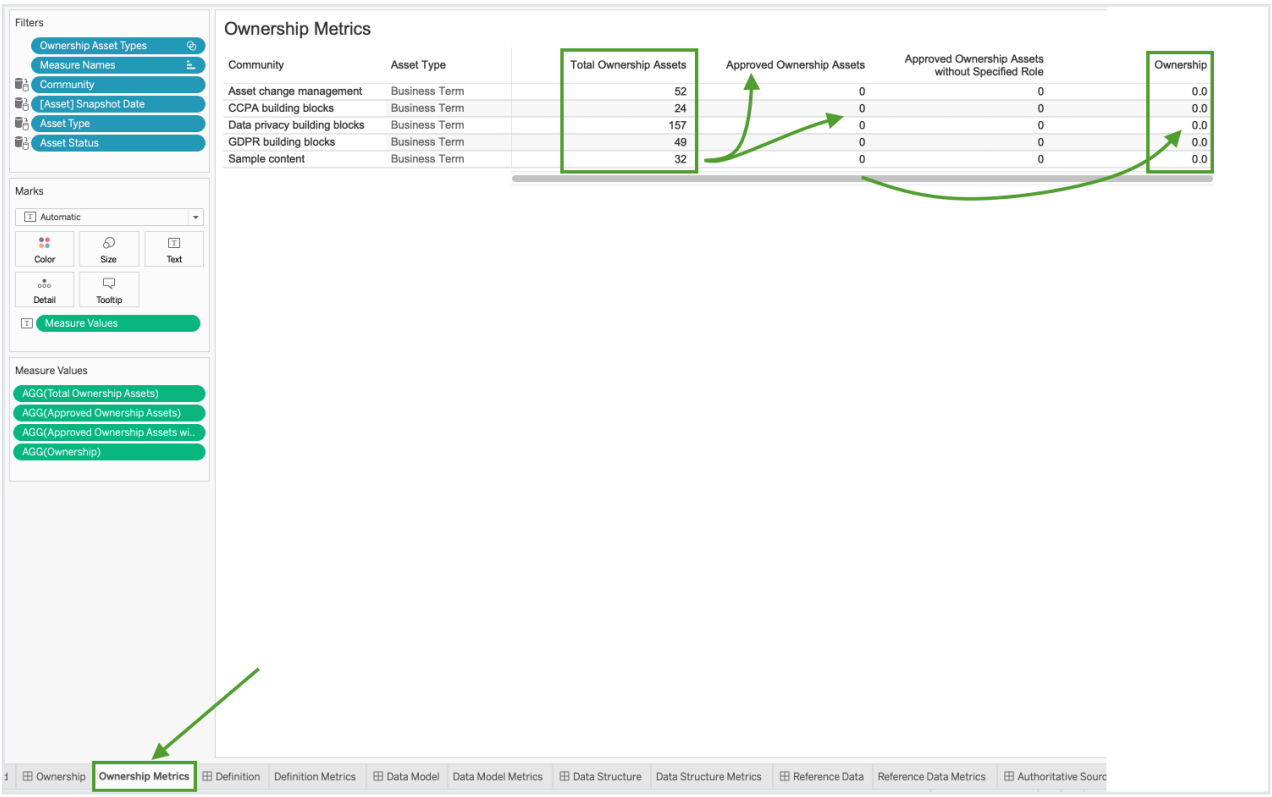
Here are some common scenarios, explanation, and tips for improving the visual output of the report.

The progress circle charts show 0%

In the following image, the Ownership progress circle chart shows 0%.



If you go to the **Ownership Metrics** tab, you see that there are many Business Term assets for inclusion in the report. One might expect that the presence of these assets would be reflected in the circle chart. However, the formula for calculating the percentage entails a division operation involving the number of assets with the status Approved. In the following image, there are no assets that have the status Approved, and this 0 value results in an Ownership percentage of 0%.



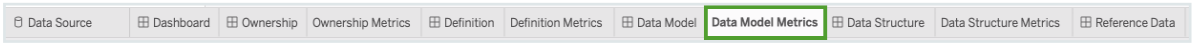
Tip Keep in mind that progress circle charts are reliant on approved assets. In other words, the more mature the data set, the more meaningful the progress circle chart will be.

No progress circle chart is shown

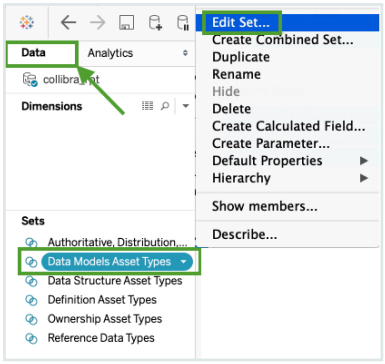
In the following image, no progress circle chart is shown for the Data Model metric.

Tip Ensure that the relevant asset types are selected for the Data Model metric.

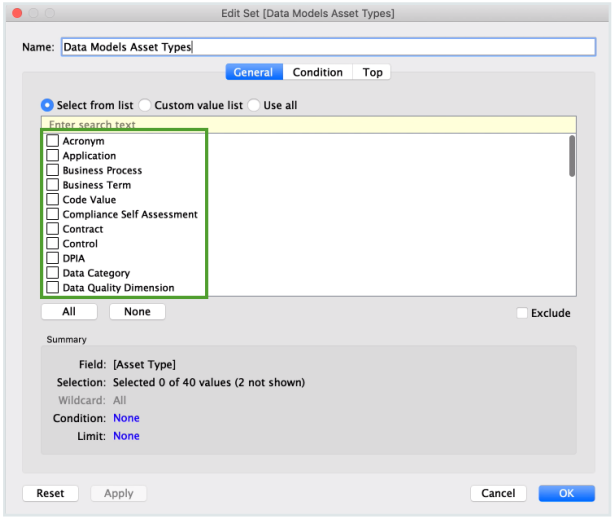
1. At the bottom of the page, click the **Data Model Metrics** tab.



2. On the **Data** tab, select **Data Models Asset Types**, and then select **Edit Set**.



» The **Edit Set** dialog box appears; however, no asset types are selected.



3. Select the asset types that you want to monitor, for example, Data Model, Data Entity, and Data Attribute.
4. Click **OK**.

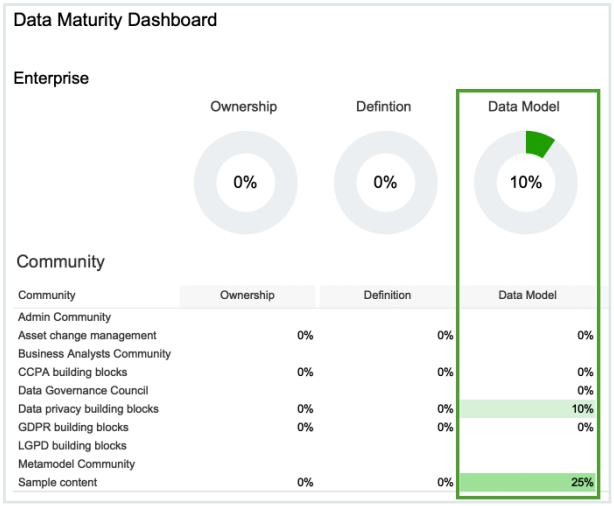
» The data is now shown in accordance with the selected asset types.

Data Model Metrics

Community	Asset Type	Total Data Model Assets	Approved Data Model Assets	Data Model
Asset change management	Business Term	52	0	0.0
	Code Value	52	0	0.0
CCPA building blocks	Business Term	24	0	0.0
Data Governance Council	Business Process	2	0	0.0
Data privacy building blocks	Business Process	82	28	0.3
	Business Term	157	0	0.0
	Code Value	52	0	0.0
GDPR building blocks	Business Term	49	0	0.0
Sample content	Business Process	82	28	0.3
	Business Term	32	0	0.0

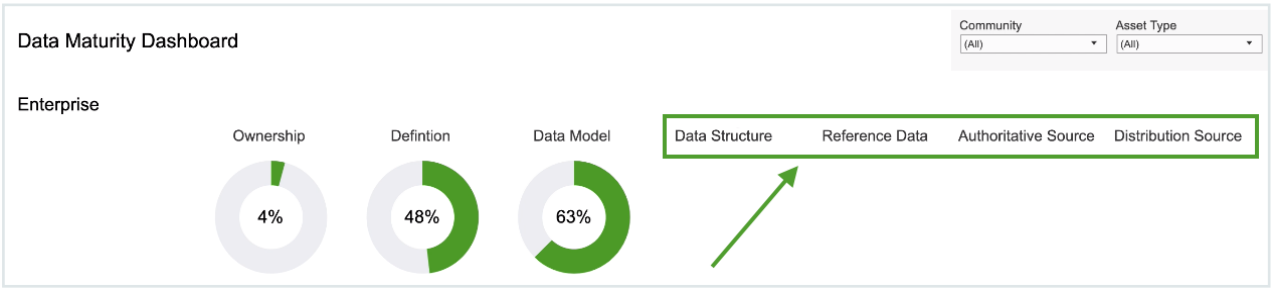
> **Note** Keep in mind that the formula for calculating the percentage entails a division operation involving the number of assets with the status Approved.

» On the Dashboard tab, the progress circle chart is now shown for the Data Model metric.



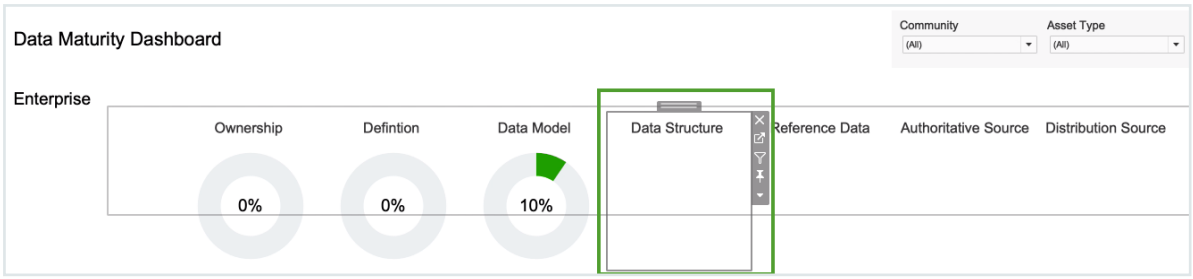
The report includes non-applicable metrics

In the following example, suppose that we want to remove the Data Structure, Reference Data, Authoritative Source, and Distribution Source metrics from the report.



Remove a single metric

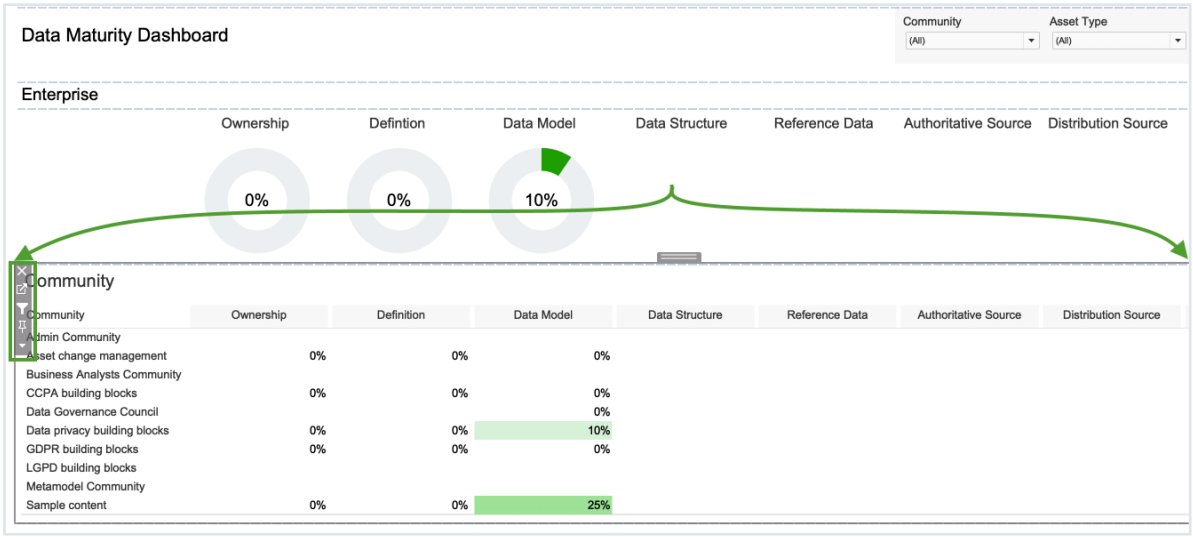
1. Select a single metric.
   You might have to first select the section, for example, **Enterprise**, and drag the frame so that you can click an individual metric.



2. Click the Remove from dashboard icon ✕.

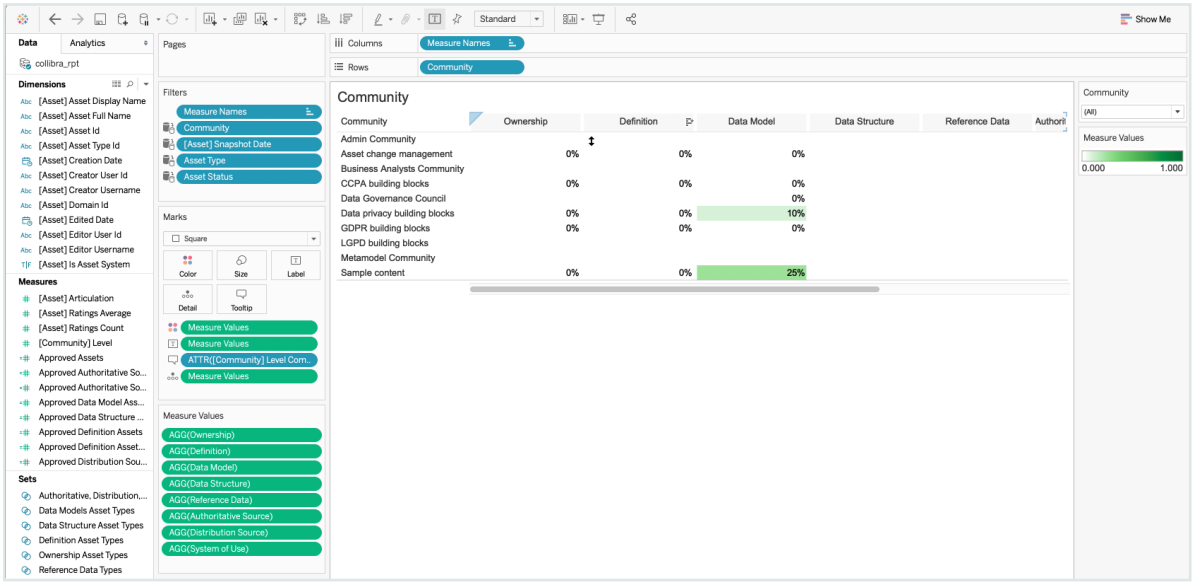
Remove several metrics at once

1. Click in the **Community** section so that the entire section is highlighted.

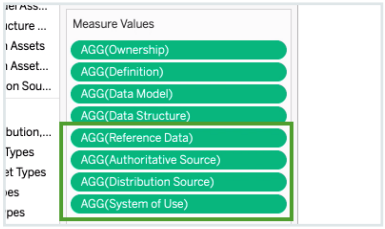


2. Click the "go to sheet" icon .

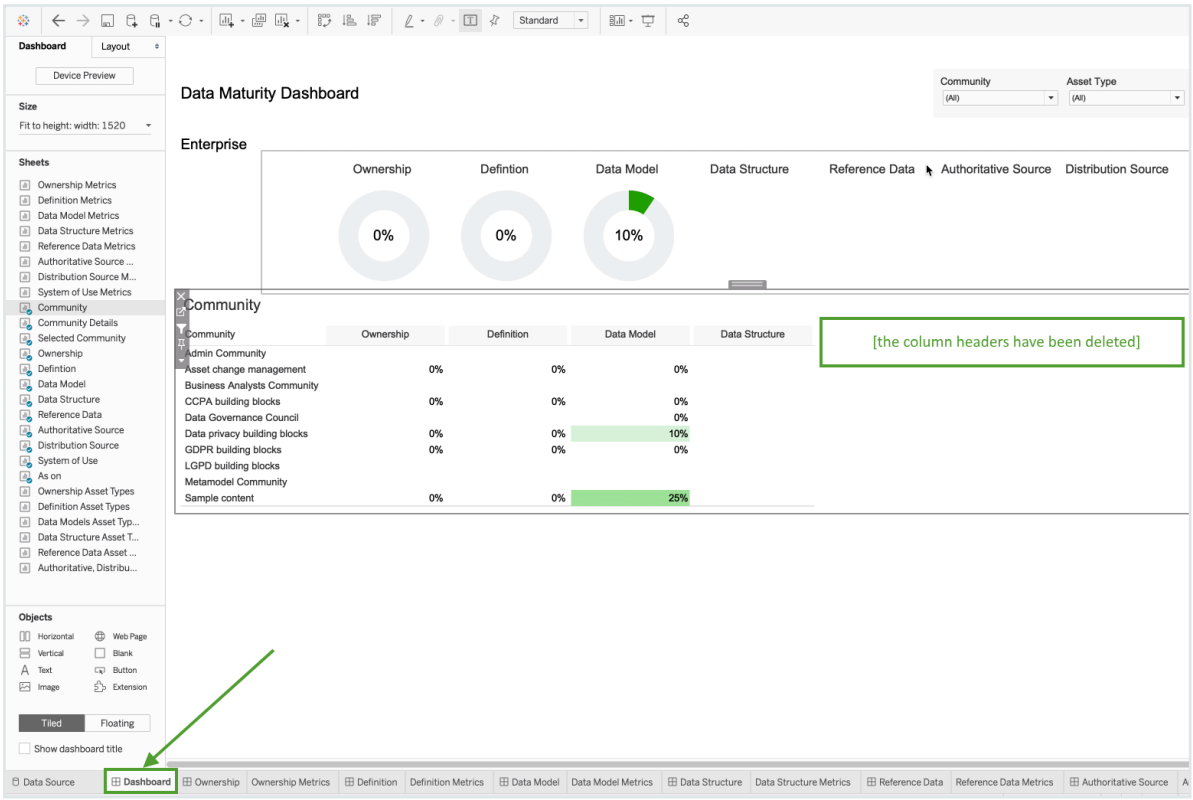
   » The Community data sheet opens.



3. In the **Measure Values** section, select the metrics that you want to remove.
   In the following example, we selected Data Structure, Reference Data, Authoritative Source, and Distribution Source.



4. Right-click the selected metrics and select **Remove**.
   » The metrics at the Community level are deleted.

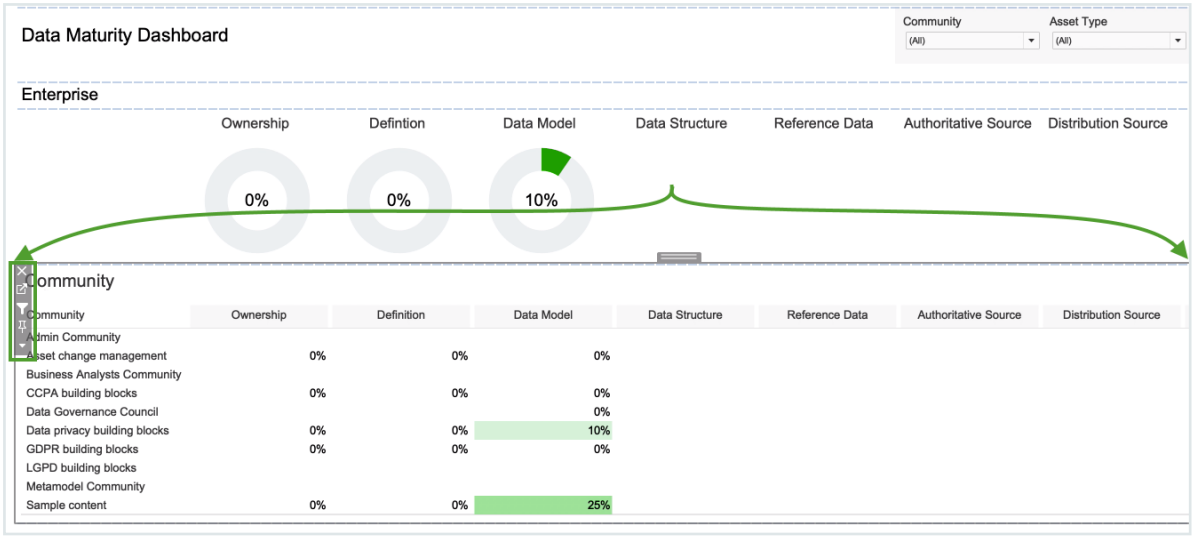


Assets you expected to see in the report are not shown

If assets that you expected to see in the report are not shown, it could be that the status of the assets are not correctly reflected in the relevant measures. By default, the reports are configured to show only assets with the status Approved. Assets with other statuses will not be shown in the reports.

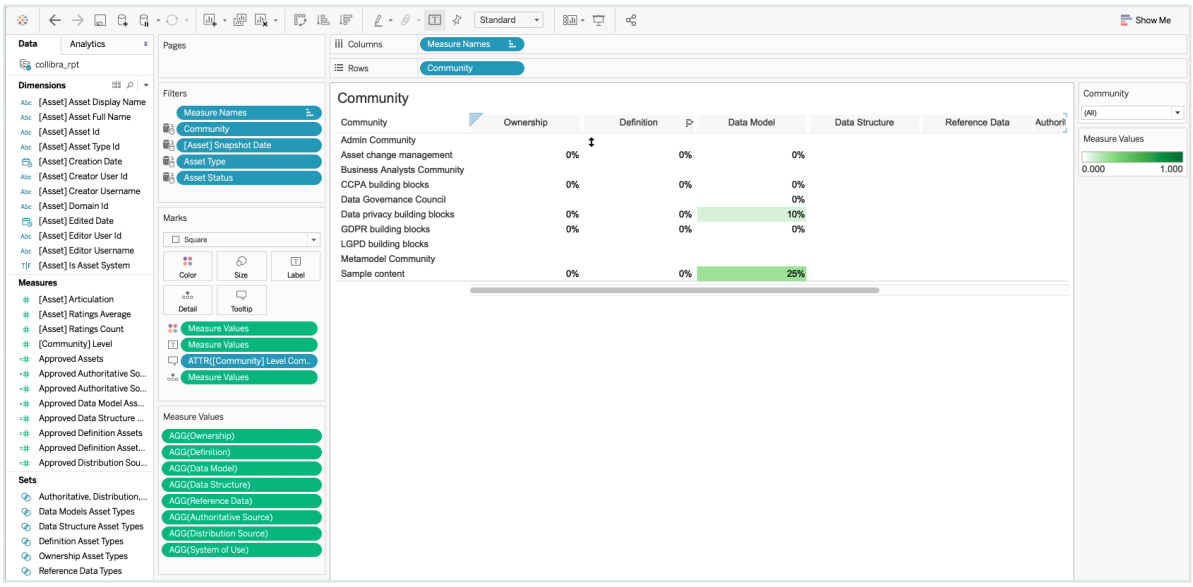
The report templates, however, are fully configurable. You can edit the relevant measures to include other statuses such as Accepted.

1. Click in the **Community** section so that the entire section is highlighted.



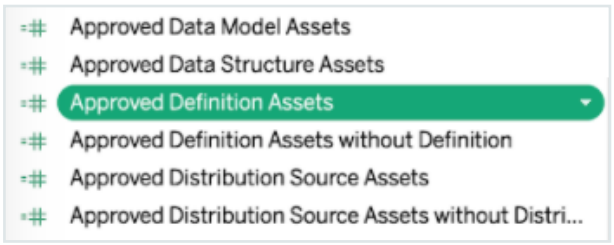
2. Click the "go to sheet" icon .

» The Community data sheet opens.



3. In the **Measure Values** section, select the measure that you want to edit.

In the following example, we selected Approved Definition Assets.



4. Right-click the selected measure and select **Edit**.

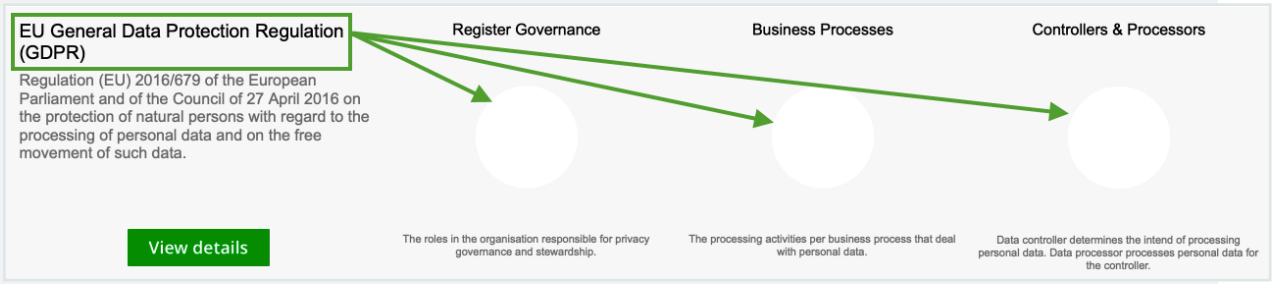
5. In the calculation logic, change the asset status from Approved to the status you want, for example, Accepted.

6. Click **OK**.

Remove NA regulation from the Privacy & Risk Readiness report

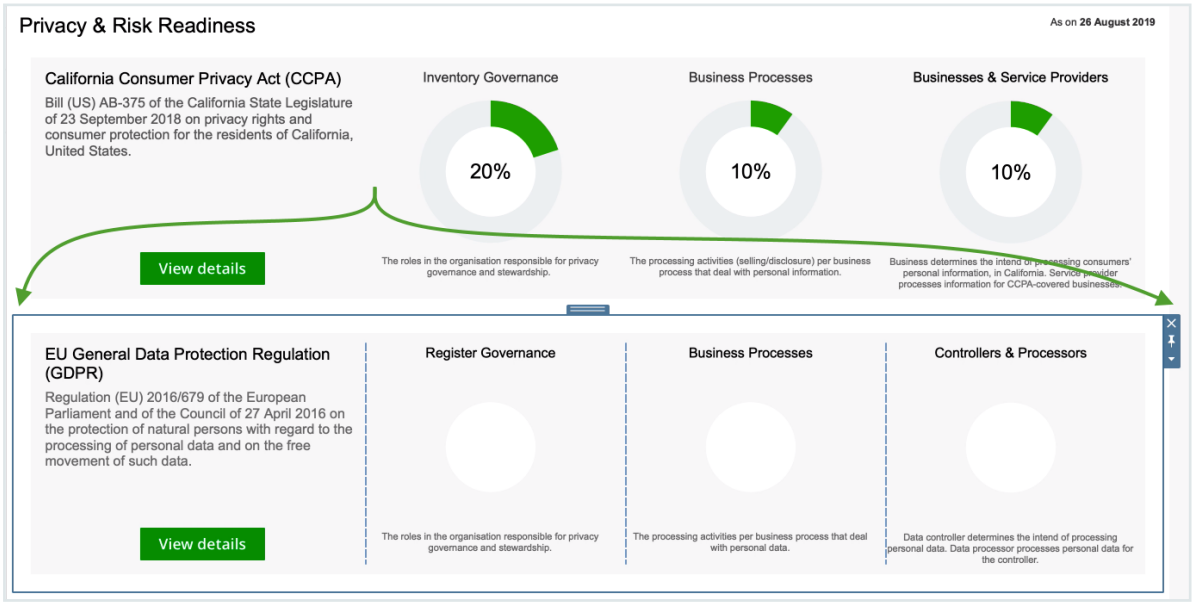
If you have purchased only one of the Data Privacy modules (CCPA or GDPR), you can remove the non-applicable placeholder from the report because there will be no data to visualize.

Example In this example, the GDPR module was not purchased. Therefore, no GDPR-specific data is available.



Steps

1. Click the non-applicable regulation so that the entire section is highlighted.



2. Click ✕.
3. Click **Delete Containers**, to confirm the deletion.

Insights on AWS

Before configuring the dashboard reports, you must set up Insights Data Access on Amazon Web Services (AWS). You can then create your dashboard reports via Collibra Console or URL.

Set up Insights on AWS

This section describes how to set up Insights Data Access on Amazon Web Services (AWS) with S3 bucket storage and AWS Athena query service.

> **Tip** For information on how to set up Insights Data Access on the Google Cloud Platform, go to Set up Insights on GCP.

Prerequisites

You have the following:

- Collibra Platform 5.7 or newer.
- License for Collibra Insights.
- Software for working with Parquet files.

Steps

1. Download a data snapshot from your Collibra environment.
2. Upload the data to an S3 bucket.
3. Download Insights Data Access from Collibra Marketplace.
4. Set up the Insights Data Access model in AWS Athena.

Step 1: Download a data snapshot from your Collibra environment

1. Enter the following URL in your browser:
   `<your-Collibra-environment-`

URL>/rest/2.0/reporting/insights/directDownload?snapshotDate=<snapshot_date>&format=zip

> **Tip** <snapshot date> is the date from when you want the data, formatted as YYYY-MM-DD, for example, **2023-09-29**. Ensure that the date you enter is within the last 31 days or is the last day of a month.

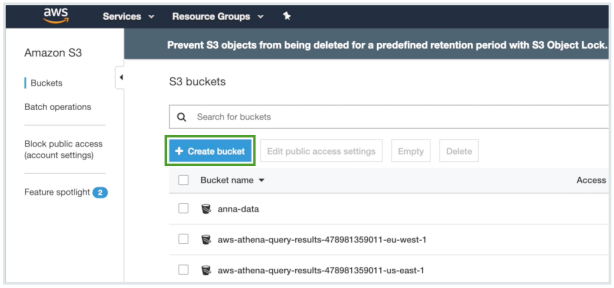
» A ZIP file of the data from your Collibra environment, for the specified date, is downloaded to your hard disk.

2. Extract the ZIP files on your local computer.
   » A folder with the name of the ZIP file is created.

Step 2: Upload the data to an S3 bucket

> **Note** This needs to be done only once for the collection Tableau workbook files. After that, you need to perform this step only if the data layer model changes.

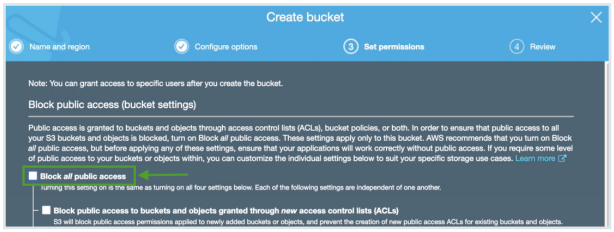
1. Sign in to your AWS account.
2. On the main menu, expand the **Services** page, and then select **S3**.
3. On the **Buckets** tab, click **Create bucket**.



» The **Create bucket** dialog box appears.

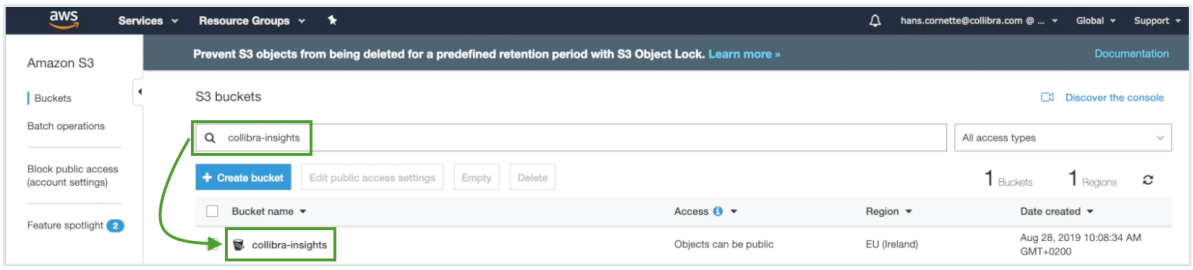
4. In the **Bucket name** field, enter a name for the bucket you are creating, for example, **collibra-insights**.
5. Click **Next**.
6. Click **Next** to bypass the configuration options.

7. Clear the **Block all public access** checkbox to allow access to Tableau.

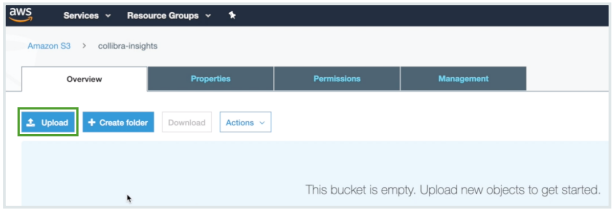


8. Click **Next**.
9. Click **Create bucket**.

   » The bucket is created.
10. On the **Buckets** tab, search for your newly created bucket, and then click it.



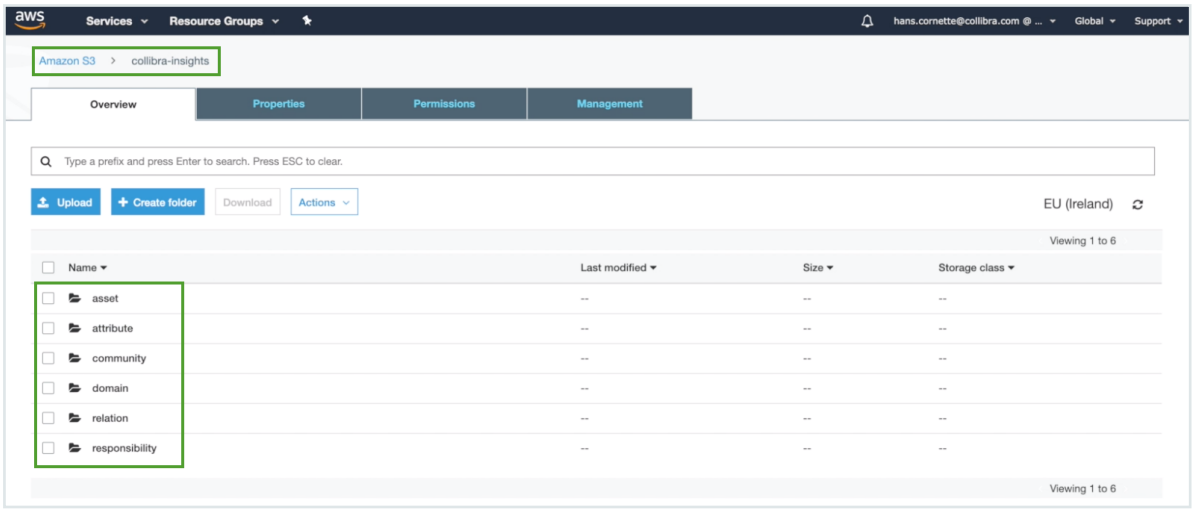
   » The bucket details page opens.
11. Click **Upload** to upload the data you downloaded from your Collibra environment.



   » The **Upload** dialog box appears.
12. Click **Add files**, or drag all of the folders in the ZIP file you downloaded from your Collibra environment into the dialog box.

   » The folders appear in the **Upload** dialog box.

13. Click **Upload**.
    » The folders are added to the newly created bucket.

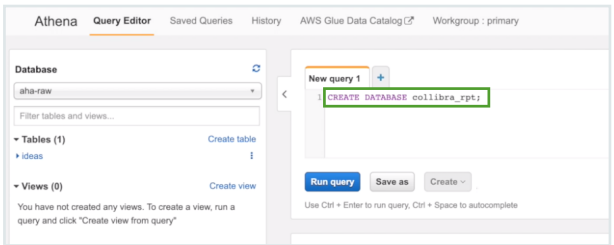


Step 3: Download the Insights Data Access package from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the Insights Data Access package.
   » A ZIP file is downloaded to your hard disk.
3. Extract the ZIP file on your local computer.
   » A folder with the name of the ZIP file is created.

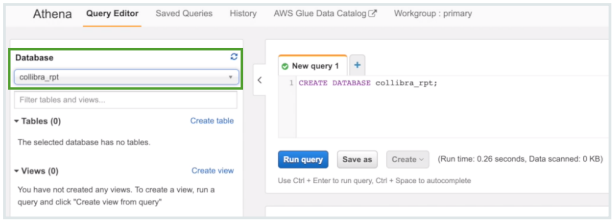
Step 4: Create the Insights Data Access model in AWS Athena

1. On the AWS main menu, expand the **Services** page, and then select **Athena**.
2. On the **New query** tab, enter *CREATE DATABASE <name-of-the-database>;*.
   As shown in the following image (example), a database named **collibra_rpt** is already created.



3. Click **Run query**.

4. On the **Database** drop-down menu, select the database you created.



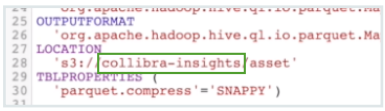
5. Click **+** to add another query.

   In the Insights Data Access ZIP file you downloaded from the Marketplace, drag the first SQL file into a new query tab.

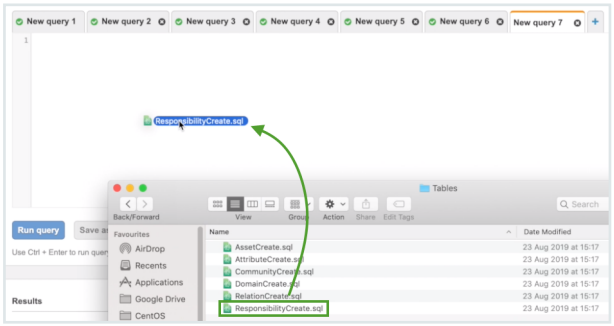
   » The code appears in the query tab.

6. Change the location to the recently created bucket.

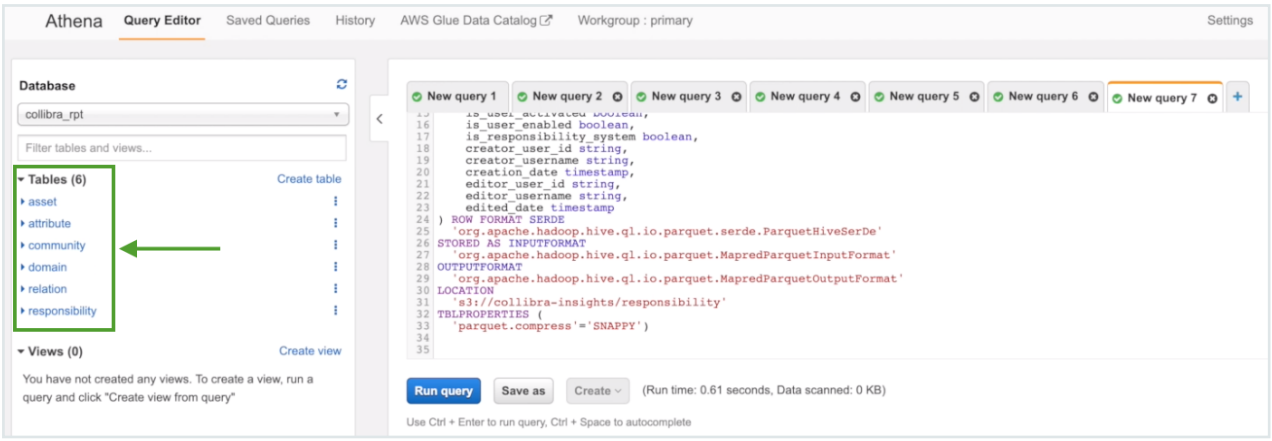
   In this example, **{{customer_data_location}}** is replaced with **collibra-insights**.



7. Click **Run query**.
8. Repeat Steps 5 through 7 for each of the SQL files in the Insights Data Access ZIP file.



» When all the steps are completed, all table definitions are shown and Insights Data Access is fully configured.



Generate dashboard reports via AWS

After setting up Insights Data Access on Amazon Web Services (AWS), you can generate dashboard reports configured in Collibra Console.

> **Tip** You can also generate dashboard reports via URL.

Prerequisites

- Set up Insights Data Access on AWSGCP.
- Ensure that you have the following:
  - The **Insights** global role, to be able to view a report in Collibra Platform.
  - A license for Tableau Desktop 2018.3.
  - A Tableau Server or Tableau Online account.
  - The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event

4. Configure the reporting options in Collibra Settings
5. Add a dashboard in Collibra and configure the Insights widget

Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
   - Process Register Report Template
   - Privacy and Risk Readiness Report Template
   - Data Maturity Report Template

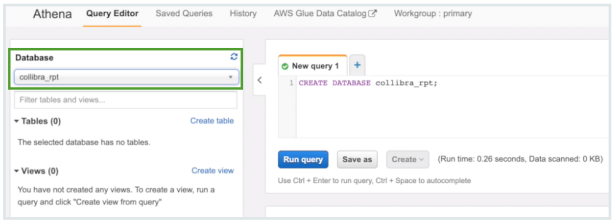
   » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

   » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

Step 2: Install the SQL views associated with the Tableau workbook files

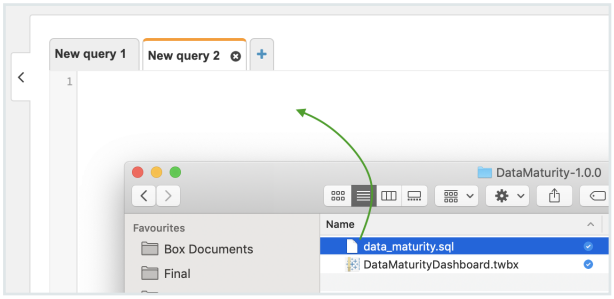
> **Note**
> - If this is the first time you are installing the SQL views, you must perform this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views but are now installing a new version of a report, you must install the new SQL view, if one was provided with the new report.

1. On the AWS main menu, expand the **Services** page, and then select **Athena**.
2. On the **Database** menu, select the relevant database.



3. Click + to add another query.

4. In one of the report template package ZIP files you downloaded from Collibra Marketplace, drag the SQL file to a new query tab.



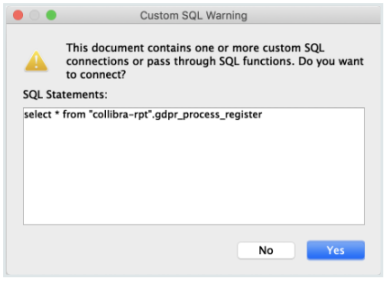
» The code appears in the query tab.

5. Click **Run query**.
6. Repeat Steps 3 through 5 for the SQL files in the other two report template packages.

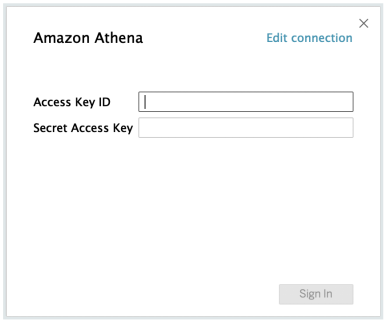
Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace (for example, **DataMaturity**).
2. Open the Tableau Workbook file (in this example, **DataMaturityDashboard.twbx**).

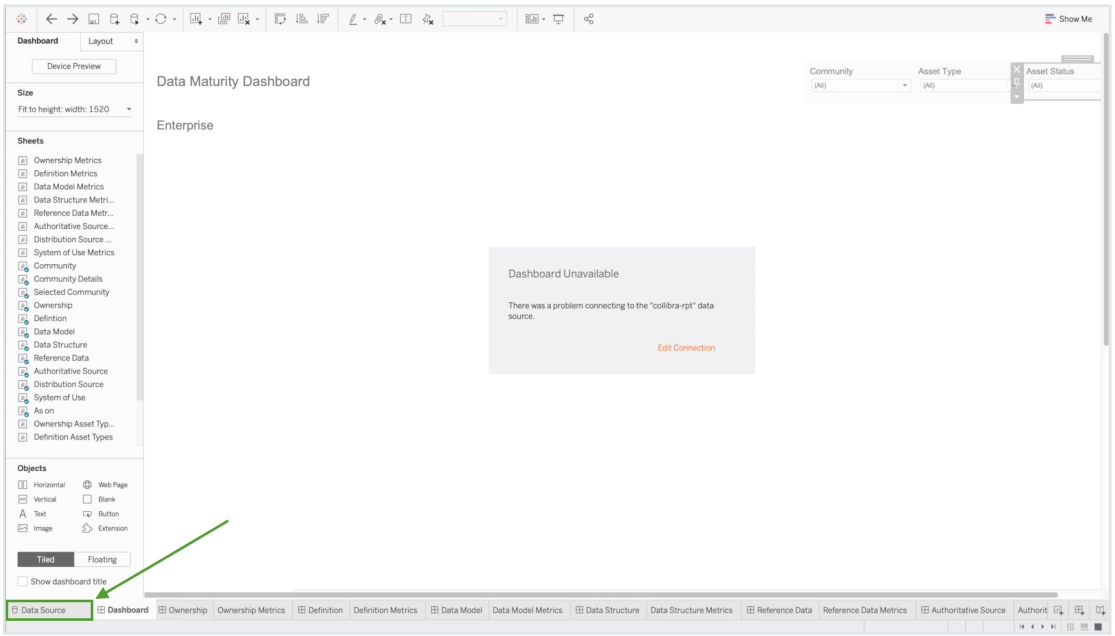
3. If the following dialog box appears, click **Yes**.



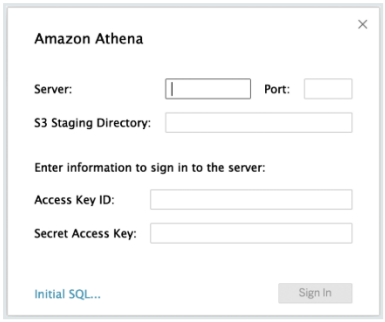
4. Perform one of the following steps:
   - If the following dialog box appears, click **Edit connection**.



   - If the Tableau dashboard is shown, click the **Data Source** tab in the lower-left corner of the page.



5. Enter the information specific to your AWS server.



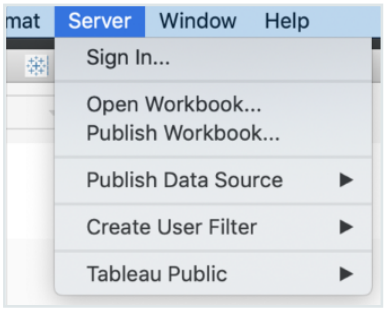
6. Click **Sign in**.

> **Note** If you now receive an error, it may be an indication that the data source "collibra_rpt" is not configured. In this case, consider editing the connection details to point to the data source you have created.

7. In the upper-right corner of the page, select an **Extract** connection.

8. In the lower-left corner of the page, click the **Dashboard** tab.
9. In the **Save As** dialog box, enter a name for the database extract file.
10. Click **Save**.

    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
11. When the dashboard is loaded, click or **File** > **Save** to save the database extract.
12. On the main menu, click **Server**, and then click **Sign In**.

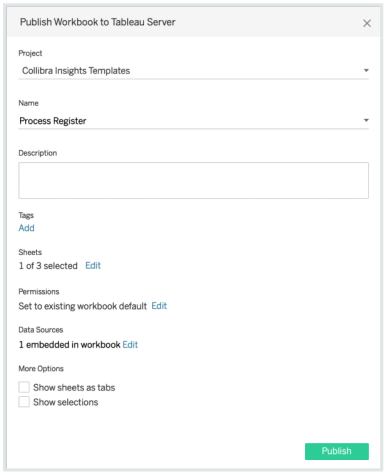


13. In the **Tableau Server Sign in** dialog box, click **Connect**.

14. Enter your Tableau sign in credentials.

15. Select the site to which you want to publish the Tableau workbook.

16. Click **Server**, and then select **Publish Workbook**.
    » The following dialog box appears.

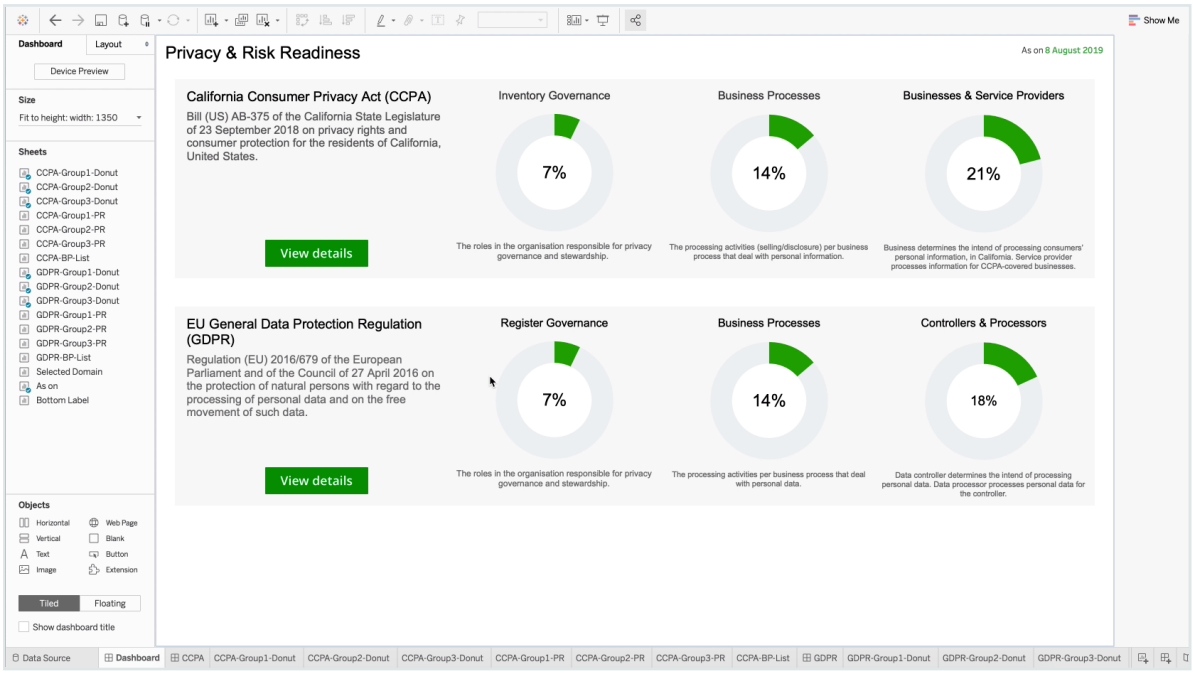


17. Enter the required information.
    For the current task, the following fields are of interest.

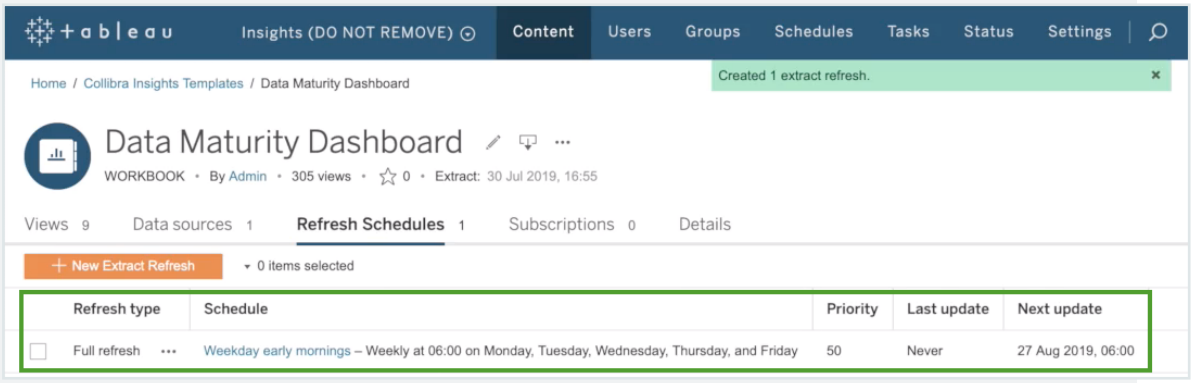
Property	Description
Project	The project to which you want to publish.
Name	The name of the workbook.
Refresh Schedule (Full Extract)	The frequency with which the currently cached database extract is purged and a new extract is cached. **Tip** Collibra recommends scheduling a daily refresh.

Property	Description
Sheets	Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it. **Tip** To avoid clutter, consider clicking **Edit** and then clicking **Only Dashboards**.
Data Sources	Determines: ◦ Whether the data is embedded in the workbook or published separately. ◦ How users authenticate with data sources. **Tip** Collibra recommends the following settings: Click **Edit**, and then: ◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**. This enables users to view the report without having to authenticate themselves every time. ◦ In the **Authentication** drop-down menu, select **Allow refresh access**. This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field.
More options	Additional publication options. **Include external files** determines whether or not external files are included in the publication. **Note** ◦ Only the **DataMaturityDashboard.twbx** file refers to external files. The **Include external files** option is not available for the other Tableau workbook files. ◦ Ensure that **Include external files** is selected, so that the images included with the Tableau workbook files are included in the publication.

18. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

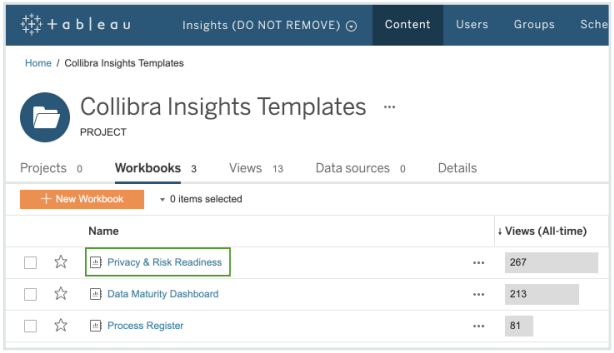


Tip On the **Refresh Schedules** tab, the refresh schedule event you configured is shown.

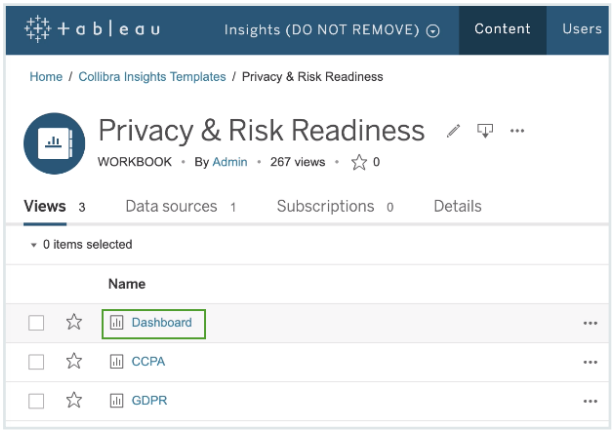


Step 4: Configure the reporting options in Collibra Settings

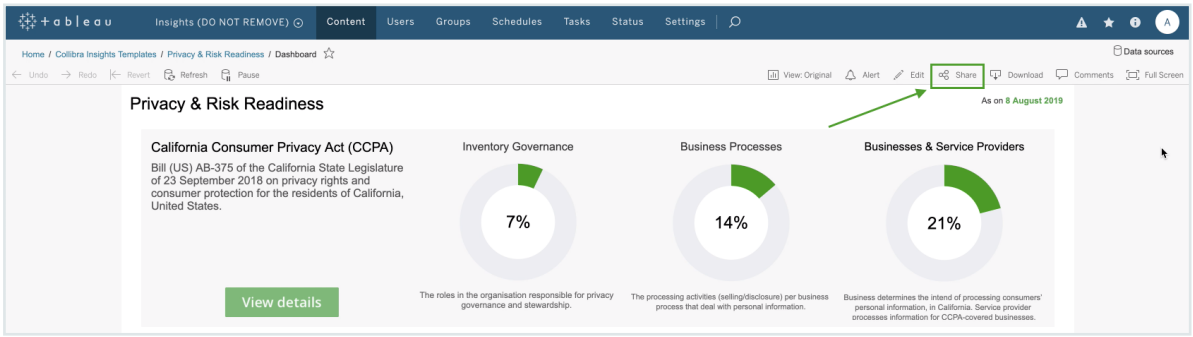
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example, **Privacy & Risk Readiness**.



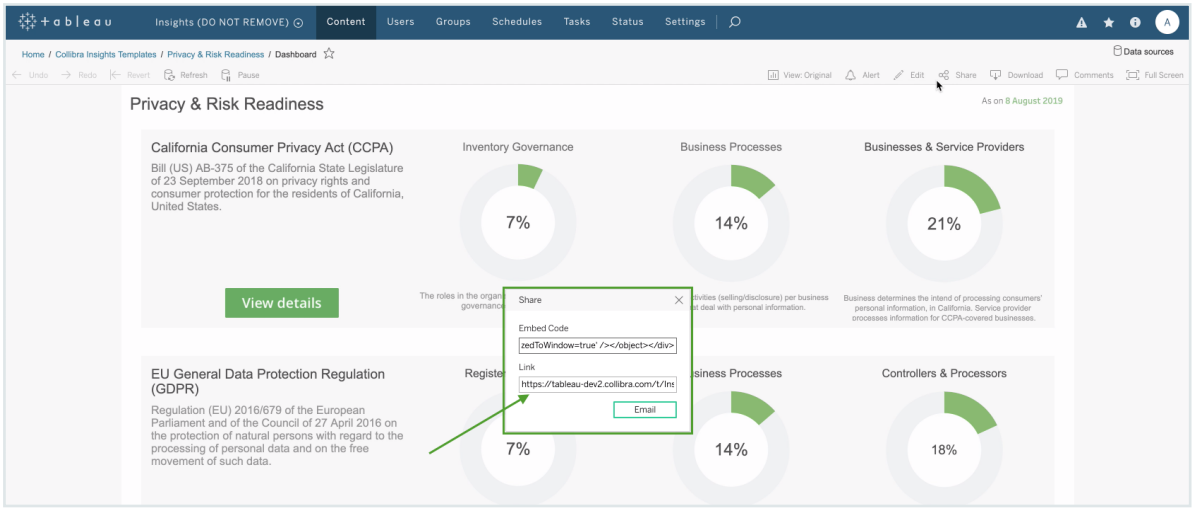
2. Click **Dashboard**.



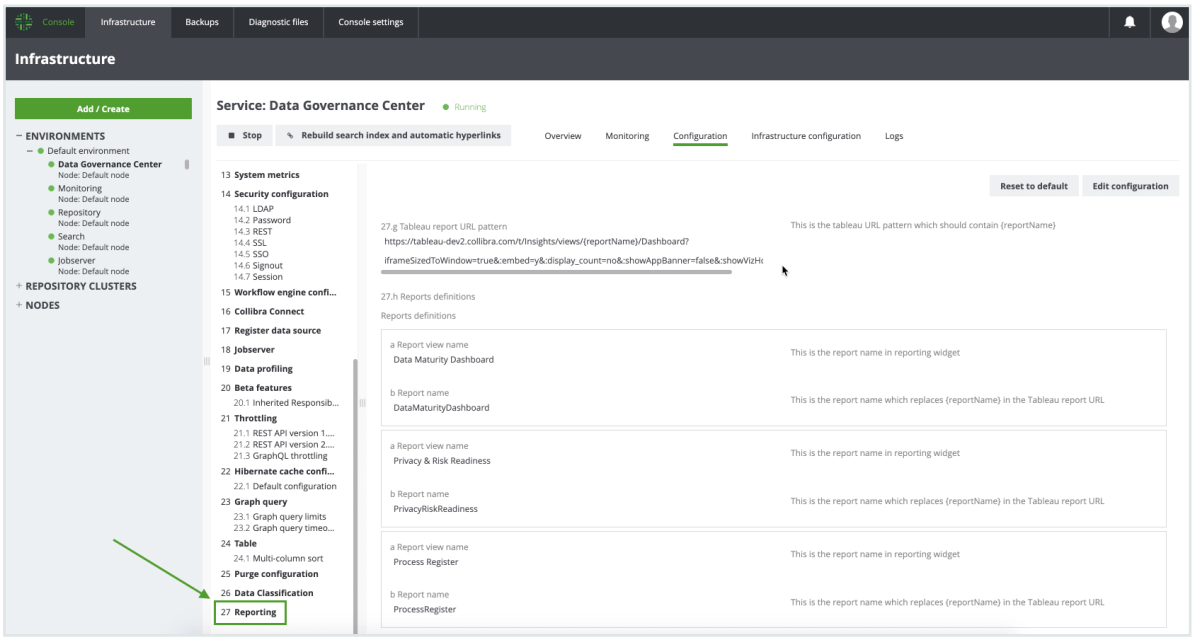
3. Click **Share**.



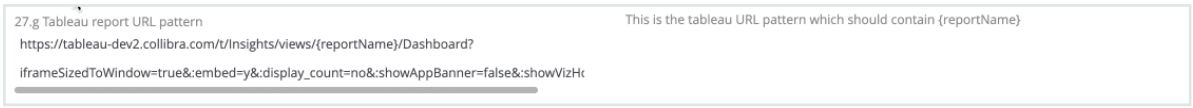
4. In the **Share** dialog box, copy the URL in the **Link** field.



5. Open Collibra Console with a user profile that has at least the **ADMIN** role.
   » Collibra Console opens with the **Infrastructure** page.
6. Click the Data Governance Center service of a Collibra environment.
   » The details of the DGC service are shown.
7. Click **Configuration**.
8. Click **Edit configuration**.
9. Scroll down the list of configuration options and click **Reporting**.



