Collibra

Collibra Platform

Data Notebook

Version 2025.06

Collibra Platform - Data Notebook

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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=data-notebook

Contents

Notebook basics

This section contains information that can help you understand how Data Notebook works and how it can be used.

Data Notebook use cases

This topic describes how different personas can use Data Notebook.

Business or Data Analysts

You may often need to link business lineage and information about the data you have to the intricate details of the raw technical data itself. This could be vital for conducting complex analyses that require a profound understanding of both the data and the business context. Data Notebook can bridge the gap between business insights and technical data by allowing you to link your analysis directly to the real-world data. This facilitates validation, sharing, and reuse of data.

Data Engineers

You can investigate and fix any production pipeline issues by querying the underlying data in a notebook. You can also document your findings in the notebook for auditing and collaboration purposes.

Data Stewards

When curating a new data set, you may often run queries in external data sources to validate the underlying data. Instead of relying on disparate tools and processes, you can use Data

Notebook to query your data sources. Data Notebook eliminates the need to switch between various tools by offering a consolidated environment for the entire process.

Data sources for Data Notebook

Queries logged in your data source that originate from Data Notebook include comments for distinction. The comments contain the following information:

- **ApplicationName:** This is always Collibra (Data Notebook).
- **Action:** Action performed in Data Notebook. This can be one of the following:
  - **ingest:** Data source was synchronized. This is applicable to service accounts.
  - **list-roles:** Roles were listed. This is applicable to Snowflake using Snowflake Authentication.
  - **run-all-queries:** All queries in a notebook were run at once.
  - **run-query:** Single query in a notebook was run.
- **ClientUser:** User ID of the Collibra user who ran the query.

The following table serves as a compatibility chart, containing the data sources supported by Data Notebook, along with the drivers and the authentication methods they support.

Data source (target)	Supported driver	Service account	Personal credentials	SAML/OAuth flow
Amazon Athena (in preview)	cdata.jdbc.amazonathena.AmazonAthenaDriver	Yes	Yes	Not planned
BigQuery	cdata.jdbc.googlebigquery.GoogleBigQueryDriver	Yes	Not applicable	Yes, Google SSO
Databricks	com.databricks.client.jdbc.Driver	Yes	Yes	Yes, Microsoft Entra ID
Microsoft SQL Server	cdata.jdbc.sql.SQLDriver com.microsoft.sqlserver.jdbc.SQLServer Driver	Yes	Yes	Not planned

Data source (target)	Supported driver	Service account	Personal credentials	SAML/OAuth flow
Oracle	oracle.jdbc.OracleDriver oracle.jdbc.driver.OracleDriver	Yes	Yes	Not planned
PostgreSQL	cdata.jdbc.postgresql.PostgreSQLDriver org.postgresql.Drive	Yes	Yes	Not planned
Redshift	cdata.jdbc.redshift.RedshiftDriver	Yes	Yes	Not planned
Snowflake	net.snowflake.client.jdbc.SnowflakeDriver	Yes	Yes	Yes **Note** You can't use the Snowflake OAuth authentication method when connecting from a virtual private cloud (VPC).
Teradata	cdata.jdbc.teradata.TeradataDriver com.teradata.jdbc.TeraDriver	Yes	Yes	Not planned

> **Note** If you need a data source provider or driver that is not listed in the table, or if you need SAML/OAuth flow for a data source, you can add an idea on the Collibra Ideation Platform.

Request Data Notebook access (in preview)

Data Notebook allows you to query, analyze, and visualize data from multiple sources directly within your Collibra environment. It is particularly useful for documenting existing data assets or sharing approaches and best practices on how to use specific assets.