10. In field **Tableau report URL pattern**, paste the URL that you copied from the **Link** field in Tableau.



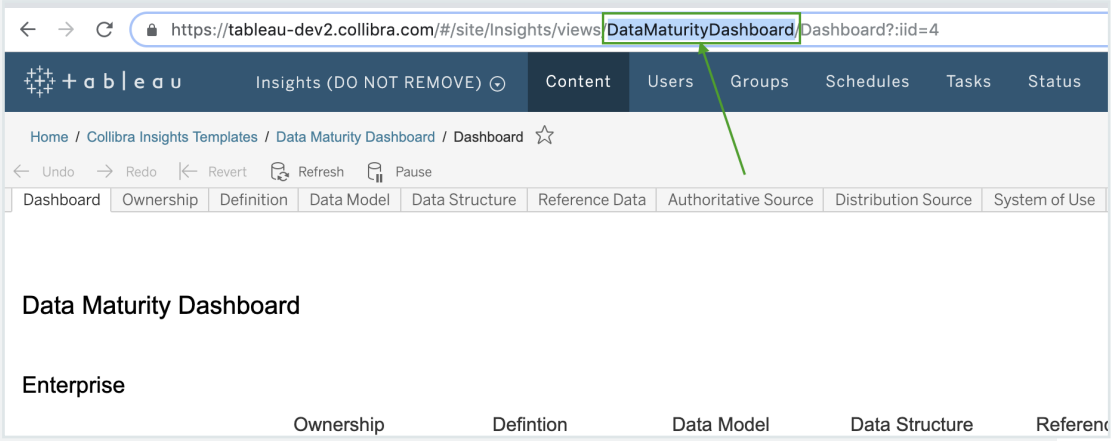
11. In the URL, replace the actual report name (such as *DataMaturityDashboard*) by *{reportName}*, for example: *https://tableau-dev2.<your-Collibra-Data-Intelligence-Cloud-environment-URL>/t/Insights/views/{reportName}/iframeSizedToWindow=true&...*
12. Under **Reports definitions**, click **Add**.

> **Note** You must perform this step for all three reports.

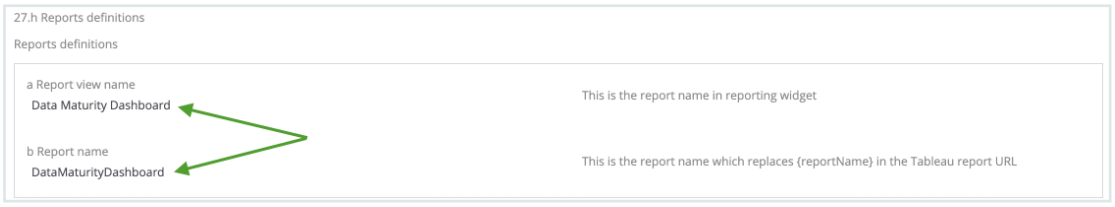
    - In **a Report view name**, enter the name of a report as you want it to appear on the report button in the Insights widget, for example:
        - Data Maturity Dashboard
        - Privacy & Risk Readiness
        - Process Register

    - In **b Report name**, enter the report name, for example:
        - DataMaturityDashboard
        - PrivacyRiskReadiness
        - ProcessRegister

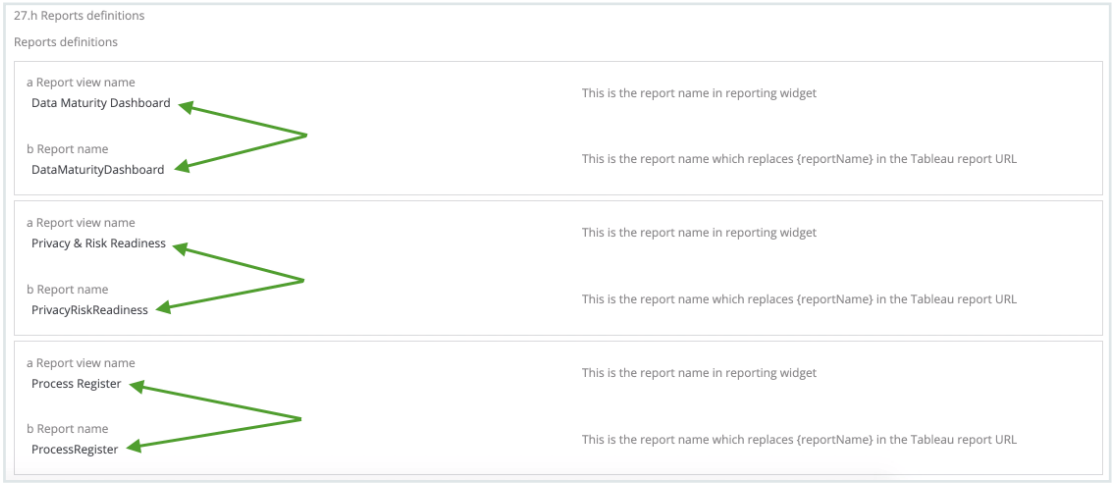
Tip Use the name as it appears in the URL of the Tableau report, for example, **DataMaturityDashboard**.



The settings in Console should look similar to the following image:



- Click **Add**, and then add the report definitions for the remaining two reports.



13. Click **Save all**.

Step 5: Add a dashboard in Collibra and configure the Insights widget

> **Tip** To facilitate the viewing of each report, we recommend that you add and configure a separate dashboard for each report. To do so, you must complete this step for each report.

1. Create a dashboard.

   > **Tip** When entering the required information, in the **Layout** field, select **1 Column**.

2. Click ⋮ → **Edit Dashboard**.
3. Drag the **Collibra Insights** widget from the **Widgets** section to the dashboard.
   » The three reports that you configured in Collibra Settings are shown.
4. Select the report you want to show on the dashboard.
5. Click **Save**.
6. In the upper-right corner of the page, click **Save**.
   » The report is shown on the dashboard you created.

What's next?

Optionally, you can:

- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

Generate dashboard reports via URL on AWS

After setting up Insights Data Access on Amazon Web Services, you can generate a dashboard report via a URL, from tools such as Tableau Online, Power BI, Qlik, or ThoughtSpot.

Prerequisites

Ensure that you have the following:

- The **Insights** global role, to be able to view a report in Collibra Platform.
- A license for Tableau Desktop 2018.3.
- A Tableau Server or Tableau Online account.
- The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event
4. Obtain the shareable link
5. Add a dashboard in Collibra and add your report via URL

Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
    - Process Register Report Template
    - Privacy and Risk Readiness Report Template
    - Data Maturity Report Template

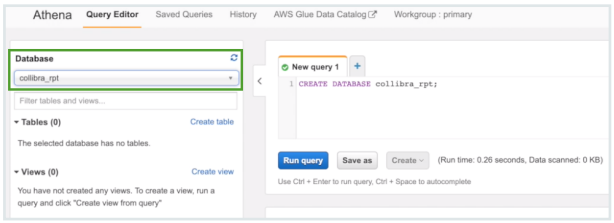
    » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

    » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

Step 2: Install the SQL views associated with the Tableau workbook files

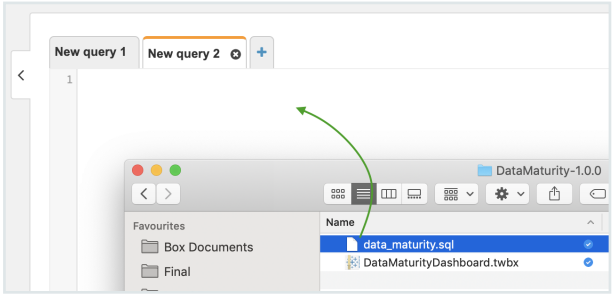
> **Note**
> - If this is the first time you are installing the SQL views, you must perform this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views but are now installing a new version of a report, you must install the new SQL view, if one was provided with the new report.

1. On the AWS main menu, expand the **Services** page, and then select **Athena**.
2. On the **Database** menu, select the relevant database.



3. Click **+** to add another query.

4. In one of the report template package ZIP files you downloaded from Collibra Marketplace, drag the SQL file to a new query tab.

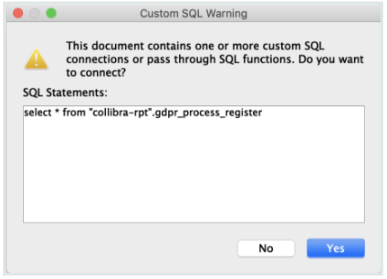


» The code appears in the query tab.

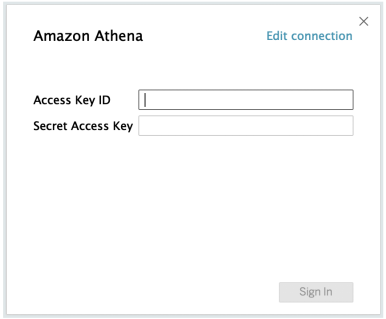
5. Click **Run query**.
6. Repeat Steps 3 through 5 for the SQL files in the other two report template packages.

Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

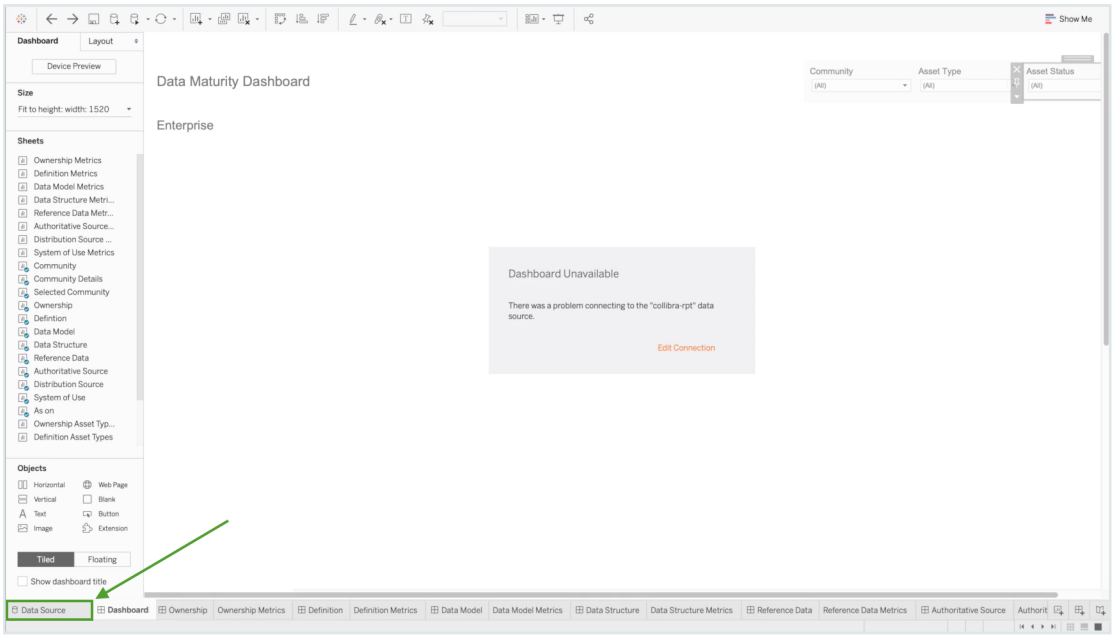
1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace (for example, **DataMaturity**).
2. Open the Tableau Workbook file (in this example, **DataMaturityDashboard.twbx**).
3. If the following dialog box appears, click **Yes**.



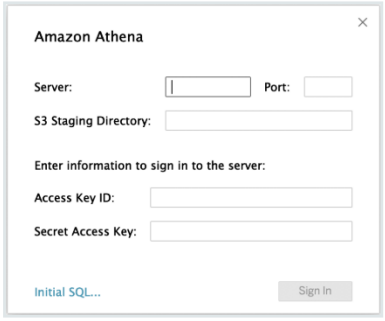
4. Perform one of the following steps:
   - If the following dialog box appears, click **Edit connection**.



- If the Tableau dashboard is shown, click the **Data Source** tab in the lower-left corner of the page.



5. Enter the information specific to your AWS server.



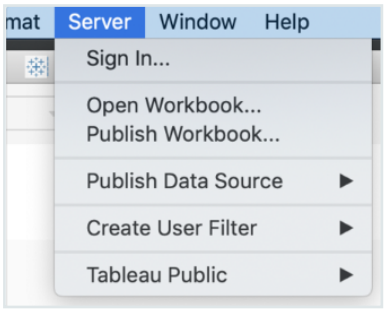
6. Click **Sign in**.

> **Note** If you now receive an error, it may be an indication that the data source "collibra_rpt" is not configured. In this case, consider editing the connection details to point to the data source you have created.

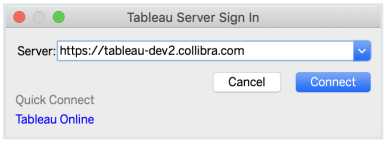
7. In the upper-right corner of the page, select an **Extract** connection.

8. In the lower-left corner of the page, click the **Dashboard** tab.
9. In the **Save As** dialog box, enter a name for the database extract file.

10. Click **Save**.
    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
11. When the dashboard is loaded, click or **File** > **Save** to save the database extract.
12. On the main menu, click **Server**, and then click **Sign In**.

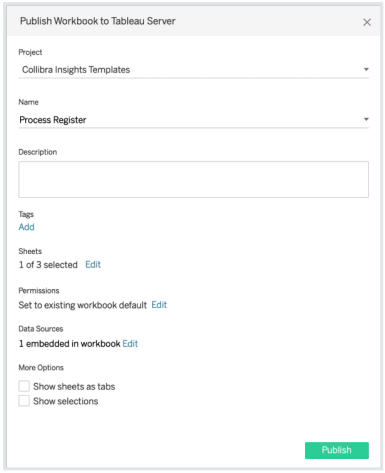


13. In the **Tableau Server Sign in** dialog box, click **Connect**.



14. Enter your Tableau sign in credentials.
15. Select the site to which you want to publish the Tableau workbook.

16. Click **Server**, and then select **Publish Workbook**.
    » The following dialog box appears.

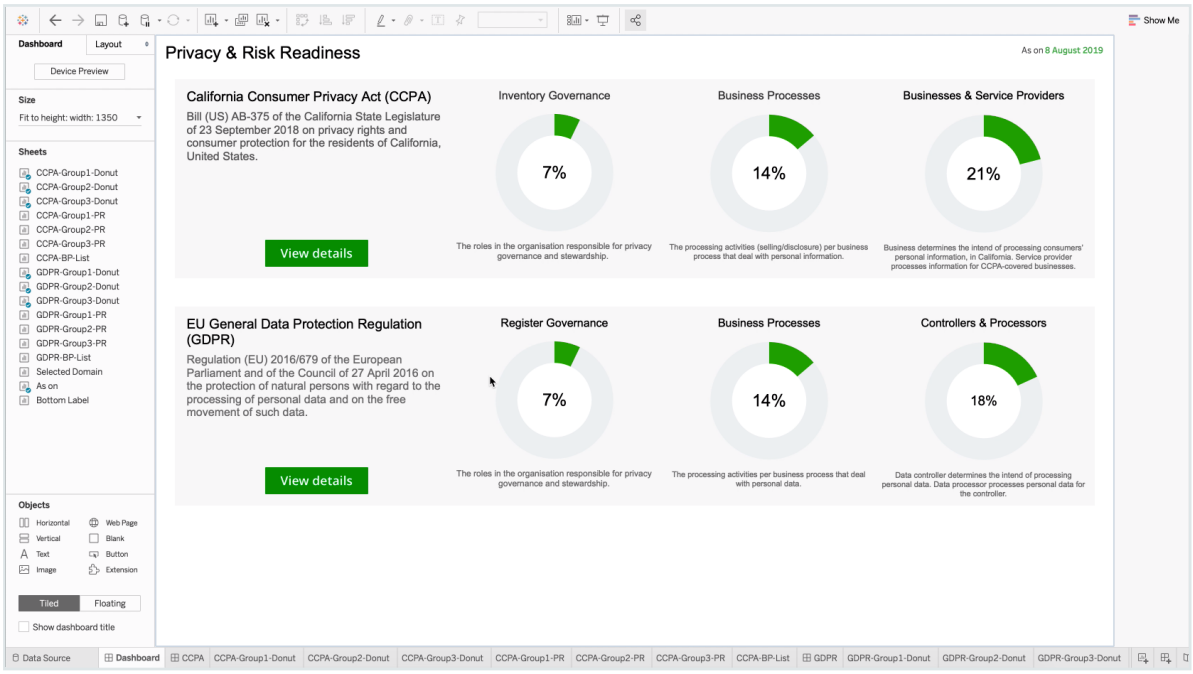


17. Enter the required information.
    For the current task, the following fields are of interest.

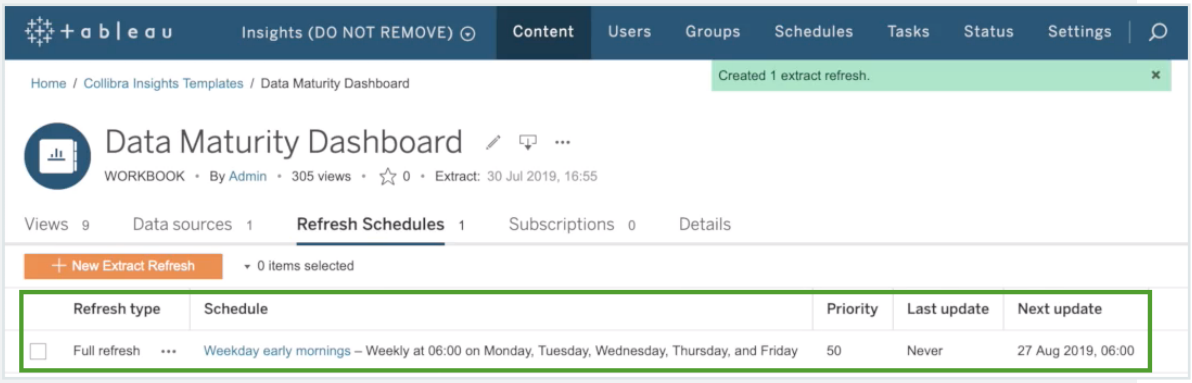
Property	Description
Project	The project to which you want to publish.
Name	The name of the workbook.
Refresh Schedule (Full Extract)	The frequency with which the currently cached database extract is purged and a new extract is cached. **Tip** Collibra recommends scheduling a daily refresh.
Sheets	Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it. **Tip** To avoid clutter, consider clicking **Edit** and then clicking **Only Dashboards**.

Property	Description
Data Sources	Determines: ◦ Whether the data is embedded in the workbook or published separately. ◦ How users authenticate with data sources. **Tip** Collibra recommends the following settings: Click **Edit**, and then: ◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**. This enables users to view the report without having to authenticate themselves every time. ◦ In the **Authentication** drop-down menu, select **Allow refresh access**. This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field.
More options	Additional publication options. **Include external files** determines whether or not external files are included in the publication. **Note** ◦ Only the **DataMaturityDashboard.twbx** file refers to external files. The **Include external files** option is not available for the other Tableau workbook files. ◦ Ensure that **Include external files** is selected, so that the images included with the Tableau workbook files are included in the publication.

18. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

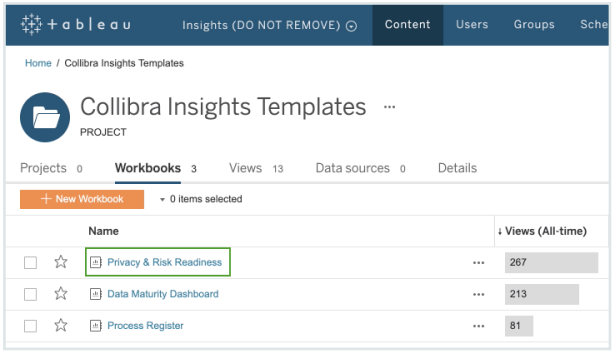


Tip On the **Refresh Schedules** tab, the refresh schedule event you configured is shown.

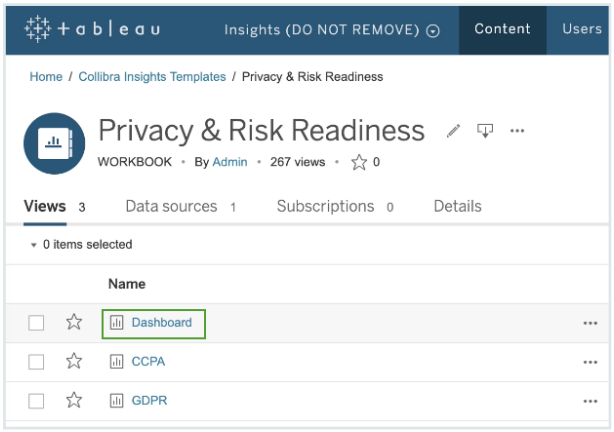


Step 4: Obtain the shareable link

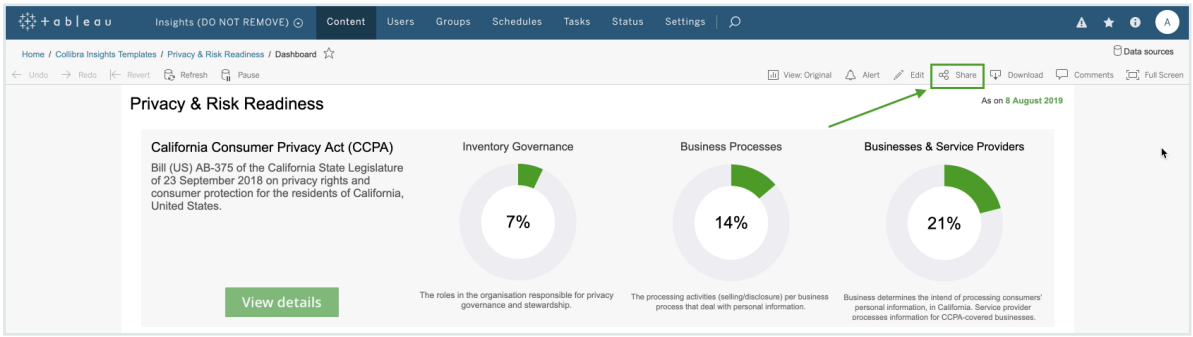
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example, **Privacy & Risk Readiness**.



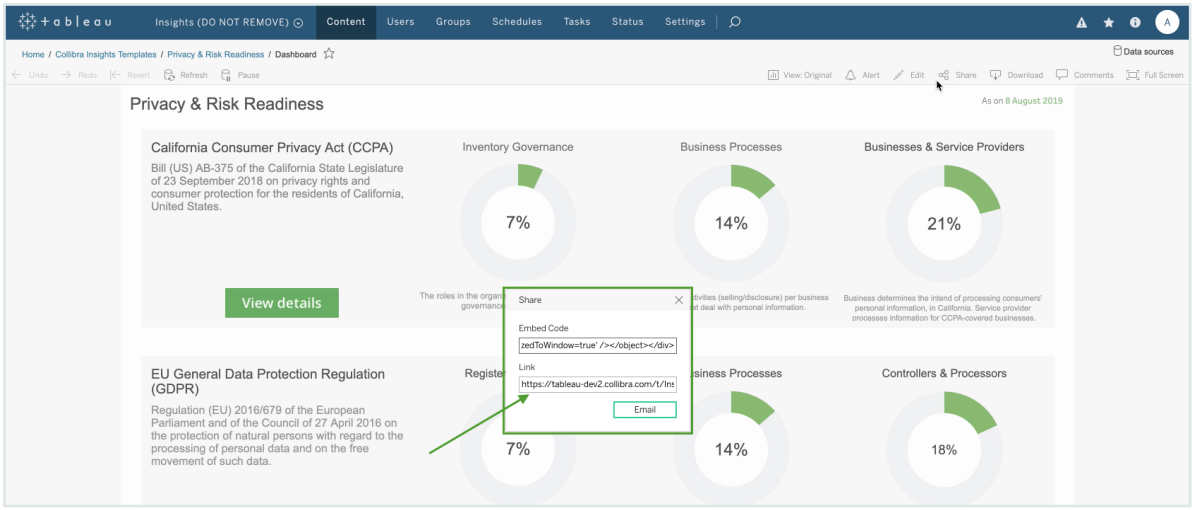
2. Click **Dashboard**.



3. Click **Share**.



4. In the **Share** dialog box, copy the URL in the **Link** field.



Step 5: Add a dashboard in Collibra and then add your report via URL

> **Tip** To facilitate the viewing of each report, consider adding and configuring a separate dashboard for each report. To do so, you must complete this step for each report.

1. Create a dashboard.

   > **Tip** When entering the required information, in the **Layout** field, select **1 Column**.

2. Add the **Collibra Insights** widget to the dashboard.
3. Configure the **Collibra Insights** widget.
   » The report is shown on the dashboard you created.

What's next?

Optionally, you can:

- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

Insights on GCP

Before configuring the dashboard reports, you must set up Insights Data Access on Google Cloud Platform (GCP). You can then create your dashboard reports via Collibra Console or URL.

Set up Insights on GCP

This section describes how to set up Insights Data Access on the Google Cloud Platform (GCP) with Google Cloud Storage and Google BigQuery.

> **Tip** For information on how to set up Insights Data Access on Amazon Web Services, go to Set up Insights on AWS.

Prerequisites

You have the following:

- Collibra Platform 5.7 or newer.
- License for Collibra Insights.
- Software for working with Parquet files.

Steps

1. Download a data snapshot from your Collibra environment.
2. Upload the data to a Google Cloud Storage bucket.
3. Create the Insights Data Access model in Google BigQuery.

Step 1: Download a data snapshot from your Collibra environment

1. Enter the following URL in your browser:
   <your-Collibra-environment-URL>/rest/2.0/reporting/insights/directDownload?snapshotDate=<snapshot_date>&format=zip

> **Tip** <snapshot date> is the date from when you want the data, formatted as YYYY-MM-DD, for example, **2023-09-29**. Ensure that the date you enter is within the last 31 days or is the last day of a month.

» A ZIP file of the data from your Collibra environment, for the specified date, is downloaded to your hard disk.

2. Extract the ZIP files on your local computer.
   » A folder with the name of the ZIP file is created.

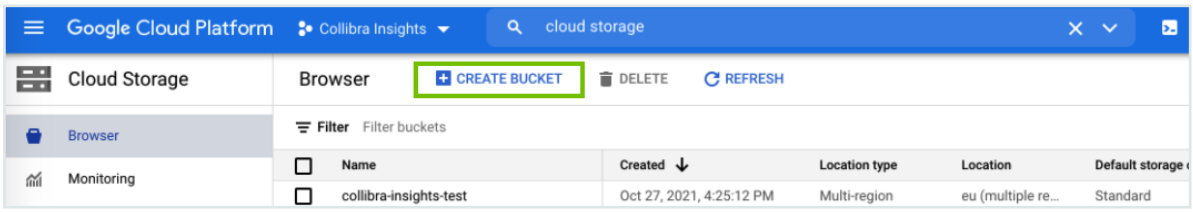
Step 2: Upload the data to a Google Cloud Storage bucket

> **Note** This needs to be done only once for the collection Tableau workbook files. After that, you need to perform this step only if the data layer model changes.

1. Sign in to your GCP account and choose your working project for Insights deployment.

   > **Tip** We recommend that you create a separate project for Insights deployment.

2. On the tab menu, click the **Storage** tab, and then click **Cloud Storage**.
3. On the **Browser** tab, click **Create bucket**.



   » The **Create a bucket** dialog box appears.
4. In the **Name your bucket** field, enter a name for the bucket you are creating, for example, *collibra-insights*.
5. Click **Continue**.
6. In the **Choose where to store your data** section, enter the relevant values, for example:
   - Location type: *Multi-region*
   - Location: *Your geographic location*

   > **Tip** Contact your IT department for help with the correct values for your Collibra environment configuration and to ensure compliance with your company policies.

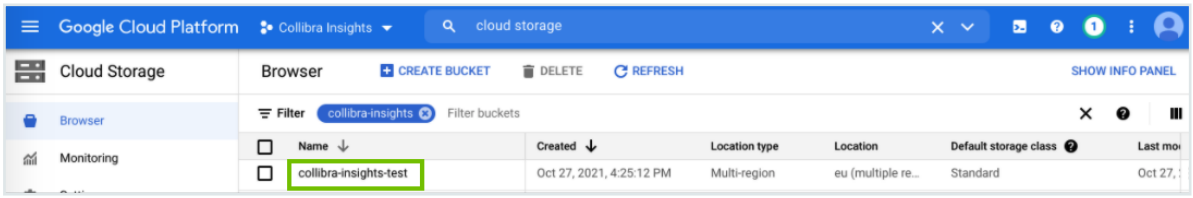
7. Click **Continue**.
8. In the **Choose a default storage class for your data** section, click **Standard**.
9. Click **Continue**.
10. in the **Choose how to control access to objects** section, enter the relevant values, for example:
    - Access control: *Uniform*

> **Tip** Contact your IT department for help with the correct values for your Collibra environment configuration and to ensure compliance with your company policies.

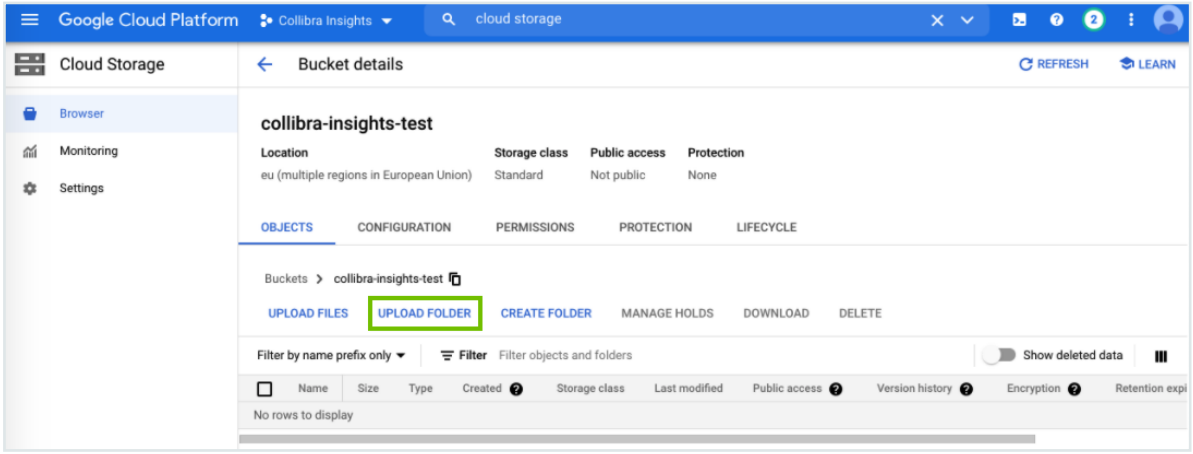
11. Click **Continue**.
12. In the **Choose how to protect object data** section, enter the relevant values, for example:
    - Protection tool: *None*

> **Tip** Contact your IT department for help with the correct values for your Collibra environment configuration and to ensure compliance with your company policies.

13. Click **Create**.
    » The bucket is created.
14. On the **Browse** tab, search for your newly created bucket, and then click it.



    » The bucket details page opens.
15. Click **Upload Folder** to upload the data you downloaded from your Collibra environment.



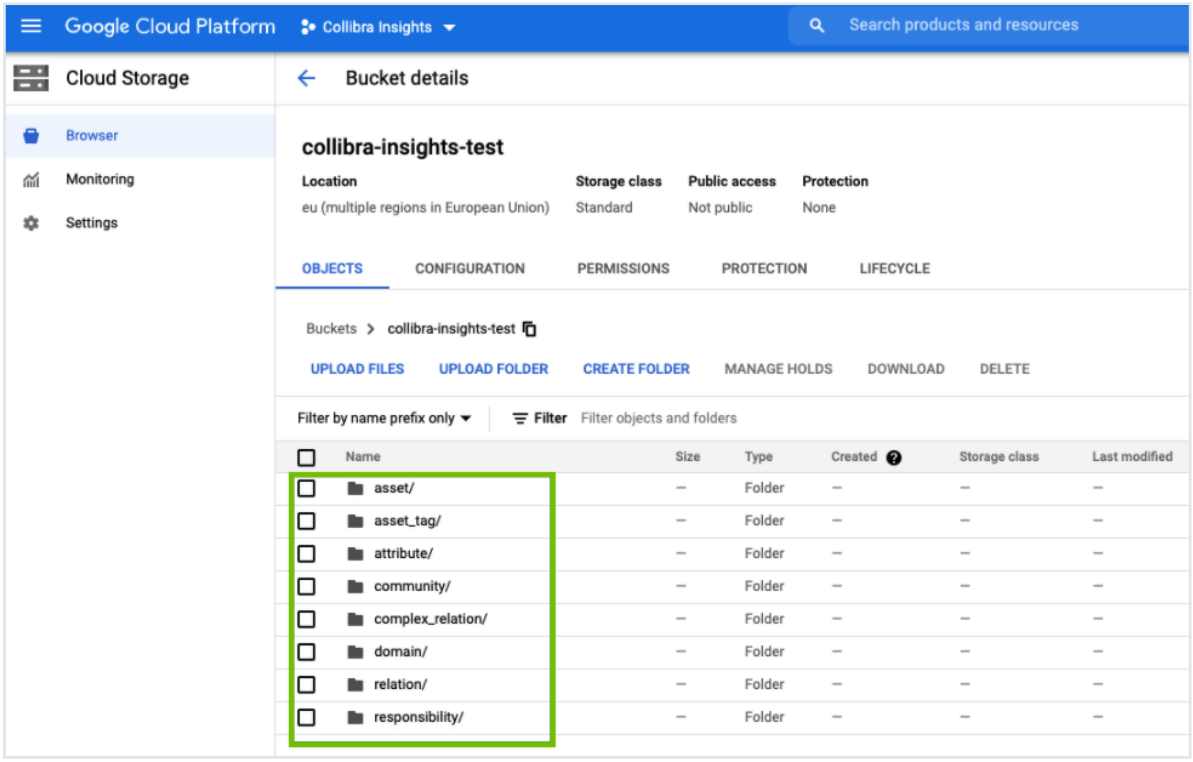
    » The **Upload** dialog box appears.

16. In the **Upload** dialog box, find the unpacked folders of the ZIP file you downloaded from your Collibra environment. As shown in the following image, there are eight folders to be uploaded.

17. Select a folder, for example, **complex_relation**, and then click **Upload**.

> **Note** You can select only one folder at a time.

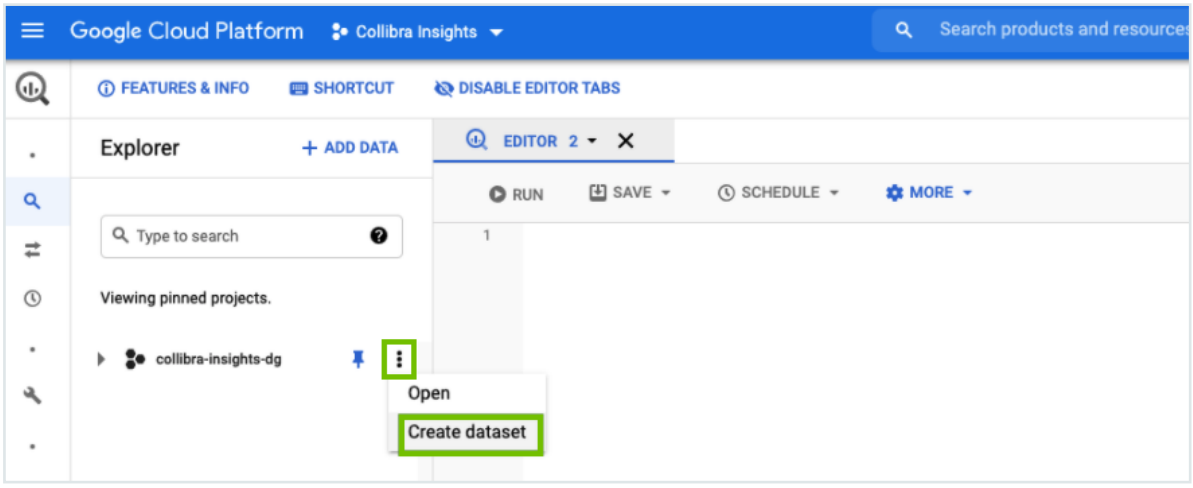
18. Repeat Steps 15 through 17 until you have uploaded all eight folders.
    » The folders are added to the newly created bucket.



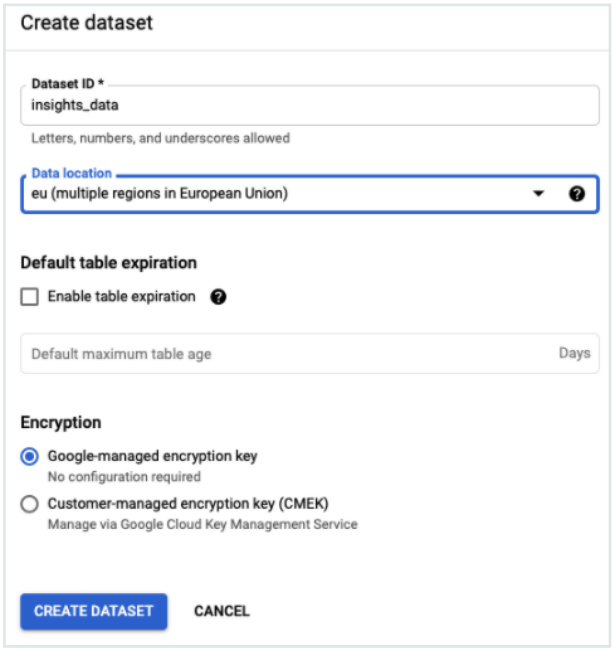
Step 3: Create the Insights Data Access model in Google BigQuery

> **Tip** The objective of Steps 6 through 8 in the following procedure can also be achieved by using a Cloud shell command.

1. On the left tab menu, in the **BIG DATA** section, click **BigQuery**.
2. On the **Explorer** page, find your Insights project, and then click ⋮ > **Create dataset**.



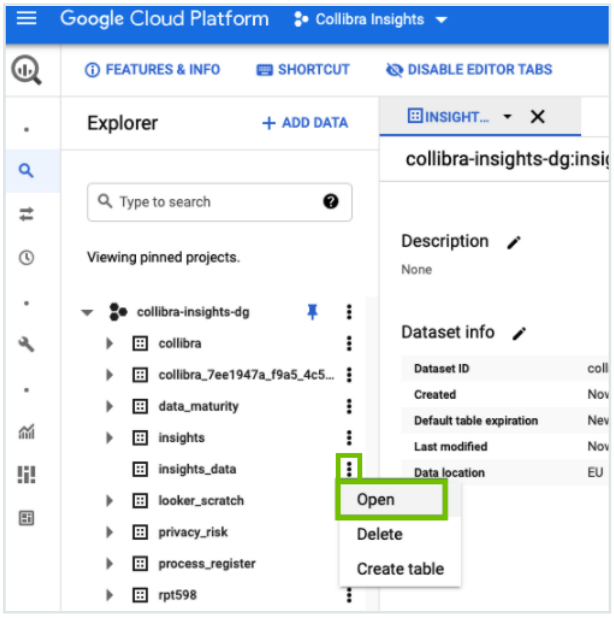
3. In the **Create dataset** side panel, enter the relevant information.



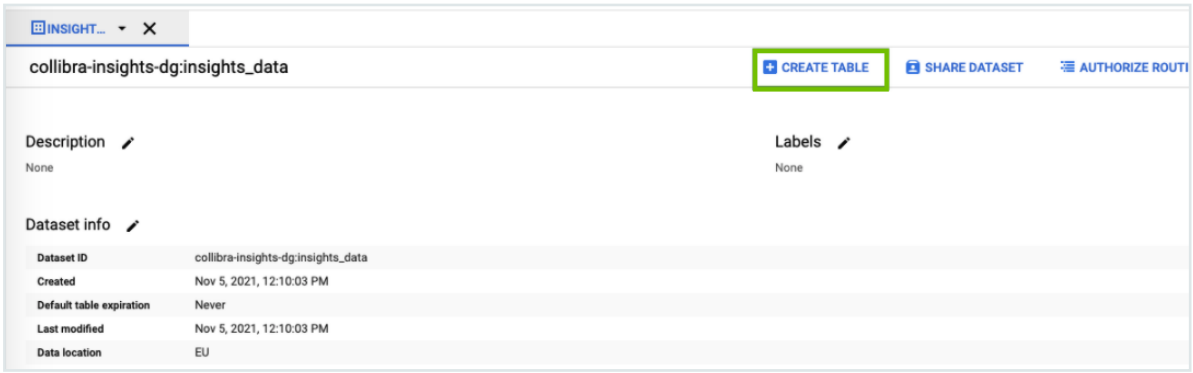
Field	Description
Dataset ID	A unique name for your dataset.
Data location	The geographical region of your data.

> **Tip** Contact your IT department for help with the correct value for your Collibra environment configuration and to ensure compliance with your company policies.

4. Click **Create dataset**.
5. In the **Explorer** page, find your newly created dataset, and then click ⋮ > **Open**.
   » The dataset view page opens.

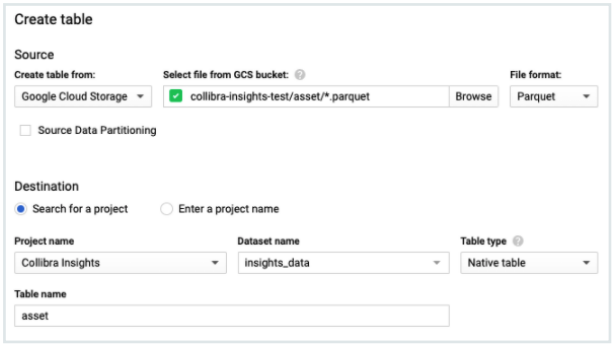


6. In the dataset view page, click **Create table**.



   » The **Create table** side panel opens.

7. In the **Create table** section, enter the relevant information.

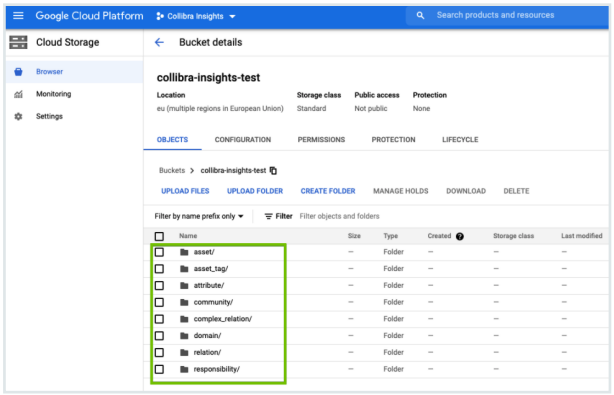


Field	Description
Create table from	Select **Google Cloud Storage**.
Select file from GCS bucket	Enter *<your-data-bucket-name>/<data type>/*.parquet* The bucket name is the one you created in Step 2.4 and the data type, for example, **asset**, is the sub-directory location. **Tip** Step 9 of this procedure prompts you to repeat Steps 6 through 8, for each data type, for example, asset, attributes, relation, responsibility, and so on.
File format	Select **Parquet**.
Source Data Partitioning	This checkbox must be cleared.
Search for a project / Enter a project name	Select the **Search for a project** option.
Project name	Select the project you are using for Insights deployment.
Dataset name	Select the database name you entered in Step 3.3.
Table type	Select **Native table**.

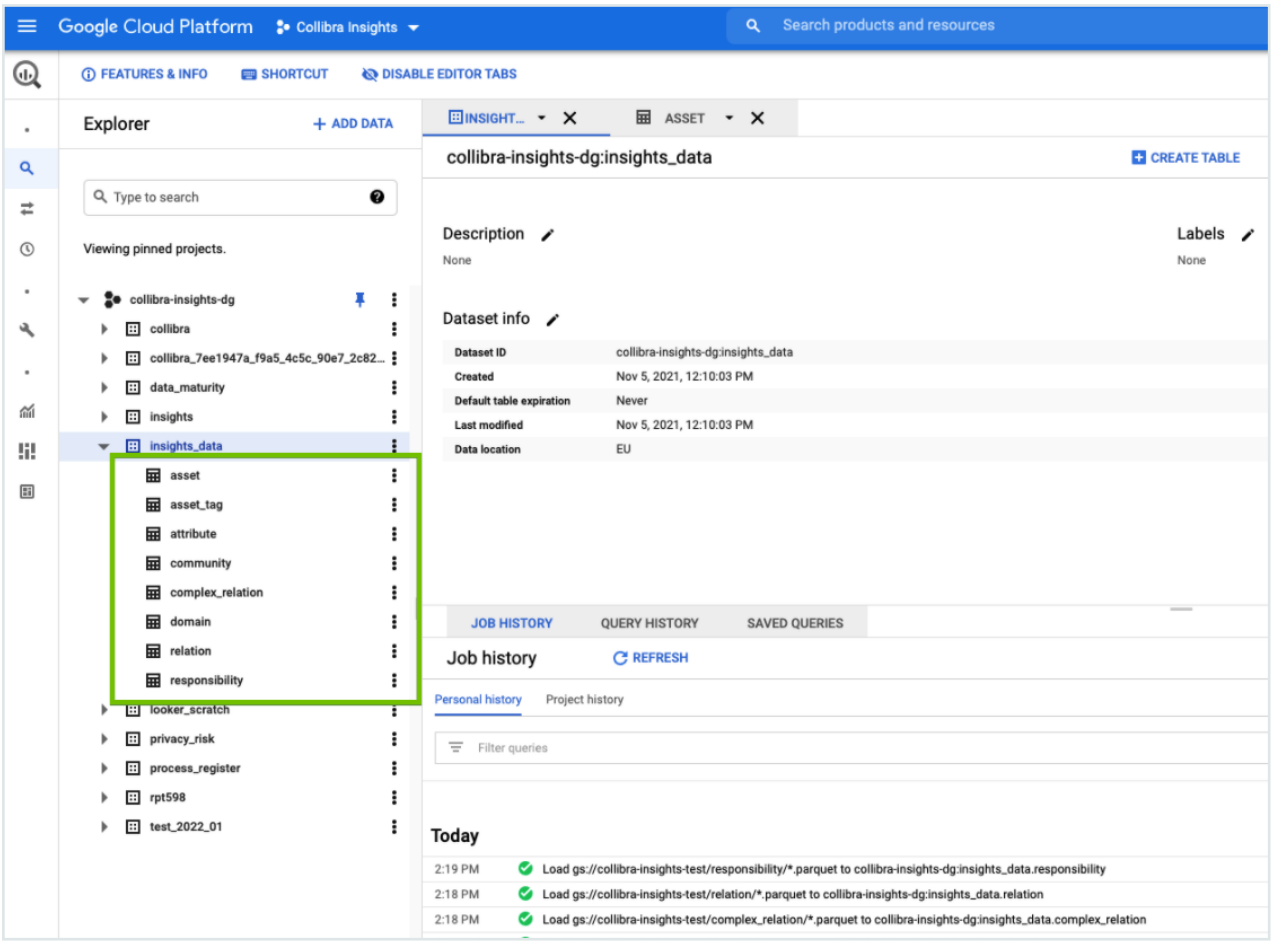
Field	Description
Table name	Enter the data type. This must match the data type entered for the sub-directory location in the **Select file from GCS bucket** field.

> **Tip** Step 9 of this procedure prompts you to repeat Steps 6 through 8, for each data type, for example, asset, attribute, relation, responsibility, and so on.

8. Click **Create table**.
9. Repeat Steps 6 through 8 for each data type in the file you downloaded in Step 1.1, for example, asset, relation, responsibility, and so on.



» When all the steps are completed, all table definitions are shown and Insights Data Access is fully configured.



Use a Cloud shell command

The objective of Steps 6 through 8 in the previous procedure can also be achieved by using a Cloud shell command.

Run the following command, where <customer-dataset-name> and <customer-data-bucket> are replaced with the relevant values.

```
bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.asset \
   gs://<customer-data-bucket>/asset/*.parquet
```

```
bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.asset_tag \
   gs://<customer-data-bucket>/asset_tag/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   customer-dataset-name>.attribute \
   gs://<customer-data-bucket>/attribute/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.community \
   gs://<customer-data-bucket>/community/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.complex_relation \
   gs://<customer-data-bucket>/complex_relation/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.domain \
   gs://<customer-data-bucket>/domain/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.relation \
   gs://<customer-data-bucket>/relation/*.parquet

bq load \
   --noreplace \
   --source_format=PARQUET \
   <customer-dataset-name>.responsibility \
   gs://<customer-data-bucket>/responsibility/*.parquet
```

Generate dashboard reports via GCP

After setting up Insights Data Access on Google Cloud Platform (GCP), you can generate dashboard reports configured in Collibra Console.

> **Tip** You can also generate dashboard reports via URL.

Prerequisites

- Set up Insights Data Access on AWSGCP.
- Ensure that you have the following:
  - The **Insights** global role, to be able to view a report in Collibra Platform.
  - A license for Tableau Desktop 2018.3.
  - A Tableau Server or Tableau Online account.
  - The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event
4. Configure the reporting options in Collibra Settings
5. Add a dashboard in Collibra and configure the Insights widget

Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
   - Process Register Report Template
   - Privacy and Risk Readiness Report Template
   - Data Maturity Report Template

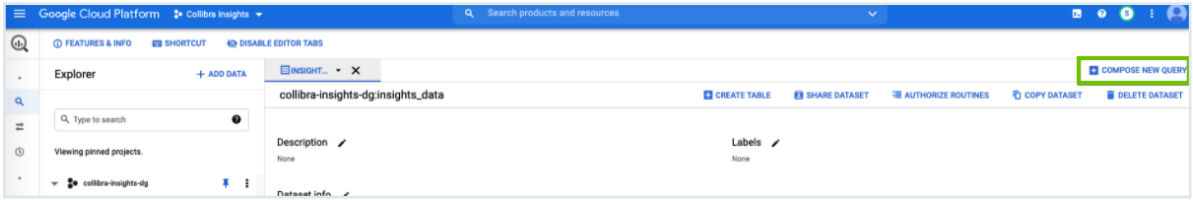
   » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

   » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

Step 2: Install the SQL views associated with the Tableau workbook files

> **Note**
> - If this is the first time you are installing the SQL views, you must perform this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views but are now installing a new version of a report, you must install the new SQL view, if one was provided with the new report.

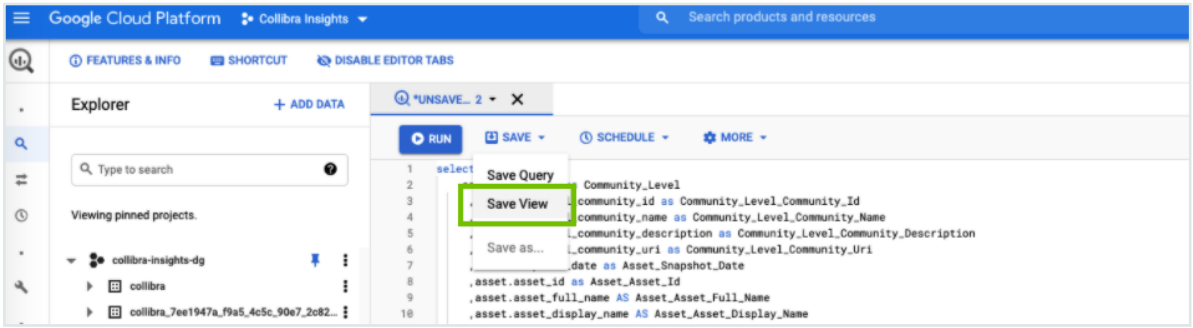
1. In the **BIG DATA** section of the GCP left-hand menu, click **BigQuery**.
2. On the **Explorer** page, click **COMPOSE NEW QUERY**.



3. From one of the report template packages you downloaded from Collibra Marketplace, drag one of the SQL files to a new query tab.
   » The code appears on the query tab.
4. In the code, change any occurrences of "<customer_dataset>" to "*<the-name-of-your-Insights-dataset>*".

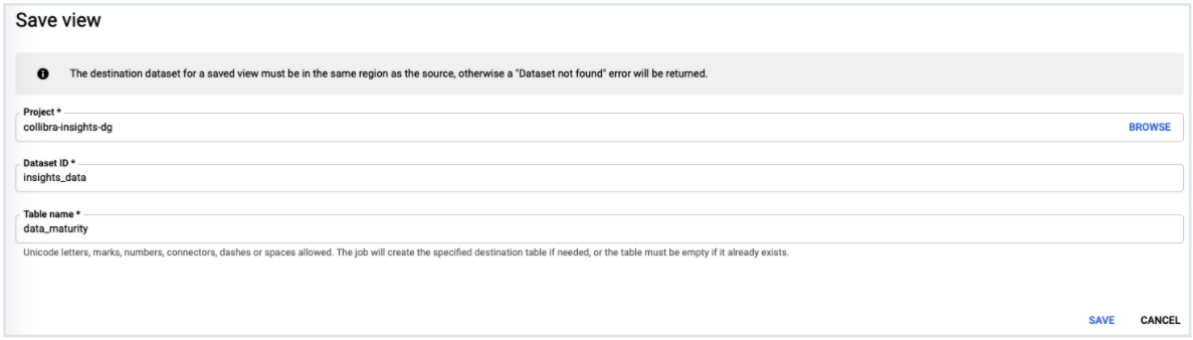
> **Tip** The dataset name is the value you entered in the Dataset ID field in Step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure.

5. Click **Save** > **Save View**.



» The **Save view** dialog box appears.

6. In the **Save view** dialog box, enter the relevant information.



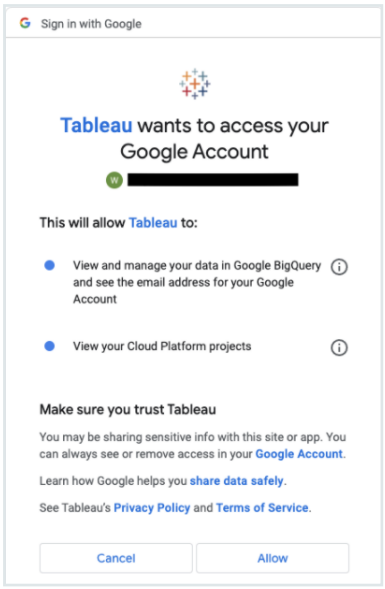
Field	Description
Project	The project you are using for Insights deployment.
Dataset ID	The value you entered in the Dataset ID field in Step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure.
Table name	The name of the report SQL file, for example, **data_maturity**.

7. Repeat Steps 3 through 5 for the SQL files in the other two report template packages.

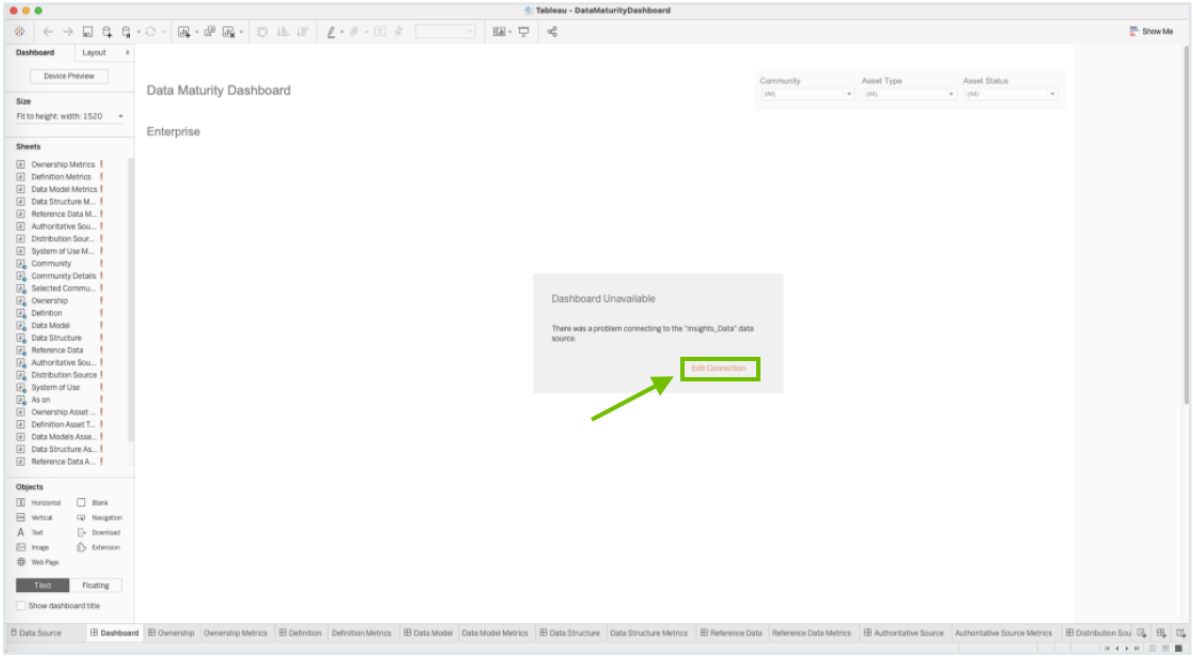
Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace (for example, **DataMaturity**).
2. Open the Tableau Workbook file (in this example, **DataMaturityDashboard.twbx**).
   » The Google sign in page appears.

3. Select the relevant Google account.
   » You are prompted to allow Tableau to access your Google account.

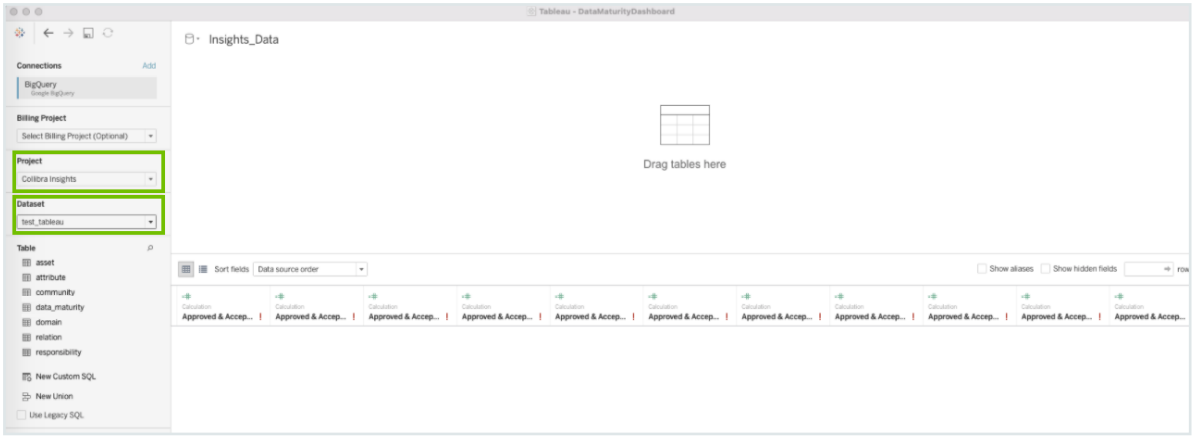


4. Ensure that both access options are selected, and then click **Allow**.
5. In the Tableau DataMaturityDashboard, click **Edit Connection** in the **Dashboard Unavailable** notification.



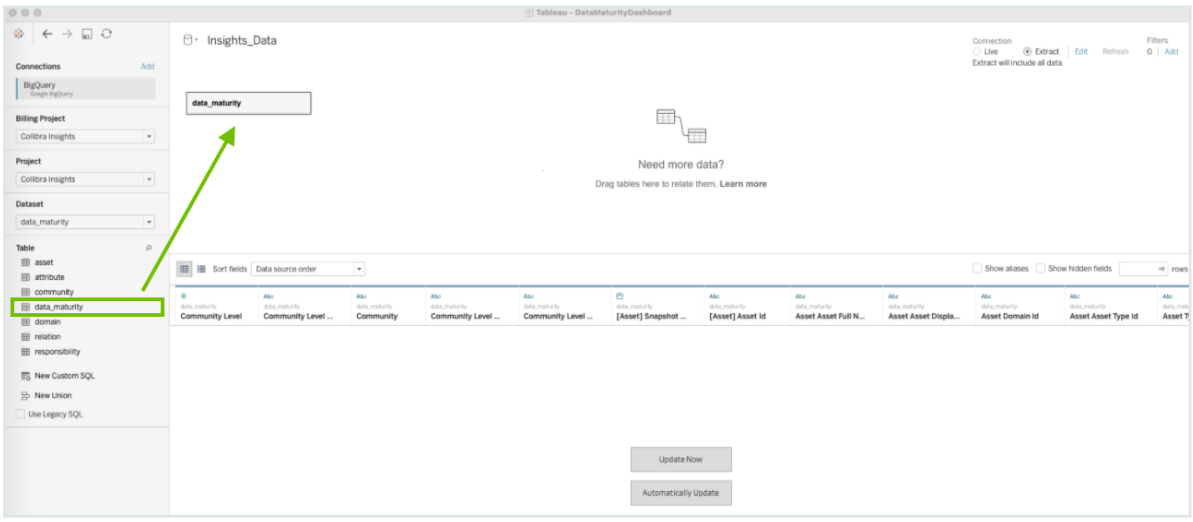
   » The **Data Source** tab opens.

6. Specify the following information.



Field	Description
Project	The project you are using for Insights deployment.
Dataset	What the user should choose.

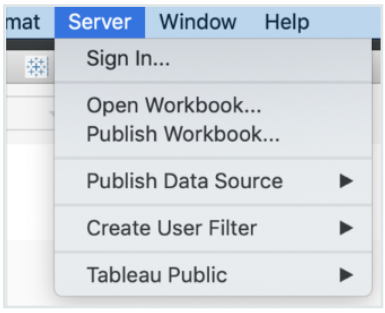
7. In the **Table** section, double-click the **data_maturity** view.
   » The view appears in the main frame, indicating that a link to the data is made.



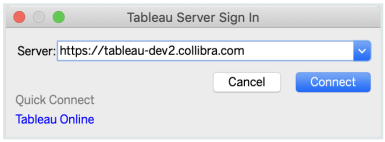
8. In the upper-right corner of the page, select an **Extract** connection.

9. In the lower-left corner of the page, click the **Dashboard** tab.
10. In the **Save As** dialog box, enter a name for the database extract file.

11. Click **Save**.
    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
12. When the dashboard is loaded, click or **File** > **Save**, to save the database extract.
13. On the main menu, click **Server**, and then click **Sign In**.

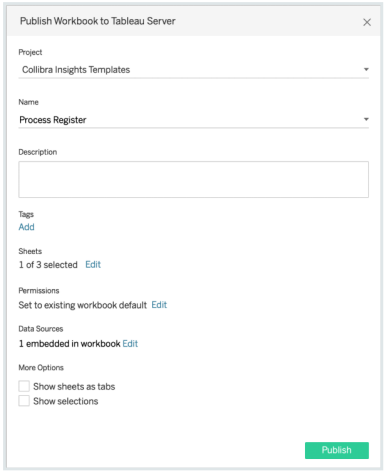


14. In the **Tableau Server Sign in** dialog box, click **Connect**.



15. Enter your Tableau sign in credentials.
16. Select the site to which you want to publish the Tableau workbook.

17. Click **Server**, and then select **Publish Workbook**.
    » The following dialog box appears.

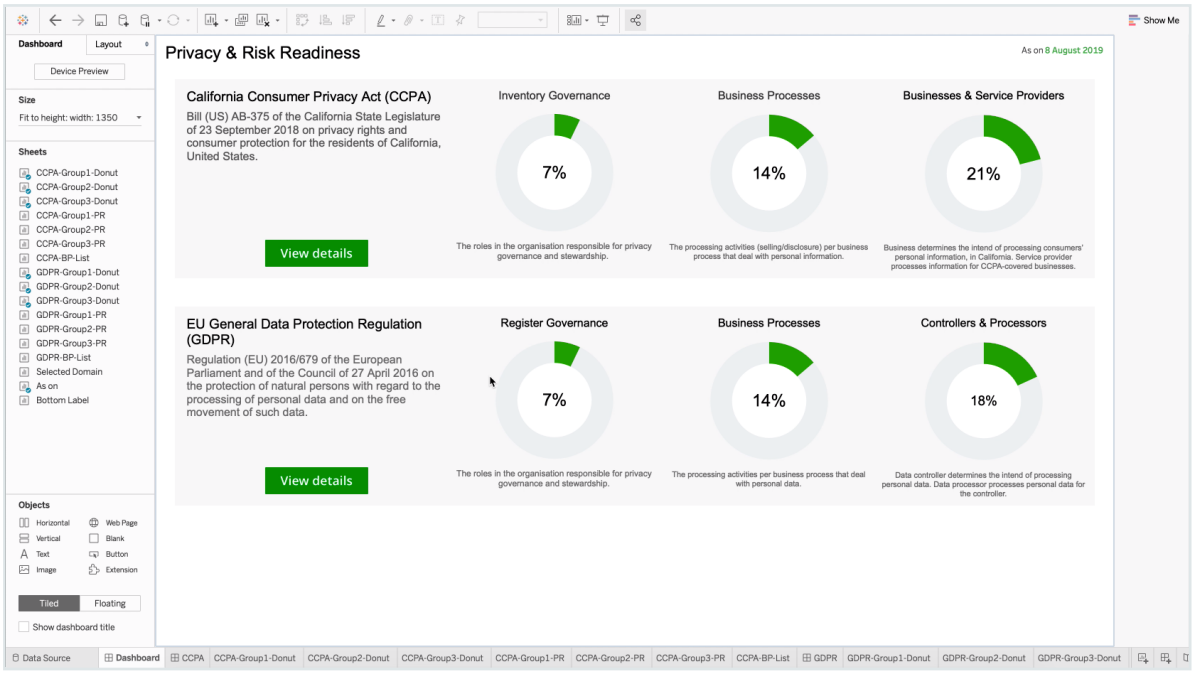


18. Enter the required information.
    For this task, the following fields are of interest.

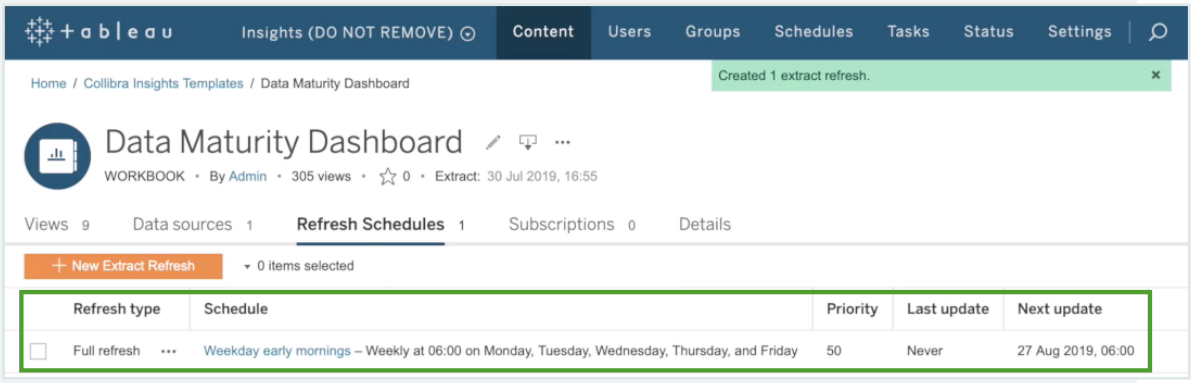
Property	Description
Project	The project to which you want to publish.
Name	The name of the workbook.
Refresh Schedule (Full Extract)	The frequency with which the currently cached database extract is purged and a new extract is cached. **Tip** Collibra recommends that you schedule a daily refresh.
Sheets	Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it. **Tip** To avoid clutter, Collibra recommends that you click **Edit** and then click **Only Dashboards**.

Property	Description
Data Sources	Determines: ◦ Whether the data is embedded in the workbook or published separately. ◦ How users authenticate with data sources. **Tip** Collibra strongly recommends the following settings: Click **Edit** and then: ◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**. This enables users to view the report without having to authenticate themselves every time. ◦ In the **Authentication** drop-down menu, select **Allow refresh access**. This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field.
More options	Additional publication options. **Include external files** determines whether or not external files are included in the publication. **Note** ◦ Only the **DataMaturityDashboard.twbx** file refers to external files. The **Include external files** option is not available for the other Tableau workbook files. ◦ Ensure that the **Include external files** is selected, so that the images included with the Tableau workbook files are included in the publication.

19. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

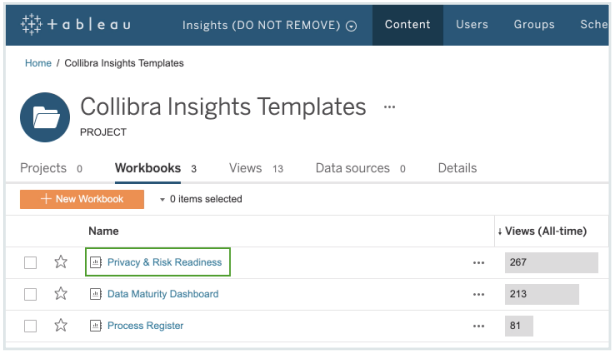


Tip On the **Refresh Schedules** tab, the refresh schedule event you configured is shown.

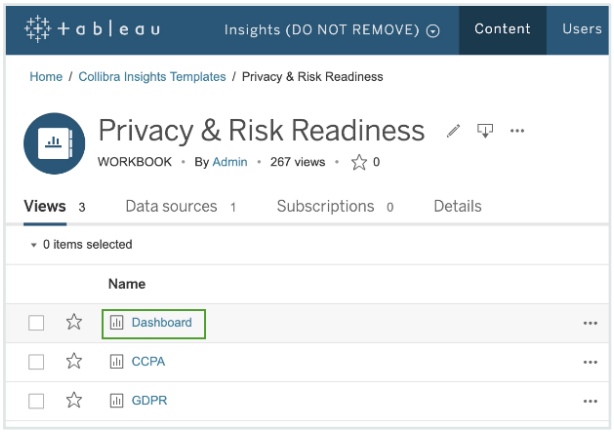


Step 4: Configure the reporting options in Collibra Settings

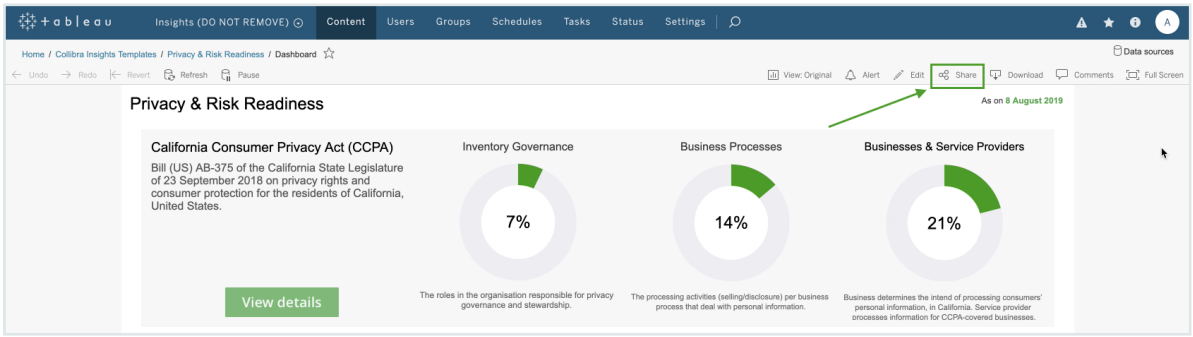
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example, **Privacy & Risk Readiness**.



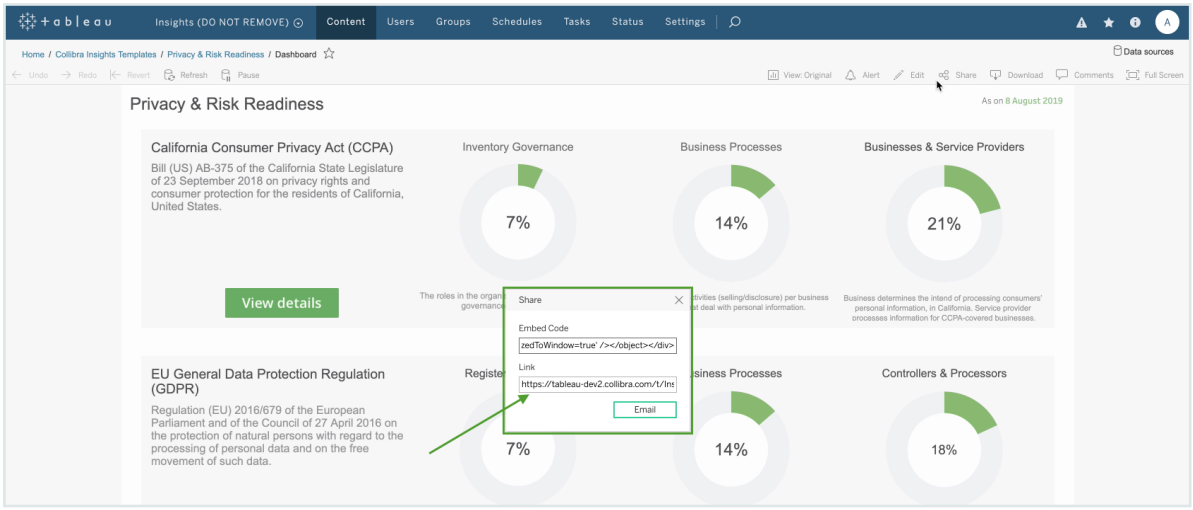
2. Click **Dashboard**.



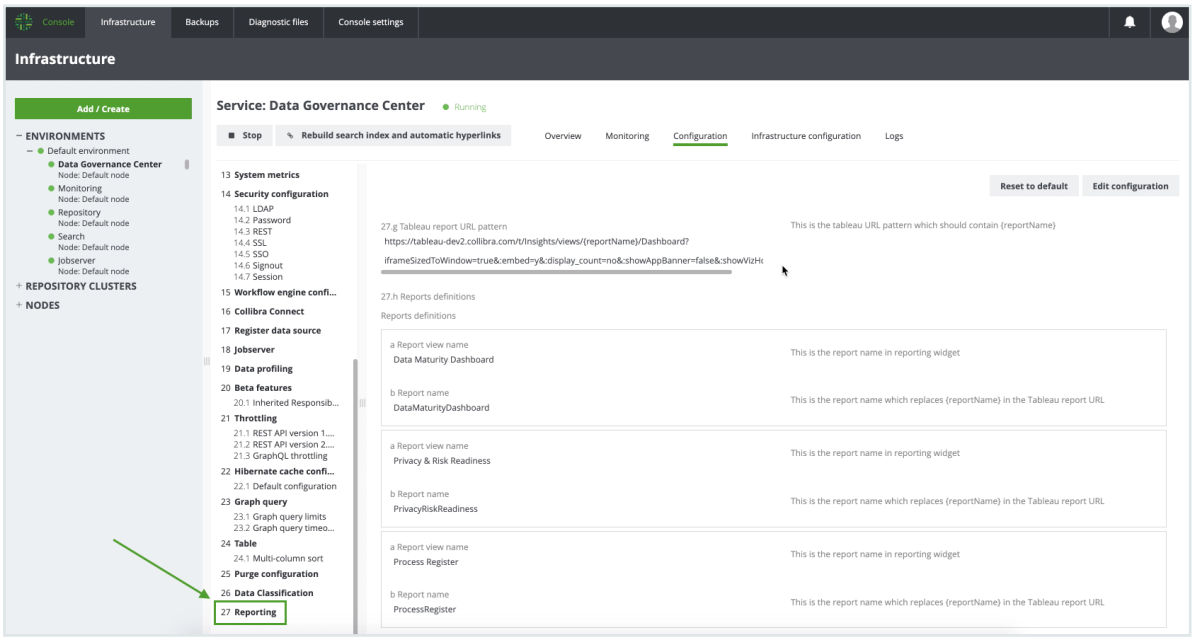
3. Click **Share**.



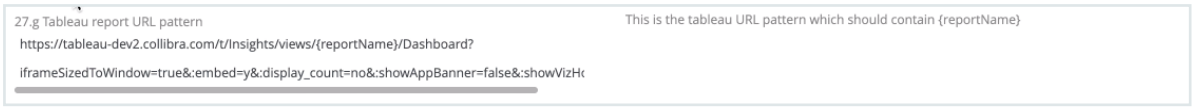
4. In the **Share** dialog box, copy the URL in the **Link** field.



5. Open Collibra Console with a user profile that has at least the **ADMIN** role.
   » Collibra Console opens with the **Infrastructure** page.
6. Click the Data Governance Center service of a Collibra environment.
   » The details of the DGC service are shown.
7. Click **Configuration**.
8. Click **Edit configuration**.
9. Scroll down the list of configuration options and click **Reporting**.



10. In field **Tableau report URL pattern**, paste the URL that you copied from the **Link** field in Tableau.



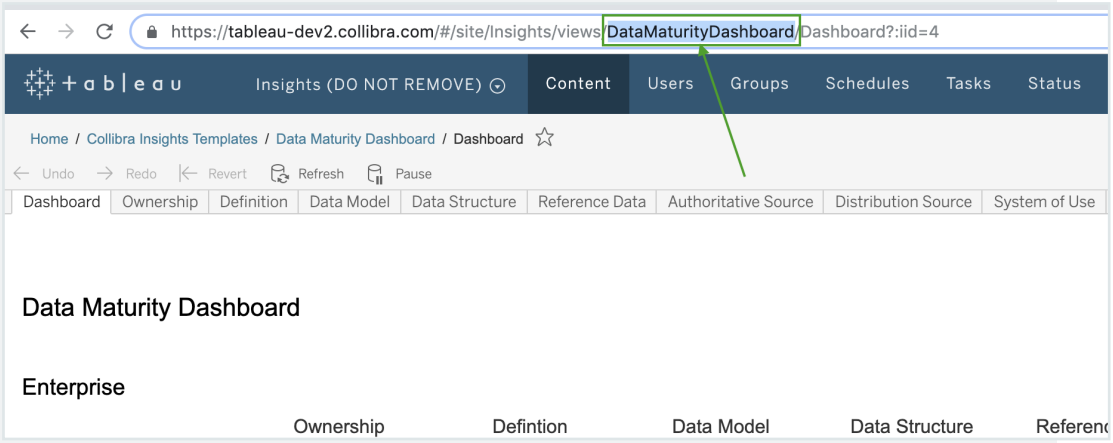
11. In the URL, replace the actual report name (such as *DataMaturityDashboard*) by *{reportName}*, for example: *https://tableau-dev2.<your-Collibra-Data-Intelligence-Cloud-environment-URL>/t/Insights/views/{reportName}/iframeSizedToWindow=true&...*
12. Under **Reports definitions**, click **Add**.

> **Note** You must perform this step for all three reports.

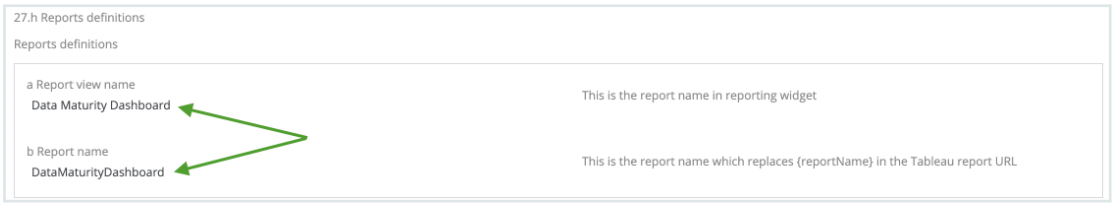
    - In **a Report view name**, enter the name of a report as you want it to appear on the report button in the Insights widget, for example:
        - Data Maturity Dashboard
        - Privacy & Risk Readiness
        - Process Register

    - In **b Report name**, enter the report name, for example:
        - DataMaturityDashboard
        - PrivacyRiskReadiness
        - ProcessRegister

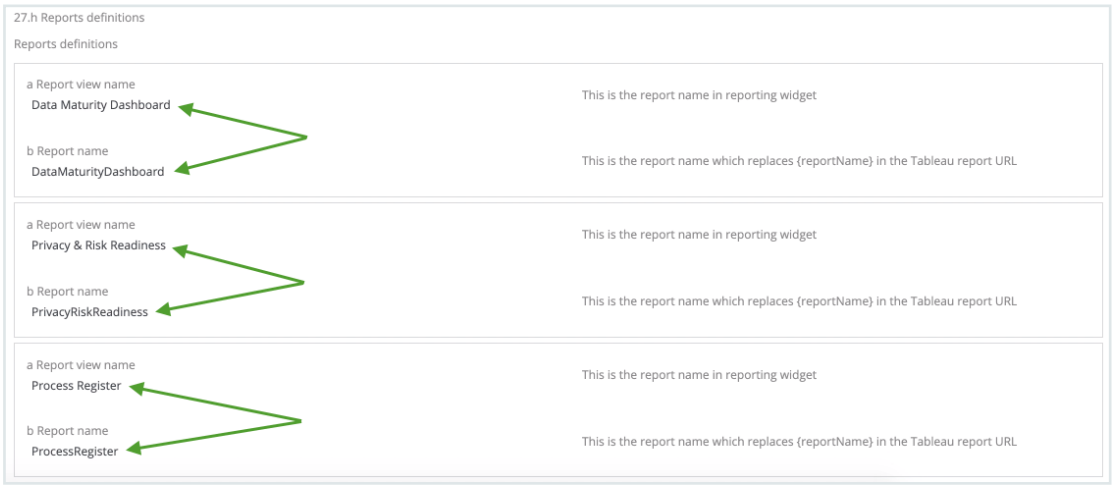
Tip Use the name as it appears in the URL of the Tableau report, for example, **DataMaturityDashboard**.



The settings in Console should look similar to the following image:



- Click **Add**, and then add the report definitions for the remaining two reports.



13. Click **Save all**.

Step 5: Add a dashboard in Collibra and configure the Insights widget

> **Tip** To facilitate the viewing of each report, we recommend that you add and configure a separate dashboard for each report. To do so, you must complete this step for each report.

1. Create a dashboard.

   > **Tip** When entering the required information, in the **Layout** field, select **1 Column**.

2. Click ⋮ → **Edit Dashboard**.
3. Drag the **Collibra Insights** widget from the **Widgets** section to the dashboard.
   » The three reports that you configured in Collibra Settings are shown.
4. Select the report you want to show on the dashboard.
5. Click **Save**.
6. In the upper-right corner of the page, click **Save**.
   » The report is shown on the dashboard you created.

What's next?

Optionally, you can:

- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

Generate dashboard reports via URL on GCP

After setting up Insights Data Access on Google Cloud Platform, you can generate a dashboard report via a URL, from tools such as Tableau Online, Power BI, Qlik, or ThoughtSpot.

Prerequisites

Ensure that you have the following:

- The **Insights** global role, to be able to view a report in Collibra Platform.
- A license for Tableau Desktop 2018.3.
- A Tableau Server or Tableau Online account.
- The **athena:GetQueryResultsStream** AWS permission, to be able to get the reporting data from AWS.

Steps

1. Download the report templates from Collibra Marketplace
2. Install the SQL views associated with the Tableau workbook files
3. Publish the workbook files to your Tableau Server or Tableau Online account and configure a database extract refresh schedule event
4. Obtain the shareable link
5. Add a dashboard in Collibra and add your report via URL

Step 1: Download the report templates from Collibra Marketplace

1. Go to Collibra Marketplace.
2. Download the following three report template packages:
    - Process Register Report Template
    - Privacy and Risk Readiness Report Template
    - Data Maturity Report Template

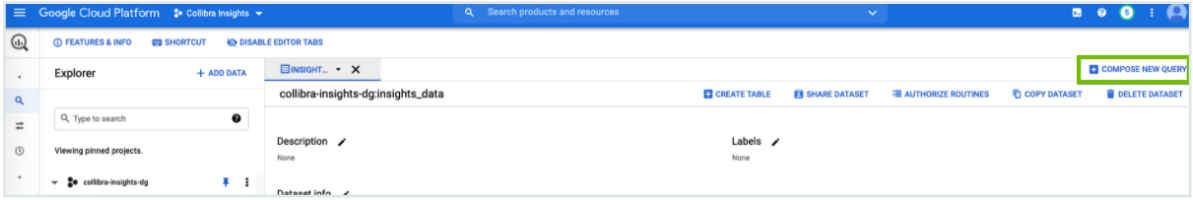
    » The three ZIP files are downloaded to your hard disk.
3. Extract the ZIP files on your local computer.

    » Folders with the names of the ZIP files are created. Each folder contains a SQL file and a TWBX file.

Step 2: Install the SQL views associated with the Tableau workbook files

> **Note**
> - If this is the first time you are installing the SQL views, you must perform this step for each of the Tableau workbook files.
> - If you have previously installed the SQL views but are now installing a new version of a report, you must install the new SQL view, if one was provided with the new report.

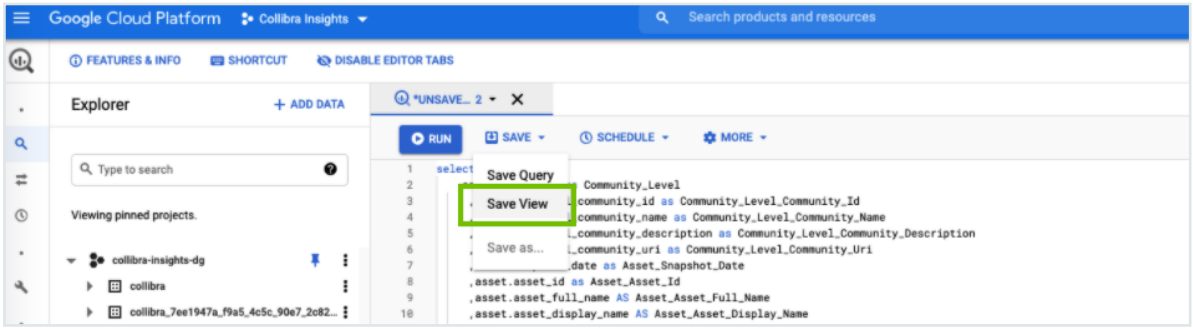
1. In the **BIG DATA** section of the GCP left-hand menu, click **BigQuery**.
2. On the **Explorer** page, click **COMPOSE NEW QUERY**.



3. From one of the report template packages you downloaded from Collibra Marketplace, drag one of the SQL files to a new query tab.
   » The code appears on the query tab.
4. In the code, change any occurrences of "<customer_dataset>" to "<*the-name-of-your-Insights-dataset*>".

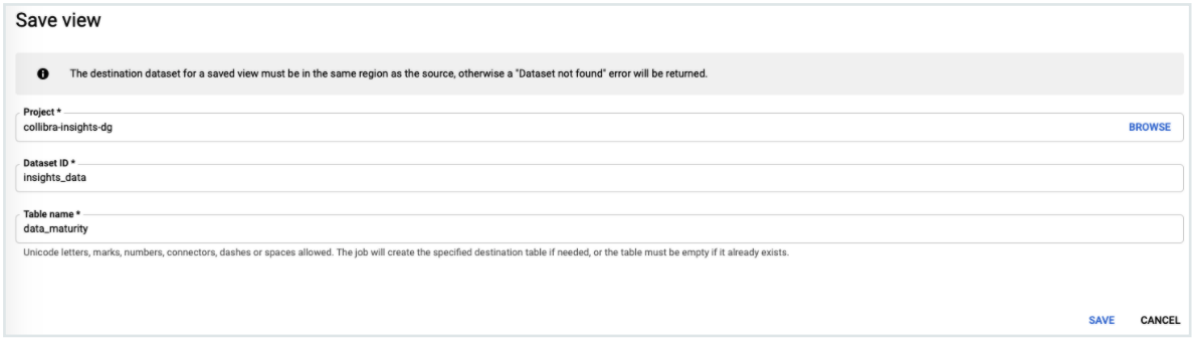
> **Tip** The dataset name is the value you entered in the Dataset ID field in Step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure.

5. Click **Save** > **Save View**.



   » The **Save view** dialog box appears.

6. In the **Save view** dialog box, enter the relevant information.



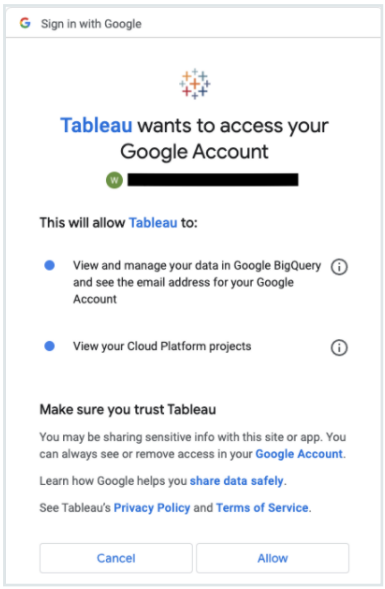
Field	Description
Project	The project you are using for Insights deployment.
Dataset ID	The value you entered in the Dataset ID field in Step 3 of the Create the Reporting Data Layer on Google Cloud Platform procedure.
Table name	The name of the report SQL file, for example, **data_maturity**.

7. Repeat Steps 3 through 5 for the SQL files in the other two report template packages.

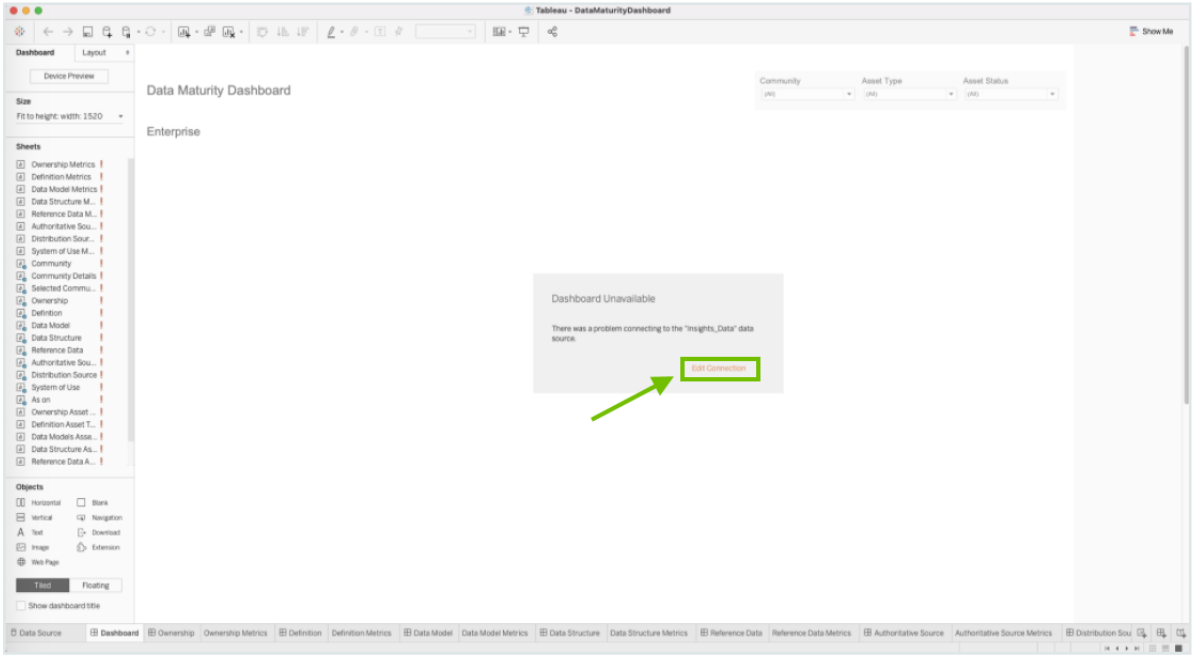
Step 3: Publish the workbook files to your Tableau Server or Online account and configure a refresh schedule event

1. On your hard drive, go to the folder of one of the report templates you downloaded from Collibra Marketplace (for example, **DataMaturity**).
2. Open the Tableau Workbook file (in this example, **DataMaturityDashboard.twbx**).
   » The Google sign in page appears.

3. Select the relevant Google account.
   » You are prompted to allow Tableau to access your Google account.

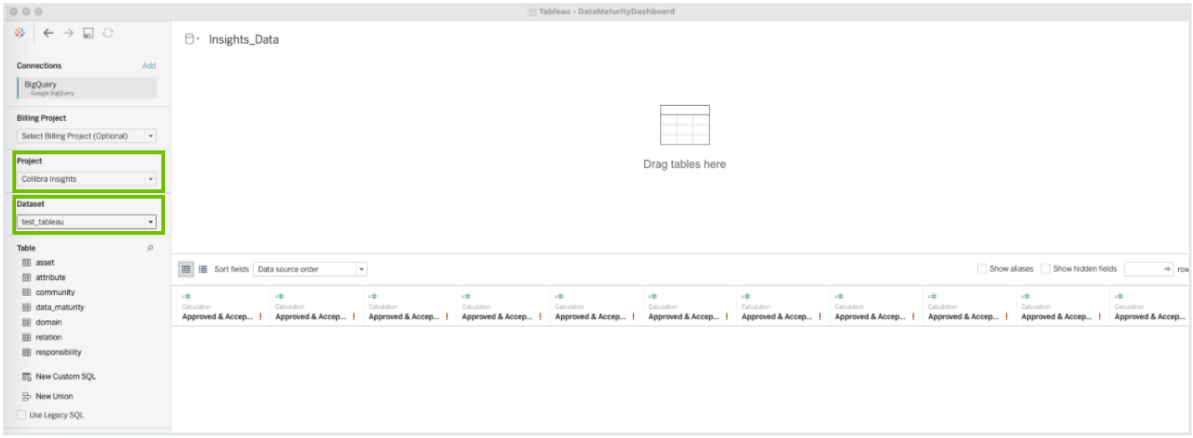


4. Ensure that both access options are selected, and then click **Allow**.
5. In the Tableau DataMaturityDashboard, click **Edit Connection** in the **Dashboard Unavailable** notification.



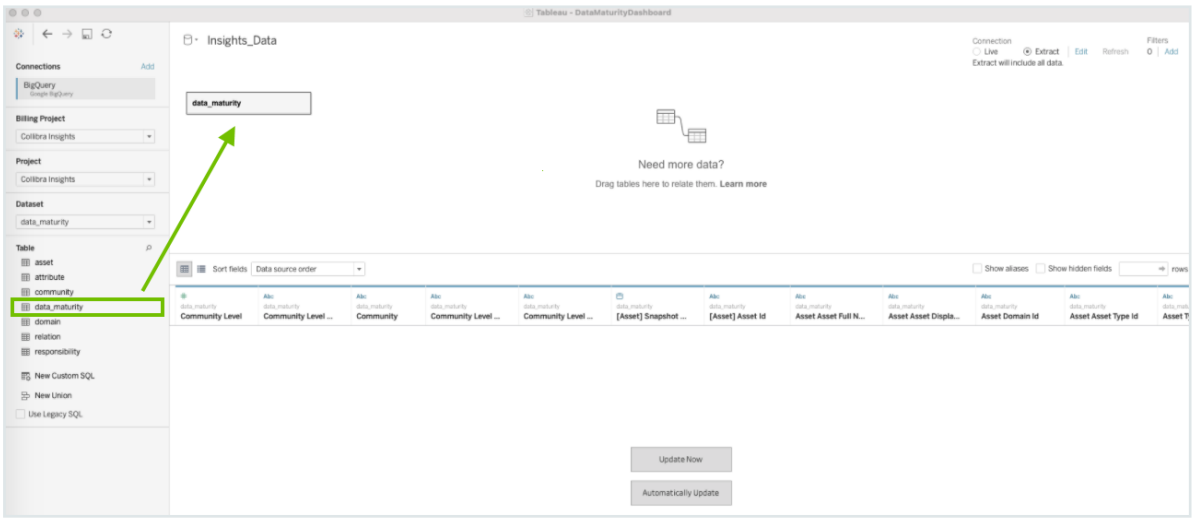
   » The **Data Source** tab opens.

6. Specify the following information.



Field	Description
Project	The project you are using for Insights deployment.
Dataset	What the user should choose.

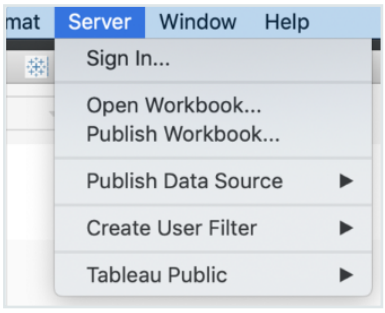
7. In the **Table** section, double-click the **data_maturity** view.
   » The view appears in the main frame, indicating that a link to the data is made.



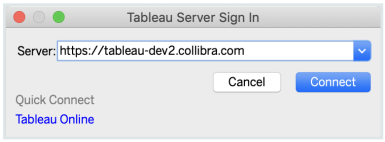
8. In the upper-right corner of the page, select an **Extract** connection.

9. In the lower-left corner of the page, click the **Dashboard** tab.
10. In the **Save As** dialog box, enter a name for the database extract file.

11. Click **Save**.
    » The extract file is saved and a database extract is cached. This can take several minutes to complete.
12. When the dashboard is loaded, click or **File** > **Save**, to save the database extract.
13. On the main menu, click **Server**, and then click **Sign In**.

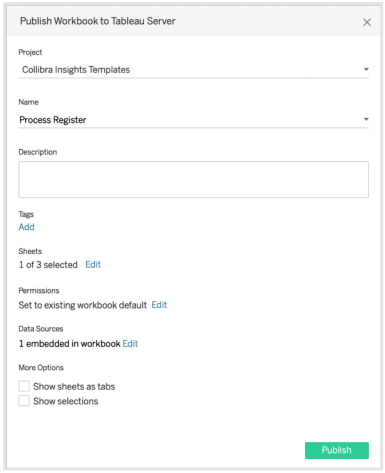


14. In the **Tableau Server Sign in** dialog box, click **Connect**.



15. Enter your Tableau sign in credentials.
16. Select the site to which you want to publish the Tableau workbook.

17. Click **Server**, and then select **Publish Workbook**.
    » The following dialog box appears.

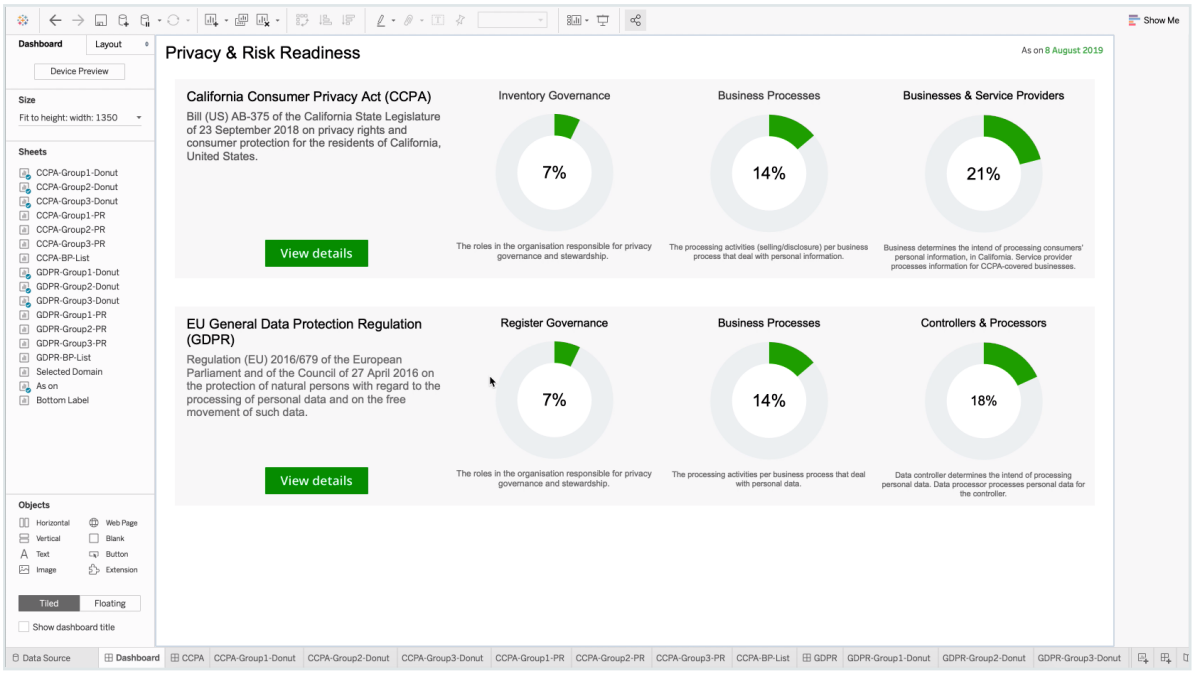


18. Enter the required information.
    For this task, the following fields are of interest.

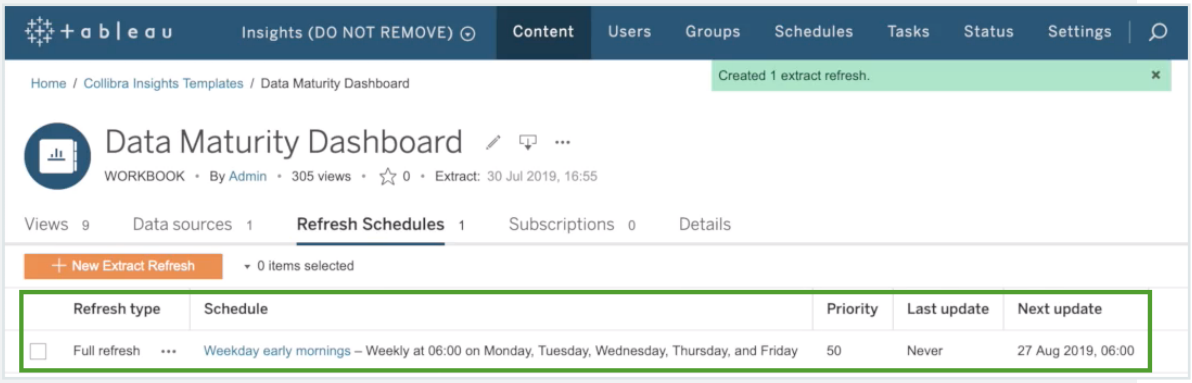
Property	Description
Project	The project to which you want to publish.
Name	The name of the workbook.
Refresh Schedule (Full Extract)	The frequency with which the currently cached database extract is purged and a new extract is cached. **Tip** Collibra recommends that you schedule a daily refresh.
Sheets	Allows you to specify which sheets to include in the publication. You can hide sheets if you want to publish a dashboard without showing all the worksheets that were used to create it. **Tip** To avoid clutter, Collibra recommends that you click **Edit** and then click **Only Dashboards**.

Property	Description
Data Sources	Determines: ◦ Whether the data is embedded in the workbook or published separately. ◦ How users authenticate with data sources. **Tip** Collibra strongly recommends the following settings: Click **Edit** and then: ◦ In the **Publish Type** drop-down menu, select **Embedded in workbook**. This enables users to view the report without having to authenticate themselves every time. ◦ In the **Authentication** drop-down menu, select **Allow refresh access**. This automatically refreshes the extract of the database. The frequency with which the cache is refreshed is determined by the value you enter in the **Refresh Schedule** field.
More options	Additional publication options. **Include external files** determines whether or not external files are included in the publication. **Note** ◦ Only the **DataMaturityDashboard.twbx** file refers to external files. The **Include external files** option is not available for the other Tableau workbook files. ◦ Ensure that the **Include external files** is selected, so that the images included with the Tableau workbook files are included in the publication.

19. Click **Publish**.
    » The report is published to your Tableau Server or Online account.

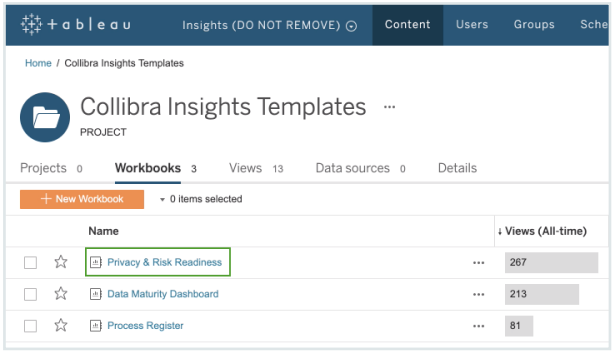


Tip On the **Refresh Schedules** tab, the refresh schedule event you configured is shown.

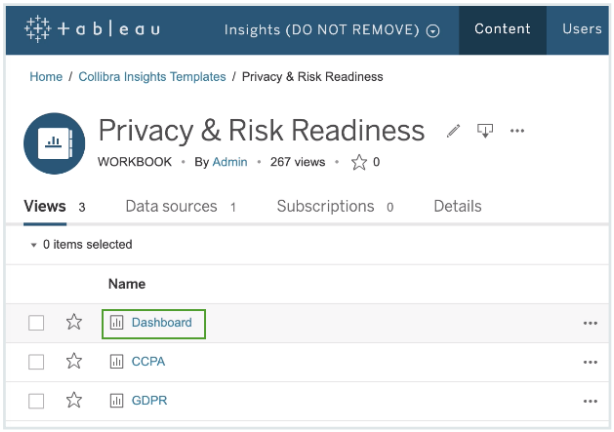


Step 4: Obtain the shareable link

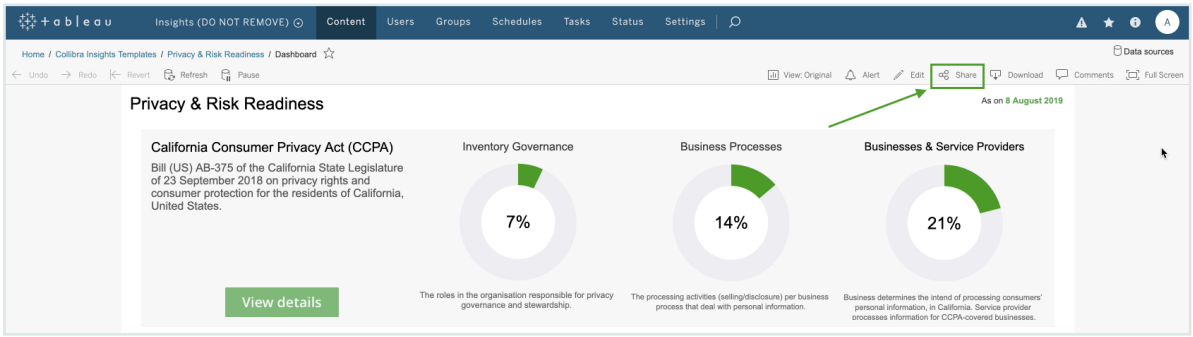
1. On the **Workbooks** tab in Tableau, click one of the workbook files, for example, **Privacy & Risk Readiness**.



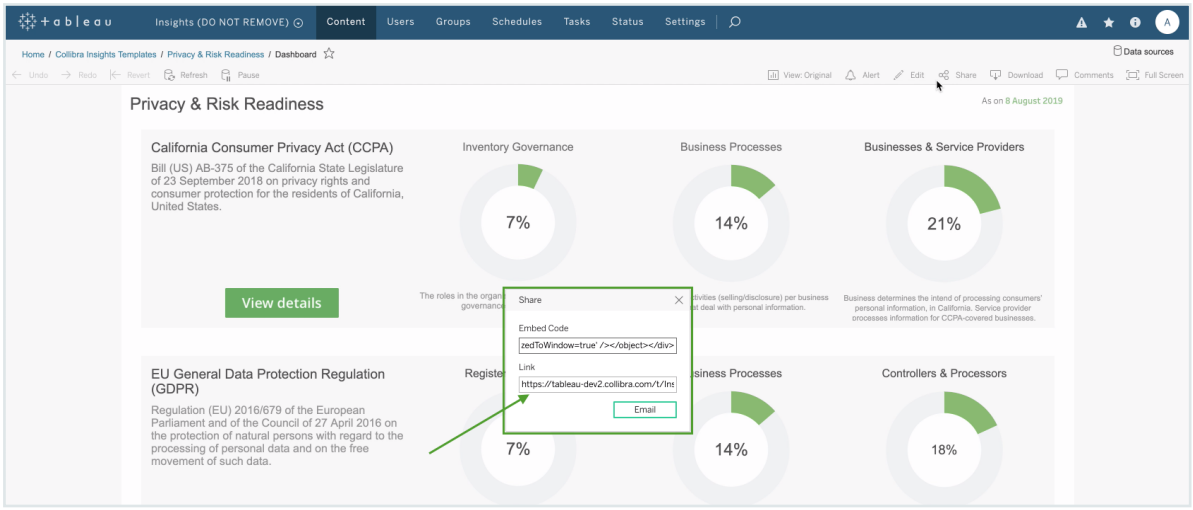
2. Click **Dashboard**.



3. Click **Share**.



4. In the **Share** dialog box, copy the URL in the **Link** field.



Step 5: Add a dashboard in Collibra and then add your report via URL

> **Tip** To facilitate the viewing of each report, consider adding and configuring a separate dashboard for each report. To do so, you must complete this step for each report.

1. Create a dashboard.

   > **Tip** When entering the required information, in the **Layout** field, select **1 Column**.

2. Add the **Collibra Insights** widget to the dashboard.
3. Configure the **Collibra Insights** widget.
   » The report is shown on the dashboard you created.

What's next?

Optionally, you can:

- Remove non-applicable regulation placeholder.
- Improve the visual output of the Data Maturity report.

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 or the refresh time?

No.

Why is there a difference in the count between Insights Data Access and Collibra Public API?

Insights Data Access is a snapshot of data from a specific point in time, whereas an API call provides real-time data. This could lead to a difference in the count. Other factors that could contribute to the difference include the following:

- Asset types that can't be managed and viewed via the Asset Type Operating Model (for example, Complex Relations and Workflow Definitions) aren't included in Insights Data Access. Attributes, communities, domains, and relations of such assets are also not included.
- Only responsibilities that are directly assigned at the asset level or domain level are included in Insights Data Access; inherited responsibilities from the community level are excluded.

CHAPTER 25

Usage Analytics

Usage Analytics is a usage-focused dashboard that provides a snapshot of who is using your Collibra environment and how they are engaging with it. It shows you the behavioral data of your users and associated analytics within Collibra.

Usage Analytics simplifies tracking the adoption of your environment by providing key metrics in near real time, with data refreshed every 2 hours. The Usage Analytics dashboard contains various sections featuring trend charts to help you gain insights into the adoption and usage of your environment. You can use the dashboard to monitor user activity, understand the total number of assets visited, and identify popular resources. Additionally, you can view the usage over time, observe trends, measure success, allocate efforts effectively, and maximize your investment. In essence, Usage Analytics can help ensure that your decisions are informed when improving the efficiency and value of your environment.

> **Example** Suppose that you have trained Business Stewards on how to use your Collibra environment and have run a campaign within your organization to help drive the usage of Collibra. If you want to measure the effectiveness of your campaign, you can use the Usage Analytics dashboard to check if those Business Stewards signed in to your Collibra environment during a specific period.

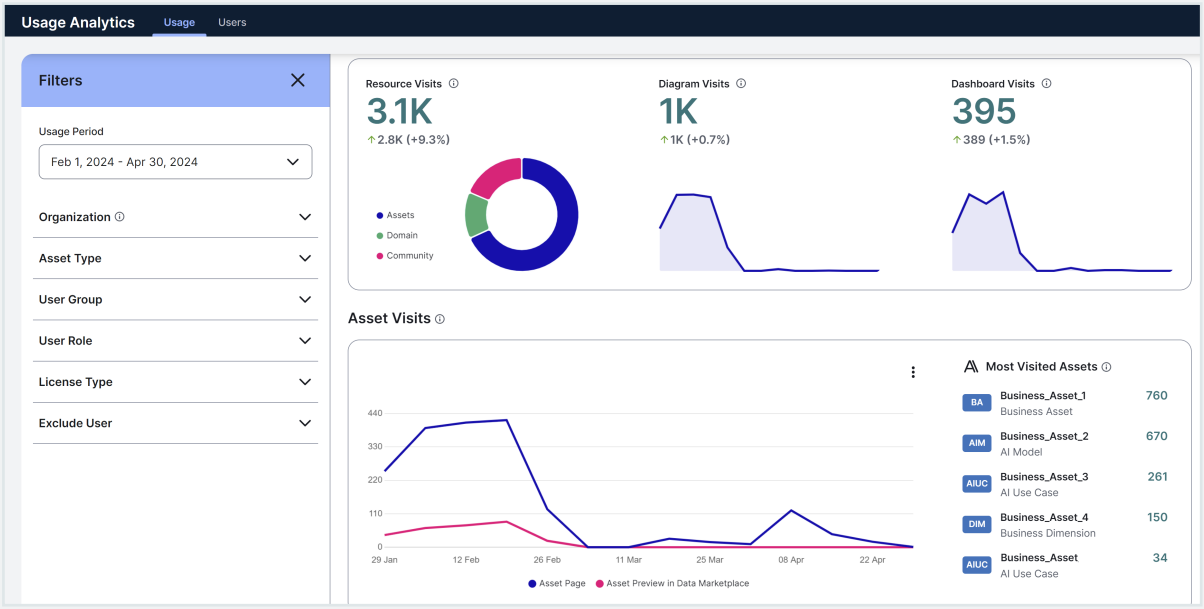
Some of the personas who can benefit from Usage Analytics are as follows:

- Customers who want to know who is using their Collibra environment and how they are engaging with it.
- Business Stewards who want to know if the content that they curate is useful.

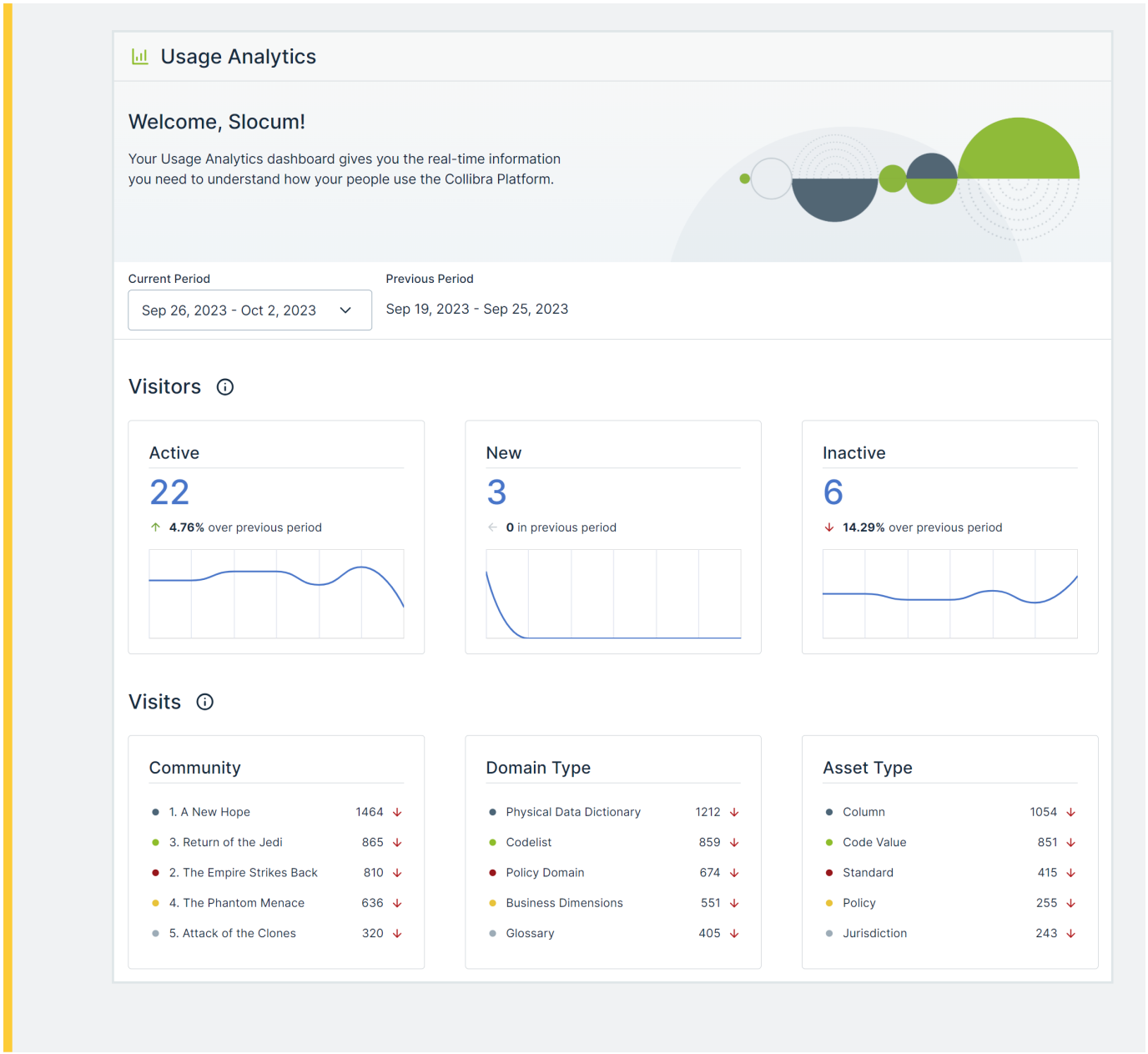
- Community managers who want to know which subcommunities are active and which need more exposure.
- End users who want to see better recommendations on their content feed.

Important
The Usage Analytics documentation is divided into the following sections:

- **New Usage Analytics:** Contains documentation for the Usage Analytics dashboard that is in the latest UI.



- **Old Usage Analytics:** Contains documentation for the Usage Analytics dashboard that is available only in the previous, classic UI.


Usage Analytics
Welcome, Slocum!
Your Usage Analytics dashboard gives you the real-time information you need to understand how your people use the Collibra Platform.
Current Period
Sep 26, 2023 - Oct 2, 2023
Previous Period
Sep 19, 2023 - Sep 25, 2023
Visitors
Active
22
4.76% over previous period
New
3
0 in previous period
Inactive
6
14.29% over previous period
Visits
Community
1. A New Hope 1464
3. Return of the Jedi 865
2. The Empire Strikes Back 810
4. The Phantom Menace 636
5. Attack of the Clones 320
Domain Type
Physical Data Dictionary 1212
Codelist 859
Policy Domain 674
Business Dimensions 551
Glossary 405
Asset Type
Column 1054
Code Value 851
Standard 415
Policy 255
Jurisdiction 243

Note

- Usage Analytics is a free, out-of-the-box product in your Collibra environment. It leverages events that are captured, stored, and processed by Collibra, in accordance with the regional requirements for customer instances. This data is made available only to customers. No third-party systems can access this data.
- Dates in Usage Analytics are stored in the Coordinated Universal Time (UTC) standard in the database but are shown in the user's local time zone in the interface. When the data is downloaded, the dates remain in UTC in the downloaded files.
- Usage Analytics doesn't collect the events that occurred before it was enabled.
- Usage Analytics was introduced in Collibra 2022.11, meaning that you can view the data on asset visits and user interactions on the Usage Analytics dashboard from November 2022. If you began using Collibra after November 2022, you can view the data starting from your onboarding date. However, data on communities, domains, dashboards, and diagrams, exclusive to the new dashboard, was added in January 2024. Therefore, this particular set of data is available from January 2024, and only in the latest UI.

Open Usage Analytics

Prerequisites

You have either the **Sysadmin** global role or one of the following global permissions:

- **Insights** > **View Usage Analytics summary**
  - This permission masks any user names in the CSV files downloaded from the new Usage Analytics dashboard.
  - With this permission, you can view only a summary of the data on the old Usage Analytics dashboard. While this permission affects only the view of the dashboard, all the Usage Analytics events and detailed data will still be captured and stored.
- **Insights** > **View Usage Analytics reports**
  - This permission does not mask any user names in the CSV files downloaded from the new Usage Analytics dashboard.
  - With this permission, you can view detailed data by clicking the cards on the old Usage Analytics dashboard. In addition, you can download the data.

Note
- The **Insights** global role is available out of the box.
- If you have both **View Usage Analytics summary** and **View Usage Analytics reports** permissions, the latter permission takes priority.

Steps

On the main toolbar, click → **Usage Analytics**.
» The Usage Analytics dashboard opens.

New Usage Analytics

Note This topic is specific to the Usage Analytics dashboard that is in the latest UI.

The new Usage Analytics dashboard has the following key capabilities:

- Filter metrics by organization, asset type, user group, user role, license type, in addition to the usage period.
- Filter out metrics related to administrators or deactivated users.
- Interact with charts.
- Download the metrics as a CSV file.

Filters

Note This topic is specific to the Usage Analytics dashboard that is in the latest UI.

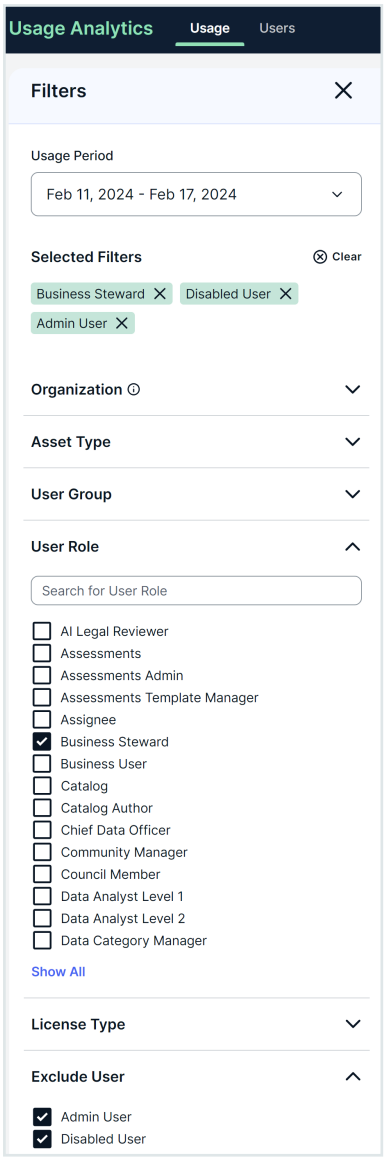
To focus on the metrics that are relevant to your needs, you can refine the metrics shown on the Usage Analytics dashboard by using the **Filters** pane. For example, if you want to see how Business Stewards use your Collibra environment, you can use the **User Role** filter. Additionally, if you don't want

to see any metrics related to the usage of your environment by administrators or deactivated users, you can use the **Exclude User** filter.

By default, the dashboard shows the metrics for the last 3 months. You can, however, select a different time period in the **Usage Period** field on the **Filters** pane, including your own period. The value you select in the **Usage Period** filter persists across both the **Usage** tab and the **User** tab. Conversely, the values you select in the other filters don't persist across the two tabs. For example, if you select **Business Steward** in the **User Role** filter on the **Usage** tab, and then switch to the **Users** tab, the filter is removed.

The **Asset Type** filter shows only those asset types that have had visits. For example, if no Business Term assets have been visited, then the **Business Term** option isn't shown in the **Asset Type** filter. Consider another example in which only Column assets from the Data Stewards community have been visited. If you select a different community in the **Organization** filter, then the **Column** option isn't shown in the **Asset Type** filter.