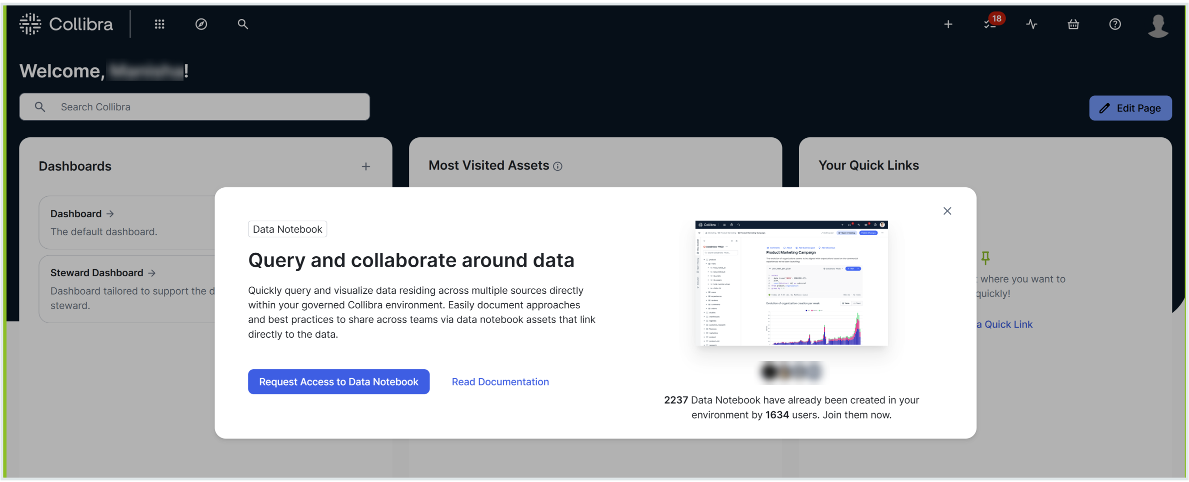
The Request Data Notebook Access feature allows data citizens from your organization to self-request access to the Data Notebook application, facilitating a streamlined and governed roll-out. Administrators can activate this feature and determine the user groups for which it is available. You can then easily request access via a straightforward form.

Prerequisites

An administrator has enabled the **Access requests** setting. Additionally, if the administrator has specified a group for access requests, you are in that group.

Steps

1. On the main toolbar, click → **Data Notebook.**
   » A dialog box appears.



2. Click **Request Access to Data Notebook.**
   » The **Request Access to Data Notebook** dialog box appears.

3. Enter information regarding why you need access to Data Notebook.

> **Tip** When approving your request, the reviewer may use this information to assign appropriate global roles or groups to you.

4. Click **Request Access**.

   » Your access request is sent to reviewers as a task for them to approve or reject the request.

> **Note**
> - When your request is approved or rejected, you are notified by email.
> - When approving your request, the reviewer assigns certain global roles or groups to you. These roles or groups determine which tasks you can perform in Data Notebook. For information about which permissions a user needs depending on the tasks they want to perform, go to Data Notebook permissions.

Data Notebook permissions

The following table contains the permissions required to perform certain tasks in Data Notebook.

> **Note** To perform any task in Data Notebook, you need to have at least the following global permission: **Product Rights** > **Data Notebook**

Task	Permissions
Non-administrative tasks	
Access Data Notebook or create a notebook.	You have the following global permission: **Product Rights** > **Data Notebook** **Note** If a user doesn't have this global permission, they might still find **Data Notebook** when clicking on the main toolbar, depending on how the administrator has configured the **Access requests** setting. Clicking **Data Notebook** allows such users to request access to Data Notebook. For more information, go to Request Data Notebook access (in preview).

Task	Permissions
View, edit, duplicate, restore, comment on, or delete a private notebook.	You are the creator of the notebook or its editor if it was previously published.
Publish a notebook.	• You are the creator of the notebook or its editor if it was previously published. • You are assigned a responsibility on the target domain with a resource role that has the following resource permission: **Asset** > **Add**
View, duplicate, or comment on a published notebook.	You have the following resource permission: **Asset** > **Data** > **View notebook content**
View the notebook content on the asset page.	
Edit a published notebook and then publish the changes.	You have the following resource permissions: • **Asset** > **Data** > **View notebook content** • **Asset** > **Update** • **Asset** > **Attribute** > **Update**
Restore a version in a published notebook.	
Delete a published notebook or unpublish a notebook.	You have the following resource permissions: **Asset** > **Data** > **View notebook content** **Asset** > **Remove**
Administrative tasks	

Task	Permissions
View or manage any type of notebook.	You have the following global permission: **Data Notebook** > **Manage all 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.
Register a data source for Data Notebook or remove the registered data source.	You have the following global permission: **Data Notebook** > **Manage data sources**
Customize the Data Notebook workspace.	You have the following global permission: **Data Notebook** > **Manage settings**
Allow users to request access to Data Notebook (in preview).	You have the following global permission: **Data Notebook** > **Manage settings**

Register a data source for Data Notebook

The first step in using Data Notebook is to register a data source, which means creating a link between your Edge data source and Data Notebook. Data Notebook reuses Edge connections.

When registering a data source, you are prompted to choose how you want users to connect to the data source when they run queries, and where you want the query results for the data source to be stored.

> **Important** After you register a data source, you can't edit it.

> **Note** This data source is not supported for Collibra Cloud sites.

Prerequisites

- You have a global role that has the following global permissions:
  - **Product Rights** > **Data Notebook**
  - **Data Notebook** > **Manage data sources**
- If you want the query results to be stored in your organization's database, set up a database.
- To know the supported drivers for the data source, go to Data sources for Data Notebook.

Steps

1. Open the **Data sources** page.
   Show more information
   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Data Notebook** tab, or in the **Data Notebook** section, click **Data sources**.

> **Tip** Alternatively, you can open the Data Notebook homepage, and then click **Settings**.

2. Click **Register data source**.
   The **Register a Data Source** dialog box appears.
3. Enter the required information.

Field	Description
Edge site	Contains a list of healthy Edge sites.
Data source connection	Contains a list of supported connections associated with the Edge site you selected.

4. Click **Continue**.
   The **Choose the Authentication Method** dialog box appears.
5. Select one of the following authentication options.

Option	Description
Service account	Users don't need to enter any credentials to connect to the data source, before running queries. Data Notebook will use the service account from the Edge data source connection.
Access keys	Users need to enter their access keys, before running queries. They inherit permissions from the data source. When you select this option, the **Credentials expiration** field appears. By default, personal credentials expire after 1 month, but you can change the duration.
Temporary security credentials	Users need to enter their temporary security credentials, before running queries. They inherit permissions from the data source. When you select this option, the **Credentials expiration** field appears. By default, personal credentials expire after 1 hour, but you can change the duration.

6. Click **Continue**.
   The **Choose your data storage option** dialog box appears.

7. Select one of the following storage options.

Option	Description
Store in Collibra Cloud	Stores the query results in Collibra Platform.
Store in your own database	Stores the query results in your organization's database. For more information, go to Set up a database for storing query results.
Do not store results	Does not store the query results. The results are shown in the user's web browser until their browser is refreshed. They need to run the query each time they want to view the results. Even the asset created when publishing the notebook does not show the query results.

8. Click **Continue.**
   A message stating that the data source is registered appears.

> **Tip**
> - The registration fails if the credentials provided in the Edge data source connection are incorrect or if the data source is unavailable. If it fails multiple times, contact Collibra Support.
> - To remove the link between your Edge data source and Data Notebook, click ⋯ next to the data source, and then select **Remove data source.** Users will then no longer be able to run queries against the data source.

1. Open the **Data sources** page.
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   a. On the main toolbar, click → **Settings.**
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   b. Click the **Data Notebook** tab, or in the **Data Notebook** section, click **Data sources.**
      > **Tip** Alternatively, you can open the Data Notebook homepage, and then click **Settings.**

2. Click **Register data source.**
   The **Register a Data Source** dialog box appears.

3. Enter the required information.

Field	Description
Edge site	Contains a list of healthy Edge sites.
Data source connection	Contains a list of supported connections associated with the Edge site you selected.

4. Click **Continue.**
   The **Choose the Authentication Method** dialog box appears.
5. Select one of the following authentication options.