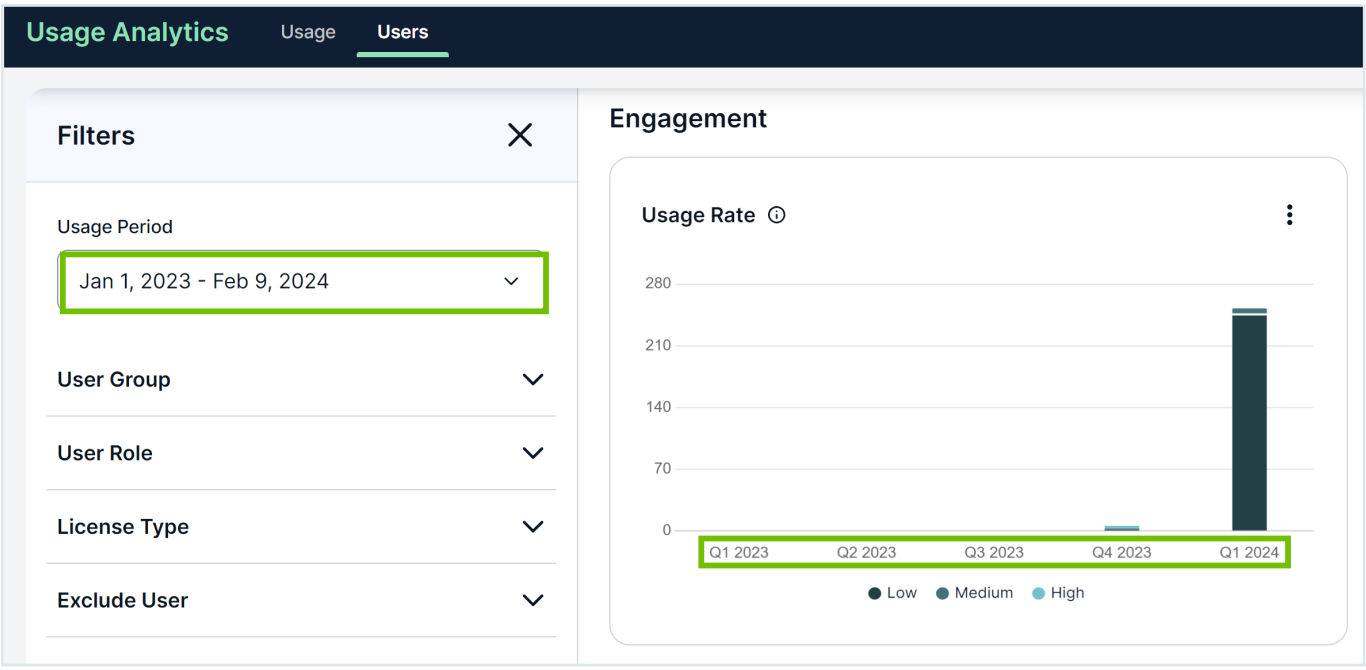
The filters you add are instantly applied to the dashboard and appear in the **Selected Filters** section in the **Filters** pane. To remove a single filter, click X next to it. To remove all the filters at once, click **Clear**.



Intervals

> **Note** This topic is specific to the Usage Analytics dashboard that is in the latest UI.

The time intervals shown in trend charts change depending on the usage period. For example, if the usage period you select spans more than 1 year, the period is divided into quarterly intervals. Similarly, for a usage period of 3 months, the period is divided into weekly intervals.



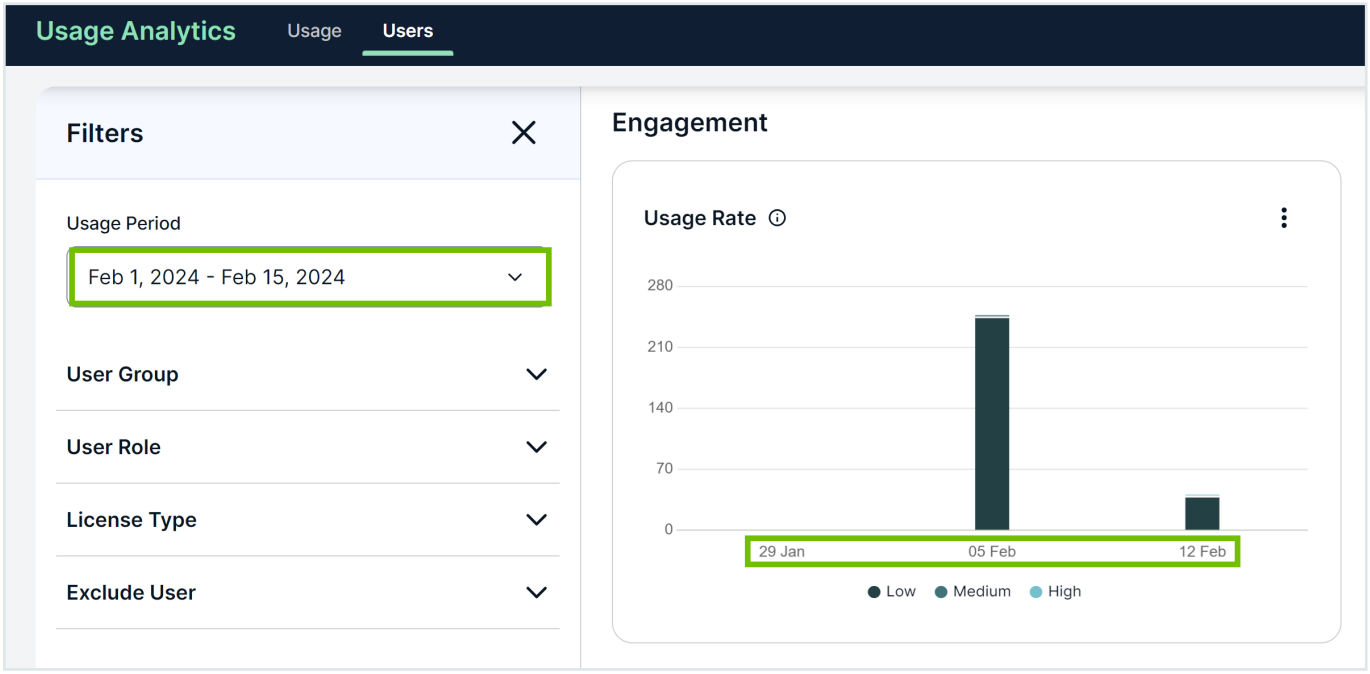
The following table shows the granularity for different ranges of the usage period, along with examples.

Range	Granularity	Example	
		Usage period	Intervals
Less than or equal to 2 weeks	Day	Jan 1 - 4, 2024	• Jan 1 • Jan 2 • Jan 3 • Jan 4
More than 2 weeks Less than or equal to 3 months	Week	Jan 1 - 31, 2024	• Jan 1-7 • Jan 8-14 • Jan 15-21 • Jan 22-28 • Jan 29-31
More than 3 months Less than or equal to 1 year	Month	Aug 1, 2023 - Jan 31, 2024	• Aug, 2023 • Sep, 2023 • Oct, 2023 • Nov, 2023 • Dec, 2023 • Jan, 2024

Range	Granularity	Example	
		Usage period	Intervals
More than 1 year	Quarter	Jan 1, 2023 - Jan 31, 2024	• Quarter 1, 2023 • Quarter 2, 2023 • Quarter 3, 2023 • Quarter 4, 2023 • Quarter 1, 2024

Start and end dates on the x-axis

The start and end dates shown on the x-axis in charts may be different from the start and end dates of the usage period you select. This is because of the way the data is organized into intervals when presented on the x-axis. For example, if the usage period you select is Feb 1, 2024 - Feb 15, 2024, then the period is divided into weekly intervals starting from a Monday. Because Feb 1, 2024, is a Thursday, the x-axis shows the preceding Monday, Jan 29, 2024, as the start date. This, however, is only for the purpose of presentation. Hovering your pointer over the first interval on the x-axis always shows the actual start date of the usage period you select.



Usage

> **Note** This topic is specific to the Usage Analytics dashboard that is in the latest UI.

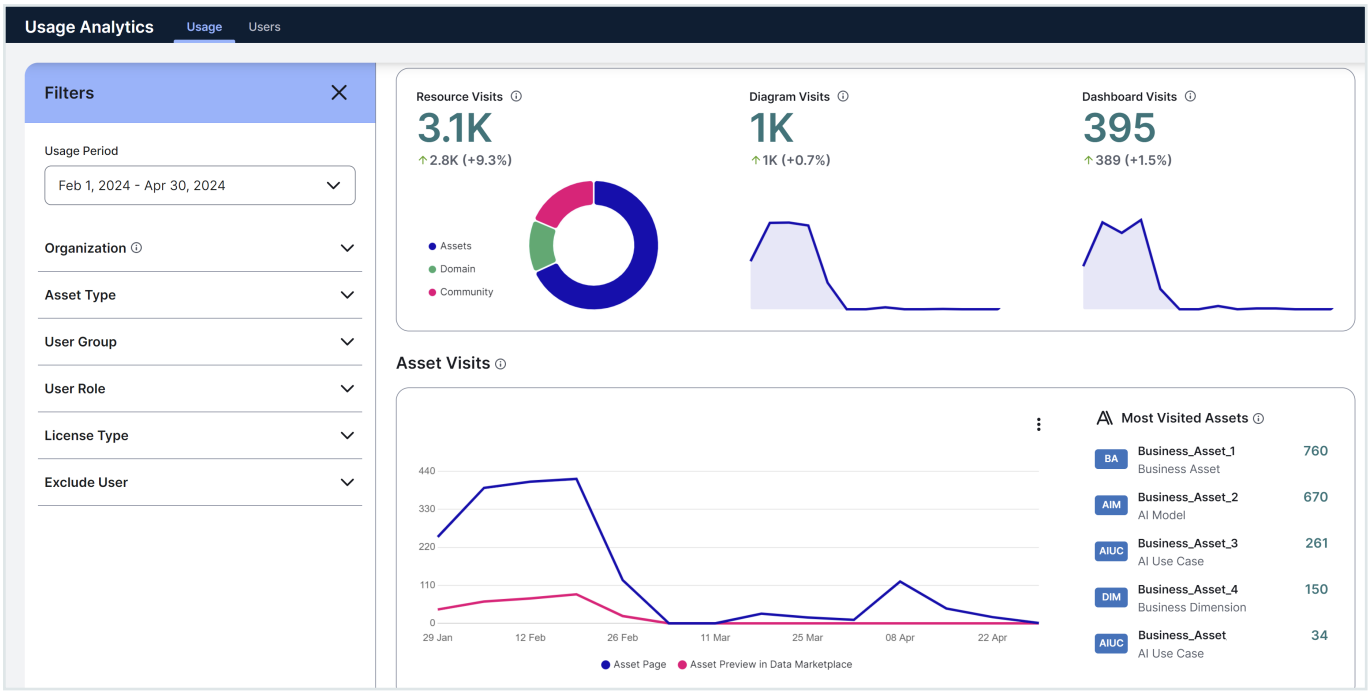
The **Usage** tab on the Usage Analytics dashboard shows metrics related to how many times the resources, diagrams, and dashboards in your Collibra environment were visited and the most visited resources.

By default, the dashboard shows the metrics for the last 3 months. You can, however, select a different time period in the **Usage Period** field on the **Filters** pane, including your own period.

What the arrows indicate

The arrows in the top section of the dashboard indicate the trend in visits compared with the previous period:

- An up arrow indicates that the number in the current period is higher than that in the previous period by the number shown next to the arrow.
- A down arrow indicates that the number in the current period is lower than that in the previous period by the number shown next to the arrow.
- A right arrow indicates that the number in the current period is the same as that in the previous period.



How to explore metrics

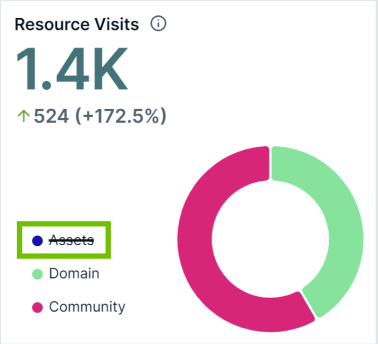
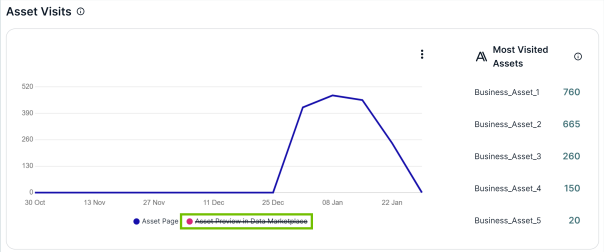
You can explore the metrics on the **Usage** tab through a variety of actions, which include the following:

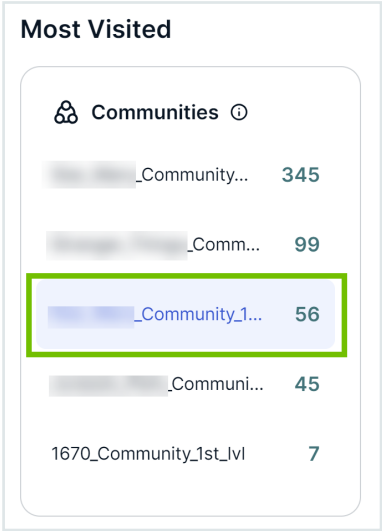
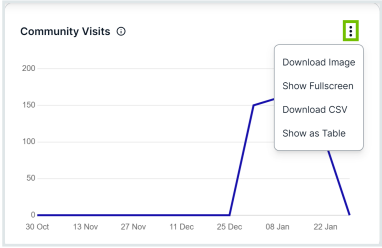
- Filtering for a targeted analysis.
- Excluding categories from charts to focus on key data.
- Changing display mode for a different perspective.
- Downloading for offline use or sharing.

How to perform certain actions

The following table describes all the actions you can perform on the **Usage** tab.

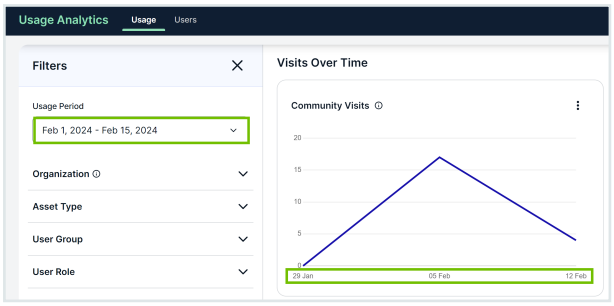
Action	Description
Filter the metrics.	Use the **Filters** pane.

Action	Description
Exclude a specific category from a chart.	Click the legend representing the category. This shows the legend with a strikethrough. To include the category back, click the legend again.  **Example** Both asset visits and most visited assets include visits to assets made not only via asset pages but also via asset previews in Data Marketplace. To exclude page or preview visits from the chart, click the corresponding legend on the x-axis. These changes, however, aren't applied when you view the chart as a table. 
View a fuller version of the charts shown at the top of the dashboard in the **Diagram Visits** and **Dashboard Visits** sections.	Click anywhere on the charts in those sections.
View the information associated with a data point.	Hover your pointer over the data point.

Action	Description
Open a most visited item directly.	Click the name of the item. 
View a chart in full screen. View a chart as a table. Download a chart as an image. Download a chart as a CSV file.	Use ⋮. 

Start and end dates on the x-axis

The start and end dates shown on the x-axis in charts may be different from the start and end dates of the usage period you select. This is because of the way the data is organized into intervals when presented on the x-axis. For example, if the usage period you select is Feb 1, 2024 - Feb 15, 2024, then the period is divided into weekly intervals starting from a Monday. Because Feb 1, 2024, is a Thursday, the x-axis shows the preceding Monday, Jan 29, 2024, as the start date. This, however, is only for the purpose of presentation. Hovering your pointer over the first interval on the x-axis always shows the actual start date of the usage period you select.



Users

> **Note** This topic is specific to the Usage Analytics dashboard that is in the latest UI.

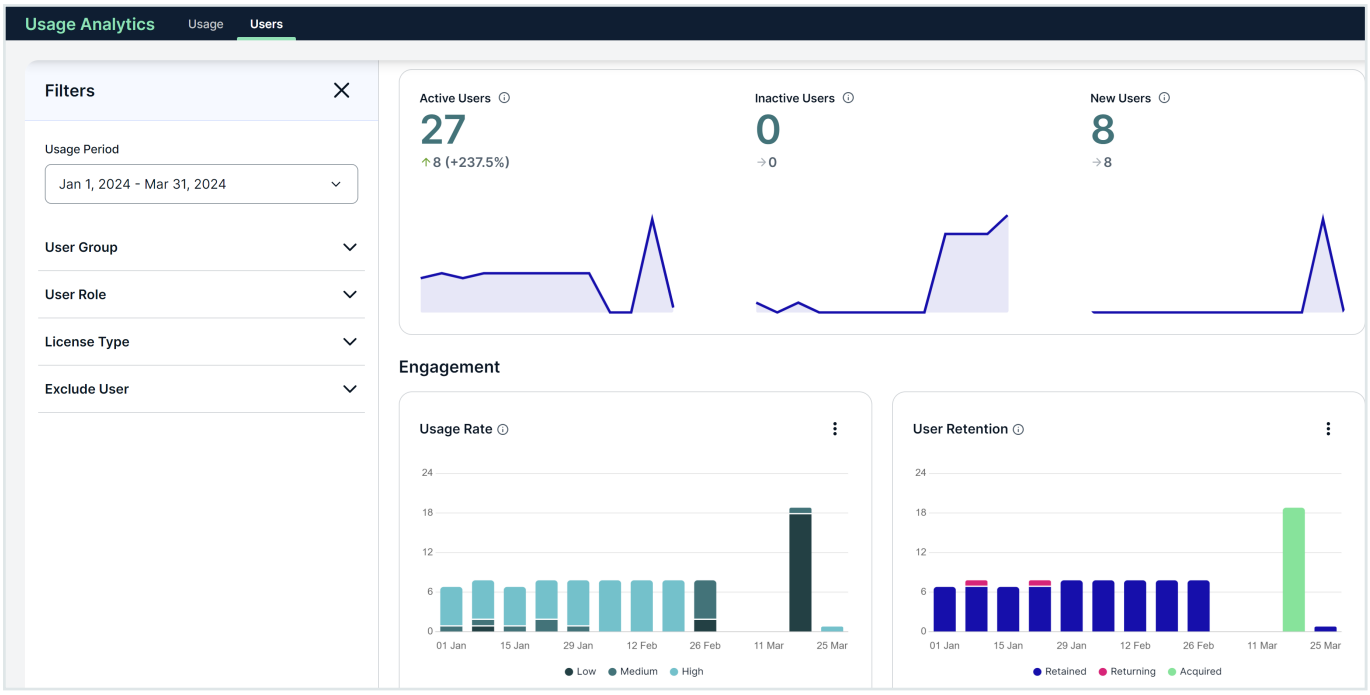
The **Users** tab on the Usage Analytics dashboard shows metrics related to how users engaged with your Collibra environment and who those users were.

By default, the dashboard shows the metrics for the last 3 months. You can, however, select a different time period in the **Usage Period** field on the **Filters** pane, including your own period.

What the arrows indicate

The arrows in the top section of the dashboard indicate the trend in visitors compared with the previous period:

- An up arrow indicates that the number in the current period is higher than that in the previous period by the number shown next to the arrow.
- A down arrow indicates that the number in the current period is lower than that in the previous period by the number shown next to the arrow.
- A right arrow indicates that the number in the current period is the same as that in the previous period.



How to explore metrics

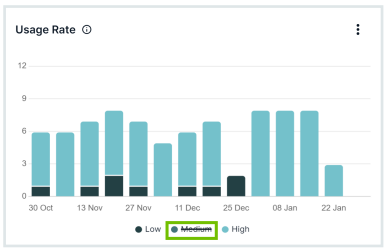
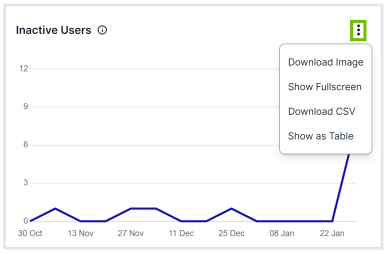
You can explore the metrics on the **Users** tab through a variety of actions, which include the following:

- Filtering for a targeted analysis.
- Excluding categories from charts to focus on key data.
- Changing display mode for a different perspective.
- Downloading for offline use or sharing.

How to perform certain actions

The following table describes all the actions you can perform on the **Users** tab.

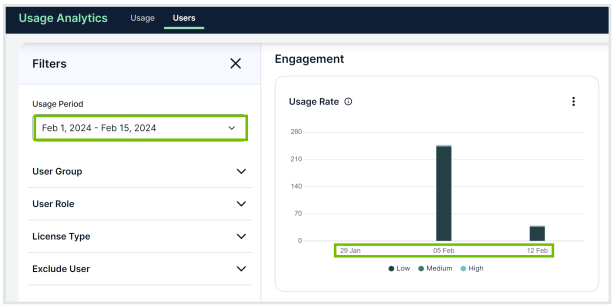
Action	Description
Filter the metrics.	Use the **Filters** pane.

Action	Description
Exclude a specific category from a chart.	Click the legend representing the category. This shows the legend with a strikethrough. To include the category back, click the legend again. 
View a fuller version of the charts shown at the top of the dashboard in the **Active Users** and **Inactive Users** sections.	Click anywhere on the charts in those sections.
View the information associated with a data point.	Hover your pointer over the data point.
View a chart in full screen. View a chart as a table. Download a chart as an image. Download a chart as a CSV file.	Use ⋮. 

Start and end dates on the x-axis

The start and end dates shown on the x-axis in charts may be different from the start and end dates of the usage period you select. This is because of the way the data is organized into intervals when presented on the x-axis. For example, if the usage period you select is Feb 1, 2024 - Feb 15, 2024, then the period is divided into weekly intervals starting from a Monday. Because Feb 1, 2024, is a Thursday,

the x-axis shows the preceding Monday, Jan 29, 2024, as the start date. This, however, is only for the purpose of presentation. Hovering your pointer over the first interval on the x-axis always shows the actual start date of the usage period you select.



Usage rate

> **Note** This topic is specific to the Usage Analytics dashboard that is in the latest UI.

In the **Usage Rate** section, the 3 categories of usage rate are based on the percentage of days that users signed in within an interval.

> **Tip** An interval is a segmented date range that is based on the duration of the usage period you selected.

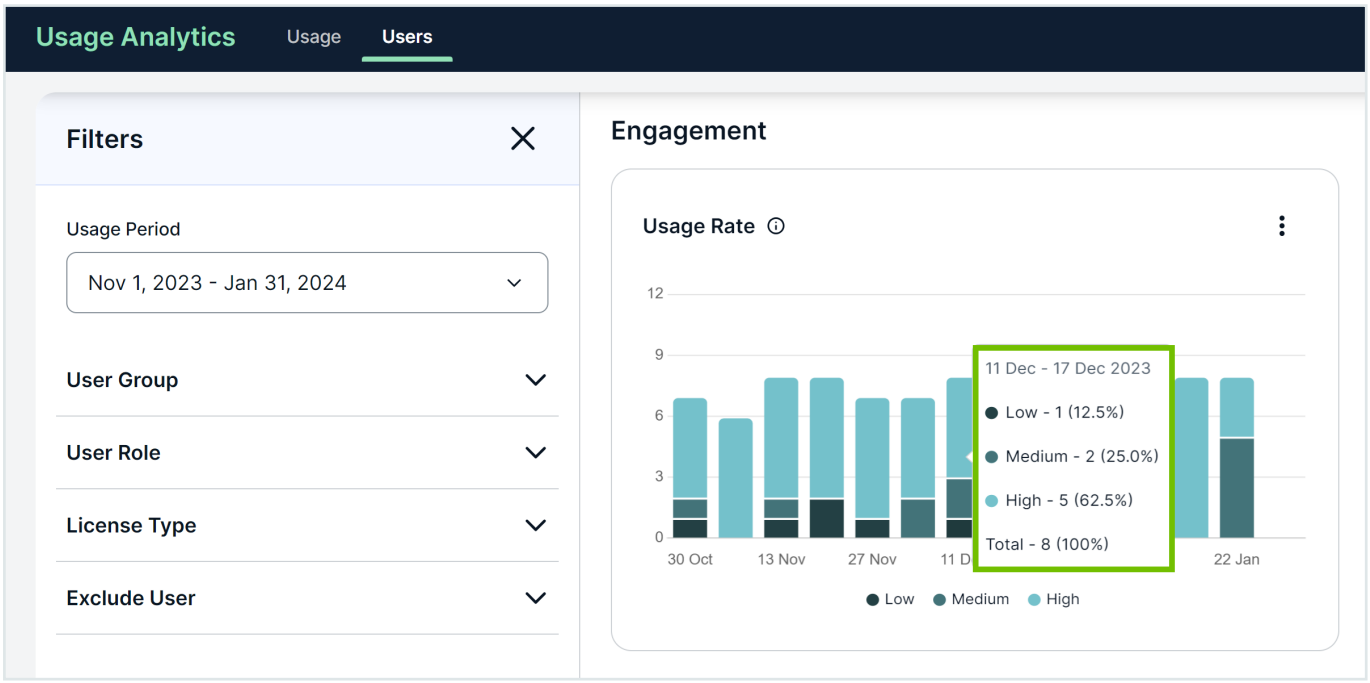
The usage rate categories are as follows:

- **Low:** Number of users who signed in for less than 30% of the days within an interval.
- **Medium:** Number of users who signed in for between 30% and 50% (inclusive) of the days within an interval.
- **High:** Number of users who signed in for more than 50% of the days within an interval.

The usage rate for each category is determined by counting the number of users falling into each category within an interval, and expressing it as a percentage of the total number of users within that interval. This provides insights into user engagement levels based on their sign-in frequency within a specific interval.

Example

To understand the data shown in the **Usage Rate** section, consider the following chart shown for a usage period of Nov 1, 2023 - Jan 31, 2024. On the x-axis of the chart, the usage period is divided into weekly intervals, where each interval constitutes 7 days.



Tip

- 30% of 7 days = 2.1 days (rounded to 2 days when calculating the metrics)
- 50% of 7 days = 3.5 days (rounded to 3 days when calculating the metrics)

How to read and interpret the data

According to the highlighted data point in the chart:

- **11 Dec - 17 Dec 2023:** The interval for which the data is shown is Dec 11-17, 2023, which constitutes 7 days.
- **Total - 8 (100%):** A total of 8 users signed in during the current interval.
- **Low - 1 (12.5%):** 1 out of the 8 users signed in for less than 30% of the 7 days, that is, less than 2 days. This constitutes 12.5% of users.

- **Medium - 2 (25.0%):** 2 out of the 8 users signed in for between 30% and 50% (inclusive) of the 7 days, that is, between 2 and 3 days (inclusive). This constitutes 25% of users.
- **High - 5 (62.5%):** 5 out of the 8 users signed in for more than 50% of the 7 days, that is, more than 3 days. This constitutes 62.5% of users.

> **Tip** You can view the chart in full screen or as a table, and also download the chart as an image or a CSV file using ⋮.

User retention

> **Note** This topic is specific to the Usage Analytics dashboard that is in the latest UI.

In the **User Retention** section, the 3 categories of user retention are based on the sign-in history of users in relation to the previous intervals.

> **Tip**
> - An interval is a segmented date range that is based on the duration of the usage period you selected.
> - A preceding interval is the interval that immediately precedes the current interval, within the usage period you selected.
> - A past interval is any interval before the preceding interval, within the usage period you selected.

The user retention categories are as follows:

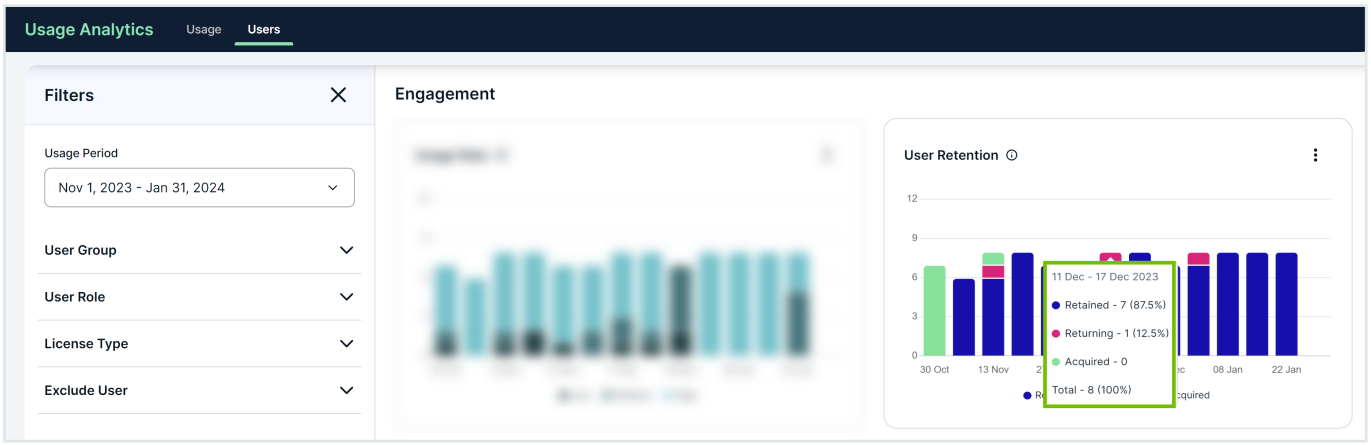
- **Retained:** Number of users who signed in within the current interval and also the preceding interval.
- **Returning:** Number of users who signed in within the current interval and also a past interval, but not within the preceding interval.
- **Acquired:** Number of users who signed in within the current interval for the first time, having never signed in before.

The user retention for each category is determined by counting the number of users falling into each category within an interval, and expressing it as a percentage of the total number of users within that

interval. This provides insights into user engagement levels based on their sign-in history within a specific interval.

Example

To understand the data shown in the **User Retention** section, consider the following chart shown for a usage period of Nov 1, 2023 - Jan 31, 2024. On the x-axis of the chart, the usage period is divided into weekly intervals, where each interval constitutes 7 days.



Tip

- 30% of 7 days = 2.1 days (rounded to 2 days when calculating the metrics)
- 50% of 7 days = 3.5 days (rounded to 3 days when calculating the metrics)

How to read and interpret the data

According to the highlighted data point in the chart:

- **11 Dec - 17 Dec 2023:** The interval for which the data is shown is Dec 11-17, 2023, which constitutes 7 days.
- **Total - 8 (100%):** A total of 8 users signed in during the current interval.
- **Retained - 7 (87.5%):** 7 out of the 8 users signed in within Dec 11-17, 2023, and Dec 4-10, 2023. This constitutes 87.5% of users.
- **Returning - 1 (12.5%):** 1 out of the 8 users signed in within Dec 11-17, 2023, and a past interval (for example, Nov 1-5, 2023), but not within Dec 4-10, 2023. This constitutes 12.5% of users.

- **Acquired:** 0 out of the 8 users signed in for the first time within Dec 11-17, 2023. If this number were, for example, 5 instead of 0, it would mean that 5 users had never signed in before Dec 11-17, 2023.

> **Tip** You can view the chart in full screen or as a table, and also download the chart as an image or a CSV file using ⋮.

Download data

> **Note** This topic is specific to the Usage Analytics dashboard that is in the latest UI.

The Usage Analytics dashboard allows you to download the metrics from certain sections as CSV (comma-separated values) files. The downloaded CSV file contains detailed data at a more granular level compared to the data shown on the dashboard. The data in the file is grouped based on intervals. In the case of the **Users** tab, the downloaded CSV files also contain the names of the users. The user names, however, are shown to you only if you have the **Insights** > **View Usage Analytics reports** global permission.

> **Note** The dates in the downloaded CSV files are formatted according to your local settings.

Steps

1. Open the new Usage Analytics dashboard.
2. Click the **Usage** or **Users** tab.
3. On the chart whose data you want to download, click ⋮ → **Download CSV**.
   » The data is downloaded as a CSV file on your computer.

Downloaded data

The following table shows the sections you can download as CSV files and the data included in the downloaded CSV files.

Section	Downloaded data
Usage → Asset Visits	The downloaded CSV file contains the following columns: • **Asset:** Name of the asset. • **Asset ID:** ID of the asset. • **Asset Type:** Type of the asset. • **Domain:** Name of the asset's domain. • **Domain ID:** ID of the asset's domain. • **Community:** Name of the asset's community. • **Community ID:** ID of the asset's community. • **Community Hierarchy:** Nested community structure of the asset. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals.

Community	Community Id	Community Hierarchy	Interval	Interval Start Date	Interval End Date	Count
Business Analysts Community	100000001		27	01/07/2024	07/07/2024	92
Data Governance Council	100000002		27	01/07/2024	07/07/2024	94
Schemas	100000003	Business Analysts Community	27	01/07/2024	07/07/2024	89
Business Analysts Community	100000004		28	08/07/2024	14/07/2024	89
Data Governance Council	100000005		28	08/07/2024	14/07/2024	110
Schemas	100000006	Business Analysts Community	28	08/07/2024	14/07/2024	93
Business Analysts Community	100000007		29	15/07/2024	21/07/2024	110
Data Governance Council	100000008		29	15/07/2024	21/07/2024	99
Schemas	100000009	Business Analysts Community	29	15/07/2024	21/07/2024	92

	• **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings. • **Count:** Number of times that the asset was visited during the interval period.
Usage → Community Visits	The downloaded CSV file contains the following columns: • **Community:** Name of the community. • **Community ID:** ID of the community. • **Community Hierarchy:** Nested community structure. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings. • **Count:** Number of times that the community was visited during the interval period.

Section	Downloaded data
Usage → Domain Visits	The downloaded CSV file contains the following columns: • **Domain:** Name of the domain. • **Domain ID:** ID of the domain. • **Community:** Name of the domain's community. • **Community ID:** ID of the community. • **Community Hierarchy:** Nested community structure. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings. • **Count:** Number of times that the domain was visited during the interval period.
Usage → Diagram Visits	The downloaded CSV file contains the following columns: • **Diagram:** Name of the diagram. • **Diagram ID:** ID of the diagram. • **Asset:** Name of the diagram's asset. • **Asset ID:** ID of the asset. • **Asset Type:** Type of the asset. • **Domain:** Name of the asset's domain. • **Domain ID:** ID of the asset's domain. • **Community:** Name of the asset's community. • **Community ID:** ID of the asset's community. • **Community Hierarchy:** Nested community structure. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings. • **Count:** Number of times that the diagram was visited during the interval period.
Usage → Dashboard Visits	The downloaded CSV file contains the following columns: • **Dashboard:** Name of the dashboard. • **Dashboard ID:** ID of the dashboard. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings. • **Count:** Number of times that the dashboard was visited during the interval period.

Section	Downloaded data
Users → Usage Rate	The downloaded CSV file contains the following columns: • **User:** Name of the user. The name is shown only if you have the **Insights** > **View Usage Analytics reports** global permission. • **Required License:** License assigned to the user. • **Roles:** Roles assigned to the user. • **Usage Rate:** Measure of how much the user engaged with the environment. For more information, go to Usage rate. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings. • **Usage Days:** Number of days that the user signed in to the environment during the interval period.
Users → User Retention	The downloaded CSV file contains the following columns: • **User:** Name of the user. The name is shown only if you have the **Insights** > **View Usage Analytics reports** global permission. • **Required License:** License assigned to the user. • **Roles:** Roles assigned to the user. • **Category:** Indicates if the user is retained, returning, or acquired. For more information, go to User retention. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings.

Section	Downloaded data
Users → Active Users	The downloaded CSV file contains the following columns: • **User:** Name of the user. The name is shown only if you have the **Insights** > **View Usage Analytics reports** global permission. • **Required License:** License assigned to the user. • **Roles:** Roles assigned to the user. • **Category:** Status of the user, which is always **Active** in this file. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings. • **Asset Visits:** Number of times that the user visited assets during the interval period. • **Diagram Visits:** Number of times that the user visited diagrams during the interval period. • **Dashboard Visits:** Number of times that the user visited dashboards during the interval period. • **Domain Visits:** Number of times that the user visited domains during the interval period. • **Community Visits:** Number of times that the user visited communities during the interval period. • **Number of Sessions:** Number of times that the user signed in during the interval period.
Users → Inactive Users	The downloaded CSV file contains the following columns: • **User:** Name of the user. The name is shown only if you have the **Insights** > **View Usage Analytics reports** global permission. • **Required License:** License assigned to the user. • **Roles:** Roles assigned to the user. • **Category:** Status of the user, which is always **Inactive** in this file. • **Interval:** Time segment by which the data in the file is grouped. This is based on the usage period selected on the dashboard. For more information, go to Intervals. • **Interval Start Date:** Start date of the interval, formatted according to your local settings. • **Interval End Date:** End date of the interval, formatted according to your local settings.

Old Usage Analytics

> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

Dashboard overview

> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

The Usage Analytics dashboard shows key data related to the adoption and engagement of your Collibra environment within your organization over a given time period.

The following table describes the fields and sections shown on the dashboard.

Field/Section	Description
Current Period	Allows you to select the period for which you want to view the data, with options for the last 1, 7 (default), 30, 60, 90, 180, or 365 days. You can also select your own period using the **Custom** option.
Previous Period	Shows the same duration as the current period, but for the period immediately preceding the current period. For example, if the **Current Period** field shows **Sep 3, 2023 - Oct 2, 2023**, then the **Previous Period** field shows **Aug 4, 2023 - Sep 2, 2023**.
Visitors	Shows how many users in your organization used Collibra in the current period.
Visits	Shows which resources were visited the most in the current period.

Detailed data

> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

If you have the **Sysadmin** global role or the **Insights** > **View Usage Analytics reports** global permission, you can view more usage data by clicking the cards in the **Visitors** or **Visits** section.

Visitors

> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

The **Visitors** section on the Usage Analytics dashboard shows data related to the user engagement over a given period of time. The following table describes the cards that are shown in the section.

Card	Description
Active	Active visitors are users who signed in to Collibra in the current period.
New	New visitors are users who signed in to Collibra either for the very first time in the current period or for the first time in the current period after having been inactive in the previous period.
Inactive	Inactive visitors are users who did not sign in to Collibra in the current period.

Understanding Visitors data

> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

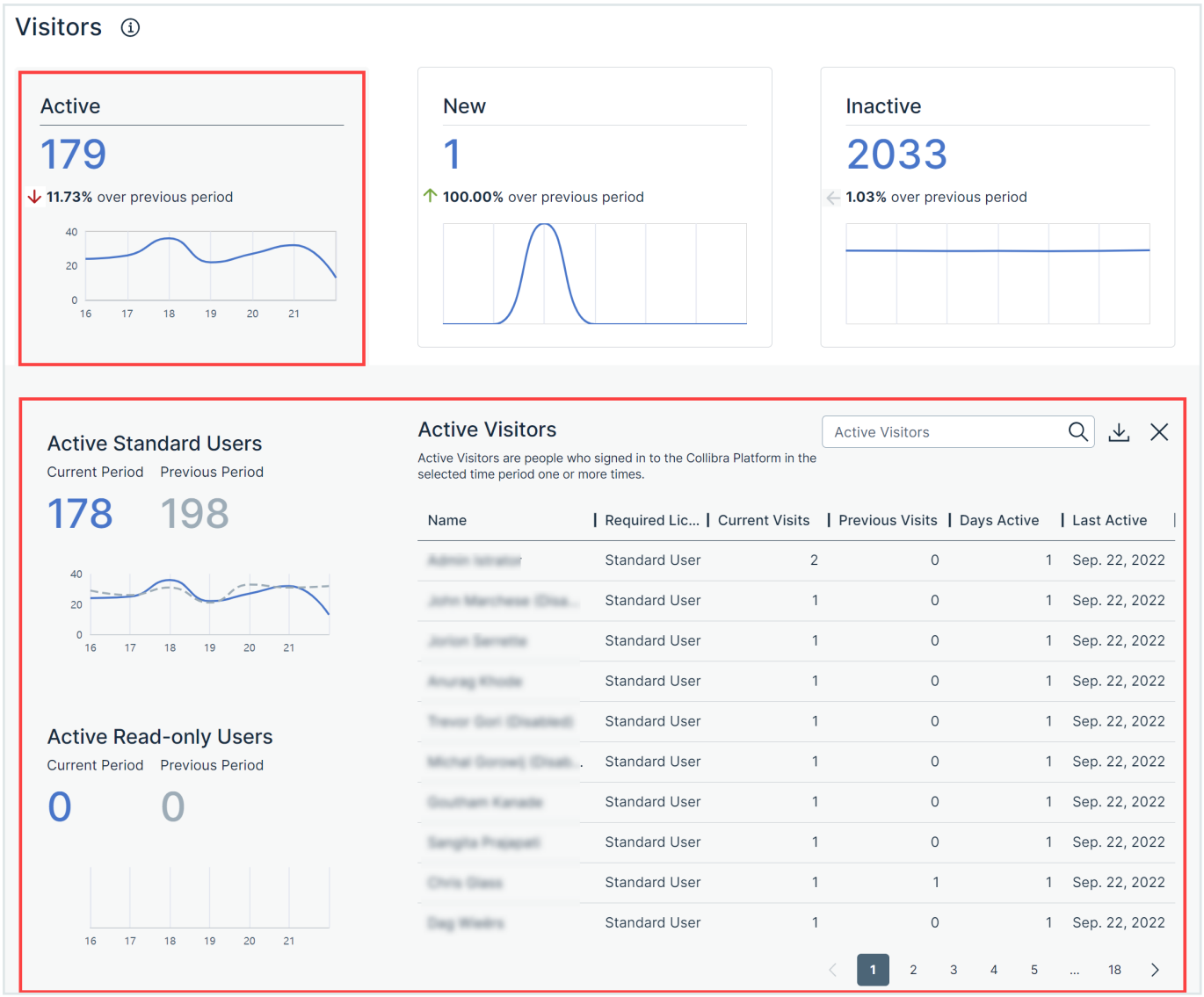
This topic describes the data that appears when you click a card in the **Visitors** section.

Active

The **Active** card shows the number of users who signed in to Collibra in the current period.

Depending on your permission, when you click the card, the following subsections appear:

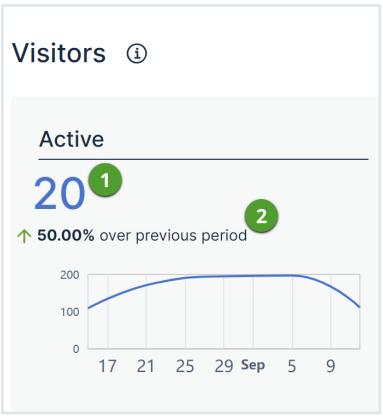
- **Active Standard Users:** The number and evolution of active visitors who have the Standard User license, in the current and previous periods.
- **Active Read-only Users:** The number and evolution of active visitors who have the Read-only User license, in the current and previous periods.
- **Active Visitors:** The names and other attributes, such as the required license and the number of current visits, of all active visitors in the current period.



Tip On the **Active Standard Users** and **Active Read-only Users** subsections, you can hover your pointer over the solid (current period) or dotted (previous period) lines in the charts to compare the data between two corresponding days in the current and previous periods.

What the number and text on the Active card indicates

The following table describes what the number and the text on the **Active** card indicates.



No.	Description
1	The number on the **Active** card considers all users who signed in to Collibra in the current period. These include not only standard and read-only visitors but also visitors whose profiles were deleted in the meantime. Suppose that the number on the **Active** card is **20**, the number on the **Active Standard Users** is **10**, and the number on the **Active Read-only Users** card is **8**. This indicates that the remaining two users are deleted.
2	The text on the **Active** card indicates the approximate percentage of active users in the current period in comparison with the previous period. Suppose that for a period of 30 days, the number on the **Active** card is **20** and the text on the **Active** card is **50.00% over previous period**. The text means that there is approximately a 50% increase in the number of active users in the current period compared to the previous period, indicating that there were about 13 active users in the previous period.

Tip
The arrow next to the number indicates the trend of the number of visitors compared with the previous period.

- An up arrow indicates that the number of visitors in the current period is more than that in the previous period.
- A down arrow indicates that the number of visitors in the current period is less than that in the previous period.
- A left arrow indicates that the number of visitors in the current period is the same as that in the previous period.

Understanding the data in the Active Visitors subsection

The following table describes the columns that are available in the **Active Visitors** subsection, including hidden columns and columns that appear only in the downloaded version of the subsection.

> **Note** Columns that are shown only in the downloaded version of the subsection are indicated by (*) next to them in the following table.

Column	Description
Name	The name of the visitor.
User Name	The username of the visitor. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
User ID (*)	The user ID of the visitor.
Required License	The license that the visitor requires for the assigned roles and responsibilities. **Note** If this data is unavailable, **-** is shown in the column.
Effective License	The actual license that the visitor is assigned. If this data is unavailable, **-** is shown in the column. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
Participated in workflows	• **Yes:** If the visitor started or stopped workflows or completed workflow tasks. • **No:** If the visitor did not start or stop workflows or complete any workflow tasks. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
Current Visits	The number of times that the visitor signed in to Collibra in the current period.
Previous Visits	The number of times that the visitor signed in to Collibra in the previous period.

Column	Description
Days Active	The number of days that the visitor signed in to Collibra.
First Active	The date when the visitors first signed in to Collibra, represented in Coordinated Universal Time (UTC). **Tip** In the downloaded file, this column additionally shows the time in milliseconds.
Last Active	The UTC (Coordinated Universal Time) date when the visitor last signed in to Collibra. **Tip** In the downloaded file, this column additionally shows the time in milliseconds.
Deleted User Flag (*)	• **0:** The visitor profile is not deleted. • **1:** The visitor profile was deleted since they last signed in to Collibra.
Disabled User Flag (*)	• **0:** The visitor profile is enabled. • **1:** The visitor profile was disabled since they last signed in to Collibra.
Is New in Period (*)	• **0:** The visitor signed in to Collibra in the previous period. • **1:** The visitor signed in to Collibra either for the very first time in the current period or for the first time in the current period after having been inactive in the previous period.

New

The **New** card shows the number of users who signed in to Collibra either for the very first time in the current period or for the first time in the current period after having been inactive in the previous period.

Example

Suppose that the current period is October 1, 2022-October 7, 2022 and the previous period is September 24, 2022-September 30, 2022. Consider a user named *Jane* who signed in to Collibra before the previous period (for example, on September 20th) but did not sign in to Collibra in the previous period. If *Jane* signs in to Collibra in the current period, *Jane* is considered a new user because she was inactive in the previous period.

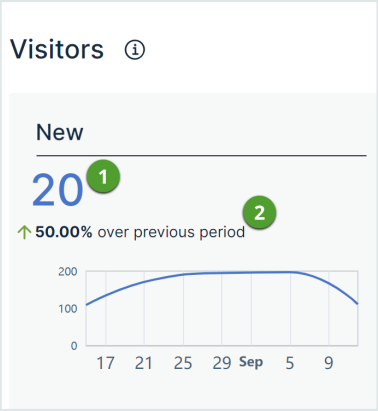
Depending on your permission, when you click the card, the following subsections appear:

- **New Standard Users:** The number and evolution of new visitors who have the Standard User license, in the current and previous periods.
- **New Read-only Users:** The number and evolution of new visitors who have the Read-only User license, in the current and previous periods.
- **New Visitors:** The names and other attributes, such as the required license and the number of current visits, of all new visitors in the current period.

> **Tip** On the **New Standard Users** and **New Read-only Users** subsections, you can hover your pointer over the solid (current period) or dotted (previous period) lines in the charts to compare the data between two corresponding days in the current and previous periods.

What the number and text on the New card indicates

The following table describes what the number and the text on the **New** card indicates.



No.	Description
1	The number on the **New** card considers all users who signed in to Collibra in the current period. These include not only standard and read-only visitors but also visitors whose profiles were deleted in the meantime. Suppose that the number on the **New** card is **20**, the number on the **New Standard Users** is **10**, and the number on the **New Read-only Users** card is **8**. This indicates that the remaining two users are deleted.

No.	Description
2	The text on the **New** card indicates the approximate percentage of new users in the current period in comparison with the previous period. Suppose that for a period of 30 days, the number on the **New** card is **20** and the text on the **New** card is **50.00% over previous period**. The text means that there is approximately a 50% increase in the number of new users in the current period compared to the previous period, indicating that there were about 13 new users in the previous period.

Tip
The arrow next to the number indicates the trend of the number of visitors compared with the previous period.

- An up arrow indicates that the number of visitors in the current period is more than that in the previous period.
- A down arrow indicates that the number of visitors in the current period is less than that in the previous period.
- A left arrow indicates that the number of visitors in the current period is the same as that in the previous period.

Understanding the data in the New Visitors subsection

The following table describes the columns that are available in the **New Visitors** subsection, including hidden columns and columns that appear only in the downloaded version of the subsection.

Tip
In the **New Visitors** subsection, users who signed in to Collibra for the first time since the time that the Usage Analytics dashboard was enabled are identified by the label **NEW**.

Note Columns that are shown only in the downloaded version of the subsection are indicated by (*) next to them in the following table.

Column	Description
Name	The name of the visitor.
User Name	The username of the visitor. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
User ID (*)	The user ID of the visitor.
Required License	The license that the visitor requires for the assigned roles and responsibilities. **Note** If this data is unavailable, - is shown in the column.
Effective License	The actual license that the visitor is assigned. If this data is unavailable, - is shown in the column. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
Participated in workflows	• **Yes:** If the visitor started or stopped workflows or completed workflow tasks. • **No:** If the visitor did not start or stop workflows or complete any workflow tasks. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
Current Visits	The number of times that the visitor signed in to Collibra in the current period.
Days Active	The number of days that the visitor signed in to Collibra.
First Active	The date when the visitors first signed in to Collibra, represented in Coordinated Universal Time (UTC). **Tip** In the downloaded file, this column additionally shows the time in milliseconds.

Column	Description
Last Active	The UTC (Coordinated Universal Time) date when the visitor last signed in to Collibra. **Tip** In the downloaded file, this column additionally shows the time in milliseconds.
Deleted User Flag (*)	• **0:** The visitor profile is not deleted. • **1:** The visitor profile was deleted since they last signed in to Collibra.
Disabled User Flag (*)	• **0:** The visitor profile is enabled. • **1:** The visitor profile was disabled since they last signed in to Collibra.
Is New in Period (*)	• **0:** The visitor signed in to Collibra in the previous period. • **1:** The visitor signed in to Collibra either for the very first time in the current period or for the first time in the current period after having been inactive in the previous period.

Inactive

The **Inactive** card shows the number of users who did not sign in to Collibra in the current period.

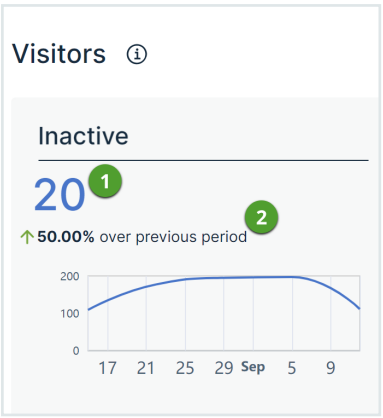
Depending on your permission, when you click the card, the following subsections appear:

- **Inactive Standard Users:** The number and evolution of inactive visitors who have the Standard User license, in the current and previous periods.
- **Inactive Read-only Users:** The number and evolution of inactive visitors who have the Read-only User license, in the current and previous periods.
- **Inactive Visitors:** The names and other attributes, such as the required license and the number of previous visits, of all inactive visitors in the current period.

Tip On the **Inactive Standard Users** and **Inactive Read-only Users** subsections, you can hover your pointer over the solid (current period) or dotted (previous period) lines in the charts to compare the data between two corresponding days in the current and previous periods.

What the number and text on the Inactive card indicates

The following table describes what the number and the text on the **Inactive** card indicates.



No.	Description
1	The number on the **Inactive** card considers all users who signed in to Collibra in the current period. These include not only standard and read-only visitors but also visitors whose profiles were deleted in the meantime. Suppose that the number on the **Inactive** card is **20**, the number on the **Inactive Standard Users** is **10**, and the number on the **Inactive Read-only Users** card is **8**. This indicates that the remaining two users are deleted.
2	The text on the **Inactive** card indicates the approximate percentage of inactive users in the current period in comparison with the previous period. Suppose that for a period of 30 days, the number on the **Inactive** card is **20** and the text on the **Inactive** card is **50.00% over previous period**. The text means that there is approximately a 50% increase in the number of inactive users in the current period compared to the previous period, indicating that there were about 13 inactive users in the previous period.

Tip
The arrow next to the number indicates the trend of the number of visitors compared with the previous period.

- An up arrow indicates that the number of visitors in the current period is more than that in the previous period.
- A down arrow indicates that the number of visitors in the current period is less than that in the previous period.
- A left arrow indicates that the number of visitors in the current period is the same as that in the previous period.

Understanding the data in the Inactive Visitors subsection

The following table describes the columns that are available in the **Inactive Visitors** subsection, including hidden columns and columns that appear only in the downloaded version of the subsection.

> **Note** Columns that are shown only in the downloaded version of the subsection are indicated by (*) next to them in the following table.

Column	Description
Name	The name of the visitor.
User Name	The username of the visitor. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
User ID (*)	The user ID of the visitor.
Required License	The license that the visitor requires for the assigned roles and responsibilities. **Note** If this data is unavailable, **-** is shown in the column.
Effective License	The actual license that the visitor is assigned. If this data is unavailable, **-** is shown in the column. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
Participated in workflows	• **Yes:** If the visitor started or stopped workflows or completed workflow tasks. • **No:** If the visitor did not start or stop workflows or complete any workflow tasks. **Note** This column is hidden by default. For information about how to show a column, go to Customize a table.
Previous Visits	The number of times that the visitor signed in to Collibra in the previous period.

Column	Description
First Active	The date when the visitors first signed in to Collibra, represented in Coordinated Universal Time (UTC). **Tip** In the downloaded file, this column additionally shows the time in milliseconds.
Last Active	The UTC (Coordinated Universal Time) date when the visitor last signed in to Collibra. **Tip** In the downloaded file, this column additionally shows the time in milliseconds.
Deleted User Flag (*)	• **0:** The visitor profile is not deleted. • **1:** The visitor profile was deleted since they last signed in to Collibra.
Disabled User Flag (*)	• **0:** The visitor profile is enabled. • **1:** The visitor profile was disabled since they last signed in to Collibra.
Is New in Period (*)	• **0:** The visitor signed in to Collibra in the previous period. • **1:** The visitor signed in to Collibra either for the very first time in the current period or for the first time in the current period after having been inactive in the previous period.

Visits

Note This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

The **Visits** section on the Usage Analytics dashboard shows data related to the platform adoption and usage over a given period of time. The following table describes the cards that are shown in the section.

Card	Description
Community	The community names and the number of times that the assets in those communities are visited in the current period.

Card	Description
Domain Type	The domain type names and the number of times that the assets associated with those domain types are visited in the current period.
Asset Type	The asset type names and the number of times that the assets of those asset types are visited in the current period.

Understanding Visits data

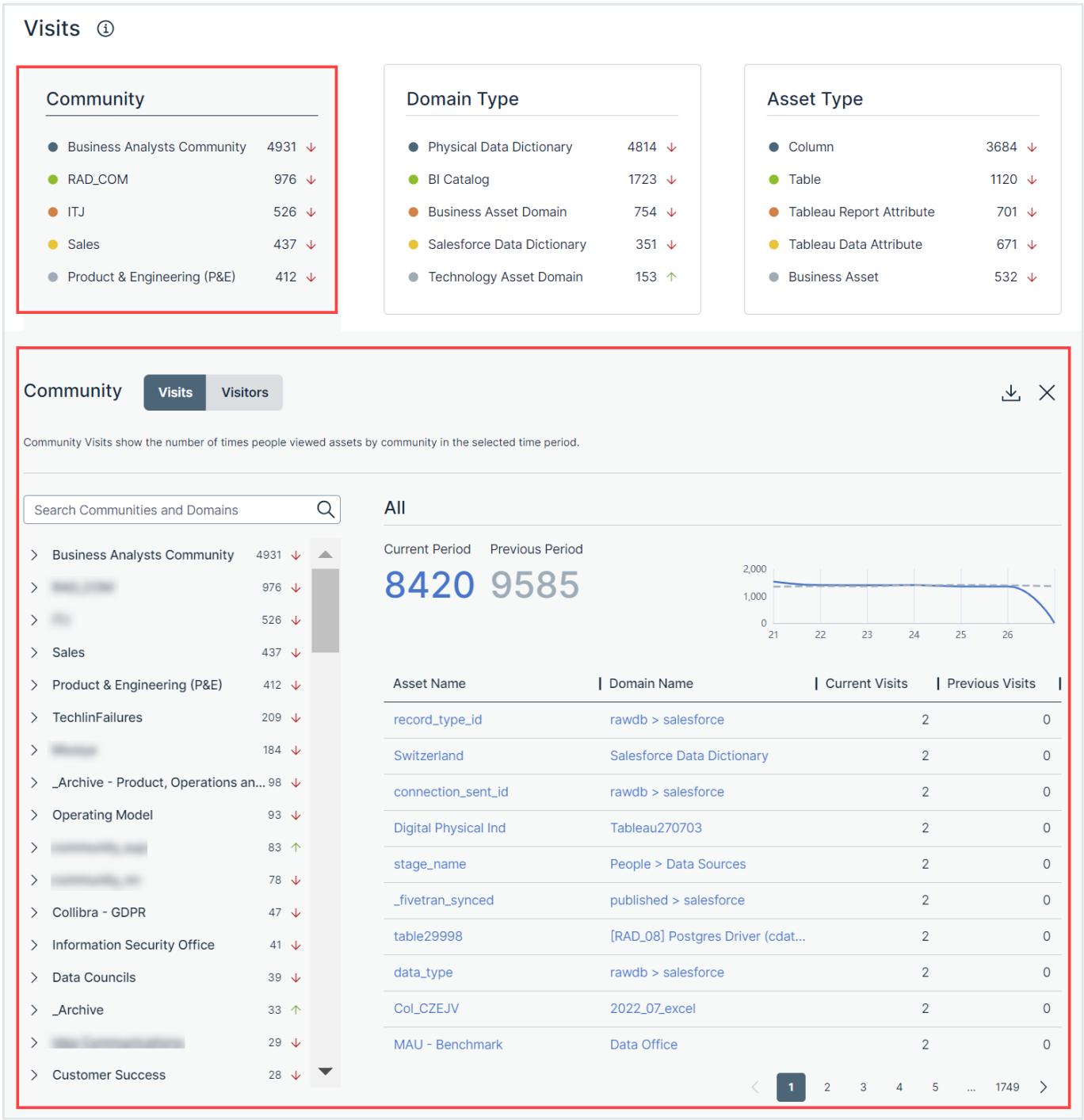
> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

This topic describes the data that appears when you click a card in the **Visits** section.

Community

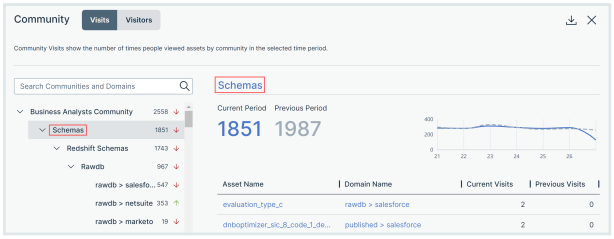
The **Community** card shows the five communities whose assets were visited the most in the current period. Depending on your permission, when you click the card, the **Community** subsection appears with the following tabs:

- **Visits:** The number of times that the users visited the assets by communities in the current period.
- **Visitors:** The number of users who visited the assets by communities in the current period.



The left pane on the **Visits** or **Visitors** tab shows a list of all communities and domains in hierarchical order. You can search for a specific community or domain by using the **Search Communities and Domains** search box.

When you expand a community in the left pane, its subcommunities and domains are shown. In addition, the data for the community that you expanded is shown in the table next to the left pane. You can also expand a subcommunity or domain in the left pane to view the data for that subcommunity or domain in the table. You can identify the community or domain for which the data is shown in the table by the label above the table.



Tip After having clicked a community or domain in the left pane, if you want to go back to viewing the data for all communities, click the same community or domain in the left pane again. When you view the data for all communities, the label **All** appears above the table.

Community: Understanding the data on the Visits tab

On the **Visits** tab, in the left pane, the number that appears next to each community or domain indicates how many times the users visited the assets within that community or domain in the current period. The arrow next to each number indicates the trend of the number of visits compared with the previous period.

Tip

- An up arrow indicates that the number of visits in the current period is more than that in the previous period.
- A down arrow indicates that the number of visits in the current period is less than that in the previous period.
- A left arrow indicates that the number of visits in the current period is the same as that in the previous period.

Above the table, **Current Period** shows the number of times that the users visited the assets within the selected community or domain in the current period, and **Previous Period** shows the

corresponding number in the previous period. This data is also graphically represented as a trend line chart. You can hover your pointer over the solid (current period) or dotted (previous period) lines in the chart to compare the data between two corresponding days in the current and previous periods.

The table contains the following columns.

Column	Description
Asset Name	The name of the asset that belongs to the selected community or domain.
Domain Name	The name of the domain to which the asset belongs.
Current Visits	The number of times that the asset was visited in the current period.
Previous Visits	The number of times that the asset was visited in the previous period.

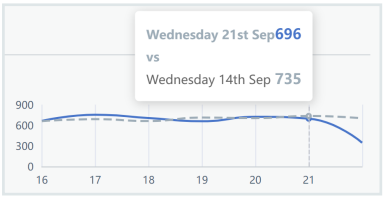
Community: Understanding the data on the Visitors tab

On the **Visitors** tab, in the left pane, the number that appears next to each community or domain indicates how many users visited the assets within that community or domain in the current period. The arrow next to each number indicates the trend of the number of visitors compared with the previous period.

Tip

- An up arrow indicates that the number of visitors in the current period is more than that in the previous period.
- A down arrow indicates that the number of visitors in the current period is less than that in the previous period.
- A left arrow indicates that the number of visitors in the current period is the same as that in the previous period.

Above the table, **Current Period** shows the number of users who visited the assets within the selected community or domain in the current period, and **Previous Period** shows the corresponding number in the previous period. This data is also graphically represented as a trend line chart. You can hover your pointer over the solid (current period) or dotted (previous period) lines in the chart to compare the data between two corresponding days in the current and previous periods.



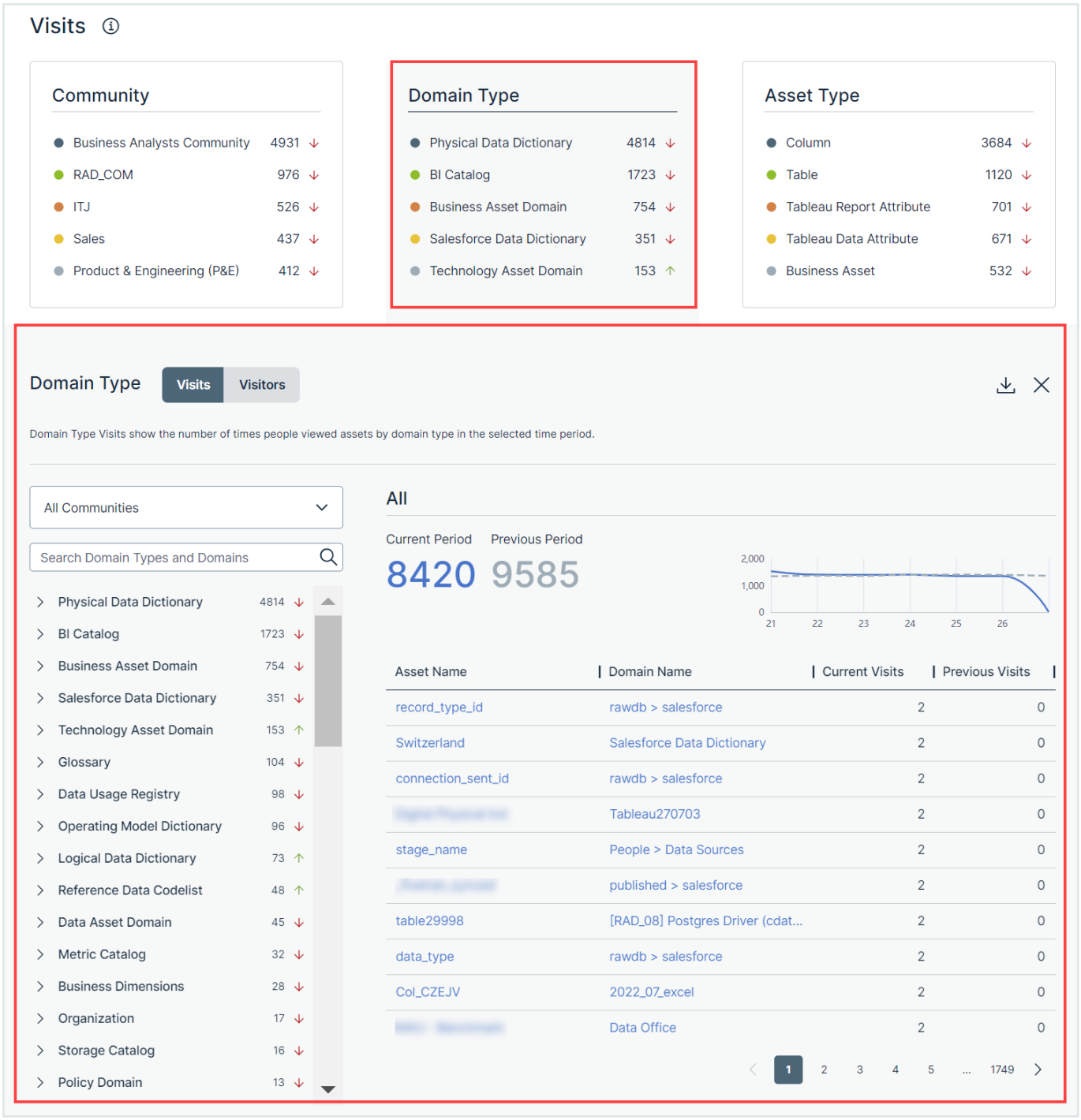
The table contains the following columns.

Column	Description
Asset Name	The name of the asset that belongs to the selected community or domain.
Domain Name	The name of the domain to which the asset belongs.
Current Visitors	The number of users who visited the asset in the current period.
Previous Visitors	The number of users who visited the asset in the previous period.

Domain Type

The **Domain Type** card shows five domain types of the domains whose assets are visited the most in the current period. Depending on your permission, when you click the card, the **Domain Type** subsection appears with the following tabs:

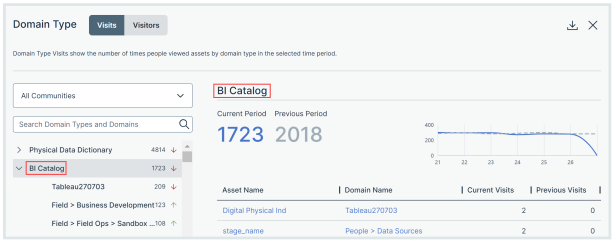
- **Visits:** The number of times that the users visited the assets by domain types in the current period.
- **Visitors:** The number of users who visited the assets by domain types in the current period.



The left pane on the **Visits** or **Visitors** tab shows a list of domain types for all communities in a hierarchical order. Only the domain types that contain at least one domain are shown in the left pane. You can view the domain types for a specific community by selecting that community in the drop-down

list box. You can search for a specific domain type or domain by using the **Search Domain Types and Domains** search box.

When you expand a domain type in the left pane, all the domains of that type are shown. In addition, the data for the domain type that you clicked is shown in the table next to the left pane. You can also click a domain in the left pane to view the data for that domain in the table. You can identify the domain type or domain for which the data is shown in the table by the label above the table.



> **Tip** After having clicked a domain type or domain in the left pane, if you want to go back to viewing the data for all domain types within the selected community, click the same domain type or domain in the left pane again. When you view the data for all domain types, the label **All** appears above the table.

Domain Type: Understanding the data on the Visits tab

On the **Visits** tab, in the left pane, the number that appears next to each domain type or domain indicates how many times the users visited the assets within that domain type or domain in the current period. The arrow next to each number indicates the trend of the number of visits compared with the previous period.

> **Tip**
> - An up arrow indicates that the number of visits in the current period is more than that in the previous period.
> - A down arrow indicates that the number of visits in the current period is less than that in the previous period.
> - A left arrow indicates that the number of visits in the current period is the same as that in the previous period.

Above the table, **Current Period** shows the number of times that the users visited the assets within the selected domain type or domain in the current period, and **Previous Period** shows the corresponding number in the previous period. This data is also graphically represented as a trend line chart. You can hover your pointer over the solid (current period) or dotted (previous period) lines in the chart to compare the data between two corresponding days in the current and previous periods.

The table contains the following columns.

Column	Description
Asset Name	The name of the asset that belongs to the selected domain type or domain.
Domain Name	The name of the domain to which the asset belongs.
Current Visits	The number of times that the asset was visited in the current period.
Previous Visits	The number of times that the asset was visited in the previous period.

Domain Type: Understanding the data on the Visitors tab

On the **Visitors** tab, in the left pane, the number that appears next to each domain type or domain indicates how many users visited the assets within that domain type or domain in the current period. The arrow next to each number indicates the trend of the number of visitors compared with the previous period.

> **Tip**
> - An up arrow indicates that the number of visitors in the current period is more than that in the previous period.
> - A down arrow indicates that the number of visitors in the current period is less than that in the previous period.
> - A left arrow indicates that the number of visitors in the current period is the same as that in the previous period.

Above the table, **Current Period** shows the number of users who visited the assets within the selected domain type or domain in the current period, and **Previous Period** shows the corresponding number in the previous period. This data is also graphically represented as a trend line chart. You can hover your pointer over the solid (current period) or dotted (previous period) lines in the chart to compare the data between two corresponding days in the current and previous periods.

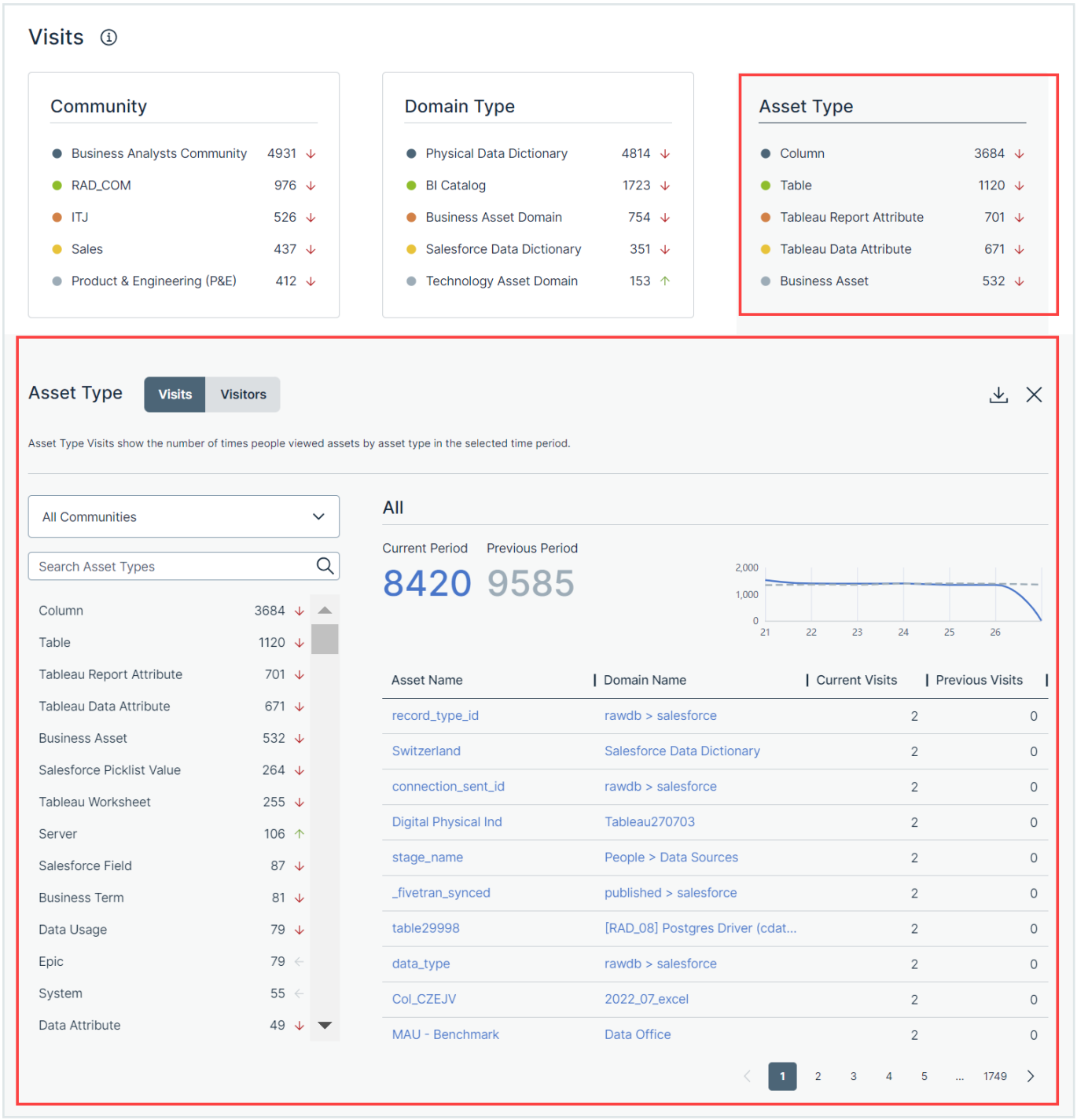
The table contains the following columns.

Column	Description
Asset Name	The name of the asset that belongs to the selected domain type or domain.
Domain Name	The name of the domain to which the asset belongs.
Current Visitors	The number of users who visited the asset in the current period.
Previous Visitors	The number of users who visited the asset in the previous period.

Asset Type

The **Asset Type** card shows five asset types of the assets that are visited the most in the current period. Depending on your permission, when you click the card, the **Asset Type** subsection appears with the following tabs:

- **Visits:** The number of times that the users visited the assets by asset types in the current period.
- **Visitors:** The number of users who visited the assets by asset types in the current period.



The left pane on the **Visits** or **Visitors** tab shows a list of asset types for all communities in hierarchical order. Only the asset types that contain at least one asset are shown in the left pane. You can view the asset types for a specific community by selecting that community in the drop-down list box. You can search for a specific asset type by using the **Search Asset Types** search box.

Tip After having clicked an asset type in the left pane, if you want to go back to viewing the data for all asset types within the selected community, click the same asset type in the left pane again. When you view the data for all asset types, the label **All** appears above the table.

Asset Type: Understanding the data on the Visits tab

On the **Visits** tab, in the left pane, the number that appears next to each asset type indicates how many times the users visited the assets within that asset type in the current period. The arrow next to each number indicates the trend of the number of visits compared with the previous period.

Tip

- An up arrow indicates that the number of visits in the current period is more than that in the previous period.
- A down arrow indicates that the number of visits in the current period is less than that in the previous period.
- A left arrow indicates that the number of visits in the current period is the same as that in the previous period.

Above the table, **Current Period** shows the number of times that the users visited the assets within the selected asset type in the current period, and **Previous Period** shows the corresponding number in the previous period. This data is also graphically represented as a trend line chart. You can hover your pointer over the solid (current period) or dotted (previous period) lines in the chart to compare the data between two corresponding days in the current and previous periods.

The table contains the following columns.

Column	Description
Asset Name	The name of the asset that belongs to the selected asset type.
Domain Name	The name of the domain to which the asset belongs.
Current Visits	The number of times that the asset was visited in the current period.
Previous Visits	The number of times that the asset was visited in the previous period.

Asset Type: Understanding the data on the Visitors tab

On the **Visitors** tab, in the left pane, the number that appears next to each asset type indicates how many users visited the assets within that asset type in the current period. The arrow next to each number indicates the trend of the number of visitors compared with the previous period.

> **Tip**
> - An up arrow indicates that the number of visitors in the current period is more than that in the previous period.
> - A down arrow indicates that the number of visitors in the current period is less than that in the previous period.
> - A left arrow indicates that the number of visitors in the current period is the same as that in the previous period.

Above the table, **Current Period** shows the number of users who visited the assets within the selected asset type in the current period, and **Previous Period** shows the corresponding number in the previous period. This data is also graphically represented as a trend line chart. You can hover your pointer over the solid (current period) or dotted (previous period) lines in the chart to compare the data between two corresponding days in the current and previous periods.

The table contains the following columns.

Column	Description
Asset Name	The name of the asset that belongs to the selected asset type.
Domain Name	The name of the domain to which the asset belongs.
Current Visitors	The number of users who visited the asset in the current period.
Previous Visitors	The number of users who visited the asset in the previous period.

Download data

> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

You can download the data shown on any of the expanded cards on the Usage Analytics dashboard as a CSV (comma-separated values) file. The downloaded file contains only the first 50,000 rows of the table.

Prerequisites

You have either the Sysadmin global role or the Insights > View Usage Analytics reports global permission.

Steps

1. Open the Usage Analytics dashboard.
2. Click the card whose data you want to download.
   » The card expands to show a table with the detailed data.
3. Click .
   » The first 50,000 rows of the table are downloaded as a CSV file on your computer.

Customize a table

> **Note** This topic is specific to the Usage Analytics dashboard that is available only in the previous, classic UI.

You can customize the table that is shown when you click a card in the **Visitors** or **Visits** section. For example, you can choose to show or hide certain columns or sort the table in ascending or descending order.

> **Tip** You can sort the table by the column values in ascending, descending, or original order by clicking the column heading.

Steps

1. In the table, hover your pointer over any column heading.

   > **Note** If you want to hide a column or sort the values in a column, you must hover your pointer over that column heading.

2. Click ⋮.
3. Select one of the following options.

Option	Description
Sort by ASC	Sorts the values in the column in ascending order.
Sort by DESC	Sorts the values in the column in descending order.
Hide	Hides the column from the table.
Show columns	Enables you to select the columns that you want to be shown in the table. If you want to show all available columns, click **Show all**.

Usage Analytics FAQ

How can I benefit from Usage Analytics?

- Improve the usage of your Collibra environment by gaining insights into who is using Collibra and which resources they are using.
- Improve the visibility and effectiveness of your adoption efforts by identifying how many users can access Collibra but have not done so, and how many new users have signed in to Collibra.
- View the number of active and inactive users over a period of time.
- View the number of visits to resources over a period of time.

Do I need to pay to use Usage Analytics?

No. Usage Analytics is a free, out-of-the-box product in your Collibra environment.

Does Usage Analytics replace Insights Data Access?

No. The following table describes the main differences between Insights Data Access and Usage Analytics.

Insights Data Access	Usage Analytics
A dashboard with configurable reports to visualize the data.	A pre-built dashboard showing usage data that is based on users and resources.
Paid.	Free.
Setup is needed.	Setup is not needed.
Data is refreshed every night to show a daily snap-shot of data.	Data is refreshed every 2 hours to show near real-time data.

When and how is the Usage Analytics data captured?

Usage Analytics captures data based on when users sign in to Collibra and when they visit a resource. These events are recorded in Collibra and sent every hour to the Usage Analytics database.

How often is the data on the Usage Analytics dashboard refreshed?

The usage data from your Collibra environment is pulled, aggregated, and refreshed every 2 hours. Thus, at any given time, the data on the Usage Analytics dashboard is not more than 2 hours behind.

Can I export the Usage Analytics data to a CSV file?

Yes. For more information, go to:

- For classic UI: Download data
- For latest UI: Usage or Users

Can a user who has a global role other than Sysadmin access Usage Analytics?

Yes, if the user has one of the following global permissions:

- **Insights** > **View Usage Analytics Reports**
- **Insights** > **View Usage Analytics Summary**

Is the usage data of administrators and deactivated users also included on the Usage Analytics dashboard?

Yes. If you want to exclude their usage data, you can do so on the new Usage Analytics dashboard using the **Exclude User** filter.

How far back can I view the data on the Usage Analytics dashboard?
Usage Analytics was introduced in Collibra 2022.11, meaning that you can view the data on asset visits and user interactions on the Usage Analytics dashboard from November 2022. If you began using Collibra after November 2022, you can view the data starting from your onboarding date. However, data on communities, domains, dashboards, and diagrams, exclusive to the new dashboard, was added in January 2024. Therefore, this particular set of data is available from January 2024, and only in the latest UI.

On the old Usage Analytics dashboard, can I restrict who can access the detailed data ?
Yes. You can hide the Usage Analytics detailed data from a user by removing the following global permission from the global role assigned to the user: **Insights** > **View Usage Analytics reports**

Can I filter the Usage Analytics data to focus on hotspots that require my attention?
Yes. You can filter the Usage Analytics data based on usage period and other criteria.

Can I access the Usage Analytics data via Public REST API?
Yes. This is available via the Insights Data Access API.

Does Usage Analytics capture events initiated via APIs, Edge, or mobile apps?
Usage Analytics captures only those events that are initiated from the Collibra user interface. Consequently, events initiated by accessing Collibra via an API, Edge, or a mobile app are not captured in Usage Analytics.

Is Usage Analytics FedRamp Certified?
Yes.

Data Helpdesk

With Data Helpdesk, 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
Business Issues	Contains a table with Issue assets in Collibra.
Data Quality	Contains tables with Data Quality and Data Quality Dimension assets.

Out-of-the-box metamodel for the Data Helpdesk

The Data Helpdesk has specific asset types and domain types.

[1] A problem related to issue management; also referred to as issue.

Asset types

The following table contains out-of-the-box asset types that are relevant for Data Helpdesk.

Domain types

The table below contains the out-of-the-box domain types that are relevant for the Data Helpdesk.

Workflows

The table below contains the out-of-the-box workflows that are relevant for the Data Helpdesk.

Name	Description
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.
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Platform.
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 out-of-the-box 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 Collibra Developer Portal.

The following table contains the different roles in an issue.

Role	Description
Requester	The requester is the user who has logged an issue, which means that there can only be one requester per issue. The requester is kept up to date on the issue resolution progress and can be asked to provide more information.
Reviewer	The reviewer analyzes the created issue and proposes a solution for it but does not implement the solution. The reviewer is responsible to ensure that all the information is available for solving the issue. This user can also mark an issue as invalid. 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

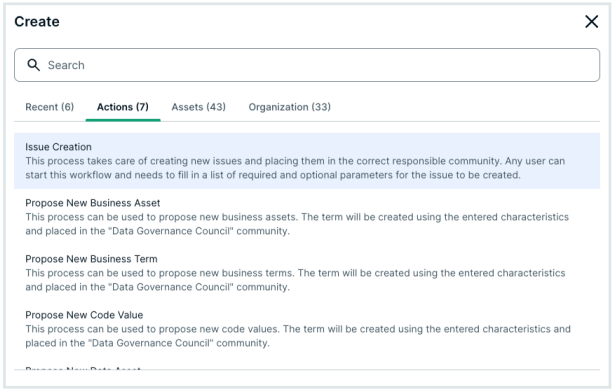
When you create a new data issue, the Issue Management workflow is triggered. The workflow behavior varies per company.

Before you begin

Ensure that the workflows outlined in Out-of-the-box metamodel for the Data Helpdesk are enabled and up-to-date on your Collibra platform. If they are not available or are not the latest versions, download them from Product Resources and deploy them on your platform.

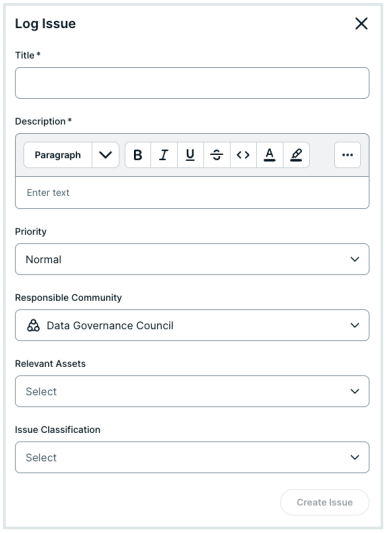
Steps

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.



   - **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**: The asset, or 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.
   - **Issue Classification**: The Issue Category asset, or assets, that best describe your 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.
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.

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 administrator has renamed the Issue Management workflow.

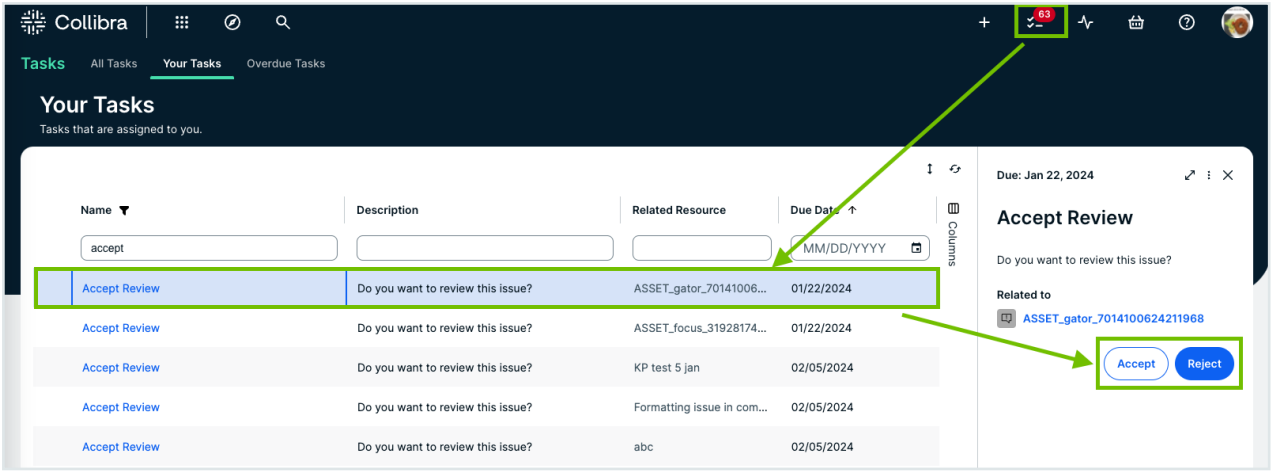
Accepting or rejecting a data issue

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.

To access the **Tasks** page, click the **Tasks** icon 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.



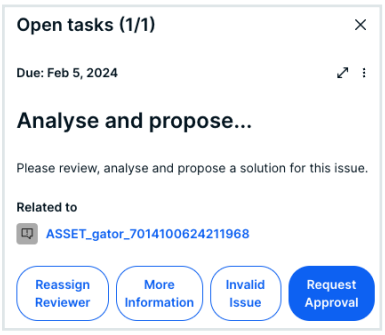
If you click the name of the task or the related resource, the issue page opens.

If you accept the issue, the workflow automatically advances to the next step.

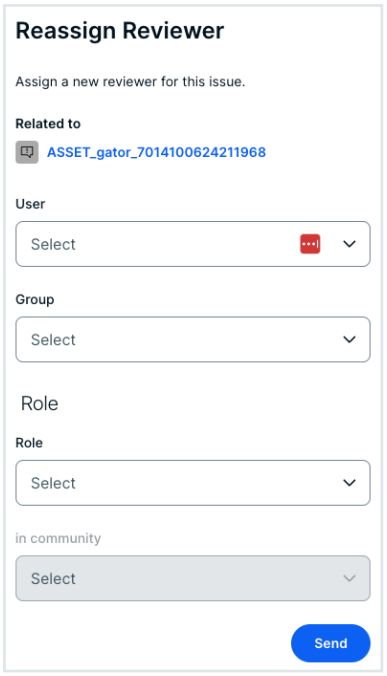
> **Tip** You can also access the issues via **Data Helpdesk** → **Issues** and apply a filter to find the issues that require an action from you.

Analyzing and proposing a solution

When the status of a task is **Under Review**, you can perform the following actions:



- **Reassign Reviewer**: Choose this action if you find that an other user is more suited to analyze the issue. The status of the task becomes **Reassign Reviewer**. Click **Submit** to assign a new user, role or group as the new reviewer for the issue.



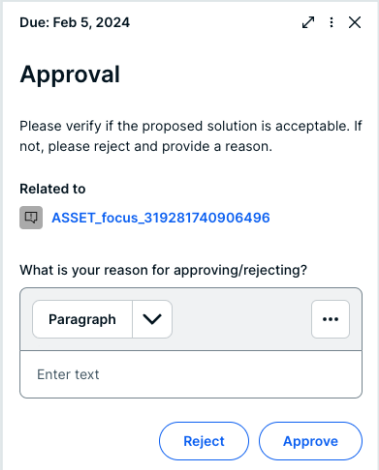
- **More Information**: Choose this action if you need more information from the issue requester. The status of the issue becomes **Pending**. This action creates a task for the requester to provide more information about the issue.
  When the requester has completed this task, the workflow returns to you with a task with the same four options.
- **Invalid Issue**: Choose this action to mark the issue as invalid. The requester is notified and the issue management workflow is finished. Note that this is an irreversible action.
- **Request Approval**: Choose this action to request an approval for your analysis and solution proposal. You can only click this action when you have provided a detailed analysis of the issue in the issue's **Analysis** attribute. In the **Resolution** attribute, you can propose a solution to the issue. When you request an approval, the contents of the **Analysis** and **Resolution** attributes can be evaluated and approved. The issue is marked as **Submitted for approval**.

Approve or reject a solution

In the approve/reject step, each stakeholder assigned to the issue is requested to accept or reject the analysis and solution proposed by the reviewer. All the stakeholders have to accept, otherwise the solution is not approved. If one stakeholder rejects the solution, the workflow creates a new task for the reviewer to update the analysis and solution, taking into account the

comments given by the stakeholder who rejected the proposed solution. If approved, the issue is marked as Accepted.

1. In the sidebar, provide a reason for your action.
2. Click **Reject** or **Approve**.



If all of the stakeholders approve 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

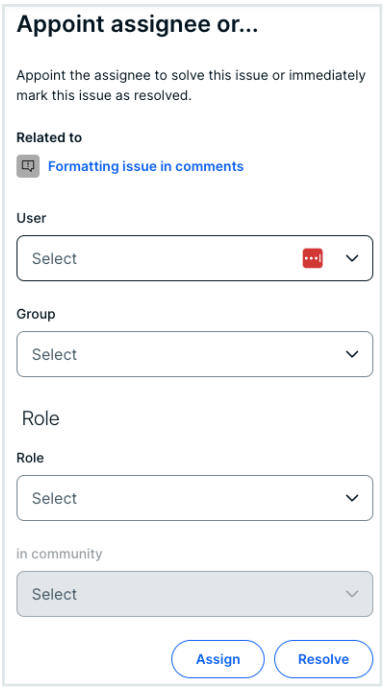
When all the stakeholders have accepted the proposed solution, it does not necessarily mean that the issue is resolved. It is possible that the solution still has to be implemented.

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.

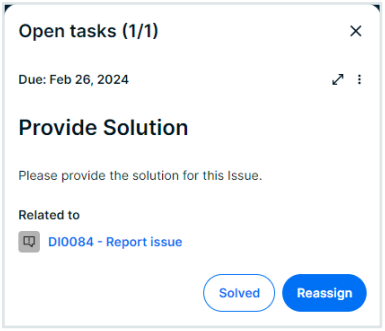


Depending on the issue management workflow configuration, a user might be proposed in the **User** field.

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 asks the reviewer to check if the solution matches the expectations. In this case, the issue is marked as **Resolution Pending**.



This task has to be completed within a predefined period, if not, the workflow returns to the previous step and presents a new task to the reviewer to appoint a new assignee to perform the task.

Instead of resolving the issue by implementing the proposed solution, it is possible that the issue can be resolved by linking it to a governance asset. For example, by forcing all assets to comply to a business rule so that the problem described in the issue can not happen again.

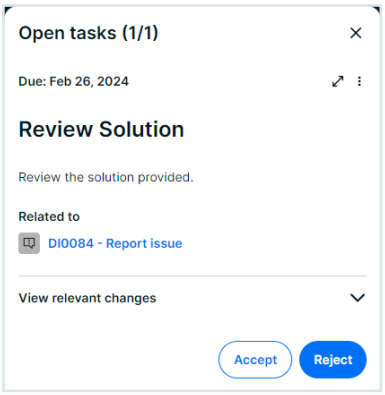
To resolve an issue with a related asset, you need the correct rights in the community as assignee.

You can link the issue with a governance asset as follows:

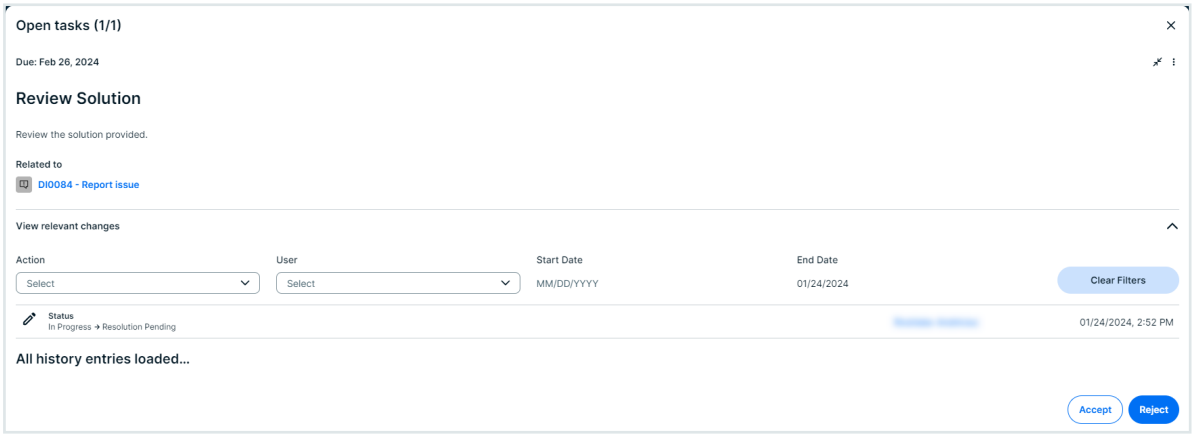
1. On the issue page, click **Characteristic**.
2. Click the **Relations** tab.
3. Choose the **Resolved by** relation.
4. Enter the resolving governance assets in the dialog box, optionally set a **Start Date** and **End Date**.
5. Click **Save**.
6. The relation appears in the **resolved by Governance Asset** table on the issue page.
7. Click **Solved** 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.



> **Tip** Open the task in full screen to have a better view of the relevant changes table.

- Click **More** → **Reassign** to assign the review step to an other user.

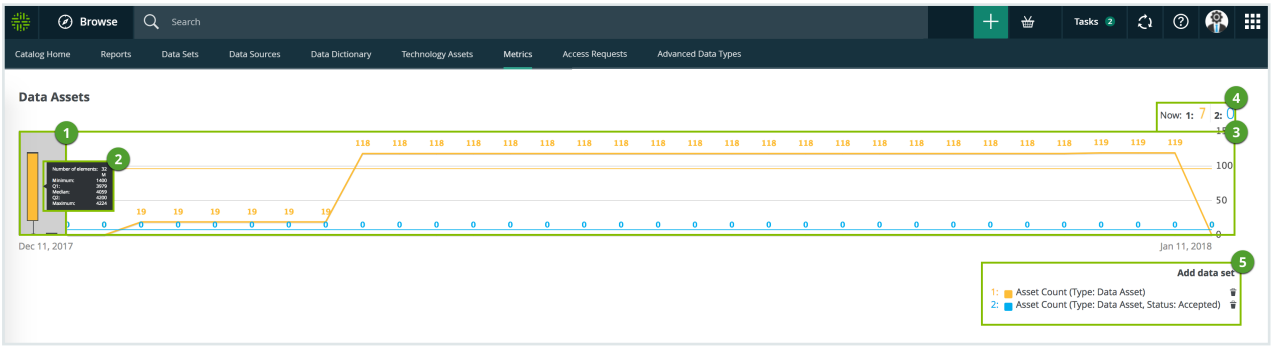
Metrics pages

This feature **isn't available** in the latest user interface.

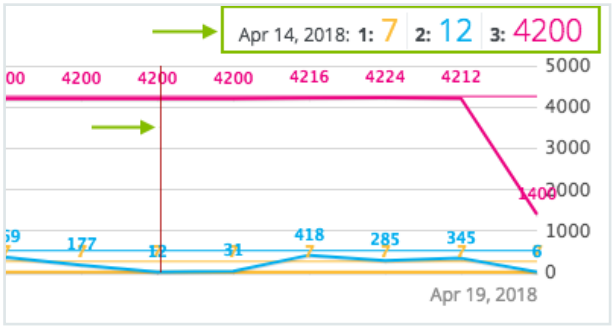
The Metrics pages contain a variety of statistics related to how an application is used. The pages contain one or more graphs, their legends, and some counters.

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 Collibra Data Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.



Number	Element	Description
1	Color-coded bars	A quick overview of the graph. The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values.
2	Data set details	More details about the graph. 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.

Number	Element	Description
3	Graph	The actual graph. What it shows 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	Hover your pointer over the graph to see the counts for a specific day for each data set. 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.

Prerequisites

Your environment uses the classic UI.

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 is shown.
4. Enter the required information.

Filter setting	Description
Filter Type	The type of data that will be counted. Depending on the filter type 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 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.

Filter setting	Description
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.
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.

Filter setting	Description
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.
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

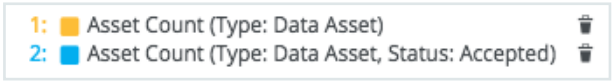
You can edit the data set that is shown in a graph on the Metrics pages.

Prerequisites

Your environment uses the classic UI.

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.



   » 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 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 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:

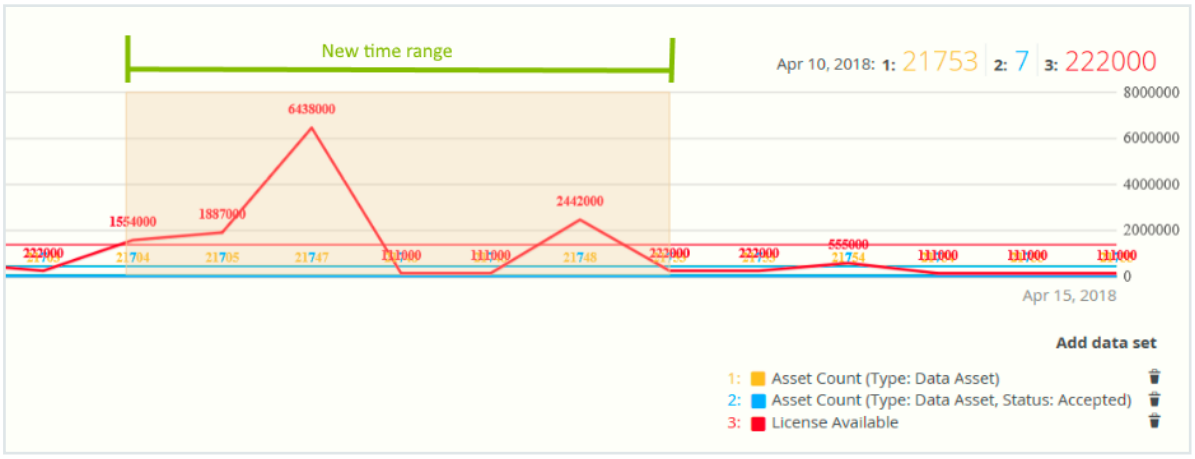
- Dragging within the graph.
- Selecting the dates for the graph.

Prerequisites

Your environment uses the classic UI.

Drag within 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. Optional: Add a data set to a metrics graph a data set to a graph.
4. In the relevant graph, drag the first date in the required range to the right, towards the last date in the range.
   » While you are dragging, the color changes in the graph, indicating the resulting time range.

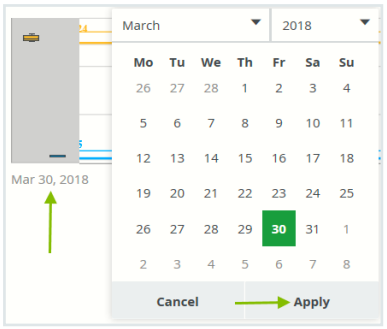


   » The graph is adjusted to the new time range.

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. Optional: 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 the required 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 the date.
   » A date picker appears.
7. Click the last day of the required 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, for example, 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 need to first Add a data set to a metrics graph another data set. You can then remove the other one.

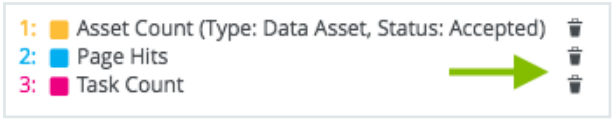
Prerequisites

Your environment uses the classic UI.

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 🗑 next to the data set you want to delete.



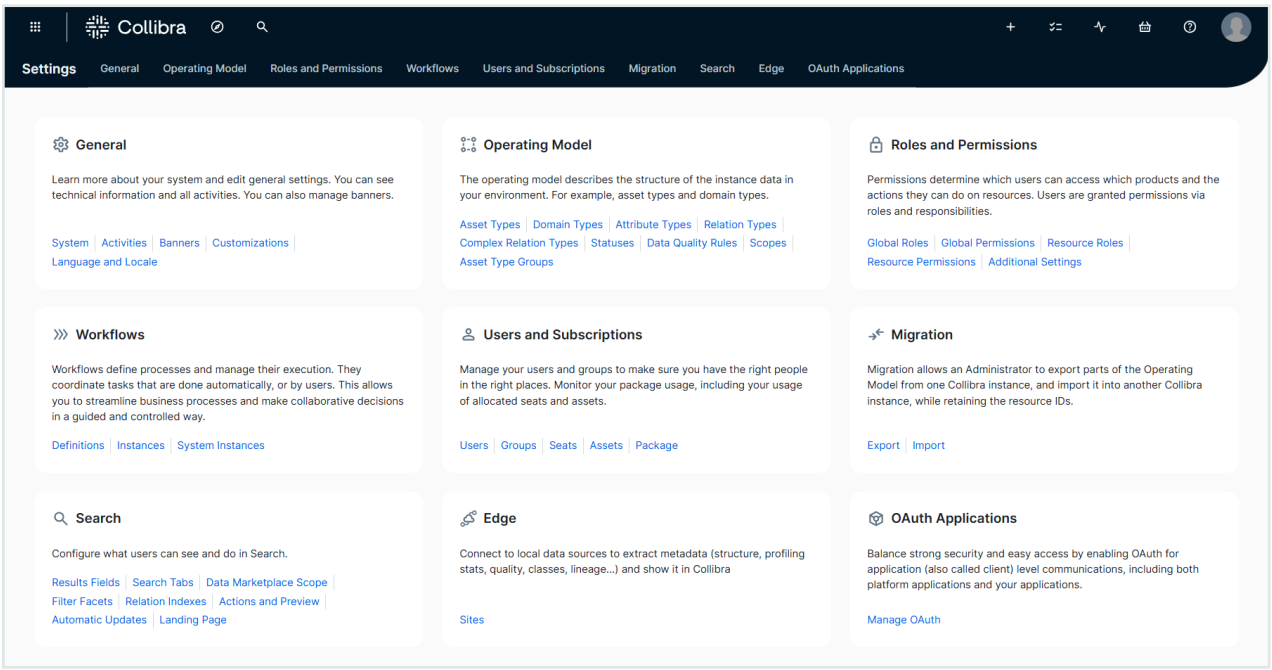
» The graph is updated.

Collibra settings

The Collibra settings allow you to customize the operating model and manage your environment according to your needs.

To access the Collibra settings, on the main toolbar, click → **Settings**.

> **Tip** Contact Collibra Support if you want to enable or disable the **Settings** page.



General settings page

The **General** page of the Collibra settings has several tab pages:

Tab page	Description
System	See information about the installation of your Collibra environment, rebuild the search index, and rebuild automatic hyperlinks.
Activities	See the details of all activities started by all users and their results, if available.
Banners	Create, edit, or delete banners.
Customizations	Customize Collibra by changing the logo or color theme, or translating custom text.
Language and Locale	Select the language and locale of Collibra.

Rebuild hyperlinks

This feature doesn't exist in the latest version of the Collibra user interface.

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.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 or 5.7.7

After an upgrade to Collibra version 2020.11 or 5.7.7, the activity history of assets is not automatically visible in Collibra Platform. You need to upgrade the activity history to make it visible.

Note

- The console export file you restore must contain history data as one of the options when creating a console export file.
- 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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **General**.
3. On the **System** tab, at the bottom of the page, click **Upgrade History**.
   » The history in the console export file is converted to the new environment. The conversion time depends on the size of the history in the console export file. You can view the status of the history upgrade by viewing your activities.

Languages and locales

The interface text of Collibra is available in the following languages, with English being the default:

- Dutch (in preview)
- English (United States)

- French
- German
- Spanish

You can also choose a specific locale of the supported languages, which determines the format of dates, times and numbers. Collibra offers the following locales:

- German (Austria)
- English (Australia)
- English (Canada)
- English (United Kingdom)
- English (Ireland)
- English (India)
- English (New Zealand)
- English (South Africa)
- French (Canada)
- French (Switzerland)

Related settings

Allow User Overrides

If Allow User Overrides is disabled, all users have the same language and locale, and they cannot change it themselves. If you enable this setting, each user can change their language in the profile settings.

International Date Format

If International Date Format is disabled, dates are shown in the format of the selected language and locale. If you enable this setting, all dates are shown in the ISO-8601 (YYYY-MM-DD) format, regardless of the language and locale.

Customizations

In the Customizations section of the Collibra settings, you can edit the strings that are used in email templates and workflow forms. You can do this for each of the main languages. The format of any dates, times and numbers in custom strings is not affected by the selected locale. For more information, go to Custom strings.

Limitations

Collibra does not support other languages for the interface text and your instance data. There are known issues with sorting and filtering non-Latin characters, affecting the accuracy of search results. Most of the Collibra interface text is translated, including buttons, messages, tooltips, and dialog boxes. There are, however, a few exceptions:

- Operating model is not translated:
  - Asset types
  - Domain types
  - Statuses
  - Characteristic types
  - Roles
  - Scopes
- Instance data is not translated:
  - Asset names
  - Characteristics
  - Tags and comments
  - Names of views and filters
  - Text in dashboards and widgets
  - Custom strings

Set the default language and locale

This feature is **available only** in the latest UI.

You can set the default language and locale of Collibra, which determines the language, as well as the format of dates, times and numbers.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.

2. Click **General**.
3. In the tab pane, click **Language and Locale**.
4. Enter the required information:

Setting	Description
Language and Locale	The default language and locale of Collibra.
Allow User Overrides	If Allow User Overrides is disabled, all users have the same language and locale, and they cannot change it themselves. If you enable this setting, each user can change their language in the profile settings.
International Date Format	If International Date Format is disabled, dates are shown in the format of the selected language and locale. If you enable this setting, all dates are shown in the ISO-8601 (YYYY-MM-DD) format, regardless of the language and locale.

Edit or translate interface text

This feature **isn't available** in the latest user interface. In the latest user interface, you can customize only the strings that are used in email templates and workflow forms. For more information, go to Custom strings.

You can edit or translate the interface text of Collibra 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.

> **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 backward compatible with other Collibra versions. When you upgrade to a newer version, there might be new keys, renamed keys, or keys that have been deleted.

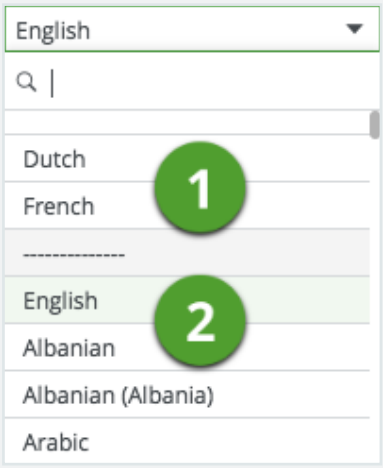
Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The Settings page opens.
2. Click **General**.
3. In the tab pane, click **Language and Locale**.
4. At the top of the editor, select the interface language.

   Tip Languages that contain previously edited text are shown at the top of the drop-down menu.

   » If you select a previously edited language (1), the editor contains the list of translation messages.

   » If you select 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. Therefore, click it only once.

5. Edit or translate the interface text, or paste the content from your translation file.
   Structure of a string
   A string must be structured in the following format: key = value. The following table describes the elements used in a string.

Element	Description
Key	A unique identifier that Collibra uses to retrieve the correct string. **Example** `userNotFoundEmail` = The user with email address "{0}" was not found.
Equal sign (=)	An equal sign placed between spaces. **Example** userNotFoundEmail = The user with email address "{0}" was not found.
Value	The actual content of the string. **Example** userNotFoundEmail = `The user with email address ''{0}'' was not found.`
Variables (optional)	A string may contain variables as placeholders for specific information. These placeholders are filled with actual data when shown to users. A variable is represented by a number enclosed within curly brackets. **Example** userNotFoundEmail = The user with email address "`{0}`" was not found.
Markup (optional)	A string may contain HTML tags for formatting or creating a hyperlink. **Example** core.header.expired = Your password has expired.` `Please change your password `<a href="{0}">`here`</a>`.

6. Click **Save**.

Reset interface text

To restore the default interface text from the language settings page, you need to override your changes with the default interface text.

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **General**.
3. In the tab pane, click **Language and Locale**.
4. Click **Load Defaults**.
5. Click **Save**.

What's next?

You can select the interface language in your account settings.

Banners

Banners are messages that are visible for all users, on all pages of Collibra Platform.

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.

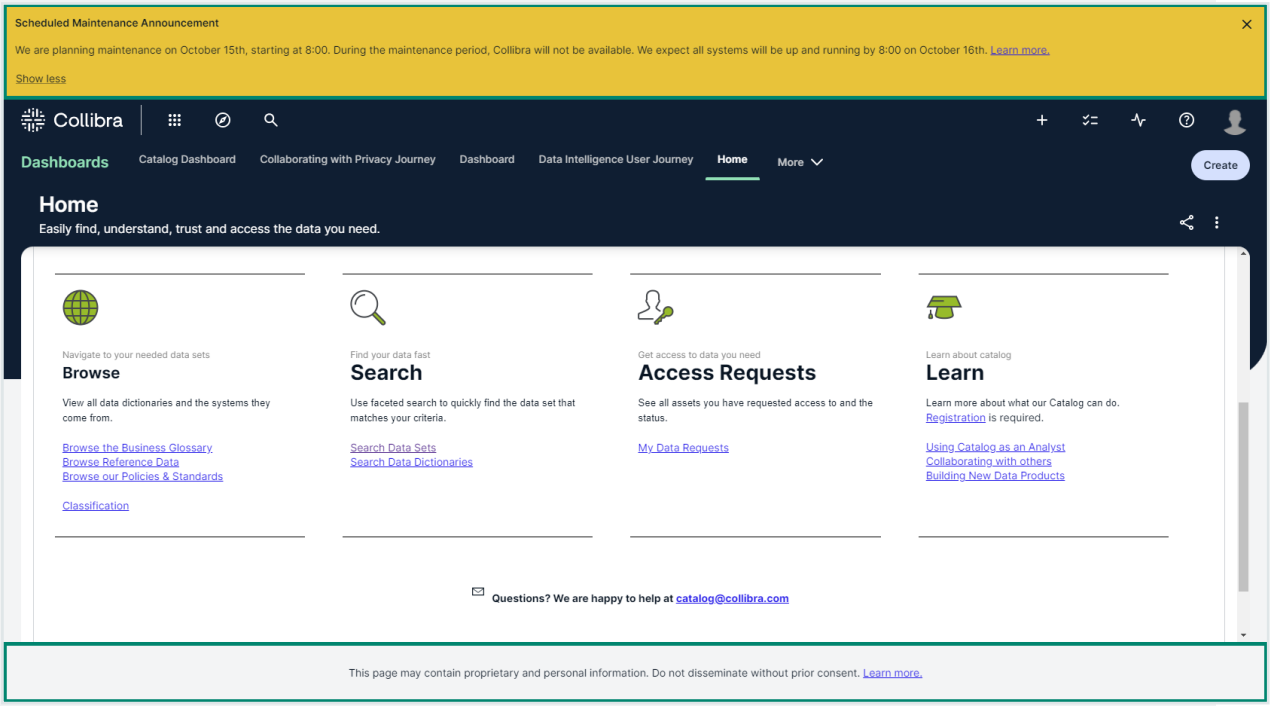
Top Banner

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


Scheduled Maintenance Announcement
We are planning maintenance on October 15th, starting at 8:00. During the maintenance period, Collibra will not be available. We expect all systems will be up and running by 8:00 on October 16th. Learn more.
Show less
Collibra
Dashboards
Catalog Dashboard
Collaborating with Privacy Journey
Dashboard
Data Intelligence User Journey
Home
More
Create
Home
Easily find, understand, trust and access the data you need.
Navigate to your needed data sets
Browse
View all data dictionaries and the systems they come from.
Browse the Business Glossary
Browse Reference Data
Browse our Policies & Standards
Classification
Find your data fast
Search
Use faceted search to quickly find the data set that matches your criteria.
Search Data Sets
Search Data Dictionaries
Get access to data you need
Access Requests
See all assets you have requested access to and the status.
My Data Requests
Learn about catalog
Learn
Learn more about what our Catalog can do.
Registration is required.
Using Catalog as an Analyst
Collaborating with others
Building New Data Products
Questions? We are happy to help at catalog@collibra.com
This page may contain proprietary and personal information. Do not disseminate without prior consent. Learn more.

Create and edit banners

1. On the main toolbar, click → **Settings**.
   » The Settings page opens.
2. In the **General** section, click **Banners**.
   » The **Banners** page opens.
3. To create or edit a banner:
   a. In the **Top Banner** or **Bottom Banner** section, click inside the text input area or click .
   b. Enter or edit the content of the banner.
   c. Click **Publish**.
      » The **Publish Banner** dialog box appears.
   d. Click **Confirm**.
      » The banner is now visible on all pages for all users.
4. To delete a banner:
   a. In the **Top Banner** or **Bottom Banner** section, click .
      » The **Remove Banner** dialog box appears.
   b. Click **Delete**.
      » The banner is no longer visible on any page.

Customizations

This feature is **available only** in the latest UI.

You can customize the theme of your entire environment and also customize strings for email templates and workflow forms.

> **Tip** In the classic UI, you can customize the interface text. For more information, go to Edit or translate interface text.

Custom theme

This feature is **available only** in the latest UI.

You can customize the overall visual appearance of your entire environment by changing the logo and the colors of various components. This feature enables you to align your Collibra

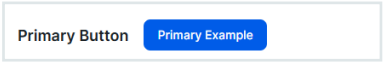
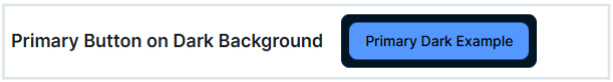
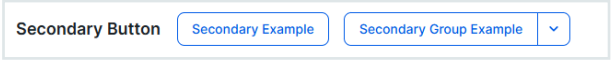
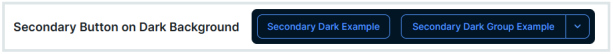
environment with your brand, for a consistent and recognizable visual identity across your applications. The customizations are applied across all Collibra pages and are visible to all users.

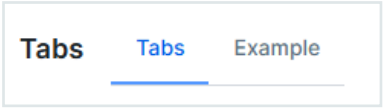
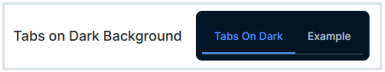
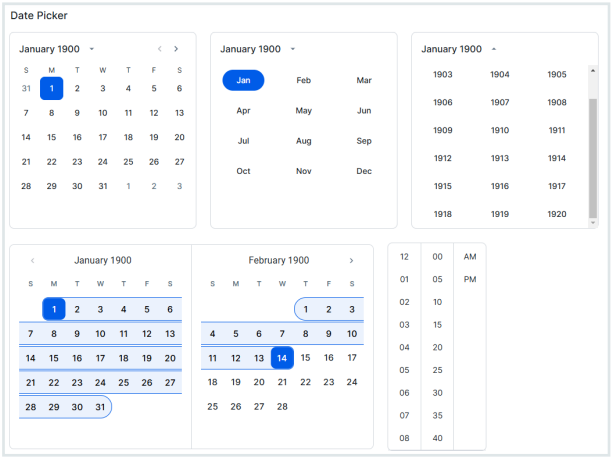
> **Note**
> - Theme customizations don't apply to standalone applications, such as Data Quality, Data Notebook, and Workflow Designer, or applications in the classic UI, such as Diagrams and Technical Lineage.
> - The latest user interface no longer supports CSS override files for customizing the appearance of the interface, for example, for replacing the Collibra logo or using a custom favicon.

User interface terminology

This feature is **available only** in the latest UI.

The **Components** section on the **Custom Theme** page contains terms related to the user interface (UI). The following table describes such terms and other UI-related terms used in Customize theme.

Term	Description
Primary Button	A prominent button for primary actions, designed to capture the user's attention. 
Primary Button on Dark Background	A primary button on a dark background. 
Secondary Button	A button for secondary actions, complementing the primary button and often used for less critical functions. Secondary buttons include outline buttons, split buttons, and button groups. 
Secondary Button on Dark Background	A secondary button when shown on a dark background. 

Term	Description
Tabs	A component for organizing and navigating between different sections. 
Tabs on Dark Background	A tab on a dark background. 
Switch	A component for switching between the enabled state and the disabled state.
Stepper	A component for indicating progress through a sequence of logical steps.
Date Picker	A component for selecting a date and time from a calendar. 

Customize theme

This feature is **available only** in the latest UI.

This documentation describes how to customize the theme of your environment, including how to reset the theme customizations. Theme customizations don't apply to standalone applications, such as Data Quality, Data Notebook, and Workflow Designer, or applications in the classic UI, such as Diagrams and Technical Lineage.

> **Note**
> - When customizing the theme, prioritize readability and accessibility.
> - Resetting the theme customizations reverts your changes to the default theme.

Prerequisites

- You have a global role that has the **Product Rights** > **System administration** global permission.
- If you want to change the logos and icons, you have the logos and icons in SVG files, and each file size is not more than 50 kilobytes.
- You are familiar with the interface terms.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **General** section, click **Customizations**.
   » The **Custom Theme** page opens.
3. If you have already customized the colors in your environment, but now want to revert the colors to the default colors, at the bottom of the page, click **Reset All Components**,

and then go to Step 5.

4. If you want to customize your environment, enter the required information.

Section	Description
Logo	Enables you to upload images that are shown as logos and icons. **Important** ◦ The changes you make in the **Logo** section are instantly applied to your environment, and they are visible to everyone. In other words, you don't need to click **Save Customizations**. Therefore, ensure that the logos and icons you upload as images don't negatively impact user accessibility. For color contrast guidelines, go to W3C website or the WCAG color contrast checker. ◦ The logos and icons you upload in the **Logo** section don't affect the favicon or the loading page icon. ◦ The **Logo** section accepts only SVG files with a file size not more than 50 kilobytes. ◦ If, after uploading an image a subsection, you want to undo your change, click **Reset** in the subsection. You don't need to click **Save Customizations**. The image reverts to the default logo or icon in the environment.
Header Color	Enables you to select a predefined color for the entire header, including the top navigation bar.
Quick Color Select Tool	The **Quick Color Select Tool** and **Components** sections affect the same components. However, the **Quick Color Select Tool** section offers a quick way to set colors for components, whereas the **Components** section allows for color selection at a more granular level for the same components. For example, in the **Components** section, you can also select a color for subcomponents, such as the active state for tabs or the background color for enabled switches. **Tip** To undo all your changes in a subsection, click **Reset** in the subsection.

Section	Description
Components	Enables you to select colors for components, including their states. **Tip** ◦ To undo all your changes in a subsection, click **Reset** in the subsection. ◦ The colors you select in the **Components** section always take precedence over the colors selected in the **Quick Color Select Tool** section.

5. Select the **I agree** checkbox.

   Tip Keep in mind that certain color combinations can negatively impact user accessibility. For color contrast guidelines, go to W3C website or the WCAG color contrast checker.

6. Click **Save Customizations**.
   » Customized theme is saved and applied throughout the environment.

Tip To undo all your changes in the **Header Color** and **Components** sections, click **Reset All Components**, and then click **Save Customizations**.

Logo

This feature is **available only** in the latest UI.

You can replace the default logo and icon in your environment with your own brand imagery via the **Logo** section on the **Custom Theme** page.

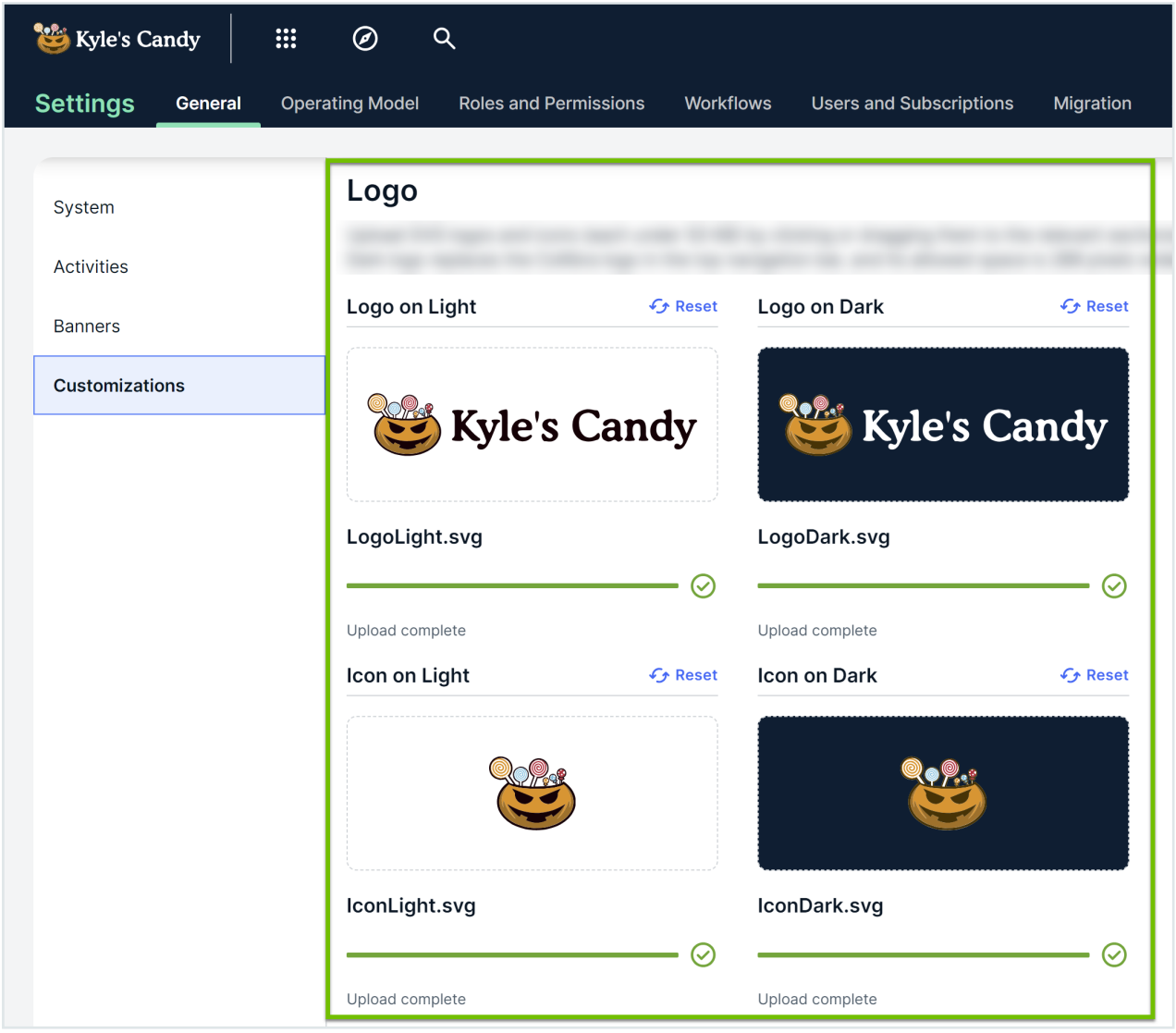
Important

- The changes you make in the **Logo** section are instantly applied to your environment, and they are visible to everyone. In other words, you don't need to click **Save Customizations**. Therefore, ensure that the logos and icons you upload as images don't negatively impact user accessibility. For color contrast guidelines, go to W3C website or the WCAG color contrast checker.