Option	Description
Service account	Users don't need to enter any credentials to connect to the data source, before running queries. Data Notebook will use the service account from the Edge data source connection.
Google OAuth	Users are redirected to Google for authentication, before running queries. They inherit permissions from the projects. **Note** This option requires you to create a Google OAuth application and obtain the client ID and client secret for such an application. To create this application, you need specific permissions on your Google Cloud console or need help from someone with those permissions. For more information, go to Google documentation.

6. Click **Continue.**
   The **Choose your data storage option** dialog box appears.
7. Select one of the following storage options.

Option	Description
Store in Collibra Cloud	Stores the query results in Collibra Platform.
Store in your own database	Stores the query results in your organization's database. For more information, go to Set up a database for storing query results.

Option	Description
Do not store results	Does not store the query results. The results are shown in the user's web browser until their browser is refreshed. They need to run the query each time they want to view the results. Even the asset created when publishing the notebook does not show the query results.

8. Click **Continue**.
   A message stating that the data source is registered appears.

> **Tip**
> - The registration fails if the credentials provided in the Edge data source connection are incorrect or if the data source is unavailable. If it fails multiple times, contact Collibra Support.
> - To remove the link between your Edge data source and Data Notebook, click ⋯ next to the data source, and then select **Remove data source**. Users will then no longer be able to run queries against the data source.

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2. Click **Register data source**.
   The **Register a Data Source** dialog box appears.
3. Enter the required information.

Field	Description
Edge site	Contains a list of healthy Edge sites.
Data source connection	Contains a list of supported connections associated with the Edge site you selected.

4. Click **Continue**.
   The **Choose the Authentication Method** dialog box appears.

5. Select one of the following authentication options.

Option	Description
Service account	Users don't need to enter any credentials to connect to the data source, before running queries. Data Notebook will use the service account from the Edge data source connection.
Personal access token	Users need to enter their personal access token that is generated on the Databricks platform, before running queries. For more information, go to Databricks personal access token authentication. When you select this option, the **Credentials expiration** field appears. By default, personal access token expires after 1 month. You can, however, change the duration.
Microsoft Entra ID OAuth	Users are redirected to Microsoft Entra for authentication, before running queries. For more information, go to Register an application with the Microsoft identity platform. **Note** This option requires you to create a new Microsoft Entra ID application from the Azure portal and obtain the directory (tenant) ID, application client ID, and application client secret for the setup.

6. Click **Continue**.
   The **Choose your data storage option** dialog box appears.
7. Select one of the following storage options.

Option	Description
Store in Collibra Cloud	Stores the query results in Collibra Platform.
Store in your own database	Stores the query results in your organization's database. For more information, go to Set up a database for storing query results.
Do not store results	Does not store the query results. The results are shown in the user's web browser until their browser is refreshed. They need to run the query each time they want to view the results. Even the asset created when publishing the notebook does not show the query results.

8. Click **Continue**.
   A message stating that the data source is registered appears.

Tip

- The registration fails if the credentials provided in the Edge data source connection are incorrect or if the data source is unavailable. If it fails multiple times, contact Collibra Support.
- To remove the link between your Edge data source and Data Notebook, click ⋯ next to the data source, and then select **Remove data source**. Users will then no longer be able to run queries against the data source.

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Data source connection	Contains a list of supported connections associated with the Edge site you selected.

4. Click **Continue**.

   The **Choose the Authentication Method** dialog box appears.
5. Select one of the following authentication options.

Option	Description
Service account	Users don't need to enter any credentials to connect to the data source, before running queries. Data Notebook will use the service account from the Edge data source connection.

Option	Description
Personal credentials	Users need to enter their own credentials, before running queries. They inherit permissions from the data source. When you select this option, the **Credentials expiration** field appears. By default, personal credentials expire after 1 month, but you can change the duration.

6. Click **Continue**.
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Store in Collibra Cloud	Stores the query results in Collibra Platform.
Store in your own database	Stores the query results in your organization's database. For more information, go to Set up a database for storing query results.
Do not store results	Does not store the query results. The results are shown in the user's web browser until their browser is refreshed. They need to run the query each time they want to view the results. Even the asset created when publishing the notebook does not show the query results.