- The logos and icons you upload in the **Logo** section don't affect the favicon or the loading page icon.
- The **Logo** section accepts only SVG files with a file size not more than 50 kilobytes.
- If, after uploading an image a subsection, you want to undo your change, click **Reset** in the subsection. You don't need to click **Save Customizations**. The image reverts to the default logo or icon in the environment.

The following table describes the subsections in the **Logo** section.

Subsection	Description
Logo on Light	Upload the logo intended for a light background by clicking the current logo, and then selecting the required logo.
Logo on Dark	Upload the logo intended for a dark background by clicking the current logo, and then selecting the required logo. **Note** This logo replaces the Collibra logo in the top navigation bar. The space in which this logo fits is 288 pixels wide and 40 pixels high.
Icon on Light	Upload the icon intended for a light background by clicking the current icon, and then selecting the required icon.
Icon on Dark	Upload the icon intended for a dark background by clicking the current icon, and then selecting the required icon.



Quick color select tool

This feature is **available only** in the latest UI.

You can change the colors of the components in your environment via the **Quick Color Select Tool** section on the **Custom Theme** page.

The **Quick Color Select Tool** and **Components** sections affect the same components. However, the **Quick Color Select Tool** section offers a quick way to set colors for components, whereas the **Components** section allows for color selection at a more granular level for the same components. For example, in the **Components** section, you can also select a color for

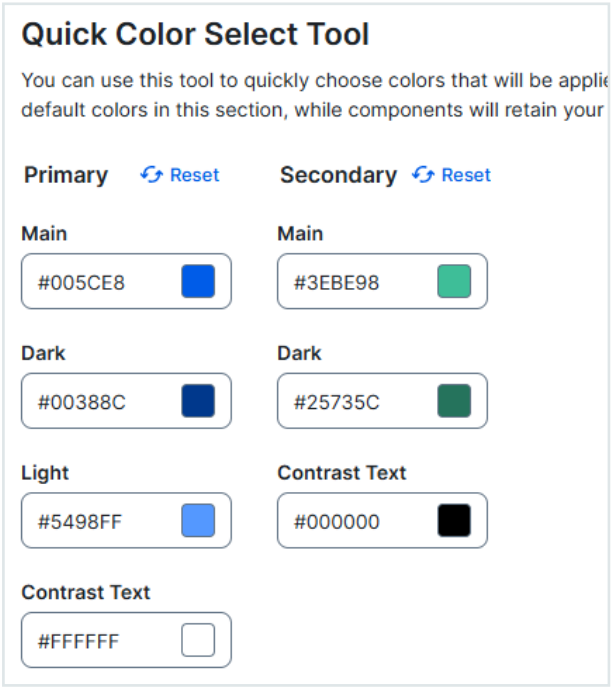
subcomponents, such as the active state for tabs or the background color for enabled switches.

Tip

- This topic contains certain terms related to the user interface. For information about these terms, go to User interface terminology.
- To undo all your changes in a subsection, click **Reset** in the subsection.

Note

- The colors you select in the **Components** section always take precedence over the colors selected in the **Quick Color Select Tool** section.
- The colors you select in the **Quick Color Select Tool** section are not retained in the section, even if you click **Save Customizations**. Those colors are, however, applied to the components, after you click **Save Customizations**.
- When you change the colors in the **Quick Color Select Tool** section, your changes are reflected in the **Components** section for the applicable components. However, when you change the colors in the **Components** section, your changes are not reflected in the **Quick Color Select Tool** section.



The following table describes the subsections and the fields in the **Quick Color Select Tool** section.

Subsection	Description
Primary	Colors of primary buttons and certain states of switches, steppers, and date pickers.
Main	• Background color of primary buttons. • Background color of switches when enabled. • Background color of steppers when the associated steps are active. • Background color of selected dates when hovered over in date pickers. • Border color of switches. • Color of thumbs in switches. • Border color of current dates in date pickers.
Dark	Background color of primary buttons when being clicked, to indicate that your interaction with the button is registered.
Light	• Background color of primary buttons when hovered over. • Background color of enabled switches when hovered over. • Background color of dates and time when selected in date pickers.
Contrast Text	• Text color of primary buttons. • Text color of steppers when the associated steps are active. • Text color of dates and time when selected in date pickers.
Secondary	Colors of secondary buttons and certain states of date pickers.
Main	• Background color of secondary buttons when hovered over. • Background color of date ranges when selected in date pickers.
Dark	Background color of secondary buttons when being clicked, to indicate that your interaction with the button is registered.
Contrast Text	• Text color of secondary buttons. • Text color of dates within a range in date pickers.

Components

This feature is **available only** in the latest UI.

You can change the colors of the components in your environment via the **Components** section on the **Custom Theme** page.

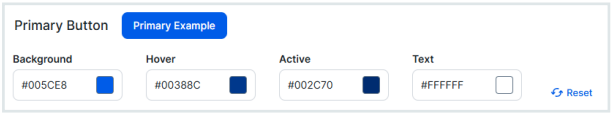
The **Quick Color Select Tool** and **Components** sections affect the same components. However, the **Quick Color Select Tool** section offers a quick way to set colors for components, whereas the **Components** section allows for color selection at a more granular level for the same components. For example, in the **Components** section, you can also select a color for subcomponents, such as the active state for tabs or the background color for enabled switches.

Tip

- This topic contains certain terms related to the user interface. For information about these terms, go to User interface terminology.
- An example is shown in each subsection in the UI to enable you to visualize and interact with components as you customize them.
- To undo all your changes in a subsection, click **Reset** in the subsection.
- The colors you select in the **Components** section always take precedence over the colors selected in the **Quick Color Select Tool** section.

Primary Button

The **Primary Button** subsection enables you to select colors for the elements and states of primary buttons when they appear on a light background.



The following table describes the fields in the **Primary Button** subsection.

Field	Description
Background	Background color of primary buttons on a light background.
Hover	Background color of primary buttons when hovered over on a light background.
Active	Background color of primary buttons when being clicked on a light background, to indicate that your interaction with the button is registered.
Text	Text color of primary buttons on a light background.

Primary Button on Dark Background

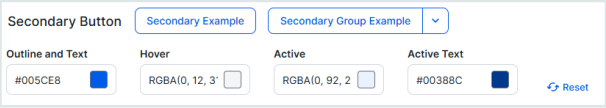
The **Primary Button on Dark Background** subsection enables you to select colors for the elements and states of primary buttons when they appear on a dark background.

The following table describes the fields in the **Primary Button on Dark Background** subsection.

Field	Description
Background	Background color of primary buttons on a dark background.
Hover	Background color of primary buttons when hovered over on dark light background.
Active	Background color of primary buttons when being clicked on a dark background, to indicate that your interaction with the button is registered.
Text	Text color of primary buttons on a dark background.

Secondary Button

The **Secondary Button** subsection enables you to select colors for the elements and states of secondary buttons when they appear on a light background.



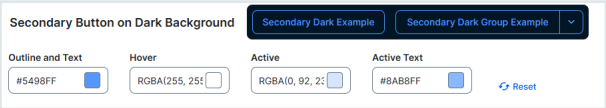
The following table describes the fields in the **Secondary Button** subsection.

Field	Description
Outline and Text	Border and text color of secondary buttons on a light background.
Hover	Background color of secondary buttons when hovered over on a light background.
Active	Background color of secondary buttons when being clicked on a light background, to indicate that your interaction with the button is registered.

Field	Description
Active Text	Text color of secondary buttons when clicked on a light background.

Secondary Button on Dark Background

The **Secondary Button on Dark Background** subsection enables you to select colors for the elements and states of secondary buttons when they appear on a dark background.

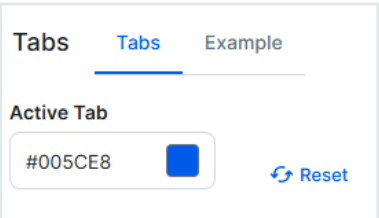


The following table describes the fields in the **Secondary Button on Dark Background** subsection.

Field	Description
Outline and Text	Border and text color of secondary buttons on a dark background.
Hover	Background color of secondary buttons when hovered over on a dark background.
Active	Background color of secondary buttons when being clicked on a dark background, to indicate that your interaction with the button is registered.
Active Text	Text color of secondary buttons when clicked on a dark background.

Tabs

The **Tabs** subsection enables you to select the color of the active state of tabs when they appear on a light background.

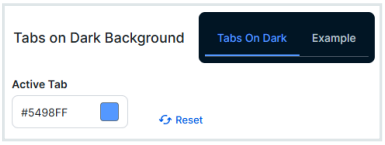


The following table describes the field in the **Tabs** subsection.

Field	Description
Active Tab	Text and indicator color of active tabs on a light background.

Tabs on Dark Background

The **Tabs on Dark Background** subsection enables you to select the color of the active state of tabs when they appear on a dark background.

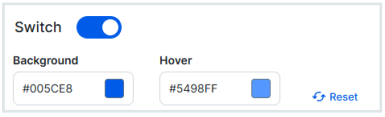


The following table describes the field in the **Tabs on Dark Background** subsection.

Field	Description
Active Tab	Text and indicator color of active tabs on a dark background.

Switch

The **Switch** subsection enables you to select colors for the elements and states of switches.



The following table describes the fields in the **Switch** subsection.

Field	Description
Background	Background color of switches when enabled.
Hover	Background color of enabled switches when hovered over.

Stepper

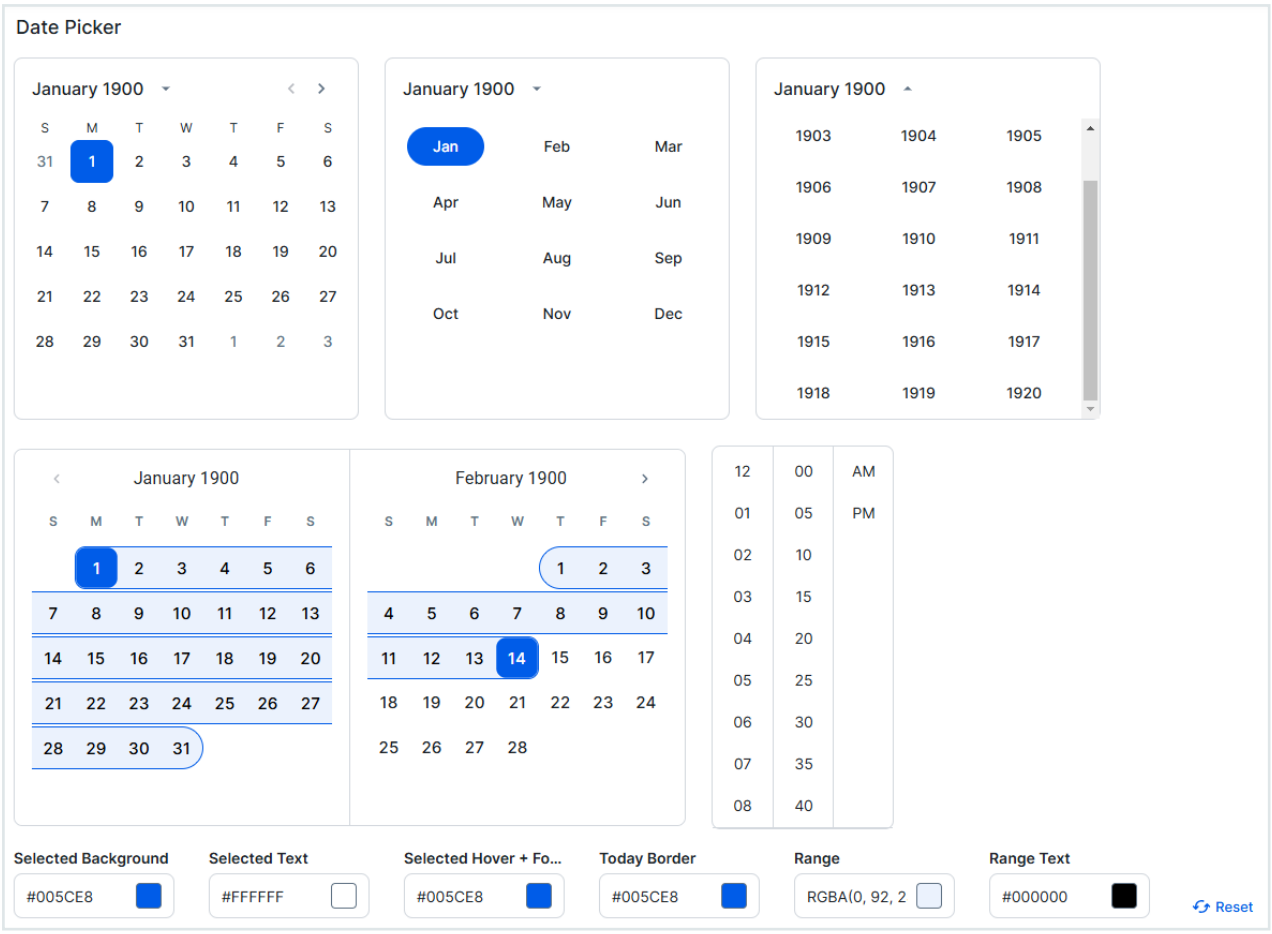
The **Stepper** subsection enables you to select colors for the elements and states of steppers.

The following table describes the fields in the **Stepper** subsection.

Field	Description
Active Icon Background	Background color of active steps.
Active Icon Text	Text color of active steps.
Completed Icon Background	Background color of completed steps.
Completed Icon Text	Text color of completed steps.
Hover Background	Background color of step titles in non-linear steppers when hovered over. **Tip** A non-linear stepper is a stepper that allows you to move forward or back in the steps.

Date Picker

The **Date Picker** subsection enables you to select colors for the elements and different presentations of calendars.



The following table describes the fields in the **Date Picker** subsection.

Field	Description
Selected Background	Background color of dates and time when selected in date pickers.
Selected Text	Text color of years, months, dates, and time when selected in date pickers.
Selected Hover + Focus	Background color of selected years, months, and dates when hovered over or in focus in date pickers.
Today Border	Border color of current dates in date pickers.
Range	Background color of span of dates when selected in date pickers.
Range Text	Text color of dates within a range in date pickers.

Custom strings

> **Important** This feature is **available only** in the latest UI. However, in the classic user interface, you can customize the interface text. For more information, go to Edit or translate interface text.

You can add or edit the strings that are used in email templates and workflow forms in any of the supported languages. All the other UI strings are provided by Collibra in the supported languages.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **General** section, click **Customizations**.
3. Click the **Custom Strings** tab.
4. In the **Language** field, select the language for which you want to customize strings.
5. Enter your custom strings in the text box.
   Structure of a string
   A string must be structured in the following format: key = value. The following table describes the elements used in a string.

Element	Description
Key	A unique identifier that Collibra uses to retrieve the correct string. **Example** `userNotFoundEmail` = The user with email address "{0}" was not found.

Element	Description
Equal sign (=)	An equal sign placed between spaces. **Example** userNotFoundEmail = The user with email address "{0}" was not found.
Value	The actual content of the string. **Example** userNotFoundEmail = `The user with email address ''{0}'' was not found.`
Variables (optional)	A string may contain variables as placeholders for specific information. These placeholders are filled with actual data when shown to users. A variable is represented by a number enclosed within curly brackets. **Example** userNotFoundEmail = The user with email address "`{0}`" was not found.
Markup (optional)	A string may contain HTML tags for formatting or creating a hyperlink. **Example** core.header.expired = Your password has expired. Please change your password here.

Note If you want to start with the default strings, click **Load Default Strings**. This fills the text box with strings for the selected language. Although the interface allows you to edit any of these strings, your changes affect only those strings that are used in email templates and workflow forms. Editing the strings that are not used in email templates and workflow forms has no impact on the latest user interface.

6. Click **Save**.
   » Your custom strings are saved.

What's next?

You can use your custom strings in email templates and workflow forms. If you use Collibra in other languages, remember to repeat these steps for those languages.

Operating Model settings page

On the **Operating Model** page of the Collibra settings, you can view and edit the operating model, which defines the structure of the data in your environment, for example asset types, domain types, characteristic types, and statuses.

The **Operating Model** page has several tab pages:

- Asset types
- Domain types
- Attribute types
- Relation types
- Complex relation types
- Statuses
- Data quality rules
- Scopes
- Asset type groups

Used In: Exploring where an item is used

The tabs on the **Operating Model** page contain the **Used In** button, which allows you to explore where a specific item is used in the operating model. To identify where an item is used, select the row containing the item, and then click **Used In**. You can then find and explore the other asset types, relation types, complex relation types, and other items where the selected item is used.

> **Note** On the **Scopes** tab, you can find the **Used In** button when you expand a scope.

The following table lists the items that are shown when you click **Used In** for an item on a tab.

Selected item	Used in items
Asset type	• List of asset types where the selected asset type is used in an asset type filter for the relations in an assignment. • List of relation types where the selected asset type is used as a source or target of a relation. • List of complex relation types where the selected asset type is used as a target of a relation.
Domain type	List of asset types where the selected domain type is used in an assignment.
Attribute type	• List of asset types where the selected attribute type is used in a characteristic. • List of asset types where the selected attribute type is used in an articulation score rule. • List of complex relation types where the selected attribute type is used. • List of Data Quality rules where the selected attribute type is used in a metric.
Relation type	• List of asset types where the selected relation type is used in an assignment. • List of Data Quality rules where the selected relation type is used in an aggregation path.
Complex relation type	List of asset types where the selected complex relation type is used in an assignment.
Status	• List of asset types where the selected status is used in an assignment. • List of asset types where the selected status is used in an articulation score rule.
Data quality rule	List of asset types where the selected Data Quality rule is used in an assignment.
Scope	List of asset types where the selected scope is used in an assignment.
Asset type group	• List of asset types that are directly part of the selected asset type group. • List of relation types where the selected asset type group is used.

Roles and Permissions settings page

On the **Roles and Permissions** page of the Collibra settings, you can view and edit the permissions and roles to define which actions users can perform.

The **Roles and Permissions** page has several tab pages:

Tab page	Description
Global roles	View and edit global roles, and manage their membership.
Resource roles	View and edit resource roles.
Global permissions	View global permissions and add or remove global permissions from global roles.
Resource permissions	View resource permissions and add or remove resource permissions from resource roles.
Additional settings	Manage the Request Responsibility feature.

Permissions

A permission is an authorization that grants access to a specific application or feature in Collibra or allows users to view or edit a particular resource, such as an asset, a workflow, or a data quality rule. Users do not receive permissions directly; instead, they inherit permissions through their assigned global roles and responsibilities. Collibra provides a set of predefined permissions included in the default roles, as a starting point for managing access control.

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.

Permission type	Description
Viewer	A Viewer permission is a permission for which a Viewer license or higher is required.

Permission type	Description
Contributor	A Contributor permission is a permission for which a Contributor license or higher is required.
Creator	A Creator permission is a permission for which a Creator license is required.

Information for the legacy license model

Permission type	Description
Read-only permission	A read-only permission is a permission for which a read-only license or higher is required.
Standard permission	A standard permission is a permission for which a standard license is required.

Actions

- Manage global role permissions to determine which global permissions are included in global roles.
- Manage resource role permissions to 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.

Global permission	Description	Required license
AI Agents	The AI Agents global permission contains a global permission that allows users to enable and configure all AI agents and the Collibra AI Copilot.	

Global permission	Description	Required license
Manage all agents	The AI Agents > Manage all agents global permission allows users to enable and configure all AI agents and the Collibra AI Copilot.	Standard
AI Governance	The AI Governance global permission contains a global permission that allows users to register and work with AI use cases.	
Register AI Use Case	The AI Governance > Register AI Use Case global permission allows users to register AI use cases. For users without this permission, the **Register AI Use Case** button is not shown on product pages.	Read-only
Register AI Model	The AI Governance > Register AI Model global permission allows users to register AI models. For users without this permission, the **Register AI Model** button is not shown on product pages.	Read-only
Register AI Agent	The AI Governance > Register AI Agent global permission allows users to register AI agents.	Read-only
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 perform administrative tasks in Assessments. They can view all private assessments and change the permissions of all assessments.	Read-only
Conduct assessments	The Assessments > Conduct assessments global permission allows users to conduct, edit, copy, delete, and make assessments obsolete, including public assessments and those that they own or are assigned.	Standard
Manage templates	The Assessments > Manage templates global permission allows users to view, create, edit, and manage assessment templates.	Standard

Global permission	Description	Required license
Data Notebook	The Data Notebook global permission contains global permissions that allow users to manage data notebooks.	
Manage all notebooks	The Data Notebook > Manage all notebooks allows users to manage notebooks. **Tip** A user who has this permission can view the content in all the notebooks regardless of who created the notebooks, even including private notebooks via direct links. Therefore, consider giving this permission to only users who have the Sysadmin global role.	Standard
Manage data sources	The Data Notebook > Manage data sources allows users to register data sources for Data Notebook and also remove the registered data sources.	Standard
Manage settings	The Data Notebook > Manage settings allows users to customize settings for Data Notebook, such as chart colors and number formatting in query results.	Standard
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.	
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
Update	The Catalog > Advanced Data Type > Update global permission allows users to edit advance data types.	Standard
Remove	The Catalog > Advanced Data Type > Remove global permission allows users to delete 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 data classification method via Edge.	
Data Classes	The Classification > Data Classes permission group contains global permissions that allow users to manage data classes in the new data classification method.	
Data Quality	The Data Quality permission group contains global permissions that allow users to manage Data Quality & Observability settings and configure connections to data sources.	

Global permission	Description	Required license
Manage Data Sources	The Data Quality > Manage Data Sources global permission allows users to manage resource roles and responsibilities for Edge connections with the Data Quality Pushdown capability.	Standard
Manage Settings	The Data Quality > Manage Settings global permission allows users to access the Settings page where they can manage data quality limits and dimensions.	Standard
Workflow	The Workflow permission group contains global permissions that allow users to manage workflows.	
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
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
Participate in workflow	The Workflow >Participate in workflow global permission allows users that meet workflow task configuration requirements to be assigned and complete workflow tasks.	Read-only
Start workflow	The Workflow > Start workflow global permission allows users that meet workflow configuration requirements to start workflows.	Read-only
Product Rights	The Product Rights permission group contains global permissions that allow users to access Collibra applications.	
AI Copilot	The Product Rights > AI Copilot global permission allows users to chat with Collibra AI Copilot.	Read-only

Global permission	Description	Required license
AI Governance	The Product Rights > AI Governance global permission allows users to access AI Governance.	Read-only
Assessments	The Product Rights > Assessments global permission allows users to access Assessments. They can view public assessments and the assessments that they own or are assigned.	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 and Data Classification.	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 standalone Data Marketplace and Data Marketplace in Search.	Read-only
Data Notebook	The Product Rights > Data Notebook global permission allows users to access Data Notebook and create notebooks. For more details, go to Data Notebook roles and permissions.	Standard
Data Quality	The Product Rights > Data Quality global permission allows users to access Data Quality & Observability product pages.	Read-only
Data Quality Integration	The Product Rights > Data Quality Integration global permission allows users to access the assets, relations, and workflows required to support the integration of Collibra Platform with Data Quality & Observability Classic.	Read-only

Global permission	Description	Required license
Data Stewardship Manager	The Product Rights > Data Stewardship Manager global permission allows users to access the Stewardship application.	Read-only
Guided Stewardship	The Product Rights > Guided Stewardship global permission allows users to access Guided Stewardship tools such as the Physical Data Connector.	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 Collibra Settings, including the general settings, 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 Collibra Settings.	Standard
Workflow Designer access	The Product Rights > Workflow Designer access global permission allows users to access the **Workflow Designer** application from the Collibra menu. **Note** This permission becomes available after you enable the **Allow access to the Workflow Designer** Collibra configuration setting.	Read-only

Global permission	Description	Required license
Protect	Go to Protect global roles and permissions.	
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
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

Global permission	Description	Required license
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
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.	
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
Insights	The Insights global permission contains global permissions related to Insights Data Access and Usage Analytics.	
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 *Reporting Data Layer*).	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
Tags	The Tags permission group contains global permissions that allow users to see and manage tags in the Stewardship application.	

Global permission	Description	Required license
Manage tags	The Tags > Manage tags global permission allows users to edit and delete tags on the tags page in the Stewardship application.	Standard
View tags	The Tags > View tags global permission allows users to see the **Tags** page in the Stewardship application. **Note** You do not need a role with the **View tags** permission to see tags set by stewards while searching, in table views, diagram views, global views, and on asset pages.	Read-only

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 in which the workflow participation occurs.

Resource permission	Description	Required license
Asset	The Asset permission group allows users to work with assets.	
Add	The Asset > Add resource permission allows users to create assets.	Standard

Resource permission	Description	Required license
Update	The Asset > Update resource permission allows users to edit assets. **Note** This only refers to the asset name and automatic hyperlinking.	Standard
Remove	The Asset > Remove resource permission allows users to delete assets.	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 allows users to work with attributes of assets.	
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
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
Remove	The Asset > Attribute > Remove resource permission allows users to remove characteristics from assets.	Standard
Data	The Asset > Data permission group allows users to work with data from data sources.	

Resource permission	Description	Required license
Access Data	The Asset > Data > Access Data resource permission allows users to create Tableau provision files.	Read-only
View notebook content	The Asset > Data > View notebook content resource permission allows users to see the content of data notebooks.	Read-only
View Samples	The Asset > Data > View Samples resource permission allows users to see sample data of data sources.	Read-only
Lifecycle Management		
Decision Record	The Asset > Lifecycle Management > Decision Record resource permission allows users to add decision record activities to the Lifecycle tracker on an asset page.	Standard
Sign-Off	The Asset > Lifecycle Management > Sign-Off resource permission allows users to add sign-off activities to the Lifecycle tracker on an asset page.	Standard
Responsibilities	The Asset > Responsibilities permission group allows users to manage the responsibilities of assets.	
Add	The Asset > Responsibilities > Add resource permission allows users to create responsibilities for assets.	Standard
Update	The Asset > Responsibilities > Update resource permission allows users to edit responsibilities of assets.	Standard
Remove	The Asset > Responsibilities > Remove resource permission allows users to delete responsibilities from assets.	Standard
Tags	The Asset > Tags permission group allows 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 allows users to manage attachments.	
Add	The Attachment > Add resource permission allows users to add attachments to resources.	Read-only
Update	The Attachment > Update resource permission allows users to edit attachments of resources.	Read-only
Remove	The Attachment > Remove resource permission allows users to remove attachments from resources.	Read-only
Comment	The Comment permission group allows users to work with comments.	
Add	The Comment > Add resource permission allows users to add comments to resources, edit their own comments, and delete their own comments. **Tip** If you want to use images and attachments in comments, you also need the Attachment > Add permission.	Read-only
Update	The Comment > Update resource permission allows users to edit others' comments on resources. **Tip** If you want to use images and attachments in comments, you also need the Attachment > Add permission.	Standard
Remove	The Comment > Remove resource permission allows users to delete others' comments from resources.	Standard

Resource permission	Description	Required license
Community	The Community permission group allows users to manage communities.	
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
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
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
Responsibilities	The Community > Responsibilities permission group allows users to manage the responsibilities of communities.	
Add	The Community > Responsibilities > Add resource permission allows users to create responsibilities for communities.	Standard
Update	The Community > Responsibilities > Update resource permission allows users to edit responsibilities of communities.	Standard

Resource permission	Description	Required license
Remove	The Community > Responsibilities > Remove resource permission allows users to delete responsibilities from communities.	Standard
Data Quality Connection	The Data Quality Connection permission group allows users and user groups to access Data Quality & Observability connections.	
Responsibilities - Add	Add responsibilities to the connection.	Standard
Responsibilities - Remove	Remove responsibilities from the connection.	Standard
View	Add responsibilities to the connection.	Read-only
Data Quality Job	The Data Quality Job permission group allows users and user groups to access Data Quality Jobs.	
Access Logs	View job logs.	Standard
Create	Create new jobs on a connection.	Standard
Delete	Delete jobs from a connection.	Standard
Edit	Edit existing jobs, including row and column filters, run date, monitoring enabled, and so on.	Standard
Responsibilities - Add	Add job-level responsibilities.	Standard
Responsibilities - Remove	Remove job-level responsibilities.	Standard
Run	Run jobs manually or via an API trigger.	Standard
Schedule	Enable, disable, or edit job schedules.	Standard
Train Monitors	Train monitor results by marking them as passing or failing.	Standard
View	View existing jobs, including profiling and monitoring results.	Read-only

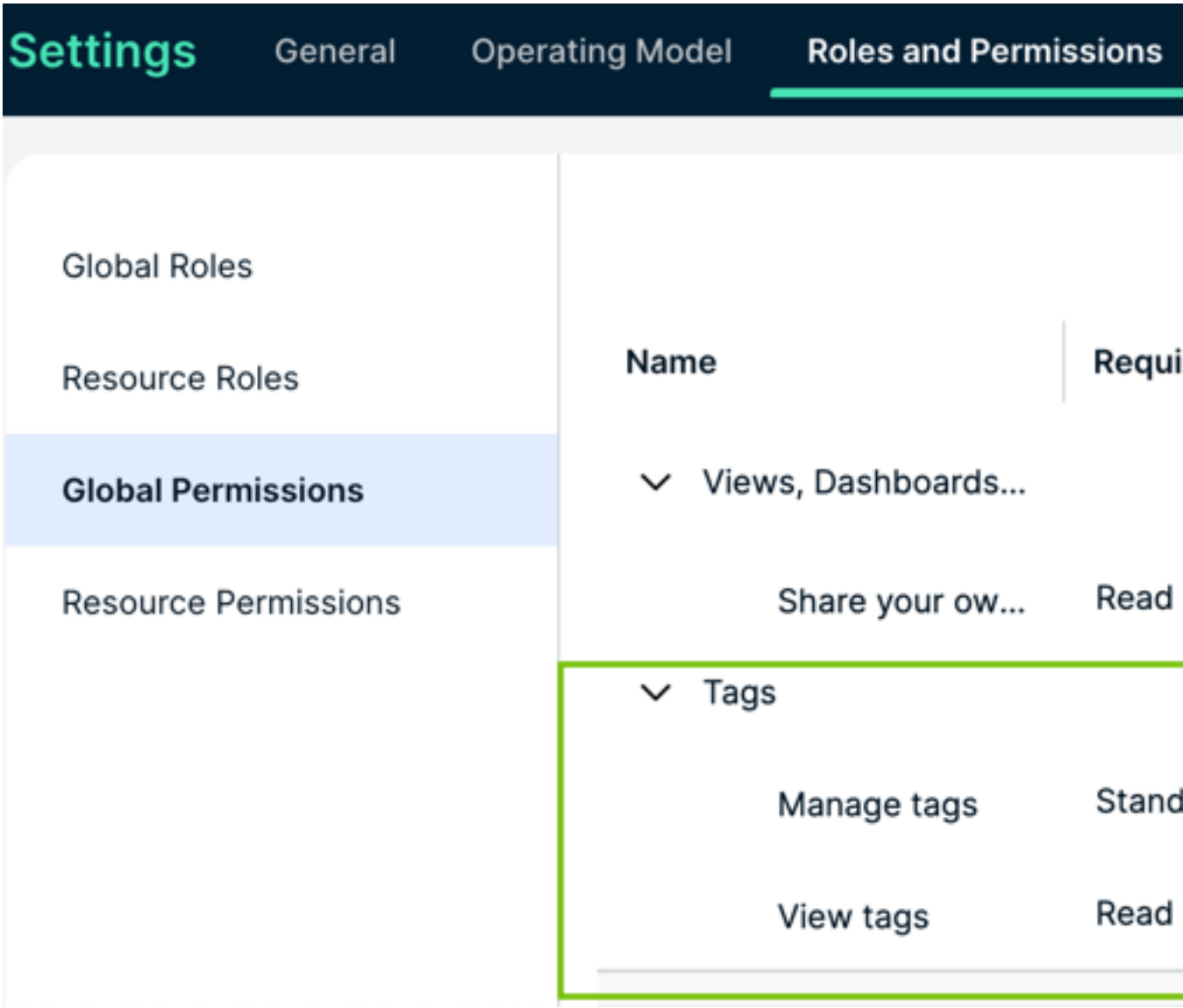
Resource permission	Description	Required license
Domain	The Domain permission group allows users to manage domains.	
Add	The Domain > Add resource permission allows users to create and edit domains. **Tip** If you want to use images and attachments in the description of domains, you also need the Attachment > Add permission.	Standard
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
Remove	The Domain > Remove resource permission allows users to delete domains.	Standard
Responsibilities	The Domain > Responsibilities permission group allows users to manage the responsibilities of domains.	
Add	The Domain > Responsibilities > Add resource permission allows users to create responsibilities for domains.	Standard
Update	The Domain > Responsibilities > Update resource permission allows users to edit responsibilities of domains.	Standard
Remove	The Domain > Responsibilities > Remove resource permission allows users to delete responsibilities from domains.	Standard
Rating	The Ratings permission group allows users to work with ratings.	

Resource permission	Description	Required license
Add	The Rating > Add resource permission allows users to rate assets, edit and delete your own ratings.	Read-only
Update	The Rating > Update resource permission allows users to edit other users' ratings	Standard
Remove	The Rating > Remove resource permission allows users to delete other users' ratings.	Standard
Validation	The Validation permission group allows 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 allows 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 allows 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 toolbar, click → **Settings**.
   » The Settings page opens.
2. Click **Roles and Permissions**.
   » The roles and permissions settings appear on the **Global Roles** tab page.
3. In the tab bar, click **Global Permissions**.
   » The matrix of global permissions appears.
4. In the table, find **Tags**.
5. Click the Edit button and check the boxes to which you want to enable permission.
6. Click **Save**.

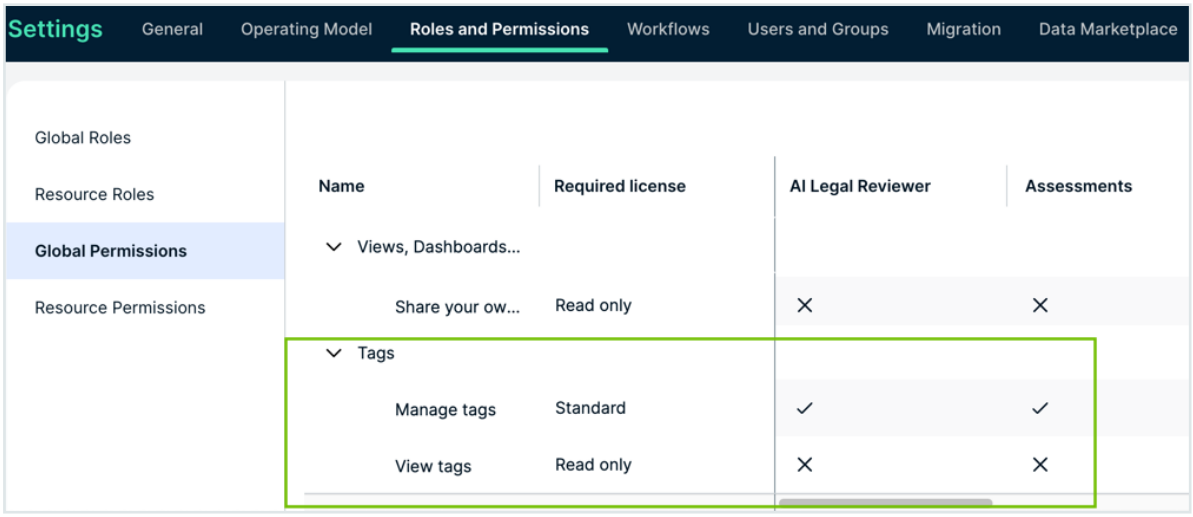


A user with one of the selected resource roles on an asset can use (add, update and delete) tags on that asset.

Disable the permission to use tags

To disable the permission to use tags, follow these steps:

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Roles and Permissions**.
   » The roles and permissions settings appear on the **Global Roles** tab page.
3. In the tab bar, click **Global Permissions**.
   » The matrix of global permissions appears.
4. In the table, find **Tags**.
5. Click the Edit button and uncheck the boxes to which you want to disable permission.
6. Click **Save**.



Roles

A role is a collection of permissions that you can assign to users and user groups.

Role types

The role type determines whether the permissions in the role apply to resources or the Collibra Platform 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.

The following table contains the out-of-the-box global roles:

Global role	Description
AI Business User	Allows users to create, update, and view AI use cases.
Assessments	A user who can conduct assessments.
Assessments Admin	A user who can view both private and public assessments, and also change the permissions of any assessment. They can also create and manage all assessment templates.
Assessments Template Manager	A user who can view, create, edit, and manage all assessment templates.
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 standalone Data Marketplace and Data Marketplace in Search.
Data Notebook Admin	A user who can manage notebooks, data sources, and settings for Data Notebook.
Data Notebook Editor	A user who can create a notebook.
Data Quality Admin	A user who can access the Data Quality & Observability product pages.

Global role	Description
Data Quality Integration	Allows users to ingest data quality insights from the Data Quality & Observability Classic application.
Data Quality User	A user who can access the Data Quality & Observability product pages.
DataSteward	A user who can access the Stewardship application for viewing tags, Business Dimensions and the organization structure, including the responsibilities of the communities and domains.
Data Scientist	Allows users to create, update, and view AI models.
DataSteward Author	A user who can access the 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. **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.
Helpdesk	A user who can access the Data Helpdesk application, where users can log issues and check issue statuses and assignees.

Global role	Description
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.
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 Collibra Platform. 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 out-of-the-box roles don't meet your specific needs.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 **Resource Roles**.
   » The overview of resource roles appears.
4. Above the table, to the right, click **Add**.
   » The **Create Roles** dialog box appears.
5. Enter one or more role names.
6. Click **Submit**.

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.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 to edit it.

Manage global role permissions

You can determine which global permissions are included in a global role.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 **Global Permissions**.
   » The matrix of global permissions and roles appears.
4. If required, add or remove columns:
   - On the content toolbar, click and select or clear the role checkboxes.
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 for a role to add or remove permissions.
7. Above the table, to the right, click **Save**.

Manage global role membership

You can manage which users or user groups are assigned to a global role by adding or removing them as members of that role.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 you want to manage, double-click the cell in the **Members** column.
   » The **Update Members** dialog box appears
4. To add members, select one or more users or user groups and click **Update**.
   » For the new license model, the **Updating Members** dialog box appears. It contains a summary of the changes to the number of Contributor or Creator seats as a result of the action you are about to perform. Click **Confirm** to proceed or **Cancel** to undo the changes.

   » The users or user groups appear in the **Members** column.
5. To remove members, click next to a user or user group and click **Update**.
   » The users or user groups no longer appear in the **Members** column.

Delete a global role

You can delete global roles that you have created and you no longer need.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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

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.

The following table contains the out-of-the-box 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.
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	

Resource role	Description
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.
Data Quality Editor	A user who can view, edit, and run Data Quality jobs.
Data Quality Manager	A user who can grant access to Data Quality connections and jobs. They can also view, create, and run jobs.
Data Quality Viewer	A basic user who can only view Data Quality connections and jobs.
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. For example, you can do this if the out-of-the-box roles don't meet your specific needs.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 **Resource Roles**.
   » The overview of resource roles appears.
4. Above the table, to the right, click **Add**.
   » The **Create Roles** dialog box appears.
5. Enter one or more role names.
6. Click **Submit**.

What's next?

- As new resource roles are created with no resource permissions included, you have to add them for the new resource role.
- Add 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.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 **Resource Roles**.
   » The overview of resource roles appears.
4. Double-click a cell to edit the **Name** or the **Description** of the role.

If you have the latest UI enabled, you can also disable roles that you do not use and that are not currently assigned to any resources from the **Actions** column. Disabled roles do not appear in resource role selection lists, for example when adding or requesting a responsibility. Regardless of UI, you can use the `disabled` parameter of the REST Core API v2 `/roles` endpoint to control the status of resource roles.

Manage resource role permissions

You can determine which resource permissions are included in a resource role.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 **Resource Permissions**.
   » The matrix of resource permissions and roles appears.
4. If required, add or remove columns:
   - On the content toolbar, click and select or clear the role checkboxes.
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 for a role to add or remove permissions.
7. Above the table, to the right, click **Save**.

Delete a resource role

You can delete resource roles that you have created and you no longer need.

Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 **Resource Roles**.
   » The overview of resource roles appears.
4. In the row of the role, click .
   » The **Delete** dialog box appears.
5. Click **Delete**.

Additional settings

The **Additional settings** page allows you to manage the **Request responsibility** feature.

Option	Description
On / off switch	When enabled, users can request responsibilities for domains or assets from the **Responsibilities** tab of the resources. The requests are sent to the first users that have the specified roles in the approval hierarchy.
Approver	Users that have this resource role for the domain or asset that is the subject of the request are the primary approvers of requests. If no user has this role, the request goes to the next level. Default: Community Manager

Option	Description
Backup approver	You can define up to 4 resource roles as backup approvers. If no user has this role, the request goes to the next level.
Global backup approver	Users that have this global role receive the requests if there are no approvers or backup approvers. Default: Sysadmin

> **Note** If you enable the **Request responsibility** feature but no users qualify as approvers, the **Request Responsibility** button will be disabled on the **Responsibilities** tab of domain and asset pages.

Managing workflows in Collibra

A workflow in Collibra Platform 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.

The **Workflows** page of the Collibra settings has 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 manage instances of running workflows.
System Instances	This tab page is only available in the latest user interface and allows you to view and manage ongoing tasks of Collibra-managed processes.

Workflow permissions

You can define who has access to view, interact with, manage, or create workflows through a combination of global and resource permissions, roles and configuration settings.

> **Important** While you can fine-tune where workflows are available and who has access to them, the actions performed by workflows are not restricted by the permissions of the users who are starting or participating in them.

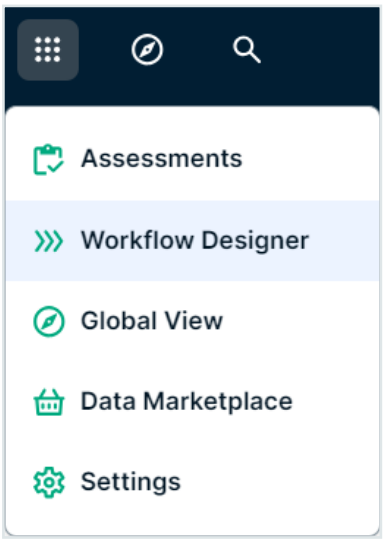
Requirements and permissions

You have a global role that has the **Product Rights** > **System administration** global permission.

> **Note** To edit permissions and roles, you must have a global role that has the **System administration** global permission.

Accessing the Workflow Designer

To access the Workflow Designer, you must have a global role that has the **Workflow Designer access** global permission. Once enabled, a link to the Workflow Designer will be added to the application menu.



Managing workflows

To manage workflows in Collibra, you must have a global role with the **Workflow Administration** or the **System administration** global permission, which allow you to:

- View workflows.
- Back up workflows.
- Deploy workflows.
- Modify workflow definitions in Collibra.
- View the running instances of workflows.
- View the running instances of Collibra-managed processes.
- Restore workflows.
- Edit the workflow configuration options in Collibra.

Interacting with workflows

At the platform level, you can manage who can start or participate in workflows by assigning the following permissions to the global roles that must interact with workflows:

- **Start workflow**
- **Participate in workflow**

> **Note** Users that have a global role with the **Workflow Administration** or **System administration** permission do not require these permissions explicitly.

At the workflow level, use roles to allow specific users to start, stop or reassign workflow tasks. You can configure the roles for each workflow individually in the workflow definition settings page:

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Workflows**.
   » The Workflows settings page appears on the **Definitions** tab page.
3. Select a workflow.
4. Edit the settings in the **Roles** section of the workflow definition.

Viewing workflow tasks

Normally, you can only view tasks if you are a candidate user for the task. If you have a role with the **Manage workflows** resource permission for the asset related to the task or if you have the **View all running tasks** global permission, you can also see ongoing tasks that are assigned to other users in the **All Tasks** tab on the tasks page.

Use workflow message events permission

Use workflow message events is a global permission that allows you to pass message events to the workflow engine via an API call.

> **Example** POST /workflowInstances/<processInstanceId>/messageEvents/<messageName>

How to manage the new workflow permissions

To help you fine tune workflow management, Collibra version 2024.05 introduces two new global permissions that are designed to give you more control over who in your environments can use workflows. This allows administrators to restrict the ability of users to trigger workflows, which incurs a cost for the organization.

> **Action** The new workflow permissions require administrator action to maintain existing user functionality. Users who leverage workflows must be assigned to a role that has the **Start workflow** permission, the **Participate in workflow** permission, or both based on their needs.

Permission	Description	Required license type**	New license type
Start workflow	• Only users that have a role with this permission can start a workflow. • Users that do not have a role with this permission can not see any global or resource workflows in Collibra. • Users that have a global role with the Workflow Administration or System administration permission do not require this permission explicitly. • Workflows triggered by an event, another workflow, or a cron expression do not require this permission.	Read-only	Viewer
Participate in workflow	• Only users that have a role with this permission can be assigned a workflow user task. • If a task is assigned to a role or group, only members that have a role with this permission get the new task assigned and not any other members.* • If a task cannot be assigned to any user because they do not have a role with this permission, the workflow generates an error and cannot start or progress. • Users that have a global role with the Workflow Administration or System administration permission do not require this permission explicitly.	Read-only	Contributor

Action * The out-of-the-box Voting Sub-Process creates a separate voting task for each of the participants. If any of the participants do not have a role with the **Participate in workflow** permission, the process fails, without creating any voting task. If you are using the Approval Process, Simple Approval, the Issue Management workflow, or a custom workflow that calls the Voting Sub-Process, either ensure that all the voting participants have a role with the **Participate in workflow** permission or download version 2024.05 or newer of the Voting Sub-Process.

> **Note** ** 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.

> **Important** Users without the **Start workflows** permission might not be able to see the global create button anymore.

Recommended setup

To take full advantage of the new permissions, add them just to the roles that require them.

A good starting point for this analysis is the **Latest Workflow Participation** column of the **Users** table. You can add the column to see the data in Collibra or you can download a CSV file for greater sorting flexibility:

1. On the main toolbar, click → **Settings**.
   » The Settings page opens.
2. 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:
5. On the main toolbar, click → **Show more**.
   » Your profile page opens on the **Activities** tab page.
   a. 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.

By analyzing how users participate in workflows and the global roles of their groups, you can identify which global roles need the new workflow permissions in your organization.

Setup for keeping current functionality

To keep the current functionality as it is and allow all users to start and participate in workflows:

1. Create a new global role, for example *Workflow user*:
    a. On the main toolbar, click → **Settings**.
        » The **Settings** page opens.
    b. Click **Roles and Permissions**.
        » The roles and permissions settings appear on the **Global Roles** tab page.
    c. Above the table, to the right, click **Add**.
        » The **Create Roles** dialog box appears.
    d. Enter one or more role names.
    e. Click **Submit**.
2. Assign the **Start workflow** and **Participate in workflow** global permissions to the new global role:
    a. On the main toolbar, click → **Settings**.
        » The **Settings** page opens.
    b. Click **Roles and Permissions**.
        » The roles and permissions settings appear on the **Global Roles** tab page.
    c. In the tab pane, click **Global Permissions**.
        » The matrix of global permissions and roles appears.
    d. If required, add or remove columns:
        ■ On the content toolbar, click and select or clear the role checkboxes.
    e. Above the table, to the right, click **Edit**.
        » You can now edit the matrix of permissions and roles.
    f. Select or clear the checkboxes for a role to add or remove permissions.
    g. Above the table, to the right, click **Save**.
3. Add the **Everyone** group as a member of the **Workflow user** role:
    a. On the main toolbar, click → **Settings**.
        » The **Settings** page opens.
    b. Click **Roles and Permissions**.
        » The roles and permissions settings appear on the **Global Roles** tab page.
    c. Hover over the name of the role you want to manage and click **Preview**.
        » The **Members** sidebar appears.
    d. Click Add Member.
        » The **Add Member** dialog box appears.
    e. Select one or more users or user groups and click **Add Member**.

Out-of-the-box workflow deployments

In general, when you start your Collibra Platform 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.

Deploy a workflow

You deploy a workflow when you upload the workflow definition or exported Workflow Designer app to Collibra Platform.

You can upload a workflow in ***.bpmn**, ***.bpmn20.xml** and zip format.

Starting with Collibra Platform version 2023.05, you can also deploy workflow apps directly from the Workflow Designer to the connected environment.

Prerequisites

You have a global role with the **Workflow Administration** or the **System administration** global permission, for example Sysadmin.

Direct deployment

1. Select your app in Workflow Designer.
2. From the App editor, click the **Deploy** button.
3. In the **Ready to Deploy** dialog box, check the target environment.
4. Click **Deploy App** to confirm and upload the workflow to the target environment.

> **Tip** The target environment is the Collibra environment you used to access the Workflow Designer.

Manual upload

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. 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.
   » A progress bar 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.

View and edit workflows

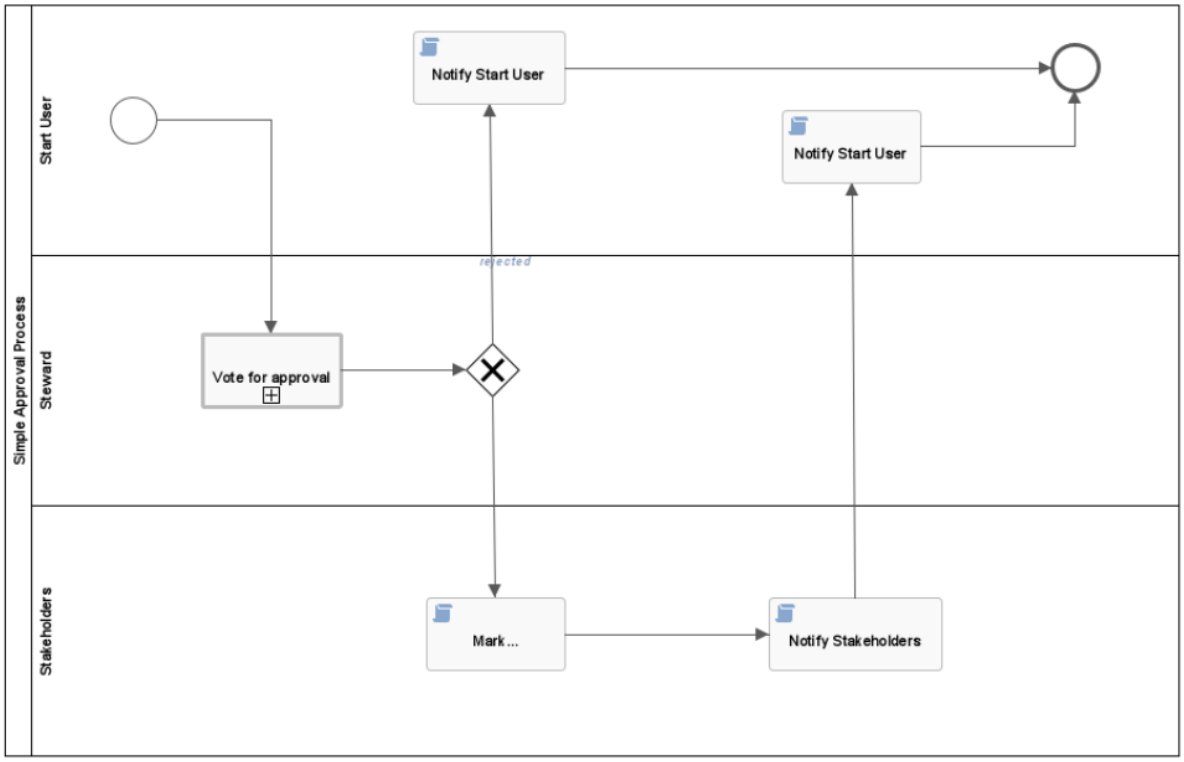
You can view both the XML schema and a visual representation of the workflow definition in Collibra Platform.

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 toolbar, click → **Settings**.
   » The **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**.

Flow

This is the diagram showing the workflow definition.



The lower part of the page contains the raw workflow definition:

Read-only mode

This is raw workflow definition. Be careful altering this.

Edit

```
<?xml version="1.0" encoding="UTF-8"?>
<definitions xmlns="http://www.omg.org/spec/BPMN/20100524/MODEL" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:activ
  <collaboration id="Collaboration">
    <participant id="pool1" name="Issue Management" processRef="issueManagement"></participant>
    <messageFlow id="messageflow1" sourceRef="scripttask6" targetRef="callactivity1"></messageFlow>
    <messageFlow id="messageflow2" sourceRef="scripttask6" targetRef="callactivity1"></messageFlow>
    <messageFlow id="messageflow3" sourceRef="scripttask6" targetRef="callactivity1"></messageFlow>
  </collaboration>
  <process id="issueManagement" name="Issue Management" isExecutable="true">
    <documentation>This process handles all issues. It will automatically be started when a new issue is created.
            Roles are assigned dynamically by the process using the configured user expressions.

            First a reviewer can accept to do the review, or if no reviewer responds within time-limit, the issue
            manager is asked to assign a reviewer. The reviewer can then choose to ask more information, choose another
            reviewer, reject the issue or accept the issue and propose a solution.

            If the issue is accepted, the stakeholders are asked to vote for the proposed solution and if accepted, the
            reviewer can assign a assignee and ask him to implement the solution.

            The assignee can reassign to another assignee or implement the solution himself. After implementing the
            reviewer is asked to review the solution and when accepted, the requester is notified of the resolution and
            the process is ended.</documentation>
```

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 **Edit** to edit the XML.
2. Click **Save** 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.

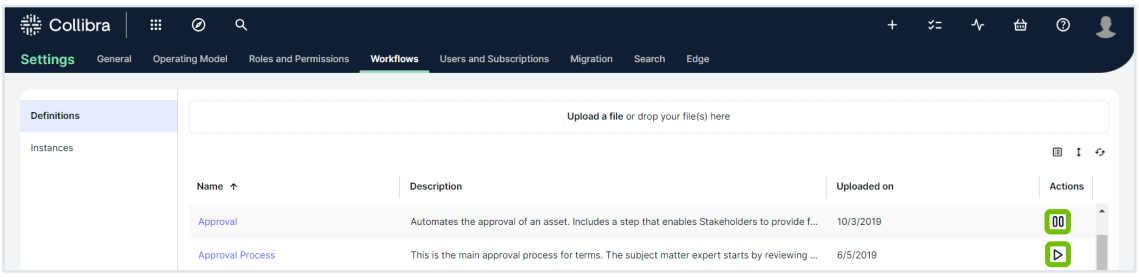
Enable or disable workflows

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 toolbar, click → **Settings**.
   » The Settings page opens.
2. Click **Workflows** → **Definitions**.
3. At the end of the row, click or to respectively enable or disable a workflow.



Enable or disable a workflow from the workflow definition page

1. On the main toolbar, click → **Settings**.
   » The Settings page opens.
2. Click **Workflows** → **Definitions**.
3. Select the workflow you want to enable or disable.
4. At the right of the title bar, click or to respectively enable or disable the workflow.

Workflow configuration options in Collibra

After you have successfully deployed a workflow, the default settings are applied to it. You can change the default settings and the workflow behavior to your organization's needs.

In the overview of a workflow, you can change the header bar and some general workflow settings.

Workflows title bar

The title bar of workflow definition pages contains the name and status of the workflow and allows you to:

1. Enable or disable the workflow.
2. Edit the display name or status of the workflow.
3. Delete the workflow.

> **Note** Collibra does not accept two workflows with the same display name.

Workflow statuses description:

- **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.

View and edit workflow definition settings

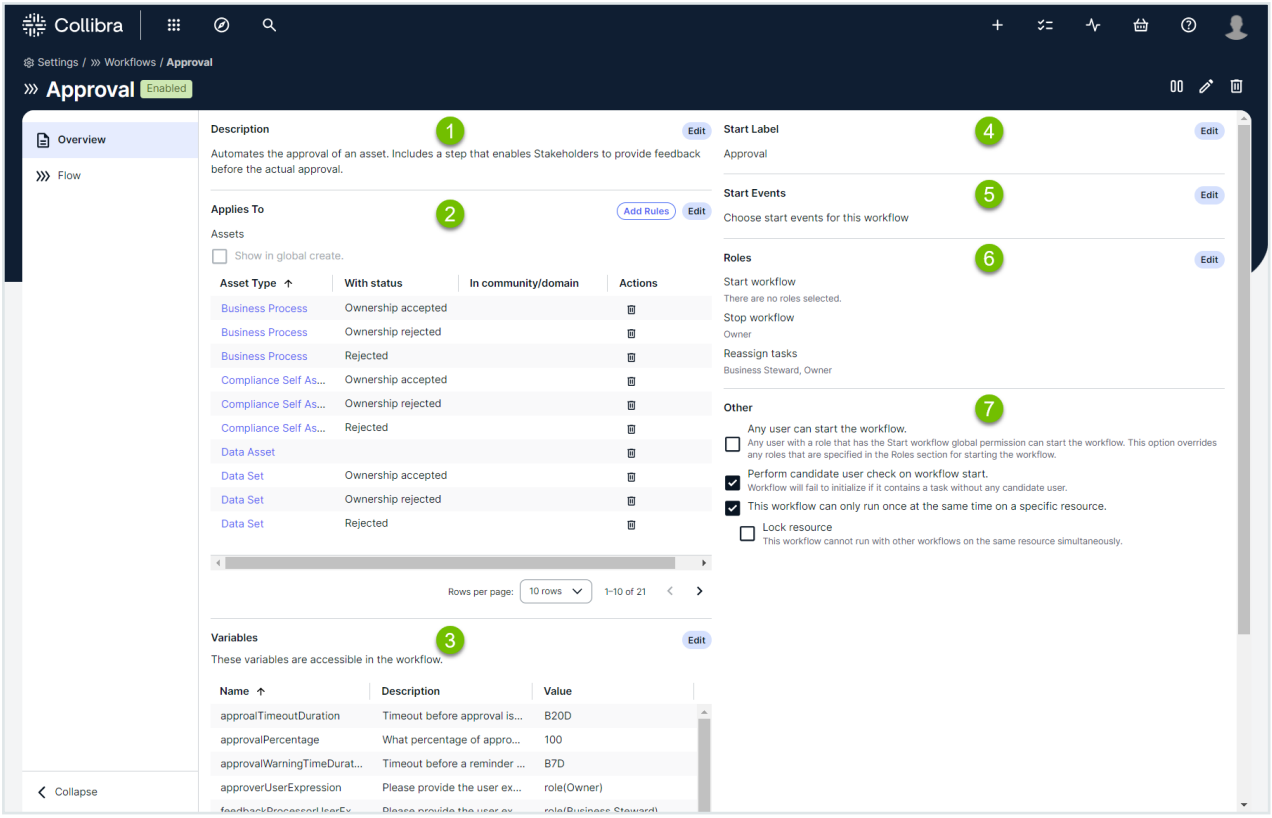
The workflow definition settings are additional parameters that help you manage the workflow behavior and accessibility inside Collibra Platform.

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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Workflows**.
   » The Workflows settings page appears on the **Definitions** tab page.
3. Select a workflow to view the definition settings.



Description

The description is a brief overview of the workflow.

Click **Edit** to edit the description.

> **Note** Uploading a workflow with a modified description also updates 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.

- Show in global create: Allows you to start the workflow from the global create button.This option is only valid for workflows where the scope is set to **Global**.

Click **Edit** to change the scope to any of the following:

- Asset
- Community
- Domain
- Global

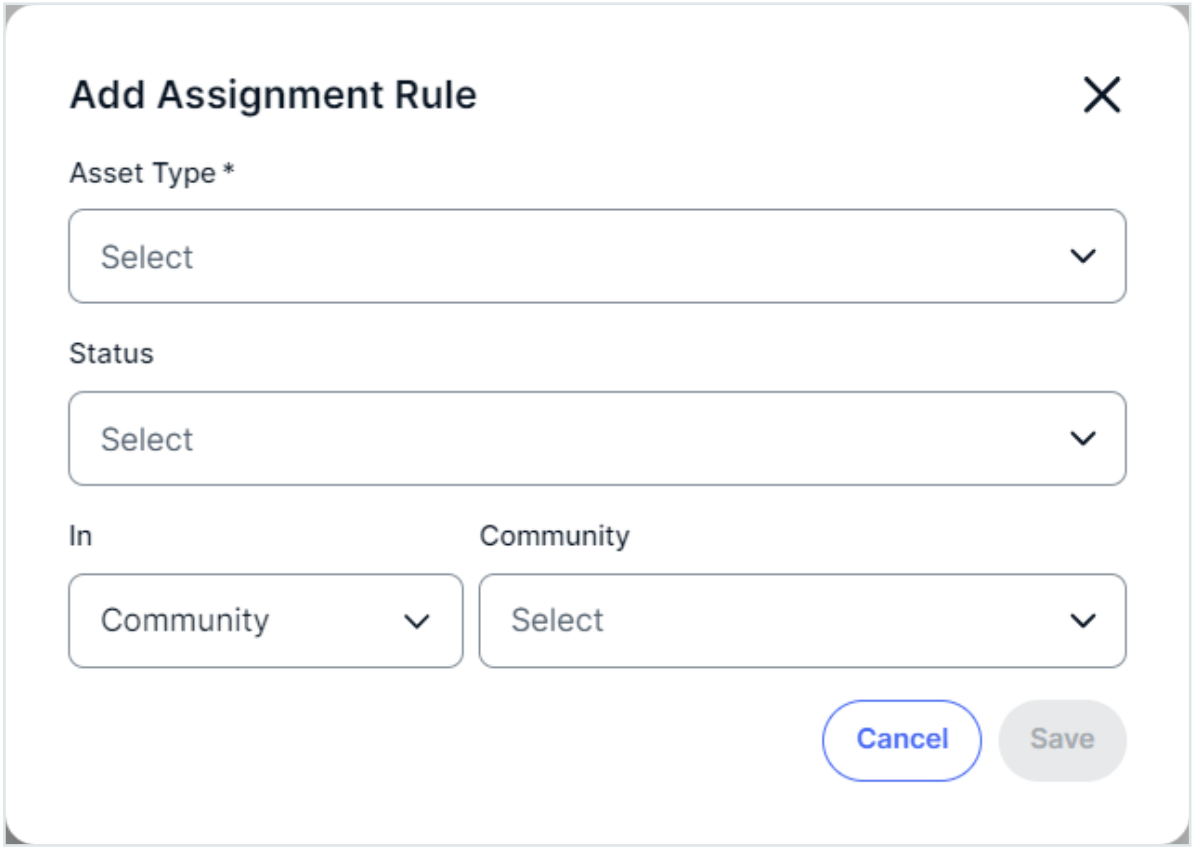
> **Note** When you change the scope, the rules are removed. If you are changing from or to the Global scope, the roles are also removed.

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 assignment rules to fine-tune the scope of the workflow.

Show me how

1. Click **Add Rules**.
   » The **Add Assignment Rule** dialog box appears.



> **Note** The available options depend on the selected scope.

2. Select the **Type**.

> **Tip** Select **Asset** to associate the workflow with all asset types.

3. Select an optional status of the resource the workflow applies to.
4. Select an optional domain or community the resource belongs to.
5. Click **Save**.
   » The rule is added to the list. The workflow is restricted to the resources that meet the listed conditions.

> **Note** If you select multiple rules, 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.

Setting	Description
Workflow Started	The workflow starts when a workflow is manually started. **Note** Manually starting a workflow configured with this option also triggers the workflow.
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 out-of-the-box 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.
Commend Added	The workflow starts when a new comment is added to a resource.
Comment Removed	The workflow starts when a comment is removed from a resource.
Comment Changed	The workflow starts when a comment is edited.
Relation was added on an asset as head	The workflow starts when an asset becomes the head of a relation.
Relation was removed from an asset as head	The workflow starts when an asset is no longer the head of a relation.
Relation was added on an asset as tail	The workflow starts when an asset becomes the tail of a relation.

Setting	Description
Relation was removed from an asset as tail	The workflow starts when an asset is no longer the tail of a relation.
Asset Tag Event	The workflow starts when a tag is either added to or removed from an asset.
Data Classification Accepted	The workflow starts when a result of the data classification process is accepted.
Data Classification Rejected	The workflow starts when a result of the data classification process is rejected.
Data Classification Added	The workflow starts when a new data class is added to a column asset.
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 **Edit** 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 user can start the workflow.	Indicates that any user with a role that has the **Start workflow** global permission can start the workflow. > **Note** This option overrides any roles that are specified in the **Roles** section.

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 user that fulfills all of the following conditions: • The user must be active. • The user must have a global role with the **Participate in workflow** global permission. • The user must have a role or must be part of a group that the task is assigned to. 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.

Configuration variables

Configuration variables are the process variables listed in the **Variables** section of the workflow definition page in Collibra, where you can edit them. These are usually variables that don't change often but that you may want to configure after you deploy the workflow. By using configuration variables, you don't need to modify the workflow definition file or ask the initiator of the workflow for input every time the workflow starts.

When you upload a workflow, Collibra automatically adds the following default configuration variables for each user task of your workflow:

Variable	Description	Example
<task id>DueDate	The date by which the user is expected to complete the task. This variable is only used for mentioning a due date when a task is presented to a user. For more information about the allowed values, see Duration variables.	accept_reviewDueDate
<task id>EscalationDuration	The elapsed time before a user task is escalated, starting from the creation time. For more information about the allowed values, see Duration variables. When the time has elapsed, the Escalation Process workflow starts.	review_solutionEscalationDuration
<task id>EscalationType	The type of escalation: *mail* (default) or *reassign*. The process variable is used in the Escalation Process workflow.	assign_reviewerEscalationType
<task id>TaskNotificationEnabled	If *true* (default), a notification email is sent to the candidate users of the task when the task is created. If *false*, no emails are sent.	review_issueTaskNotificationEnabled

Your workflow may have additional configuration variables that you define in the workflow start event form.

> **Note** If you set the **Writeable** property of a configuration variable to *false*, you will not be able to change its value on the workflow definition page. You can use and change the value of the variable throughout your workflow the same as any other process variable.

> **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.

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.

Translating workflows

You can translate workflows in any of the supported languages by adding custom strings for those languages and leveraging the workflows Java API translation bean. This enables users with a language preference that matches the translation to see the workflow tasks that are assigned to them in their selected language.

To use custom strings, you must prepare your workflow for translations:

Item	Workflow Designer attribute	Custom string example
Task name*	• Field: **Name** • Value: A string that identifies the task name • Example: *user.task1.name*	user-.task1.name=The translated name of the task
Task descrip-tion*	• Field: **Documentation** • Value: A string that identifies the task description • Example: *user.task1.description*	user-.task1.-description=The translated descrip-tion of the task

Item	Workflow Designer attribute	Custom string example
Form fields	• Field: Form component fields in the **General** section, such as: ◦ **Label** ◦ **Label tooltip** ◦ **Default value** ◦ **Description** • Value: The expression `{{translation.getMessage('translation.key')}}` • Example: `{{translation.getMessage('text.area.label')}}`	text.area.label=The translated label of the field
Form buttons	• Field: Form outcome **Label** • Value: The expression `{{translation.getMessage('translation.key')}}` • Example: `{{translation.getMessage('button.name')}}`	button.name=The translated name of the button
Email task	• Field: **Email properties**, such as: ◦ **Subject** ◦ **Body** • Value: The expression `${translation.getMessage('translation.key')}` • Example: `${translation.getMessage('email.body')}` **Note** Emails are translated into the preferred language of the user who completes the task, not the recipient.	email.body=The translated body of the email

Item	Workflow Designer attribute	Custom string example

Custom error message	• Field: The **Script** of a script task
	• Value: `translation.getMessage('translation.key')`
	• Example:
	`import com.-`
	`col-`
	`libra.dgc.-`
	`work-`
	`flow.api.exception.WorkflowException`
	
	`def customError = new Work-`
	`flowException("translation.getMessage`
	`('error.description')")`
	`customError.setTitleMessage("trans-`
	`lation.getMessage('error.title')")`
	`throw customError;`
		error.-description=The translated description of the error

Note * Start forms display the process name instead of the task name and description. You cannot translate the process name.

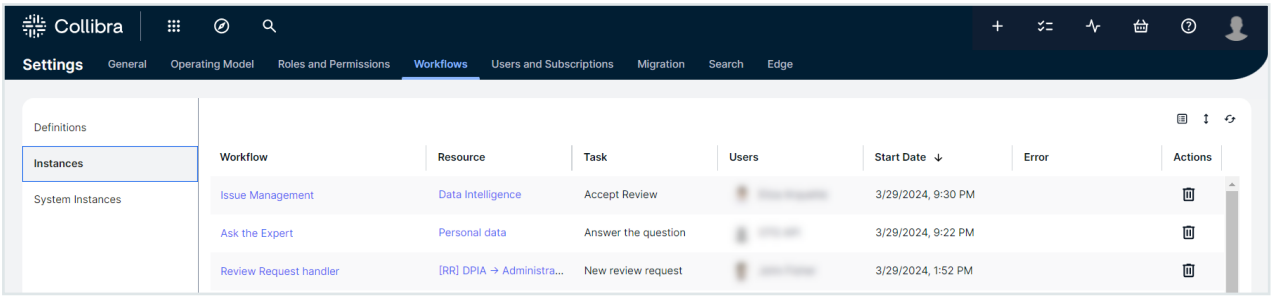
Note If you are not yet using the Workflow Designer, you can achieve similar results with the Eclipse plug-in by changing the expression format to `${translation.getMessage('translation.key')}`.

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.

Note You cannot view running workflows that contain only script tasks or that do not contain any more 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:



Column	Description
Workflow	The name of the running workflow.
Resource	The resource the workflow is associated with. **Tip** Click the resource name to go to the resource page.
Task	The name of the active user task.
Users	The users the active task is assigned to. **Tip** • Click the user name to go to the user profile page. • When there are multiple users assigned to a task, you might only see their avatars. Click in the upper-right corner of the table to wrap the text onto multiple lines.
Start Date	The start date of the process.
Error	Possible error message if the workflow instance encountered an error.
Actions	Button to delete the workflow instance.

Tip You can filter by workflow or resource name and sort by starting date.

System instances

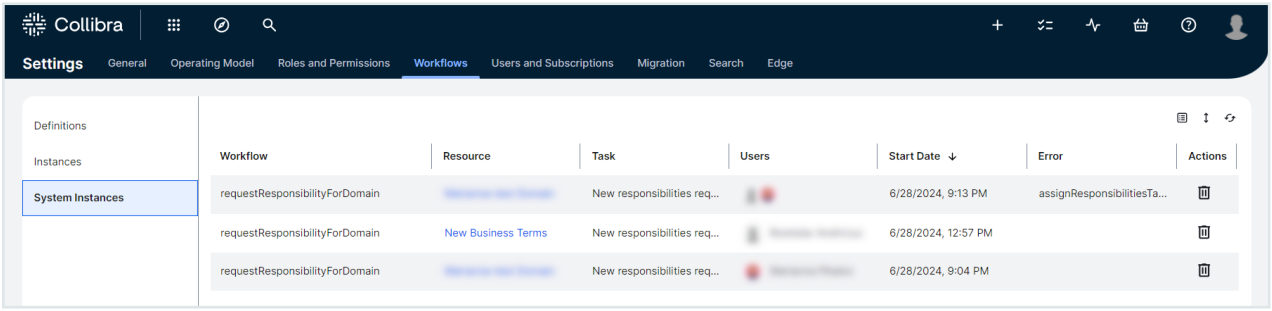
This feature is **available only** in the latest UI.

The **System Instances** page displays details about active user tasks that are part of Collibra-managed processes, such as requesting a responsibility. These processes provide you with common basic actions that are completed similarly to workflows. Unlike workflows, these processes:

- Do not require users to have roles with workflow permissions.
- Cannot be disabled or configured.
- Are automatically updated.

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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **Workflows** section, click **System Instances**.
   » The overview of system instances appears.



Column	Description
Workflow	The name of the process.
Resource	The resource the process is associated with. **Tip** Click the resource name to go to the resource page.
Task	The name of the active user task.
Users	The users the active task is assigned to. **Tip** Click the user name to go to the user profile page.
Start Date	The start date of the process.

Column	Description
Error	Possible error message if the system instance encountered an error.
Actions	Button to delete the system instance.

Tip You can filter by workflow or resource name and sort by starting date.

Collibra-managed processes

Collibra provides the following processes:

Process	Description
requestResponsibilityForDomain	Allows you to submit a request for responsibilities from a domain page to the community managers of that domain.
requestResponsibilityForAsset	Allows you to submit a request for responsibilities from an asset page to the community managers of that asset.

Delete workflows

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. On the main toolbar, click → **Settings**.
   » The Settings page opens.
2. Click **Workflows** → **Definitions**.
3. Select the workflow you want to delete.
4. At the right of the title bar, click .

   » The **Delete Workflow** dialog box appears.
5. Click **Delete** to delete the workflow and any currently running instances.

Users and Subscriptions settings page

The **Users and Subscriptions** settings page serves as the central hub for managing user access and understanding your Collibra Platform capabilities and license consumption. This section provides a guide to configuring user accounts and groups, monitoring license usage, viewing asset allowances, and understanding your current Collibra product package.

The **Users and Subscriptions** page of the Collibra settings allows you to:

- Define users and their permissions Collibra.
- Manage user groups.
- View license consumption and download monthly reports.
- View your current asset allowance with the new license model.
- View your current product package.

Collibra uses a standard user-group-role model where you create groups with assigned roles and add users to the groups. You can also assign roles to individual users.

Assigning roles to users or groups is important because:

- It provides or restricts permissions to perform certain actions in Collibra, such as editing asset attributes or deleting domains.
- It defines user responsibilities, which are mostly used in workflows to assign tasks to the correct users.

You can manage users in the following ways:

- SCIM: Manage users and groups via your identity provider.
- LDAP: Connect Collibra to your company's LDAP server to import users and groups.
- Manually: Create users and groups directly in Collibra.

The **Users and Subscriptions** page has several tab pages:

Tab page	Description
Users	View and edit user accounts.
Groups	View and edit groups.
Seats	View license consumption and download monthly reports.
Assets	View your current asset allowance with the new license model.

Tab page	Description
Package	View your current product package.

Users

A user is an individual who has access to Collibra through a user account. The specific actions a user can perform depend on depend on their license type, global roles, and responsibilities.

> **Tip** Add users to user groups for efficient assignment of roles and responsibilities to multiple users simultaneously.

User types

The type of a user depends on their license type. The new license model defines three user types, based on the licenses:

User type	Description
Viewer	A Viewer license allows users to access and browse Collibra, add comments and ratings, create collections, and start workflows. With a Viewer license, users can search through business and technical content, typically to find curated data products in the Data Marketplace and perform a data product check-out. Viewer users have full viewing capabilities across Collibra, but administrators may restrict them to only see curated and approved content. They also have access to applications such as Glossary, Catalog, Data Marketplace, or Reference Data, allowing them to navigate through available content. When Viewer users spot missing or incorrect information, they can engage with data stewards and owners by commenting, rating, or starting workflows to ask questions, propose changes, suggest missing content, or report issues.

User type	Description
Contributor	In addition to the Viewer license, a Contributor license allows users to perform a deeper exploration of the platform to understand and interact with the metadata landscape: • Participate in workflows for data product improvement, curation, and certification. • Offer feedback on data product quality or issues related to data products. • Assist Creator users with final certifications and approvals. • Update asset tags. • Execute classification rules. • Conduct and submit assessments. • Leverage data notebooks to write SQL-based queries to build insights on data products. They also have access to applications such as Guided Stewardship, Usage Analytics, or Data Helpdesk.
Creator	A Creator license grants users full access to all available products and capabilities. In addition to platform administration, configuration, and customization, they can create, edit, and delete assets without restriction and take on the roles of business and data stewards: • Manage the operating model, including users and subscriptions. • Manage the organizational setup, including communities, domains, and responsibilities. • Create, update, and delete assets and asset characteristics, including bulk import. • Manage assessments and assessment templates. • Manage and publish data notebooks. • Manage Protect, classification, and tags. • Access Settings, Workflow Designer, and Insights Data Access.

Note

- The described actions for each license type are not all-inclusive and may be subject to change.
- At any moment, a user has the maximum license required by any permission included in any role assigned to them directly or through group membership. For example, if a user has a role with a permission that requires a Contributor license and another role with a permission that requires the Creator license, the user occupies a Creator seat.

Information for the legacy license model

User type	Description
Read-only user	A user who has a read-only license and who can: • 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 on the **Settings** page.
Standard user	A user who has a standard license and who can: • 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. • 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 view which global and resource permissions require a Standard license on the **Settings** page.

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.
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. Admin Istrator allows you to perform the initial user creation and configuration. You can delete this account if you have at least one other user who has the **Sysadmin** global role.
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. You cannot modify or delete this user.
Workflow User	00000000-0000-0000-0000-000000900003	Standard	The Workflow User performs the actions triggered by workflows that are not the result of a user task or a synchronous script. You cannot modify or delete this user.

> **Note** You can retrieve a full list of out-of-the-box users by using the REST Core API v2 GET method of the /users endpoint with the **includeDisabled** parameter set to `true`. Out-of-the-box users have `true` in the **system** filed.

Profile page basics

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

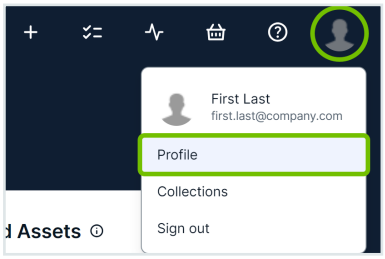
In this topic

Open a profile page

As a regular user, you can open your own profile page. Administrators can access the profile pages of all users.

Open your profile page

On the main toolbar, click your avatar → **Profile**.



Open another profile page

To open a profile page that is not your own, you must have a global role with the **User Administration** or the **System Administration**global permission, such as **Sysadmin**.

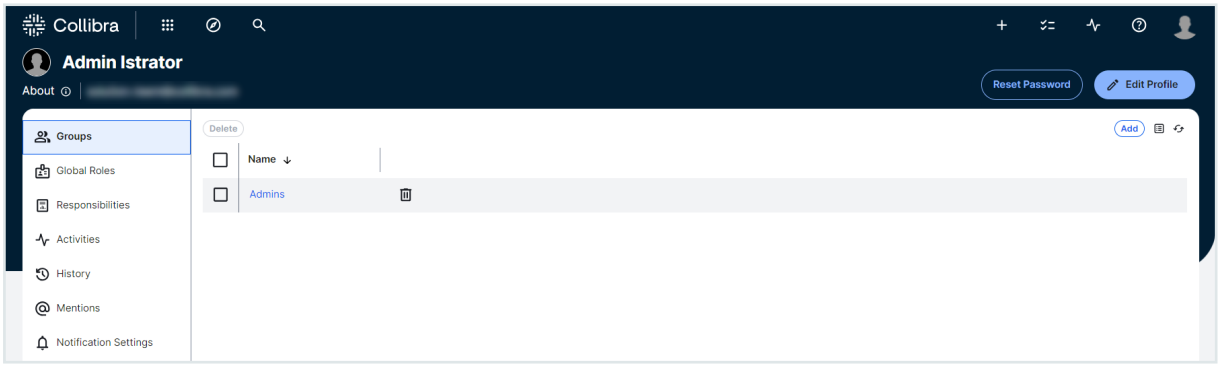
1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.

2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. In the row of the profile you want to open, click the username.

Full and basic profile pages

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, you can see all information for all users.

Full profile page



The **About** sidebar contains important information about the user, such as the user name, language, and email address

The profile page contains the following tab pages:

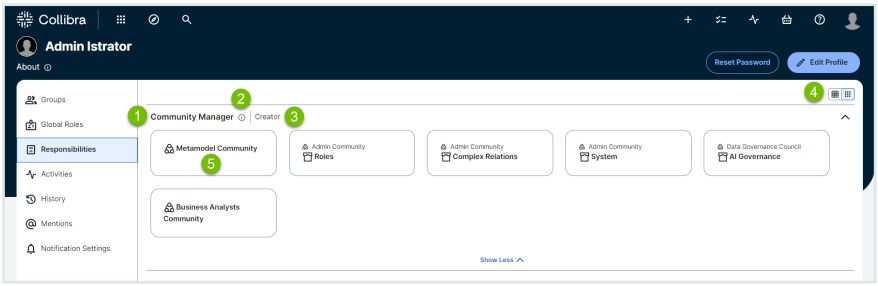
Tab page	Description
Groups	The groups page contains the groups of which the user is a member and, with the right permissions, allows you to add the user to or remove the user from groups.
Global Roles	The Global Roles page contains global roles assigned to the user.

Tab page	Description
Responsibilities	The responsibilities page contains the responsibilities that are assigned to the user.

> **Note** Only 300 responsibilities are visible at one time, even if more exist in the system.

Learn more
You can see a full list of both direct and inherited responsibilities for a user on the **Responsibilities** tab of the user **Profile** page, in either tile mode or table mode.

Tile mode

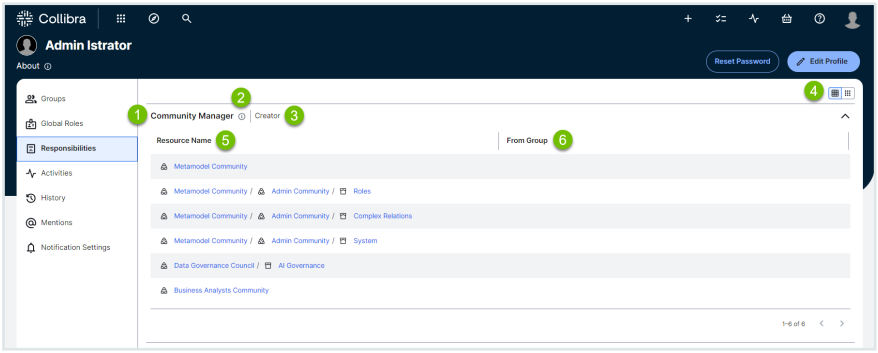


No.	Item name	Description
1	Resource role	Name of the resource role.
2	Tooltip	Tooltip that shows the resource role description.
3	License	Highest license type required by the resource permissions assigned to this role.
4	Display mode	Switch between the tile and table mode.

Tab page	Description

No.	Item name	Description
5	Resource tile	Tile showing details of the resource to which the responsibility applies, including the groups with that responsibility that have the user as a member. **Tip** Click the tile to see additional details about the resource.

Table mode



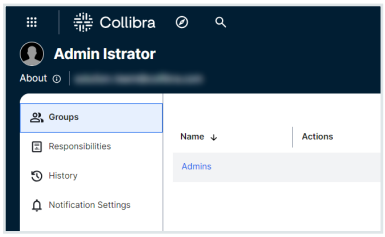
No.	Item name	Description
1	Resource role	Name of the resource role.
2	Tooltip	Tooltip that shows the resource role description.
3	License	Highest license type required by the resource permissions assigned to this role.

Tab page	Description

No.	Item name	Description
4	Display mode	Switch between the tile and table mode.
5	Resource name	Details of the resource to which the responsibility applies.
6	Group name	Groups with that responsibility that have the user as a member.

Activities	The activities pages contains the list of your activities.
History	The history page contains the history of the user's actions.
Mentions	The mentions page contains a list of all comments in which you are mentioned.
Notification Settings	The **Notification Settings** page contains mail notification options. Go to Edit the email notification settings or Edit the product notification settings.

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:

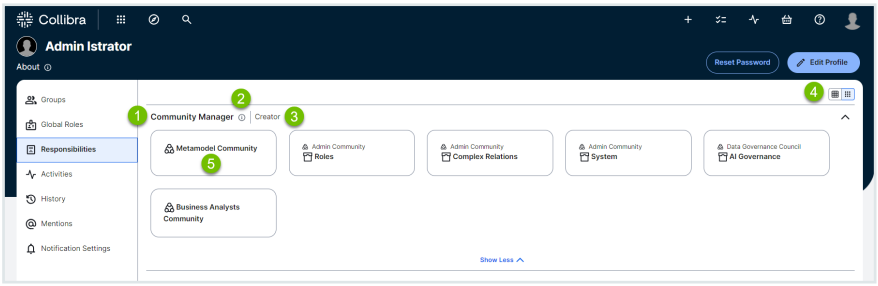
Tab page	Description
Groups	The groups page contains the groups of which the user is a member.

Tab page	Description
Responsibilities	The responsibilities page contains the responsibilities that are assigned to the user.

> **Note** Only 300 responsibilities are visible at one time, even if more exist in the system.

Learn more
You can see a full list of both direct and inherited responsibilities for a user on the **Responsibilities** tab of the user **Profile** page, in either tile mode or table mode.

Tile mode

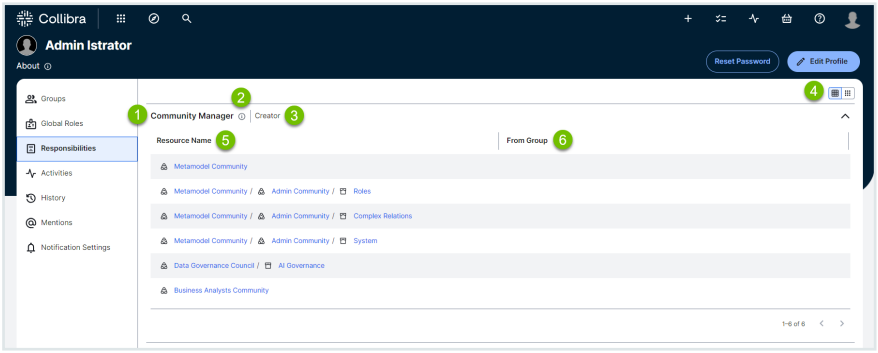


No.	Item name	Description
1	Resource role	Name of the resource role.
2	Tooltip	Tooltip that shows the resource role description.
3	License	Highest license type required by the resource permissions assigned to this role.
4	Display mode	Switch between the tile and table mode.

Tab page	Description

No.	Item name	Description
5	Resource tile	Tile showing details of the resource to which the responsibility applies, including the groups with that responsibility that have the user as a member. **Tip** Click the tile to see additional details about the resource.

Table mode



No.	Item name	Description
1	Resource role	Name of the resource role.
2	Tooltip	Tooltip that shows the resource role description.
3	License	Highest license type required by the resource permissions assigned to this role.

Tab page	Description
	<table><tr><th>No.</th><th>Item name</th><th>Description</th></tr><tr><td>4</td><td>Display mode</td><td>Switch between the tile and table mode.</td></tr><tr><td>5</td><td>Resource name</td><td>Details of the resource to which the responsibility applies.</td></tr><tr><td>6</td><td>Group name</td><td>Groups with that responsibility that have the user as a member.</td></tr></table>
History	The history page contains the history of the user's actions.
Notification Settings	The **Notification Settings** page contains mail notification options. Go to Edit the email notification settings or Edit the product notification settings.

Related topics

- Manage a profile
- Users

Manage a profile

You can update your personal information and preferences in Collibra. This topic covers how to edit your account settings, contact information, and notification preferences for both emails and product updates.

In this topic

- Edit the user account settings
- Edit the contact information
- Edit the email notification settings
- Edit the product notification settings

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 the settings of other users.

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. Click **Edit Profile**.

» The **Edit Profile** dialog box appears.

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** `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
Language and Locale	Choose the interface language, which affects the language as well as the format of dates, times and numbers. As an administrator, you can set the default language and locale, and make all dates show in the ISO-8601 (YYYY-MM-DD) format, regardless of the selected language and locale. This option can also be disabled when an administrator selects the default language and local.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.

Field	Description
Email Address	Enter the email address on which the user receives all communication from Collibra, such as the registration mail and notifications. **Note** When you edit your own email address, you must confirm your Collibra password. Administrators can edit the email addresses of other users without a password confirmation. To add a phone number, website, or instant messaging, go to Edit the contact information.

4. Click **Save all**.

Edit the contact information

As a regular user, you can edit or add new contact information for your own user account on your profile page. As an administrator, you can also edit the contact information of other users either from their profile page or the Users settings page.

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.

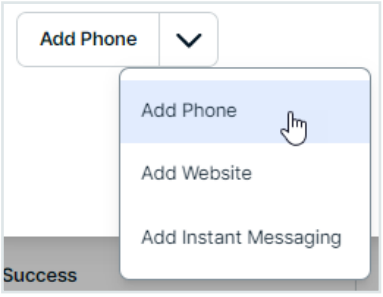
Edit contact information from a profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. Click **Edit Profile**.
   » The **Edit Profile** dialog box appears.

3. In the **Contact Details** tab, do one of the following:
   - Update any existing fields.

     > **Note** When you edit your own email address, you must confirm your Collibra password. Administrators can edit the email addresses of other users without a password confirmation.

   - Select the type of contact information you want to add from the **Add Phone** button, and click the button.



     > **Note** After editing an email address, a notification email is sent to the old email address.

4. Edit the contact information.
5. Click **Save all**.

Edit contact information from the Users settings page

> **Note** Administrators cannot edit their own email address in the Users settings page.

1. On the main toolbar, click → **Settings**.
   » The Settings page opens.
2. Click **Users and Subscriptions**.
   » The Users tab page opens.

3. Hover your cursor over a cell in the **Email** column and double-click .

> **Note** After editing an email address, a notification email is sent to the old email address.

4. Edit the email address.
5. Press `Enter`, `Tab`, or click outside the filed to save the changes.

Edit the email notification settings

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

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. Click **Notification Settings**.
3. In **Content Notifications**, select the required option.

Option	Description
None	You won't receive any email notifications.
Weekly	Receive email notifications only on the days you specify.
Monthly	Receive a summary email once a month.

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

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. Click **Notification Settings**.
3. In the **Product Notifications** section, select or clear the checkbox for each type of notification.

Create a user account

You can manually create users and add them to user groups. By default, a new user does not have global permissions and cannot access Collibra. To grant access to Collibra applications, add the new user to one or more global roles that have the appropriate permissions. By default, all users are added to the **Everyone** and **Users** system-managed 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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. Above the table, to the right, click **Add**.
   » The **Create Users** dialog box appears.
4. Enter the required information.

Field	Description
User details	The details of the user accounts.

Field	Description
Username*	The username of the user to sign in to Collibra. **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
E-Mail*	The email address to which Collibra sends emails, such as the registration email and notifications.
First name	The first name of the user.
Last name	The last name of the user.
	Button to remove the user details when you added more than one user.
Add another user	Button to add another user.
Add to user groups	A user needs access to at least one of the basic Collibra applications, such as Data Catalog, Stewardship, or Assessments. You can grant access by assigning one of the global roles that provide the required permissions.

Field	Description
Add another user	A list of user groups to which you can add the new users. You can also add or remove users from groups later.

> **Note** Fields marked with * are mandatory.

5. Click **Create**.

> **Important** New user accounts are enabled, but inactive and their password status is **Unset**. To activate the accounts, new users receive an email to set their password, which changes their password status **Set**.

> **Tip** As an administrator, you can manually set or reset user passwords.

Edit a user account

You can edit a user account.

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. Do one of the following:
   - Edit the account settings.
   - Edit the contact information.
   - Edit the email notifications.
   - Edit the user details.

Set or reset a user password

As a regular user, you can reset your own password. Administrators can set or reset the passwords of all users.

> **Important** You can only reset the password of users that were created manually.

You can view the default password requirements in the Service configuration options.

Reset your password

1. On the main toolbar, click your avatar → **Profile**.
   » Your profile page appears.
2. In the upper-right corner, click **Reset Password**.
   » You receive a password reset email.

   > **Note** The password reset link is valid by default for 60 minutes.

Set or reset the password of another user

To set or reset the password of another user, you must have a global role with the **User Administration** or the **System Administration** global permission, such as **Sysadmin**.

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. In the row of the user whose password you want to set or reset, click .
   » The **Password Reset** dialog box appears.

4. Choose how you want to set or reset the password.

Option	Description
Email a link to the user.	Send an email to the user and let them set a new password. **Note** The password reset link is valid by default for 60 minutes. You can edit the length of the validity in Collibra Console.
Specify a new password.	Set a password yourself. **Note** If you set the password of an inactive account, their password status changes to **Set**

5. Click **Reset Password**.

Enable a user account

You can enable a user account if they were created manually.

> **Note** New user accounts 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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. In the row of the account you want to enable, click .

» The user account is enabled and the icon changes into .

Disable a user account

You can disable a user account. Disabled accounts do not count towards the total seat allocation.

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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. In the row of the account you want to disable, click .

» The user account is disabled and the icon changes into .

Delete a user account

You can delete one or more user accounts.

Prerequisites

You have a global role that has the **User Administration** or **System Administration** global permission, for example, **Sysadmin**.

Steps

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.

3. Do one of the following:

Action	Steps
Delete a single user account.	a. In the row of the user you want to delete, click . b. In the delete confirmation dialog box, click **Delete**.
Delete one or more users accounts.	a. Select the check boxes in front of the rows of the users you want to delete. b. Above the table, to the left, click **Delete**. c. In the delete confirmation dialog box, click **Delete**.

> **Note** 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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users**.
   » The user table appears.
3. Above the table, to the right, click .
   » The export activity starts.
4. When the export activity finishes, you can download the CSV file:
   a. On the main toolbar, click → **Go to All Activities**.
      » Your profile page opens on the **Activities** tab page.
   b. In the **Results** column of the **Export users** activity, click **Results**.
      » Depending on your browser and browser settings, the files are downloaded to a default location or a dialog box appears to specify the location for the downloads.

Example

This is an example of the user information that is exported:

- User ID
- Password status (**activated** column)
- User status (**enabled** column)
- Username
- Email address
- First name
- Last name
- Gender
- Default language
- Last login time

exporta6d82c651da94d3181517a2e05de8df1

id	activated	enabled	username	emailAddress	firstName	last
00000000-0000-0000-0000-000000900002	TRUE	TRUE	Admin	solution-team@collibra.com	Admin	Istra
0b42659d-ebc7-4171-b0d8-8fc18b8751da	TRUE	TRUE	john	john.fisher@collibra.com	John	Fish
1c4190f2-23a0-410c-a4e1-e1ea979dc67a	TRUE	TRUE	otg-api	rafael.ugolini@collibra.com	OTG	API
2086de3e-0dbf-44e9-b02b-a2565e623cd4	TRUE	TRUE	mary	mary.smith@collibra.com	Mary	Smit
23ccaf2b-7e25-42ce-89ce-9dc3d743bace	TRUE	TRUE	cliff	cliff.chopra@collibra.com	Cliff	Bak
35f55a00-7331-49d0-aa1b-43e4cbeb2d6c	TRUE	TRUE	joanna	joanna.zhou@collibra.com	Joanna	Zhou
45b944df-b758-4826-b1b7-14351ca21a05	TRUE	TRUE	william	william.parker@collibra.com	William	Park
5dd073c3-03ee-44e8-b0c4-61ba461236a4	TRUE	TRUE	eliza	eliza.arquette@collibra.com	Eliza	Arqu
9693d5ce-9fb4-4e97-b46e-7218526eda14	TRUE	TRUE	DataLakeAdmin	datalake@collibra.com	DataLake	Adm
b0ffb1f5-f1aa-41e9-9815-494f45516932	TRUE	TRUE	dora	dora.portman@collibra.com	Dora	Port
dfa71da4-fa9d-462c-87d7-52bec5ad207b	TRUE	TRUE	Gloria	gloria@collibra.com	Gloria	ML
ec0162b4-f062-46f9-bbf8-22ff684916a6	TRUE	TRUE	preston	preston.sterling@collibra.com	Preston	Ster

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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. The **Online** column indicates which users are currently logged in.

> **Tip** To add the column to the table, above the table, to the right, click → select the checkbox next to the **Online** column.

User licenses

A user license authorizes a user to perform certain actions in Collibra. The specific actions a user can perform depend on the user's global roles and responsibilities.

License types

The new license model defines three license types:

License type	Description
Viewer	A Viewer license allows users to access and browse Collibra, add comments and ratings, create collections, and start workflows. With a Viewer license, users can search through business and technical content, typically to find curated data products in the Data Marketplace and perform a data product check-out. Viewer users have full viewing capabilities across Collibra, but administrators may restrict them to only see curated and approved content. They also have access to applications such as Glossary, Catalog, Data Marketplace, or Reference Data, allowing them to navigate through available content. When Viewer users spot missing or incorrect information, they can engage with data stewards and owners by commenting, rating, or starting workflows to ask questions, propose changes, suggest missing content, or report issues.
Contributor	In addition to the Viewer license, a Contributor license allows users to perform a deeper exploration of the platform to understand and interact with the metadata landscape: • Participate in workflows for data product improvement, curation, and certification. • Offer feedback on data product quality or issues related to data products. • Assist Creator users with final certifications and approvals. • Update asset tags. • Execute classification rules. • Conduct and submit assessments. • Leverage data notebooks to write SQL-based queries to build insights on data products. They also have access to applications such as Guided Stewardship, Usage Analytics, or Data Helpdesk.

License type	Description
Creator	A Creator license grants users full access to all available products and capabilities. In addition to platform administration, configuration, and customization, they can create, edit, and delete assets without restriction and take on the roles of business and data stewards: • Manage the operating model, including users and subscriptions. • Manage the organizational setup, including communities, domains, and responsibilities. • Create, update, and delete assets and asset characteristics, including bulk import. • Manage assessments and assessment templates. • Manage and publish data notebooks. • Manage Protect, classification, and tags. • Access Settings, Workflow Designer, and Insights Data Access.

Note
- The described actions for each license type are not all-inclusive and may be subject to change.
- Access to Collibra Console does not require a license.

The maximum number of licenses is defined in the license file.

Warning If your organization occupies more licenses than the maximum stipulated in your contract and identified in the license file, your administrator receives a warning, but all users retain access to Collibra functionality as determined by their roles and responsibilities. Occupying more licenses than the maximum can have financial and legal implications.

License assignment

License assignment automatic. You cannot assign licenses individually. Instead, Collibra calculates the required license type for each user. At any moment, a user has the maximum license required by any permission included in any role assigned to them directly or through group membership. For example, if a user has a role with a permission that requires a Contributor license and another role with a permission that requires the Creator license, the user occupies a Creator seat.

> **Tip** You can view the required license type of all permissions in ⚙ Settings.

> **Note** The new license model no longer uses required and effective licenses.

License usage

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.

Information for the legacy license model

License types

The legacy license model defines two license types:

License type	Description
Read-only	A Read-only license is a basic license type that allows users 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 on the **Settings** page.
Standard	A Standard license is an enhanced license type that allows users to perform all of the 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. • 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 view which global and resource permissions require a Standard license on the **Settings** page.

License assignment

License assignment is automatic. 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 view the required license type of all permissions in ⚙ **Settings**.
>
> You can also see the required license types of all permissions and the out-of-the-box global roles and resource roles in the documentation:
>
> - Permissions of the out-of-the-box global roles
> - Permissions of the out-of-the-box 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.

Related topics

- View used licenses
- Usage moderation and management

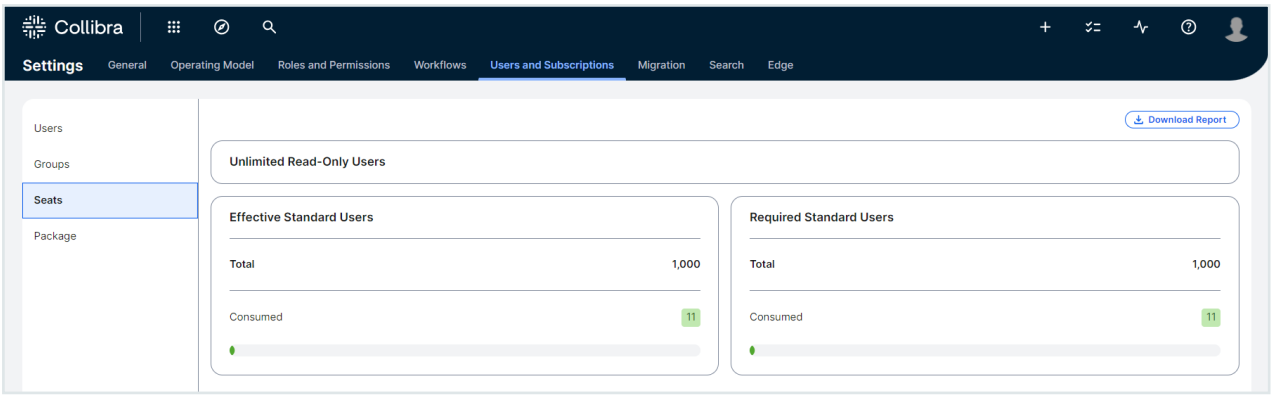
View used licenses

As an administrator, you can view how many licenses of each type are currently in use.

Steps

> **Note** The information in this table is, by default, refreshed hourly.

1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. In the **Users and Subscriptions** section, select **Seats**.



You see an overview of the total number of licenses that you are entitled to and their current consumption.

> **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 out-of-the-box global roles and resource roles in the admin guide:
>
> - Permissions of the out-of-the-box global roles
> - Permissions of the out-of-the-box resource roles

Steps

1. On the main toolbar, click → **Settings**.
   » The **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 legacy license model Standard license in Collibra grants users broader access and functionality compared to a Read-only licenses. This license level allows holders to actively interact with the platform, performing tasks and activities such as creating and editing assets, participating in workflows, and contributing to data governance processes.

This license type is **available only** if you have a legacy license model.

> **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 global or resource permission in a Collibra environment with a legacy license model requires either a Standard or a Read-only license. The required license for each permission is visible under **Settings** → **Roles and Permissions** → Global Permissions or **Settings** → **Roles and Permissions**→ 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** → **Roles and Permissions**→ **Global Roles** or **Settings** → **Roles and Permissions**→ **Resource Roles**.

Roles are assigned to users through a group or directly. If the user has at least one role that requires a Standard license, then the user is occupying a Standard license seat. This is known as the required license of a user.

Global roles are assigned in **Settings**, and resource roles are assigned at the 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 effectively occupies a Standard license until the end of that month. This is known as the effective license of a user.

Verify why a specific user requires a Standard license

Global roles

1. Go to **Settings** → **Users and Subscriptions** → **Users**.
2. Find the user that requires a Standard license and click their name.
3. On the user profile page, click the **Groups** tab to see the list of groups the user belongs to.
4. Add the **Required License** column to view the license each group requires.

Resource roles

1. Go to **Settings** → **Users and Subscriptions** → **Users**.
2. Find the user that requires a Standard license and click their name.
3. On the user profile page, click the **Responsibilities** tab to see a list of the responsibilities the user has.
4. Each responsibility shows the required license.

Update a Standard license to a Read-only license

Remove the user from any groups or responsibilities that require a Standard license to update a user from a Standard license to a Read-only license.

> **Note** If you 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.

Groups

A group is a logical collection of users.

The main purpose of groups is to facilitate assigning roles and responsibilities. When you assign a role to a group, the users in the group receive the role and its 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, 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	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	00000000-0000-0000-0000-000001000002	The Users group contains all users and can be used for actions that affect all users. It is hidden in Collibra.

Default name	UUID	Purpose
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 user groups.

The group page contains the following tab pages:

Tab page	Description
Overview	The overview page contains a table with 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.
Global Roles	The global roles page contains a list of global roles 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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. Click **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 create multiple user groups together. To do so, enter the first name, click the drop-down or press `Enter`, and then enter the next name. ◦ User group names must be globally unique.

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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. Click **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 bar, 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 toolbar, click → **Settings**.
   » The **Settings** page opens.

2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. Click **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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. Do one of the following:
   - Double-click a cell in the **Groups** column.
   - Hover your mouse over a cell in the **Groups** column and click ✎.
4. Click in the field and start typing the name of the group.
5. Select the group from the suggestions.

6. If required, select **Apply to visible rows**.
   This will add all visible users to the groups.

   > **Tip** You can filter the columns first to add a selection of users to the group.

7. Click ✔.

Add a user to a user group from the user group page

1. Open a user group page.
2. Above the table, to the right, click **Add**.
   » The **Add to group** dialog box appears.
3. Enter the required information.

Field	Description
Users	Choose one or more users.

4. Click **Add**.
   » The users are added to the user group and the users now appear in the table.

Add a user to a user group from the profile page

1. Click your avatar, then **Profile**.
   » Your profile page appears.
2. In the tab bar, 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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. Do one of the following:
   - Double-click a cell in the **Groups** column.
   - Hover the mouse pointer over a cell in the **Groups** column and click ✎.
4. In the user group name, click ⊗.
5. If required, select **Apply to visible rows**.
   This will add all visible users to the groups.

   > **Tip** You can filter the columns first to add a selection of users to the group.

6. When you have added the groups, click ✓.

Remove a user from a user group from the user group page

1. Open a user group page.
2. Do one of the following:

If you want to...	Follow these steps
Remove a single user from user group	a. In the row of the user that you want to remove from the group, click 🗑. » 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. 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 bar, click **Groups**.
3. Do one of the following:

If you want to...	Follow these steps
Remove a user from a single user group	a. In the row of the group from which you want to remove the user, click 🗑. » 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. 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 toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Users and Subscriptions**.
   » The **Users** tab page opens.
3. Click **Groups**.
   » The user group table appears.
4. Do one of the following:

Action	Steps
Delete a single group	a. In the row of the group you want to delete, click . b. In the delete confirmation dialog box, click **Delete**.
Delete one or more groups	a. Select the check boxes in front of the rows of the groups you want to delete. b. Above the table, to the left, click **Delete**. c. In the delete confirmation dialog box, click **Delete**.

LDAP user and group management

The Collibra Console administrator can integrate Collibra Platform 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.

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.

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 toolbar, click → **Settings**.
   » The 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 toolbar, click → **Settings**.
   » The Settings page opens.
2. Do one of the following:
   - Click **Users**.
     » The user table appears.
   - Click **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 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.

Why are there a lot of connection problems during the synchronization of users and there are no users visible in Collibra after synchronizing?

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

What happens if I change the LDAP configuration while a synchronization is ongoing?

If you change the LDAP configuration to point to a different server while a synchronization with the initial server is ongoing:

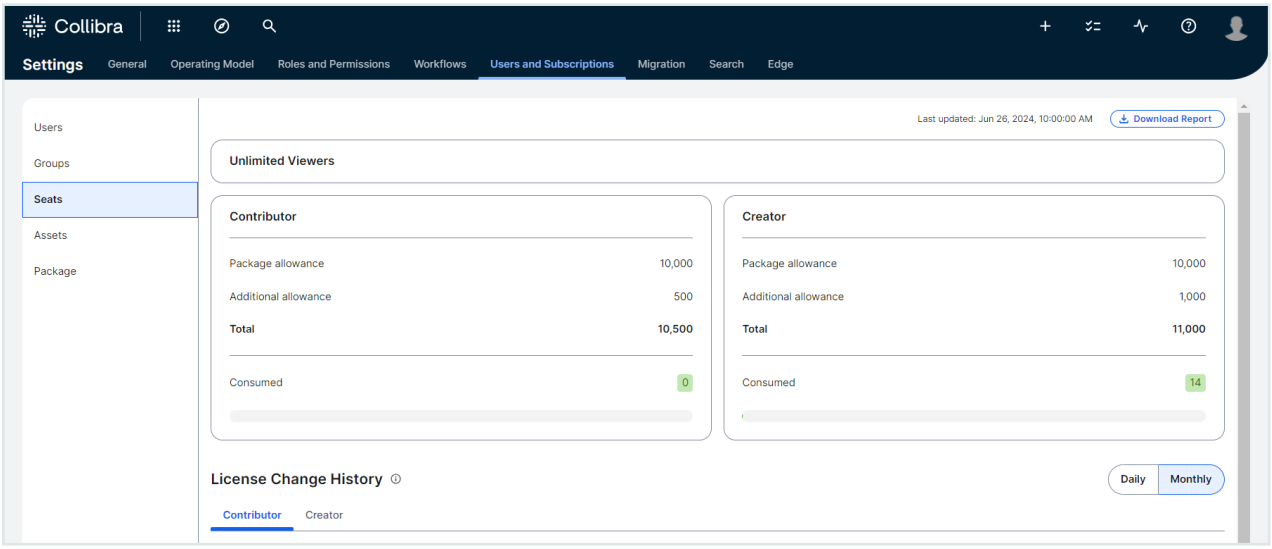
- The synchronization with the initial server is stopped
- The status of all the users that were imported from the initial server is changed to disabled.

- A synchronization with the newly configured LDAP server starts.
- The password status of the users that were imported from the new server is set to active.

Seats

The **Seats** page provides an overview of the total number of licenses you are entitled to and their current consumption.

This feature is **available only** in the latest UI.



Viewer seats are unlimited. The number of Contributor and Creator seats depend on your subscription. A license key is uploaded to the applicable environment for each subscription. The license key contains package details such as included users by type, asset allowance, and product and capabilities included or purchased additionally.

The **Seats** page allows you to see when your organization exceeds the number of assigned seats so you can take action by purchasing more seats or by removing permissions from users or groups to reduce the number of occupied seats.

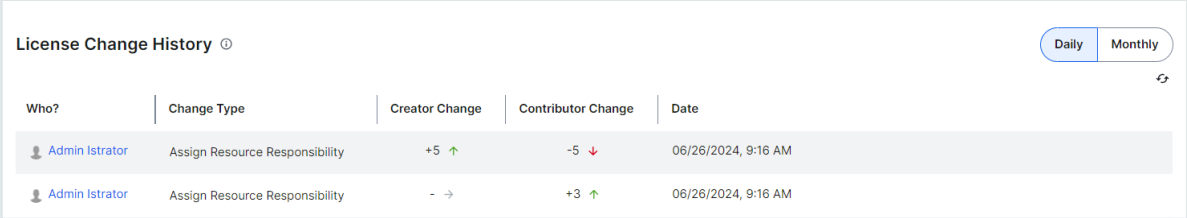
The number of allocated Contributor or Creator seats has a 20% buffer to help manage consumption after exceeding the purchased amount. If the assigned seats exceed 120% for these licenses for more than 9 consecutive weeks, you cannot:

- Assign responsibilities to a role that requires that license.
- Add members to a global role that requires that license.

- Add users to a group with a role that requires that license.

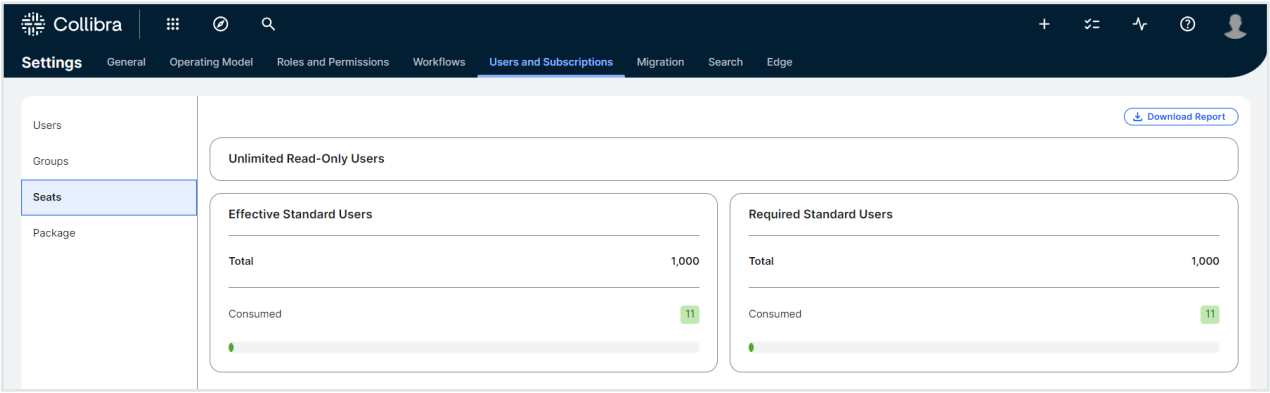
The **License Change History** section shows:

- A **Monthly** chart reflecting the evolution of the number of seats.
- A **Daily** table that captures the operations that have an impact on the number of assigned seats, such as changes in:
  - Group memberships.
  - Global role membership.
  - Responsibilities.
  - Permissions for resource or global roles.



You can download a report in CSV format to see weekly historical data.

Information for the legacy license model



Note

- The information on this page refreshes hourly.
- Disabled accounts do not count towards the total.
- System-reserved accounts do not count towards the total.

A user license authorizes a user to perform certain actions in Collibra. The specific actions a user can perform depend on the user's global roles and responsibilities.

Read-only seats are unlimited. The number of Standard seats depends on your subscription. A license key is uploaded to the applicable environment for each subscription. The license key contains package details such as included users by type, asset allowance, and product and capabilities included or purchased additionally.

The **Seats** page allows you to see when your organization exceeds the number of assigned seats so you can take action by purchasing more seats or by removing permissions from users or groups to reduce the number of occupied seats.

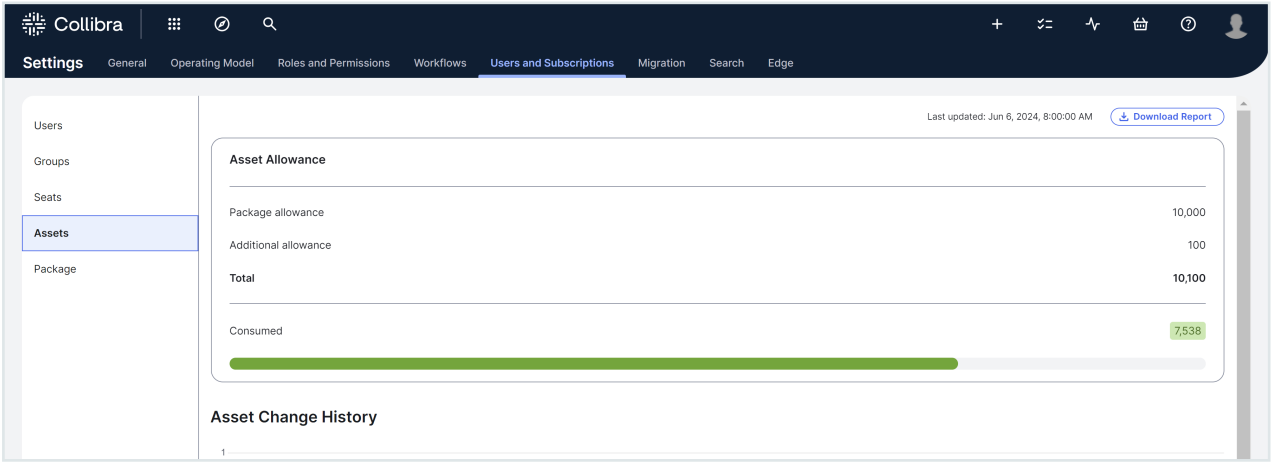
You can download a report in CSV format to see how monthly workflow participation contributed to the number of effective standard users.

Related topics

- User licenses
- Usage moderation and management

Assets

This feature is **available only** in the latest user interface and only if you have a new license model.



The **Assets** page offers an overview of the total amount of assets that you are entitled to and their current consumption:

- The number of Creator licenses included in your package or additionally purchased multiplied by 58,000 assets.

- Additional asset bundles that you have purchased.

As your organization reaches the maximum number of allocated assets, you can take action to purchase additional asset bundles or add more users to increase your asset allowance.

The number of allocated assets has a 20% buffer to help you manage consumption after exceeding the entitled amount. When the total number of assets goes over 120% for more than 9 consecutive weeks, you can no longer:

- Manually create new assets using the global create function.
- Import assets in bulk through the asset import wizard.
- Register new data sources in Data Catalog and Data Lineage.

The **Asset Change History** section displays a chart reflecting the evolution of the number of assets.

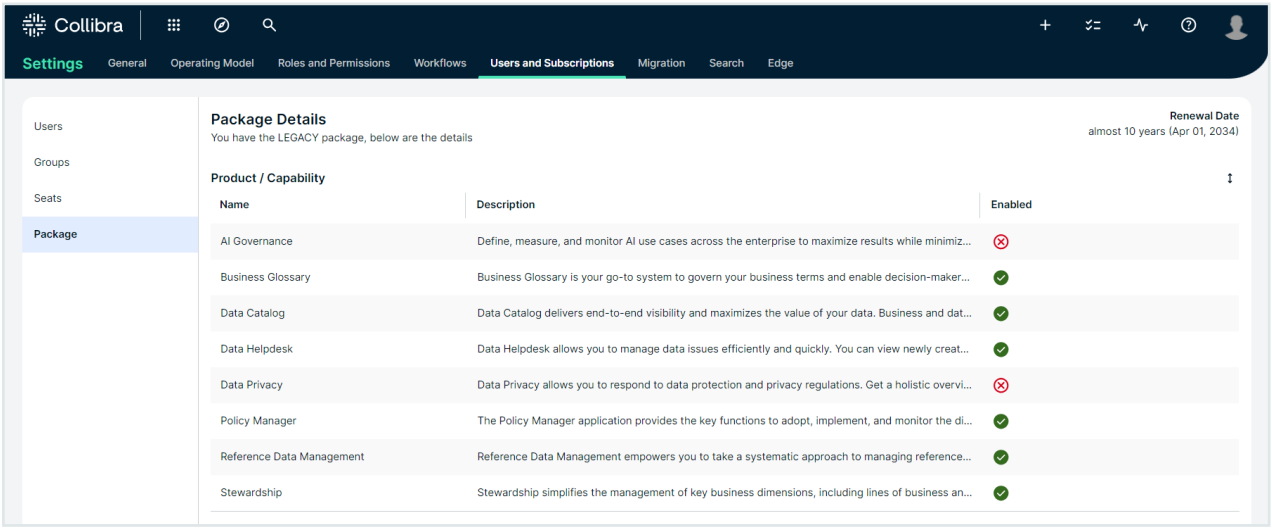
If needed, you can download a report in CSV format to see weekly historical data.

Related topics

- Usage moderation and management

Package

This feature is **available only** in the latest UI.



The **Package** page offers an overview of the products and capabilities that are enabled in your environment.

If you have a new license model, it also lists the integrations that you can use.

Usage moderation and management

The current license model provides an in-depth and personalized approach to user and asset moderation, allowing you to match your Collibra experience to your organizational and budgetary requirements.

At the core of the license model are three user types:

User type	Description
Viewer	A Viewer license allows users to access and browse Collibra, add comments and ratings, create collections, and start workflows. With a Viewer license, users can search through business and technical content, typically to find curated data products in the Data Marketplace and perform a data product check-out. Viewer users have full viewing capabilities across Collibra, but administrators may restrict them to only see curated and approved content. They also have access to applications such as Glossary, Catalog, Data Marketplace, or Reference Data, allowing them to navigate through available content. When Viewer users spot missing or incorrect information, they can engage with data stewards and owners by commenting, rating, or starting workflows to ask questions, propose changes, suggest missing content, or report issues. You can have an unlimited number of users with Viewer licenses.

User type	Description
Contributor	In addition to the Viewer license, a Contributor license allows users to perform a deeper exploration of the platform to understand and interact with the metadata landscape: • Participate in workflows for data product improvement, curation, and certification. • Offer feedback on data product quality or issues related to data products. • Assist Creator users with final certifications and approvals. • Update asset tags. • Execute classification rules. • Conduct and submit assessments. • Leverage data notebooks to write SQL-based queries to build insights on data products. They also have access to applications such as Guided Stewardship, Usage Analytics, or Data Helpdesk. You decide how many Contributor licenses you need.
Creator	A Creator license grants users full access to all available products and capabilities. In addition to platform administration, configuration, and customization, they can create, edit, and delete assets without restriction and take on the roles of business and data stewards: • Manage the operating model, including users and subscriptions. • Manage the organizational setup, including communities, domains, and responsibilities. • Create, update, and delete assets and asset characteristics, including bulk import. • Manage assessments and assessment templates. • Manage and publish data notebooks. • Manage Protect, classification, and tags. • Access Settings, Workflow Designer, and Insights Data Access. A number of Creator licenses is already included in every package, and you can add more if required.

You can see an overview of the total number of licenses you are entitled to and their current consumption in **Settings** → Seats.

> **Note** Disabled user accounts do not count towards your license consumption.

Learn more about user licenses.

Assets

The number of assets your platform can have is primarily determined by the number of Creator licenses. However if your organization relies more on automation, you can keep the Creator number to a minimum and add asset bundles.

The total number of assets is calculated as follows:

- The number of Creator licenses included in your package or additionally purchased multiplied by 58,000 assets.
- Additional asset bundles that you have purchased.

Learn more about the Assets page.

User and license management

License assignment is automatic. You cannot assign licenses individually. Instead, Collibra calculates the required license type for each user.

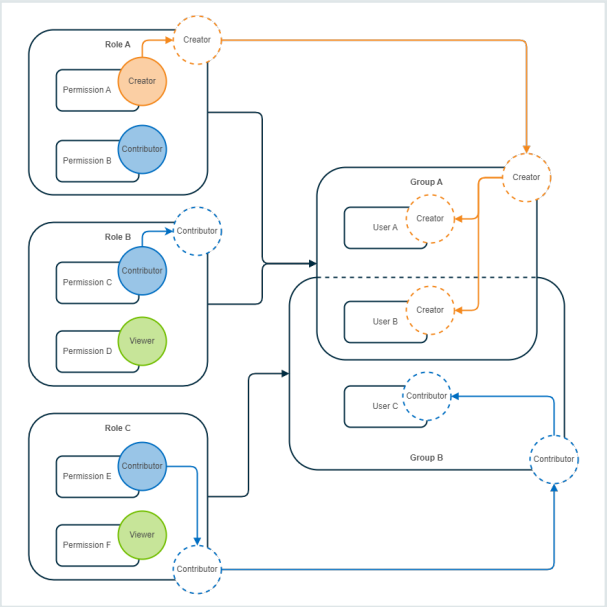
At any moment, a user has the maximum license required by any permission included in any role assigned to them directly or through group membership. For example, if a user has a role with a permission that requires a Contributor license and another role with a permission that requires the Creator license, the user occupies a Creator seat.

Roles and permissions

A permission is the authorization to access a Collibra application or function, or to view or edit a resource. Each permission has a required license and this is the only direct connection to a license type.

> **Important** You cannot assign permissions directly to users.

A role is a collection of permissions that you can assign to user groups or, exceptionally, to users. Roles inherit the highest license type from the permissions they contain. Groups inherit the highest license type from the roles they have while users inherit the highest license type from the groups they belong to, determining the license consumption.



The diagram demonstrates how Collibra determines license types at different levels for global roles and permissions:

- **Role A** has aCreator license from **Permission A**, while **Role B** and **Role C** have a Contributor license from **Permission C** and **Permission E**, respectively.
- **Role A** and **Role B** are assigned to **Group A**, which inherits the higher Creator license from **Role A**.
- **Role C** is assigned to **Group B**, which inherits the Contributor license.
- **User A** is a member of **Group A** and inherits the Creator license from **Group A**.
- **User B** is a member of both **Group A** and **Group B** and inherits the higher Creator license from **Group A**.
- **User C** is a member of **Group B** and inherits the Contributor license from **Group B**.