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Field	Description
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Data source connection	Contains a list of supported connections associated with the Edge site you selected.

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Option	Description
Service account	Users don't need to enter any credentials to connect to the data source, before running queries. Data Notebook will use the service account from the Edge data source connection.
Personal credentials	Users need to enter their own credentials, before running queries. They inherit permissions from the data source. When you select this option, the **Credentials expiration** field appears. By default, personal credentials expire after 1 month, but you can change the duration.
Snowflake OAuth	Users are redirected to Snowflake for authentication, before running queries. They inherit permissions from the data source. **Note** This option requires you to have the ACCOUNTADMIN role or a role with the CREATE INTEGRATION privilege in Snowflake to create and manage integrations for OAuth. You need to create an OAuth security integration and obtain the client ID and client secret for the setup.

6. Click **Continue**.
   The **Set up Snowflake OAuth** dialog box appears.
7. Follow the instructions, click **Continue**, and then enter the OAuth Client ID and OAuth Client Secret.
8. Click **Continue**.
   The **Choose your data storage option** dialog box appears.
9. Select one of the following storage options.

Option	Description
Store in Collibra Cloud	Stores the query results in Collibra Platform.
Store in your own database	Stores the query results in your organization's database. For more information, go to Set up a database for storing query results.
Do not store results	Does not store the query results. The results are shown in the user's web browser until their browser is refreshed. They need to run the query each time they want to view the results. Even the asset created when publishing the notebook does not show the query results.

10. Click **Continue**.
    A message stating that the data source is registered appears.

Tip

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Option	Description
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Do not store results	Does not store the query results. The results are shown in the user's web browser until their browser is refreshed. They need to run the query each time they want to view the results. Even the asset created when publishing the notebook does not show the query results.

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What's next?

Create a notebook.

Set up a database for storing query results

When registering a data source for Data Notebook, you can choose to have the SQL query results stored in a database managed by your own organization.

> **Note** PostgreSQL is the only supported data source type for storing query results in a self-managed database.

This topic describes how to set up your own storage database in Edge for Data Notebook. The following steps need to be performed only once.

> **Note** This feature is not supported for Collibra Cloud sites.

Steps

1. Within the virtual machine where your Edge site is running, create a YAML file (for example, `result-persistence-config.yaml`) with the following syntax, replacing `<database-ip>`, `<database-name>`, `<username>`, and `<password>` with the corresponding parameters from your own database.

```
apiVersion: v1
kind: Secret
metadata:
  name: session-manager-persistence-update
  namespace: collibra-edge
  labels:
    session-manager/update: persistence
type: Opaque
stringData:
  JDBC_PERSISTENCE_URL: jdbc:postgresql://<database-
ip>/<database-name>
  JDBC_PERSISTENCE_USERNAME: <username>
  JDBC_PERSISTENCE_PASSWORD: <password>
  JDBC_PERSISTENCE_DRIVER: org.postgresql.Driver
```

2. Use the YAML file created in the previous step to apply its configuration to your Edge site using the following command.

   ```
   kubectl apply -f result-persistence-config.yaml -n collibra-edge
   ```

3. Restart the storage service of the Edge site using the following command.

   ```
   kubectl delete pods -n collibra-edge --
   selector=app.kubernetes.io/instance=edge-session-manager
   ```

   » Data Notebook can now recognize that you have your own database set up for storing query results.

   > **Tip** When registering a data source for Data Notebook, if you now select the **Store in your own database** option, the storage database you set up is shown. If, however, a message appears stating that a storage database is not found, contact Collibra Support.

Create a notebook

A notebook can be used for diverse tasks ranging from ad-hoc analysis to issue investigation and routine reporting. It includes both a text editor for adding content and an SQL editor for writing and running SQL queries against a data source.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- A data source for Data Notebook is registered.