Learn more about roles and permissions.

Tracking changes

As you make changes that have an impact on the license consumption, the **Updating Responsibilities** dialog box presents a summary of the changes to the number of Contributor or Creator seats as a result of the action you are about to perform.

Use the Assets and Seats reports to keep an eye on the past and current usage. For a more detailed analysis of events that led to changes in the number of Contributor and Creator seats, use the daily License Change History.

Resource permissions and responsibilities

A responsibility is the assignment of a resource role to one or more users or user groups for a resource. Based on their responsibilities, users can act on the permissions assigned to them via the resource role.

For future maintainability and higher transparency, add responsibilities as high up in the organization hierarchy as possible and rely on the automated inheritance of responsibilities from communities and domains to the individual assets.

Opt for assigning responsibilities to groups rather than individuals at the highest possible level. As your governance structure stabilizes, leverage the Request responsibility feature to:

- Assign individual responsibilities for short-term changes.
- Add the requesters to groups that already have the necessary responsibilities for long-term changes.
- Spread the governance management effort to the approver roles of the **Request responsibility** feature.

> **Tip** Manage the approvers and their backups in **Settings** → **Roles and Permissions** → Additional Settings.

Managing users

Use SCIM to manage users and, more importantly, groups. Instead of manually creating groups and group memberships, manage them via your Identity Provider. Once the groups are provisioned, start from one of the following scenarios, depending on your use case.

Simple scenario

This approach allows you to get started immediately and have a very tight grip on license consumption. It's easy to set up, requires low maintenance, and is transparent in understanding license consumption to ensure compliance with the license policy:

- Create three global roles for **Viewers**, **Contributors**, and **Creators**.
- Assign permissions based on the required licenses to your three roles.
- Use the out-of-the-box **Everyone** group for the **Viewers** role, which requires no main-

tenance because all users are part of this group by default.
- Add your SCIM groups to **Contributors** and **Creators** as needed.

Complex scenario

This approach leverages the global roles that come with Collibra and is suitable for complex organizational setups where different departments are responsible for different parts of the platform, and different types of users or groups need access to various applications:

- Where relevant, use the out-of-the-box **Everyone** group for global roles with Viewer permissions.
- Add your SCIM groups to the required out-of-the-box roles.

General considerations

When opting for out-of-the-box global or resource roles, use as few as possible and add extra permissions as needed if you don't require a detailed split of responsibilities. Because you cannot delete roles that are included with Collibra, once you have reached the desired setup, mark any remaining global roles as not in use to let your colleagues know to avoid them. You can disable resource roles that you don't need in **Settings** → **Roles and Permissions** → **Resource Roles**.

> **Note** We use some of the out-of-the-box roles in our workflows. If you do not use a particular role included in a workflow, modify the workflow configuration variables to include a similar role that you are using.

Allowance limits

The Seats and Assets settings pages help you monitor your license and asset consumption. Collibra calculates consumption as follows:

- The seats and assets data is refreshed every hour.
- Consumption is evaluated every week.
- A week starts at 00:00 UTC every Monday.
- You benefit from a 20% buffer to bring back usage within the allowance of your package.

- Exceeding 120% usage for more than 9 consecutive weeks triggers limitations for user or asset management.
- The limitations are automatically removed after one week of usage below the 120% threshold.

> **Important** Since consumption is evaluated weekly and each week starts on Monday, if you exceed the threshold on a Friday, that entire week counts as out of compliance.

Seats

Viewer seats are unlimited. The number of Contributor and Creator seats depend on your subscription. A license key is uploaded to the applicable environment for each subscription. The license key contains package details such as included users by type, asset allowance, and product and capabilities included or purchased additionally.

The **Seats** page allows you to see when your organization exceeds the number of assigned seats so you can take action by purchasing more seats or by removing permissions from users or groups to reduce the number of occupied seats.

The number of allocated Contributor or Creator seats has a 20% buffer to help manage consumption after exceeding the purchased amount. If the assigned seats exceed 120% for these licenses for more than 9 consecutive weeks, you cannot:

- Assign responsibilities to a role that requires that license.
- Add members to a global role that requires that license.
- Add users to a group with a role that requires that license.

Assets

As your organization reaches the maximum number of allocated assets, you can take action to purchase additional asset bundles or add more users to increase your asset allowance.

The number of allocated assets has a 20% buffer to help you manage consumption after exceeding the entitled amount. When the total number of assets goes over 120% for more than 9 consecutive weeks, you can no longer:

- Manually create new assets using the global create function.
- Import assets in bulk through the asset import wizard.
- Register new data sources in Data Catalog and Data Lineage.

Options

Managing usage means either reducing the number of seats or assets, or purchasing additional packages to accommodate current usage. Using your Identity Provider to manage groups and adopting simple group schemas allow you to perform bulk changes that impact seat consumption meaningfully.

In exceptional cases, such as when administrators who manage users are not available to bring usage back to normal, contact the Collibra Account Team.

Services configuration

> **Important** You can't edit the service configuration from the **Settings** page in the latest UI. If you use the latest UI, you can edit the service configuration only in Collibra Console. For more information, go to Collibra service configuration settings.

On the **Services Configuration** page of the Collibra settings, you can edit settings that affect your entire platform. For example, you can edit the Help menu or configure the search feature.

The settings on the **Services Configuration** page are also available in the Collibra service settings in Collibra Console.

> **Note** The **Services Configuration** page is not available by default. For more information, contact Collibra Support.

Migration settings page

The Migration feature allows you to migrate the operating model and views from one Collibra Platform 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 console export files for disaster recovery.

> **Note** Exporting and importing CMA files is restricted by the file upload settings, which determine the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra Support if you want to change the file upload settings.

> **Warning**
> The versions of the source and target environment have to be the same. Migrating between different versions may lead to unexpected behavior.
>
> For example, migrating does not work correctly if you import a CMA file in an environment of version 2021.07 or older if the CMA file includes assignments of any of the following asset types:
>
> - BI Report Attribute
> - Business Qualifier
> - Column
> - Field
> - Looker Report Attribute
> - Report Attribute
> - Table
> - Tableau Report Attribute

Overview of the migration procedure

1. Export objects from a source environment.
    a. Choose the objects that you want to migrate.
    b. Download the summary and the archive file.
    c. Review the summary.
2. Create a console export file for 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 console export file for 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. Apply the export file 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.

Prerequisites

You have a global role that has the **Product Rights** > **System administration** global permission.

Steps

1. On the main toolbar, click → **Settings**.
   » The **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.

If you want to export...	Do the following:
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.
Workflows	a. At the top of the page, click **Workflows**. b. 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 Diagram views Search filters Global asset views	a. At the top of the page, click **Views**. b. 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. c. 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.

If you want to export...	Do the following:
Asset views in application pages	a. At the top of the page, click **Views**. b. In the filter pane to the left, click **Asset views - in Applications**. » The applications pages appear in the table. c. Do one of the following: ■ 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: i. Click the name of an application page. » The available views appear in the right column. ii. Select one or more views.
Asset views in communities and domains pages	a. Click **Views**. b. In the filter pane to the left, click **Asset views - in Communities and Domains**. » The organization browser appears in the table. c. Do one of the following: ■ 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 an 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: i. Click the name of an community or domain. » The available views appear in the right column. ii. Select one or more views.

> **Note** Referenced model objects are also exported based on the export logic. For example, if you export a workflow, all roles to which the workflow refers are also exported.

4. In the upper-right corner, click **Export**.
   » The **Provide file name and description** dialog box appears.

5. Enter the required information.

Field	Description
Archive file name	The name of the exported archive file. **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 and other objects it needs.

If you export an object, Collibra Platform automatically exports all referenced objects. For example, if you export a workflow, Collibra will also export roles, asset types, and statuses 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:
  - Asset views:
    - Global
    - In applications
    - In communities and domains
    - Domain type defaults, if enabled
  - 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.

Secondary objects include the following:

- Assets
- Asset types
- Assets referenced by a filter clause on a relation type filter
- Characteristic types
  - Attribute types
  - Complex relation types
  - Relation types

- Asset page layout configurations, excluding draft, dynamic, and out-of-the-box layouts
- Scopes
- Communities
- Data quality rules
- Domain types
- Domains
- Roles
- Status
- Validation rules

Objects that cannot be migrated

Some objects will never be migrated. The following is a non-exhaustive list of such objects:

- 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
	  ◦ Asset type groups and their assignment

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
	• Asset type groups and their assignment

<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Assignment</td><td>

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
Asset type groups and their assignment

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>

</td></tr>
</table>

Object	Migrated fields and secondary objects

Kind	Properties
Selection (single value list)	Allowed values (adding values, AND removals)
Text	Plain text
True/False (boolean)	Metric

- 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
    - Asset type groups and their assignment
  - 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

Object	Migrated fields and secondary objects

- displayNameEnabled
- ratingsEnabled
- Asset type groups and their assignment

- 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

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)

Object	Migrated fields and secondary objects

Kind	Properties
Text	Plain text
True/False (boolean)	Metric

- 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
      - Icon reference
    - displayNameEnabled
    - ratingsEnabled
    - Asset type groups and their assignment
    - Minimum cardinality
    - Maximum cardinality

- Data quality rules referenced in the assignments
  - 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

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
- Asset type groups and their assignment

- 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
  - Asset type groups and their assignment

- Categorization 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

Object	Migrated fields and secondary objects

- Asset type groups and their assignment
- 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
  - Asset type groups and their assignment

- Data Quality Metrics: attribute types of the Metric attribute type kind
  - ID
  - Name
  - Description
  - Attribute type kind and its properties

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.

Object	Migrated fields and secondary objects

Kind	Properties
Selection (single value list)	Allowed values (adding values, AND removals)
Text	Plain text
True/False (boolean)	Metric

- Domain types referenced in the assignment
  - Parent domain types up to root
    - ID
    - Name
    - 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

Object	Migrated fields and secondary objects

- 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

- 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

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

Object	Migrated fields and secondary objects

Kind	Properties
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

- 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
    - Asset type groups and their assignment
  - Tail asset type
    - ID
    - Name
    - Description
    - Parent asset types, up to the root asset type (for example Busi-

Object	Migrated fields and secondary objects

ness asset)
- Display options
  - Color
  - Symbol (none, Icon or Code)
  - Code
  - Icon reference
- displayNameEnabled
- ratingsEnabled
- Asset type groups and their assignment

- 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

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

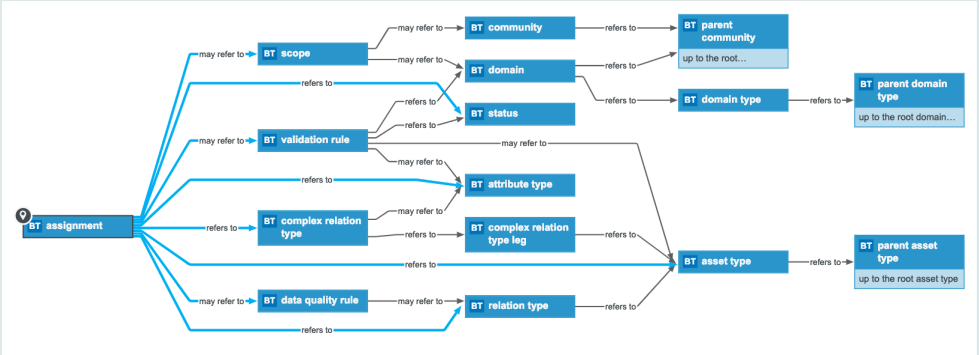
Object	Migrated fields and secondary objects

Kind	Properties
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

- 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
      - Icon reference
    - displayNameEnabled
    - ratingsEnabled
    - Asset type groups and their assignment
    - Minimum cardinality
    - Maximum cardinality
- The domain of the validation rule asset
  - ID
  - Name

Object	Migrated fields and secondary objects

        - 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)
        - Asset type groups and their assignment
    - The status of the validation rule
        - ID
        - Name
        - Description
    - Published asset page layout configurations.



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
	  ▪ Asset type groups and their assignment
	• Attribute type
	  ◦ ID
	  ◦ Name
	  ◦ Description

Object	Migrated fields and secondary objects

- Attribute type kind and its properties

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

- Value(s)

<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Attribute type</td><td>

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>

</td></tr>
<tr><td>Community</td><td>

ID
Name
Description
Parent communities, up to the root level

ID
Name
Description

</td></tr>
</table>

<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Complex relation type</td><td>

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
<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>

</td></tr>
</table>

Object	Migrated fields and secondary objects

- 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
      - Icon reference
    - displayNameEnabled
    - ratingsEnabled
    - Asset type groups and their assignment
    - 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
	  ▪ Asset type groups and their assignment
	  ▪ 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
	  ▪ Asset type groups and their assignment
	  ◦ Categorization relation types
	  ▪ ID
	  ▪ Description
	  ▪ Role
	  ▪ Co-role

Object	Migrated fields and secondary objects

- 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
  - Asset type groups and their assignment
- 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
  - Asset type groups and their assignment

- Data Quality Metrics: attribute types of the Metric attribute type kind
  - ID
  - Name
  - Description
  - Attribute type kind and its properties

Kind	Properties
Date	None

Object	Migrated fields and secondary objects

Kind	Properties
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

Object	Migrated fields and secondary objects

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

Domain type	• ID
	• Name
	• Description
	• Parent domain types up to root
	  ◦ ID
	  ◦ Name
	  ◦ Description

Object	Migrated fields and secondary objects

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
	  ◦ Asset type groups and their assignment
	• 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
	  ◦ Asset type groups and their assignment

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

Status	• ID • Name • Description

<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Validation rule</td><td>

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

</td></tr>
</table>

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
  - Asset type groups and their assignment
- 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
  - Asset type groups and their assignment

- 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
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

- 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

Object	Migrated fields and secondary objects

        - Color
        - Symbol (none, Icon or Code)
        - Code
        - Icon reference
      - displayNameEnabled
      - ratingsEnabled
      - Asset type groups and their assignment
      - 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)
  - Asset type groups and their assignment
- 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
	  ▪ Asset type groups and their assignment
	  ◦ 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
	  ▪ Description

Object	Migrated fields and secondary objects

- 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
    - Asset type groups and their assignment
  - Characteristic types
    - Attribute types
      - ID
      - Name
      - Description
      - Attribute type kind and its properties

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

Object	Migrated fields and secondary objects

Kind	Properties
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

- 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
    - Asset type groups and their assignment
  - Tail asset type
    - ID
    - Name
    - Description
    - Parent asset types, up to the root asset type (for example Busi-

Object	Migrated fields and secondary objects

ness asset)
- Display options
  - Color
  - Symbol (none, Icon or Code)
  - Code
  - Icon reference
- displayNameEnabled
- ratingsEnabled
- Asset type groups and their assignment

- 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

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

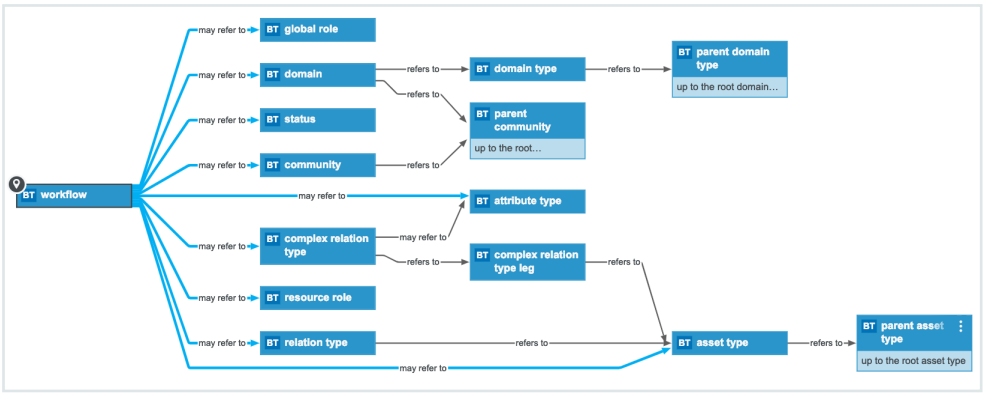
Object	Migrated fields and secondary objects

Kind	Properties
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

- 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
      - Icon reference
    - displayNameEnabled
    - ratingsEnabled
    - Asset type groups and their assignment
    - Minimum cardinality
    - Maximum cardinality
- Communities
  - ID
  - Name

Object	Migrated fields and secondary objects

        - 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
            - 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

Object	Migrated fields and secondary objects
Navigation objects	

<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Asset view</td><td>

ID
Name
Description
Configuration
Is preferred
Is default
Sharing rules
Assignment rules
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>

</td></tr>
</table>

Object	Migrated fields and secondary objects

	• 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
	  ▪ Asset type groups and their assignment
	  ◦ 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
	  ▪ Asset type groups and their assignment
	• Statuses used as filters
	  ◦ ID
	  ◦ Name
	  ◦ Description
	• Domain types used as filters
	  ◦ ID
	  ◦ Name
	  ◦ Description
	  ◦ Parent domain types up to root
	  ▪ ID

Object	Migrated fields and secondary objects

        - Name
        - Description
- Asset types used as filters
    - 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
    - Asset type groups and their assignment
- Resource roles used as filters
    - No secondary objects
    - ID
    - Name
    - Description
    - Global
    - Permissions
- Communities used as filters
    - ID
    - Name
    - Description
    - Parent communities, up to the root level
        - ID
        - Name
        - Description
- Domains used as filters, domains that are the origin of the view for "Asset views - Default for Domain Types", and domains for "Asset Views - in Communities and Domains"
    - ID
    - Name
    - Description
    - Exclude from Autohyperlinking
    - Domain type
        - ID
        - Name
        - Description
        - Parent domain types up to root
            - ID

Object	Migrated fields and secondary objects

        - Name
        - Description
    - Parent communities, up to the root level
        - ID
        - Name
        - Description
- Domain type for "Asset views - Default for Domain Types"
    - ID
    - Name
    - Description
    - Parent domain types up to root
        - ID
        - Name
        - Description

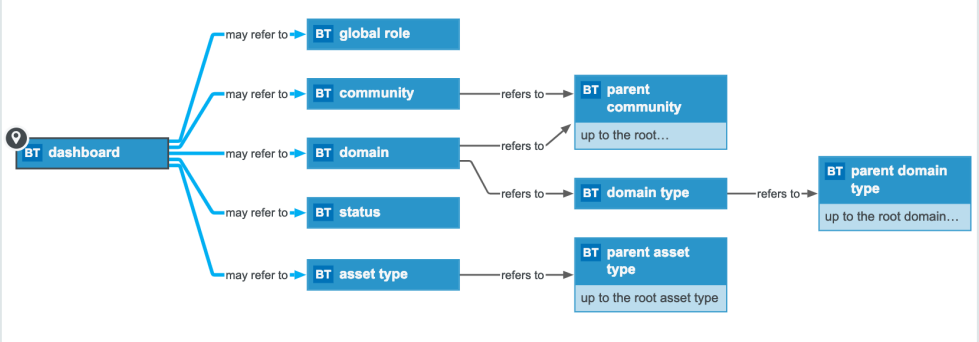
Object	Migrated fields and secondary objects

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
	  ◦ Asset type groups and their assignment
	• 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
	  ▪ Description
	• Roles

Object	Migrated fields and secondary objects

- No secondary objects
- ID
- Name
- Description
- Global
- Permissions

- Status
  - ID
  - Name
  - Description



<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Diagram view</td><td>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
Asset type groups and their assignment

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>
</td></tr>
</table>

Object	Migrated fields and secondary objects

Kind	Properties
Selection (single value list)	Allowed values (adding values, AND removals)
Text	Plain text
True/False (boolean)	Metric

- 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
    - Asset type groups and their assignment
  - 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

Object	Migrated fields and secondary objects

- displayNameEnabled
- ratingsEnabled
- Asset type groups and their assignment

- 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

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)

Object	Migrated fields and secondary objects

Kind	Properties
Text	Plain text
True/False (boolean)	Metric

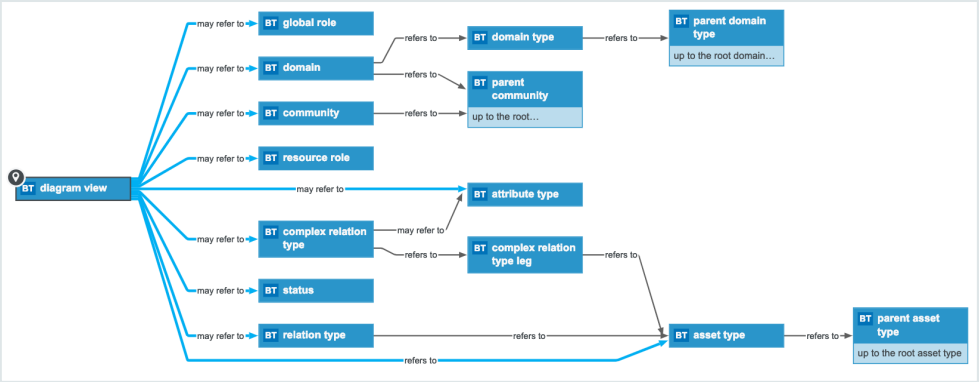
        - Minimum cardinality
        - Maximum cardinality
    - Leg types (relation types)
        - Role
        - Co-role
        - Asset types that are head or tail of the relation types
            - ID
            - Name
            - Description
            - Parent asset types, up to the root asset type (for example Business asset)
            - Display options
                - Color
                - Symbol (none, Icon or Code)
                - Code
                - Icon reference
            - displayNameEnabled
            - ratingsEnabled
            - Asset type groups and their assignment
            - Minimum cardinality
            - Maximum cardinality
- Communities
    - ID
    - Name
    - Description
    - Parent communities, up to the root level
        - ID
        - Name
        - Description
- Domains
    - ID
    - Name
    - Description
    - Exclude from Autohyperlinking
    - Domain type

Object	Migrated fields and secondary objects

- ID
- Name
- Description
- Parent domain types up to root
  - ID
  - Name
  - Description

- Parent communities, up to the root level
  - ID
  - Name
  - Description

- Roles



<table>
<tr><th>Object</th><th>Migrated fields and secondary objects</th></tr>
<tr><td>Search filter</td><td>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
Asset type groups and their assignment
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></td></tr>
</table>

Object	Migrated fields and secondary objects

Kind	Properties
Selection (single value list)	Allowed values (adding values, AND removals)
Text	Plain text
True/False (boolean)	Metric

- 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
    - Asset type groups and their assignment
  - 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

Object	Migrated fields and secondary objects

- displayNameEnabled
- ratingsEnabled
- Asset type groups and their assignment

- 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

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)

Object	Migrated fields and secondary objects

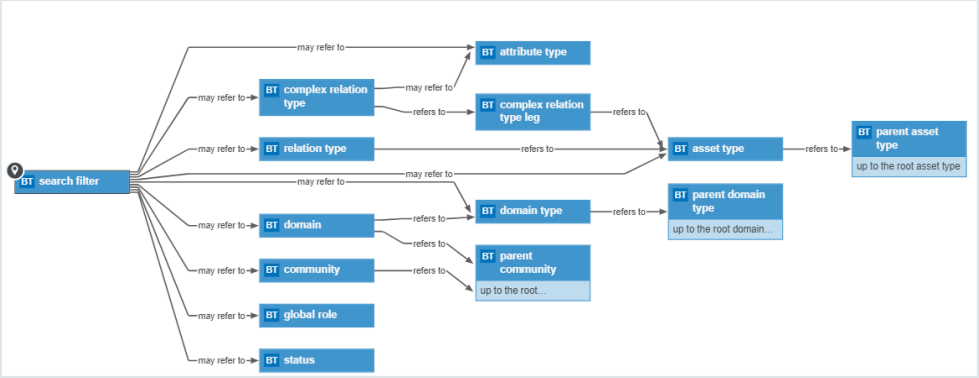
Kind	Properties
Text	Plain text
True/False (boolean)	Metric

        - 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
                - Icon reference
            - displayNameEnabled
            - ratingsEnabled
            - Asset type groups and their assignment
            - 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

Object	Migrated fields and secondary objects

- Domain type
  - ID
  - 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



Understanding the migration export report

After exporting model objects from a Collibra Platform environment, a report is created and downloaded alongside the migration file itself. The report is an XLSX file containing a summary of what has been exported.

Structure of the report

The report consists of three worksheets, each containing specific information:

Worksheet name	Contents
Summary	A table that shows the amount of objects of each type that were exported.
Primary Resources	A table in which each row contains a primary object that you exported and the objects that it requires.
Associated Dependencies	A table in which each row contains a secondary object that was exported to support a primary or another secondary object. Its columns is identical to the Primary Resources worksheet.

Columns on the Primary Resources and Associated Dependencies worksheets

The tables on the Primary Resources and the Associated Dependencies worksheets contain information about the exported objects and the objects they require. Each column contains specific information:

Column name	Contents
ResourceType	The type of the object that was exported. 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 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.

Column name	Contents
	• 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.
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	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. 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.

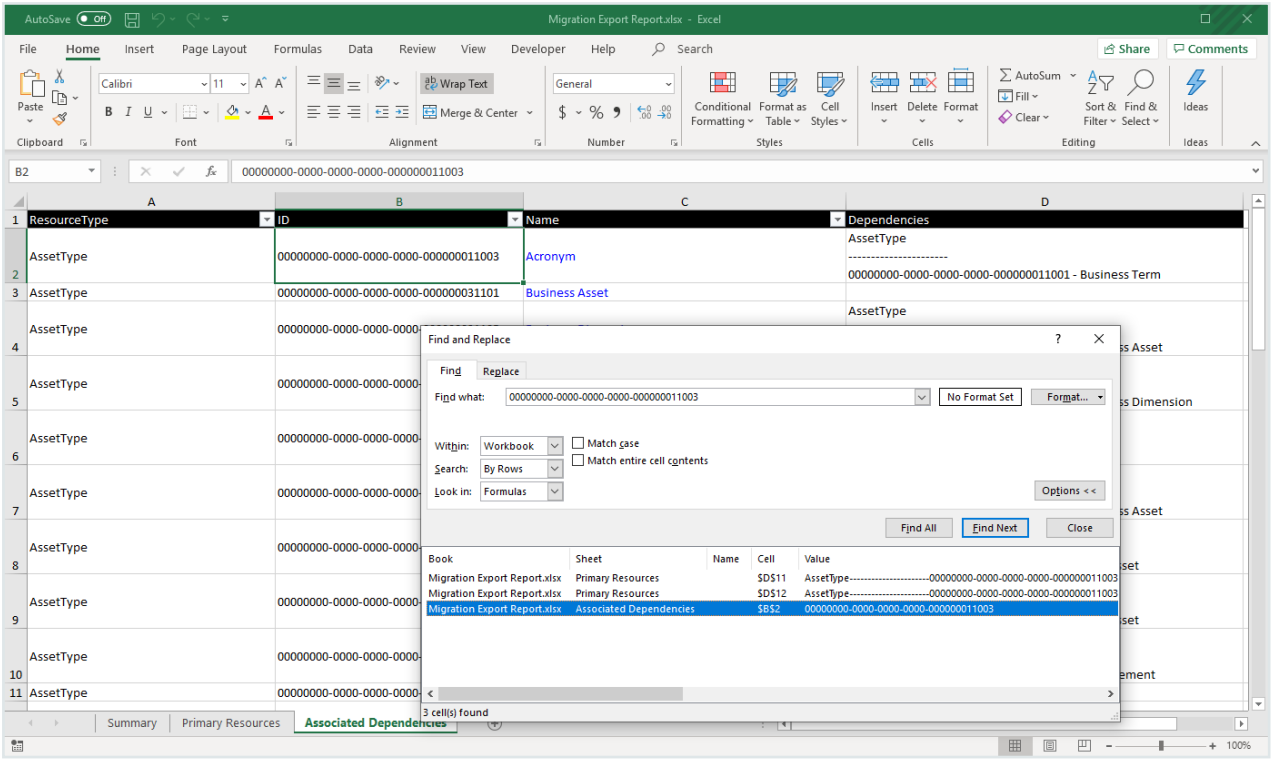
Learn more about the export logic of migration.

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.

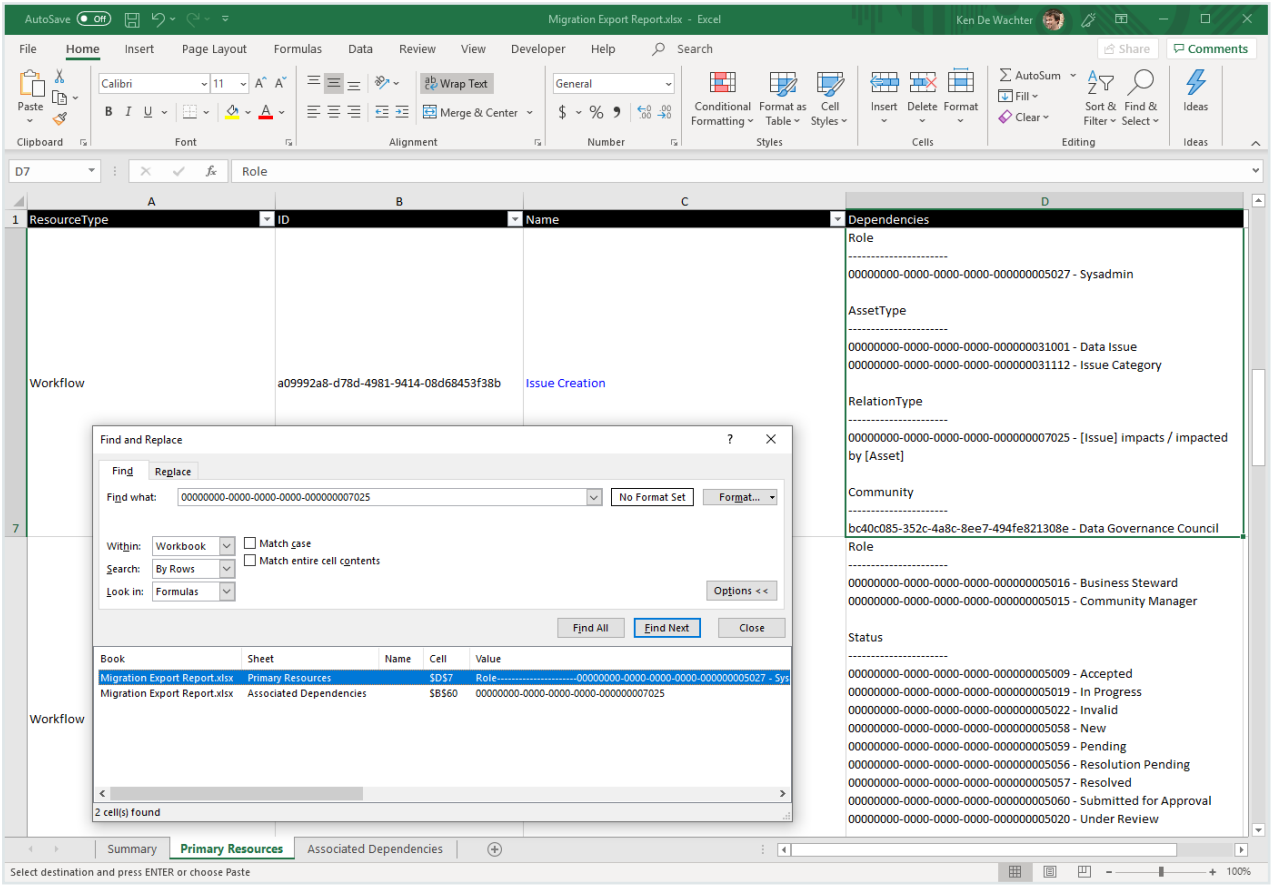
Example 1: Precedents

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 environment.

> **Note** Exporting and importing CMA files is restricted by the file upload settings, which determine the maximum file size, allowed file extensions and maximum amount of uploads and downloads per day. Contact Collibra Support if you want to change the file upload settings.

> **Warning**
> - Importing model objects cannot be undone. Make sure that there is a recent backup available before doing this.
> - The versions of the source and target environment have to be the same. Migrating between different versions may lead to unexpected behavior.

Prerequisites

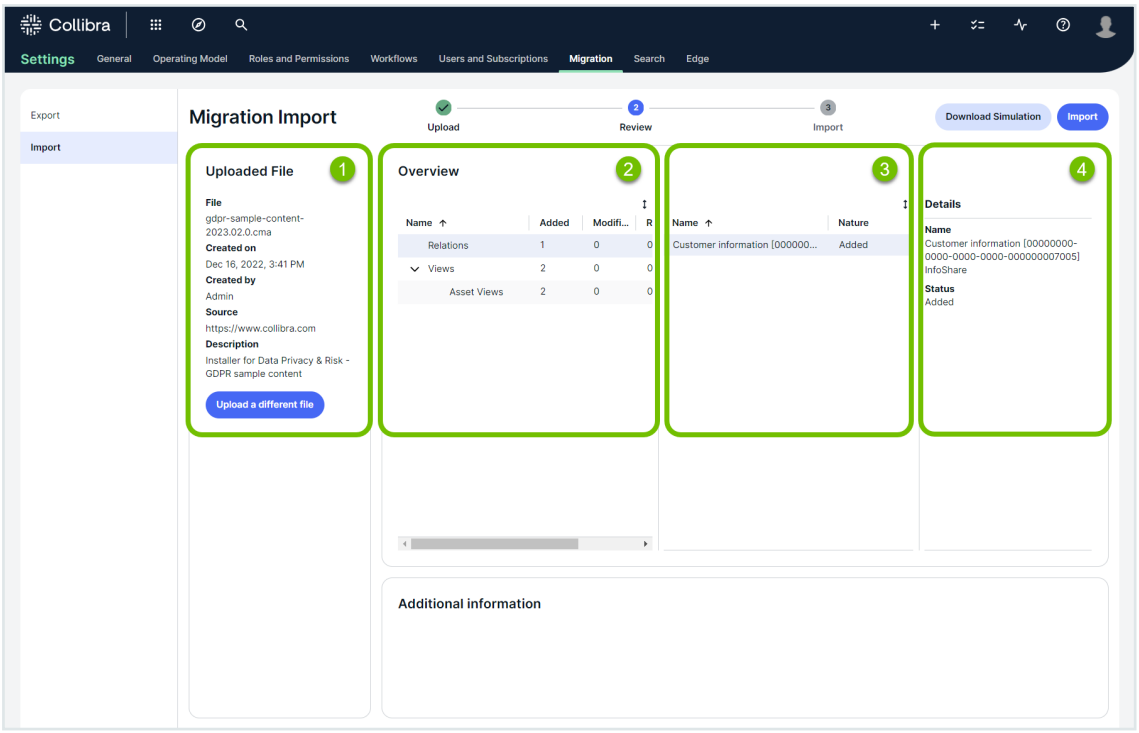
- You have a global role that has the **Product Rights** > **System administration** global permission.
- An archive file that was exported from an environment that has the same Collibra version.
- A backup of the environment.

Steps

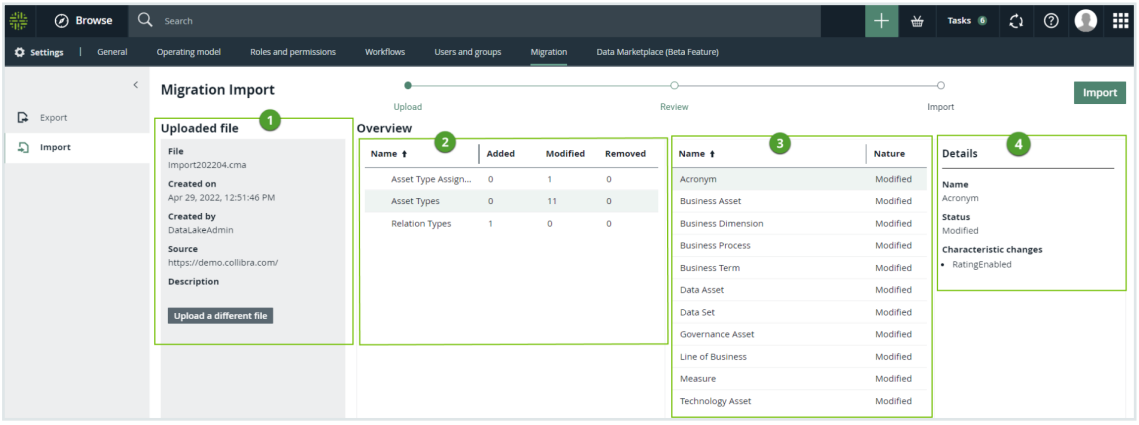
1. On the main toolbar, click → **Settings**.
   » The **Settings** page opens.
2. Click **Migration**.
   » The migration page appears on the **Export** tab page.
3. In the tab pane, click **Migration** → **Import**.
   » The **Migration Import** page opens.
4. Upload an archive file in one of the following 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.

Latest UI



Classic UI



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

Migrating data between Collibra environments requires careful consideration of how objects are handled during the import process. This document outlines the core migration import logic, focusing on object matching using IDs and logical keys. You learn how Collibra determines whether to create new objects, update existing ones, or skip objects during migration, and how this process impacts your data.

Import matching

During import, Collibra tries to match each migrated object with an object in the target environment. 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, because the object is new to the source environment for example, the matching algorithm tries to use a logical key. This logical key may be different depending on the type of object.

Tip
In most cases, the logical key is the name of the 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 assignments, 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 edit existing objects or create new ones.

Note Migration never deletes objects, but it may reduce assignments, rename assets, or perform other modifications.

The table below describes the general import logic:

Outcome	When	Description
A matched object is not edited.	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.
A matched object is edited.	The matched object has different properties than the migrated object.	The matched object is 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, Collibra 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, Collibra renames the community in the target.

Outcome	When	Description
An unmatched object is updated in addition to the matched object.	In the target environment, another object has the same name as the matched object.	The matched object is edited with the properties from the migrated object, including the name. The name of the unmatched object is changed to `<original_name>-migration-YYYYMMDD_hhmmss`. **Example** The archive contains an asset type `AWS Crawler` with the ID `0000`. The target environment contains two asset types: • `Crawler` with the ID `0000`. • `AWS Crawler` with the ID `1111`. Since there is a match on ID, after the import, the target environment contains the following updated assets: • `AWS Crawler` with the ID `0000`. • `AWS Crawler-migration-20250415_153605` with the ID `1111`.
A new object is created.	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 the objects are imported in the target environment. The table below provides 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 If there is a match on either the ID or the logical key, the asset is updated. Otherwise a new asset is created. **Note** You cannot migrate assets that belong to system-owned domains, such as the Issues domains.

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Asset type</td><td>Matching logic based on:

1. ID
2. Public ID
3. Name

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>Any of:

• ID
• Public ID
• Name</td><td>N/A</td><td>Matched asset type 1 is updated.</td></tr>
<tr><td>3</td><td>Any of:

• ID
• Public ID</td><td>Name</td><td>Matched asset type 1 is updated.

Matched asset type 2 is renamed.</td></tr>
<tr><td>5</td><td>ID</td><td>Public ID</td><td>Migration fails because it tries to update asset type 1 with the same public ID as asset type 2.</td></tr>
<tr><td>11</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 fails. This is because migration cannot delete the ratings of assets of that type.
• Asset types are imported using the depth-first order.</td></tr>
</table>

Object	Import logic
Assignment	Matching logic based on: 1. ID 2. Asset type and scope If there is a match on either the ID or the logical key, the assignment is updated. Otherwise a new assignment is created. **Note** Assignments are imported in a specific order: 1. Global assignments 2. Scoped assignments
Attribute	Matching logic based on: 1. ID 2. Combination of parent asset, attribute type and value If there is a match on either the ID or the logical key, the attribute is updated. Otherwise a new attribute is created. **Note** • You cannot migrate attributes that belong to system-owned domains, such as the Issues domains. • The only fields that you can migrate are validation scripts of validation rule assets and description fields of any resource.

Object	Import logic
Attribute type	Matching logic based on: 1. ID and kind 2. Public ID and kind 3. Name and kind Whenever the kind does not match, as a result of APIs deleting and recreating attribute types, a new attribute type is created while existing attribute types with the same name are renamed. Assuming a match in kind, the following table contains the possible cases and results.

Case	Matched attribute type 1	Matched attribute type 2	Result
1	Any of: • ID • Public ID • Name	N/A	Matched attribute type 1 is updated.
3	Any of: • ID • Public ID	Name	Matched attribute type 1 is updated. Matched attribute type 2 is renamed.
5	ID	Public ID	Migration fails because it tries to update attribute type 1 with the same public ID as attribute type 2.
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 potential issues by deleting attribute types in the target environment before importing the archive.

Object	Import logic
Community	Matching logic based on: 1. ID 2. Name If there is a match on either the ID or the logical key, the asset is updated. Otherwise a new asset is created. **Note** Communities are imported using the depth-first order.

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Complex relation type</td><td>Matching logic based on:
1. ID
2. Public ID
3. Name

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>Any of:
• ID
• Public ID
• Name</td><td>N/A</td><td>Matched complex relation type 1 is updated.</td></tr><tr><td>3</td><td>Any of:
• ID
• Public ID</td><td>Name</td><td>Matched complex relation type 1 is updated.

Matched complex relation type 2 is renamed.</td></tr><tr><td>5</td><td>ID</td><td>Public ID</td><td>Migration fails because it tries to update complex relation type 1 with the same public ID as complex relation type 2.</td></tr><tr><td>11</td><td>None</td><td>N/A</td><td>A new complex relation type is created.</td></tr></table></td></tr>
</table>

Object	Import logic

> **Note**
> - 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.

Data quality rule

Matching logic based on:

1. ID
2. Public ID
3. Name

The following table contains the possible cases and results.

Case	Matched data quality rule 1	Matched data quality rule 2	Result
1	Any of: • ID • Public ID • Name	N/A	Matched data quality rule 1 is updated.
3	Any of: • ID • Public ID	Name	Matched data quality rule 1 is updated. Matched data quality rule 2 is renamed.
5	ID	Public ID	Migration fails because it tries to update data quality rule 1 with the same public ID as data quality rule 2.
11	None	N/A	A new data quality rule is created.

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Domain</td><td>Matching logic based on:

1. ID
2. Name and parent community

If there is a match on either the ID or the logical key, the community is updated. Otherwise a new community is created.

Note You cannot migrate Issues domains.</td></tr>
<tr><td>Domain type</td><td>Matching logic based on:

1. ID
2. Public ID
3. Name

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>Any of:

• ID
• Public ID
• Name</td><td>N/A</td><td>Matched domain type 1 is updated.</td></tr><tr><td>3</td><td>Any of:

• ID
• Public ID</td><td>Name</td><td>Matched domain type 1 is updated.

Matched domain type 2 is renamed.</td></tr><tr><td>5</td><td>ID</td><td>Public ID</td><td>Migration fails because it tries to update domain type 1 with the same public ID as domain type 2.</td></tr><tr><td>11</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.</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Relation type</td><td>Matching logic based on:

1. ID
2. Public ID
3. 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>Any of:
• ID
• Public ID
• 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>2</td><td>Any of:
• ID
• Public 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>ID</td><td>Public ID</td><td>Migration fails because it tries to update relation type 1 with the same public ID as relation type 2.</td></tr>
<tr><td>4</td><td>None</td><td>N/A</td><td>A new relation type is created.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Roles</td><td>Matching logic based on:

1. ID
2. Public ID
3. Name

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>Any of:

• ID
• Public ID
• Name</td><td>N/A</td><td>Matched role 1 is updated.</td></tr>
<tr><td>3</td><td>Any of:

• ID
• Public ID</td><td>Name</td><td>Matched role 1 is updated.

Matched role 2 is renamed.</td></tr>
<tr><td>5</td><td>ID</td><td>Public ID</td><td>Migration fails because it tries to update role 1 with the same public ID as role 2.</td></tr>
<tr><td>11</td><td>None</td><td>N/A</td><td>A new role is created.</td></tr>
</table>
</td></tr>
</table>

Object	Import logic
Scope	Matching logic based on: 1. ID 2. Public ID 3. Name The following table contains the possible cases and results.

Case	Matched scope 1	Matched scope 2	Result
1	Any of: • ID • Public ID • Name	N/A	Matched scope 1 is updated.
3	Any of: • ID • Public ID	Name	Matched scope 1 is updated. Matched scope 2 is renamed.
5	ID	Public ID	Migration fails because it tries to update scope 1 with the same public ID as scope 2.
11	None	N/A	A new scope is created.

> **Note** The global scope cannot be migrated.

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Status</td><td>Matching logic based on:

1. ID
2. Public ID
3. Name

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>Any of:

• ID
• Public ID
• Name</td><td>N/A</td><td>Matched status 1 is updated.</td></tr><tr><td>3</td><td>Any of:

• ID
• Public ID</td><td>Name</td><td>Matched status 1 is updated.

Matched status 2 is renamed.</td></tr><tr><td>5</td><td>ID</td><td>Public ID</td><td>Migration fails because it tries to update status 1 with the same public ID as status 2.</td></tr><tr><td>11</td><td>None</td><td>N/A</td><td>A new status is created.</td></tr></table></td></tr>
<tr><td>Validation rule</td><td>Matching logic based on:

1. ID
2. Full name and parent domain

If there is a match on either the ID or the logical key, the validation rule is updated. Otherwise a new validation rule is created.

Note If there is a match, only the Description and Validation script are changed. Other characteristics are not changed.</td></tr>
</table>

<table>
<tr><th>Object</th><th>Import logic</th></tr>
<tr><td>Workflow</td><td>Matching logic based on:

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 – <code>$processId</code>.</td></tr><tr><td>3</td><td>None</td><td>N/A</td><td>A new workflow is created.</td></tr></table></td></tr>
<tr><td>Navigation objects</td><td></td></tr>
<tr><td>Asset view</td><td>Matching logic based on:

1. ID
2. Name, type, location, and common assigned resources

If there is a match on either the ID or the logical key, the asset view is updated. Otherwise a new asset view is created.</td></tr>
<tr><td>Dashboard</td><td>Matching logic based on:

1. ID
2. Name, type, location, and common assigned resources

If there is a match on either the ID or the logical key, the dashboard is updated. Otherwise a new dashboard is created.

The following table contains the possible cases and results.</td></tr>
</table>

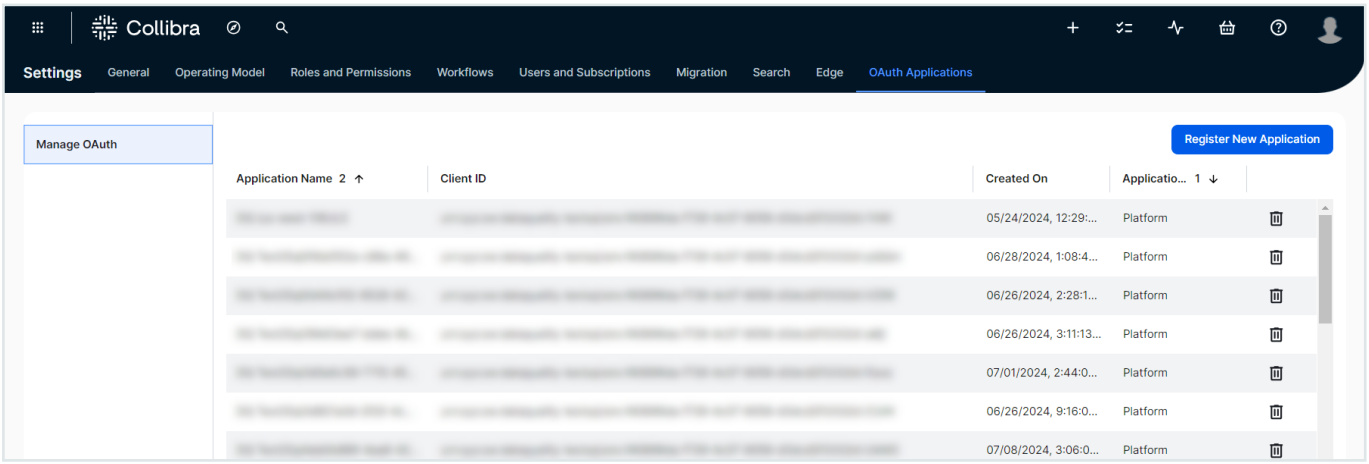
Object	Import logic
Diagram view	Matching logic based on: 1. ID 2. Name, type, location, and common assigned resources If there is a match on either the ID or the logical key, the diagram view is updated. Otherwise a new diagram view is created.
Search filter	Matching logic based on: 1. ID 2. Name, type, location, and common assigned resources If there is a match on either the ID or the logical key, the search filter is updated. Otherwise a new search filter is created.

Migration import troubleshooting

For a full list of troubleshooting topics, go to the Support Portal.

OAuth Applications settings page

This feature is **available only** in the latest UI.

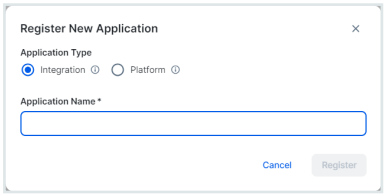


You can securely authenticate your applications to access Collibra public APIs without requiring individual user credentials. The **Manage OAuth** page allows you to register your applications to obtain a client ID and client secret that are required to request an access token.

> **Note** You can use OAuth for authentication only.

Register an application

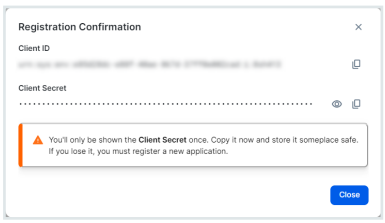
1. Click **Register New Application**
   » The **Register New Application** dialog box appears.



2. Enter the required information:

Field	Description
Application Type	Integration: For applications that are developed by you to access and interact with the Collibra public APIs, facilitating integration with our product suite. Platform: For applications the are used to facilitate communication between different components of the Collibra platform, ensuring seamless data exchange and interaction across our product suite.
Application Name	The name of you application, used to identify it in the list of registered applications.

3. Click **Register**.
   » The **Registration Confirmation** dialog box appears.



4. Copy and safely store the **Client ID** and **Client Secret**.

> **Important** This is the only time you are able to see the client secret.

Request an access token

Use the client ID and secret to obtain access tokens via the REST OAuth API v2 `POST` method of the `/token` endpoint:

cURL

```
curl -L -X POST '/rest/oauth/v2/token' \
-H 'Content-Type: application/x-www-form-urlencoded' \
-d 'client_id=<your_client_id>' \
-d 'client_secret=<your_client_secret>' \
-d 'grant_type=client_credentials'
```

Python - http.client

```
import http.client

conn = http.client.HTTPSConnection("")
payload = 'client_id=<your_client_id>&client_secret=<your_
client_secret>&grant_type=client_credentials'
headers = {
  'Content-Type': 'application/x-www-form-urlencoded'
}
conn.request("POST", "/rest/oauth/v2/token", payload,
headers)
res = conn.getresponse()
data = res.read()
print(data.decode("utf-8"))
```

Node - Native

```
var https = require('follow-redirects').https;
var fs = require('fs');

var qs = require('querystring');

var options = {
  'method': 'POST',
  'hostname': '',
  'path': '/rest/oauth/v2/token',
  'headers': {
    'Content-Type': 'application/x-www-form-urlencoded'
  },
  'maxRedirects': 20
};

var req = https.request(options, function (res) {
  var chunks = [];

  res.on("data", function (chunk) {
    chunks.push(chunk);
  });

  res.on("end", function (chunk) {
    var body = Buffer.concat(chunks);
    console.log(body.toString());
  });

  res.on("error", function (error) {
    console.error(error);
  });
});

var postData = qs.stringify({
  'client_id': '<your_client_id>',
  'client_secret': '<your_client_secret>',
  'grant_type': 'client_credentials'
});

req.write(postData);

req.end();
```

Response example:

```
{
  "access_token": "rmzhoBwqYWzkGUO2C5jerPbVObywLq8AUP...",
  "token_type": "Bearer",
  "expires_in": 299
}
```

> **Note** Collibra assigns all scopes to your client.

Rate limits

Collibra issues tokens from a pool of 5 per client. The pool renews at a rate of 1 token per minute. Tokens are valid for 5 minutes. You may encounter a rate limit exception in the following scenarios:

- Excessive token requests by a single client: If a single client requests too many tokens before the current token expires. Ensure that your application reuses a valid issued token instead of requesting a new one with each API call.
- Sharing a client across multiple applications: If each application independently requests a new token, the combined requests may surpass the allowed threshold.

Search settings

As an administrator, you can configure the following search settings via the **Search** section in Collibra settings:

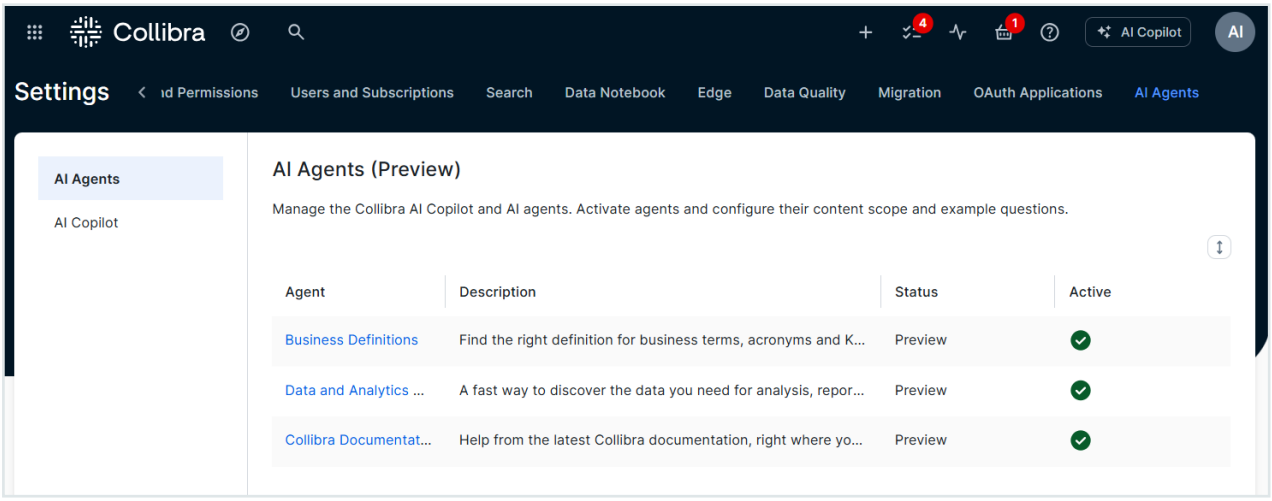
- Search result fields
- Data Marketplace quick filters on the search page
- Data Marketplace scope
- Data Marketplace filter facets
- Data Marketplace relation indexes
- Data Marketplace actions and preview
- Data Marketplace emails and other options
- Data Marketplace shopping basket and data set management
- Data Marketplace landing page

AI Agents settings page (in preview)

In this topic

On the **AI Agents** page of the Collibra settings, you can activate AI agents and generally configure Collibra AI Copilot.

> **Note** You need a global role with the **Manage all agents** global permission to access the AI Agents settings. For more information, go to Collibra AI Copilot configuration.



AI Agents tab page

From the **AI Agents** tab page in the **AI Agents** settings, you can check the status of AI agents in Collibra AI Copilot and activate them.

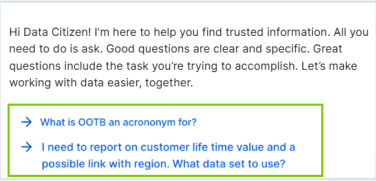
- The status of an AI agent can be **Preview** or **Generally available**.
- By default, AI agents are not active when Collibra AI Copilot is enabled. To activate an AI agent, set the **Active** column to **Yes**.
- To open a dedicated page and configure an AI agent, click the agent's name.

Business Definitions agent configuration

For the Business Definitions agent, you can add example questions and customize the content scope.

Example questions

Collibra AI Copilot can show up to 3 clickable example questions. These questions help users understand the types of queries they can ask and allow them to click to see how the AI responds.



By default, no example questions are available for any AI agent. You can add up to 3 example questions per AI agent, with each question limited to 100 characters.

> **Note** If more than 3 example questions exist for the active AI agents, Collibra AI Copilot selects up to 3 to show when a chat starts.

Content scope

The content scope of the Business Definitions agent is based on asset type, status, and organization. The AI agent considers all 3 content scope configurations.
The default, out-of-the-box content scope includes the following:

- **Asset types**: The following asset types are included in the content scope. Child asset types aren't automatically included.
  - Business Term
  - Acronym
  - KPI
  - Measure
- **Statuses**: All statuses are included.
  On the page, this is indicated with no default selection.

- **Organization**: All communities and domains in your organization are included. On the page, this is indicated with no default selection.

> **Note** In addition to the content scope, Collibra AI Copilot shows an asset only if the asset has a description, description from source, or definition, and if the user has access to the asset.

As an administrator, you can customize the out-of-the-box content scope to match your organization's needs. To change the content scope:

1. Manually change the scope by selecting or clearing items.
   The Business Definitions agent allows you to select from all asset types in the Business Glossary product.
2. Click **Save**.

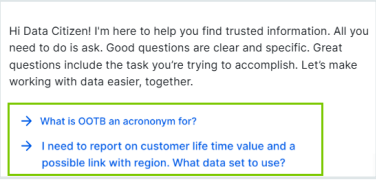
> **Tip** You can revert to the out-of-the-box content scope by clicking **Reset to default**. When you do so, the default content scope is applied and automatically saved.

Data and Analytics Discovery agent configuration

For the Data and Analytics Discovery agent, you can add example questions and customize the content scope.

Example questions

Collibra AI Copilot can show up to 3 clickable example questions. These questions help users understand the types of queries they can ask and allow them to click to see how the AI responds.



By default, no example questions are available for any AI agent. You can add up to 3 example questions per AI agent, with each question limited to 100 characters.

> **Note** If more than 3 example questions exist for the active AI agents, Collibra AI Copilot selects up to 3 to show when a chat starts.

Content scope

The content scope of the Data and Analytics Discovery agent is based on asset type, status, and organization. The AI agent considers all 3 content scope configurations. The default, out-of-the-box content scope includes the following:

- **Asset types**: The following asset types are included in the content scope. Child asset types aren't automatically included.
  - Report
  - Data Notebook
  - BI Report and all its child asset types
  - Data Product and all its child asset types
  - AI Model and all its child asset types
  - Data Set and all its child asset types
- **Statuses**: All statuses are included.
  On the page, this is indicated with no default selection.
- **Organization**: All communities and domains in your organization are included.
  On the page, this is indicated with no default selection.

> **Note** In addition to the content scope, Collibra AI Copilot shows an asset only if the asset has a description, description from source, or definition, and if the user has access to the asset.

As an administrator, you can customize the out-of-the-box content scope to match your organization's needs. To change the content scope:

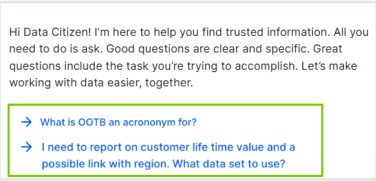
1. Manually change the scope by selecting or clearing items.
   The Data and Analytics Discovery agent allows you to select from all asset types, except Columns and the asset types associated with the Business Glossary product.
2. Click **Save**.

> **Tip**
> - You can also set the content scope to the same scope as Data Marketplace by clicking **Load Data Marketplace scope**.
>   When you do this, part of the Data Marketplace scope is copied and automatically saved in the AI agent content scope. It includes statuses, organization, and asset types, but excludes the Column asset type and asset types associated with the Business Glossary product.
> - You can revert to the out-of-the-box content scope by clicking **Reset to default**. When you do so, the default content scope is applied and automatically saved.

Collibra Documentation agent configuration

For the Collibra Documentation agent, you can add example questions.

Collibra AI Copilot can show up to 3 clickable example questions. These questions help users understand the types of queries they can ask and allow them to click to see how the AI responds.

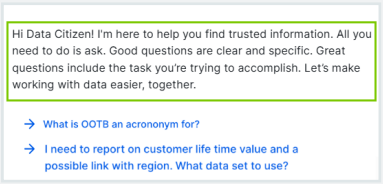


By default, no example questions are available for any AI agent. You can add up to 3 example questions per AI agent, with each question limited to 100 characters.

> **Note** If more than 3 example questions exist for the active AI agents, Collibra AI Copilot selects up to 3 to show when a chat starts.

AI Copilot tab page

From the **AI Copilot** tab page in the **AI Agents** settings, you can create a **welcome message**, which can include a maximum of 300 characters. This welcome message is shown when a user starts a conversation with Collibra AI Copilot.

> **Tip** Use the welcome message to set user expectations based on the agents you have activated.
>
> 
>

Use a custom favicon

By default, Collibra Platform shows the Collibra logo as favicon. You can, however, upload the favicon of your own organization.

> **Note** This feature isn't available in the latest user interface. Additionally, in Collibra 2022.11 or newer versions, you can no longer edit the user interface configuration of new features such as Data Marketplace, homepage, and Usage Analytics.

Prerequisites

- You have the **ADMIN** or **SUPER** role in Collibra Console.
- Your favicon has the name **favicon.ico**.

Steps

1. Create a console export file for your cloud environment that includes only the customization and configuration.
2. Download the export file.
3. Edit the export file:
    a. Extract the export file somewhere on your local computer.
    A folder with the name of the ZIP file is created.
    b. In the created folder structure, go to **<export_file>/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 contents inside the export file folder.

    > **Warning** Do not create a ZIP file from the extracted directory itself. Doing so will result in an invalid export file.

4. Restore the new export file:
    a. Upload the new ZIP file to Collibra Console.
    b. Apply only the customization 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 is shown.