Steps

1. On the main toolbar, click → **Data Notebook**.
   » The Data Notebook homepage opens.
2. Click **Create Notebook**.
   » A notebook is created, and the notebook page opens.

   > **Tip**
   > - Your notebook is not visible to others until you publish it.
   > - You can work on your notebook later if needed. You can find your notebook in the **Your Private Notebooks** section of the Data Notebook homepage.

3. Enter a name to identify your notebook.
   » Your changes are saved.

What's next?

Add content to a notebook or run a query.

Add content to a notebook

After creating a notebook, you can add content, including business goals and takeaways, to the notebook.

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.
2. Enter content in the notebook.

   Show more information

   - Structuring:
     - Use the **Add Business Goal** button to clarify the purpose of your data analysis.
     - Use the **Add Takeaways** button to summarize important insights derived from your data.
   - Formatting:
     - To add different content types such as headings, numbered lists, and code blocks, enter a forward slash (/) in a new line, and then select the required option from the list that appears.
     - To apply formatting options such as bold, italics, underline, strikethrough, and hyperlinks, double-click the content, and then select the required option from the list that appears.
     - To mention someone, enter @, and then enter their username. The user is notified of the comment only after you publish the notebook.
   - Other options:
     - To move a block of content, hover your pointer over the content, and then drag ⠿ to where you want the block.
     - Clicking ⠿ also provides you with options to duplicate or delete the block, comment on a block, insert a line above or below the block, copy the block link, and collapse or expand the block.

» Your changes are saved.

Organization Table Details

Business Goal

New information has been pulled into our organization table describing the organization better. Before ingesting the table, let's take a look at it.

Takeaways Neutral

Values inside the table make sense.
We've ingested the table and columns and added Data Quality checks.
Additional care should be taken on the language column.
Discovery details can be found below.

organizations DATA_NOTEBOOK Run

```
SELECT
  *,
  CASE UNIFORM( 0, 8, random())
    WHEN 0 THEN 'EN'
    WHEN 1 THEN 'EN'
    WHEN 2 THEN 'EN'
    WHEN 3 THEN 'EN'
    WHEN 4 THEN 'FR'
    WHEN 5 THEN 'FR'
    WHEN 6 THEN 'DE'
    ELSE NULL
  END as language
from PRODUCT.ORGANIZATION
```

Coherence check

The evolution of organizations **seems to be aligned** with expectations based on the commercial experiences we've been launching.

Organizations

per_week_per_plan DATA_NOTEBOOK Run

Plans

plan_split DATA_NOTEBOOK Run

```
SELECT
  PLAN,
  SUM(SUBTOTAL)
FROM per_week_per_plan
GROUP BY PLAN
```

Quality checks

Nulls

nulls_count DATA_NOTEBOOK Run

```
select
  count(*),
  count_if(ID is null) / count(*),
  count_if(CREATED_AT is null) / count(*),
  count_if(NAME is null) / count(*),
  count_if(PLAN is null) / count(*),
  count_if(LANGUAGE is NULL) / count(*)
from organizations
```

We need to be careful as the language column does contain some null values. Product team needs to get back to us quickly on that.

Zoom on LANGUAGE column

language_split_dive DATA_NOTEBOOK Run

What's next?

Run a query.

Connect to a data source in a notebook

An SQL query in a notebook is run on a database linked to a registered data source. However, before running a query, you need to connect to the registered data source within the notebook.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- A data source for Data Notebook is registered.

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.
2. In the left pane, in the **Data Explorer** section, click **Add a Data Source**. Alternatively, you can click **Add a Data Source** on the menu next to the query title.

   » The **Add a Data Source** dialog box appears.
3. Click **Add** next to the data source against which you want to run the query.

   » Databases linked to the data source appear in the **Data Explorer** section.

   > **Tip**
   > - If the data source requires personal credentials to connect to the data source, a dialog box appears to prompt you to enter your credentials.
   > - The databases may not immediately appear due to the time it takes to load the data source.
   > - To remove the data source connection from the notebook, click **Add a Data Source** again, and then, in the **Add a Data Source** dialog box, click **Added** next to the data source.

What's next?

Run a query in a notebook.

Run a query in a notebook

After creating a notebook, you can write and run SQL queries against different data sources within the same notebook. Query results can be viewed as a table or chart.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- A data source for Data Notebook is registered.

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.
2. In a new line, enter two forward slashes (//).

   » A query block appears.
3. Enter a title to identify your query.

   > **Tip** You can use this query in another SQL query within the same notebook.

4. Write your query.

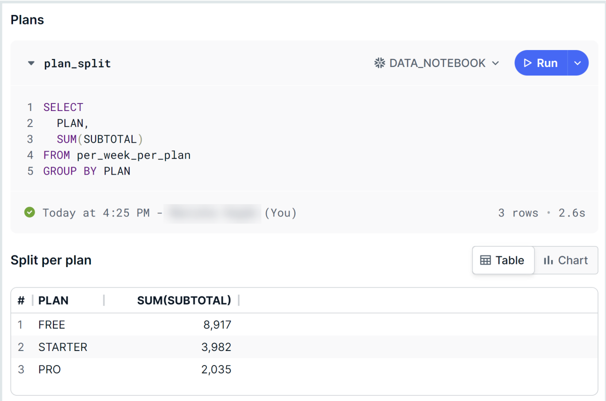
   > **Note** If you can't write or run a non-query statement (for example, UPDATE), it is because your administrator has restricted it.

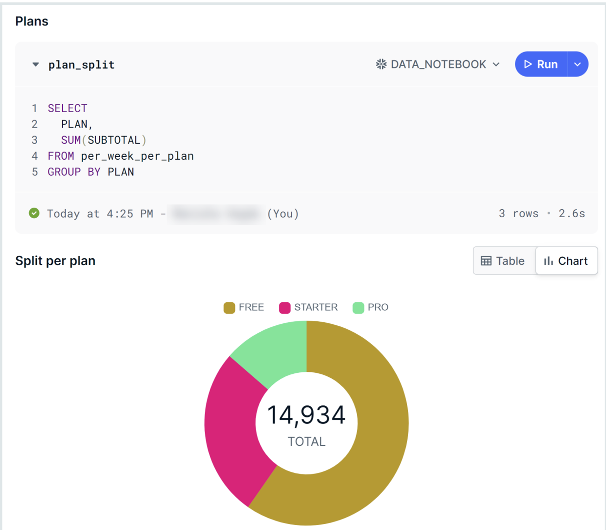
5. Connect to a data source.
6. On the menu next to the query title, select a database.

7. Click **Run**.

> ### Tip
>
> - If the data source requires personal credentials to connect to the data source, a dialog box may appear again to prompt you to enter your credentials. In the dialog box, the value in the **Duration** field indicates the amount of time you want to remain connected to the data source. The default duration is 2 minutes. You can, however, change the duration.
> - To reduce database load, by default, only the first 100 rows of query results are returned. To remove this limit, on the **Run** menu of the query block, clear the **100-row limit on this query** option, and then click **Run** again. The maximum number of rows of query results that can be returned is 100,000.
> - To stop running the query, on the **Run** menu of the query block, click **Cancel execution**.

» Query results are shown.





Tip

- You can edit the query and run it again.
- To run all the queries in the notebook at once, in the leftmost pane, click **Execution**, and then click **Run all queries**. Alternatively, you can use the following keyboard shortcut, depending on your operating system:
  - **macOS:** Press Command+Shift+Enter
  - **Windows:** Press Ctrl+Shift+Enter
- When viewing the query results as a table, to resize the table, drag its border.
- To change a column's display name, hover your pointer over the column, click ⋯, enter the new name in the **Display name** field, and then click outside.
- To change the number format in a column, hover your pointer over the column, click ⋯, and then select the new format in the **Format** field.
- To download or view the table or chart in full screen, hover your pointer over it, and then click **Download results** or **Download image**. If you can't find the **Download results** button on a table, it is because your administrator has hidden it.

What's next?

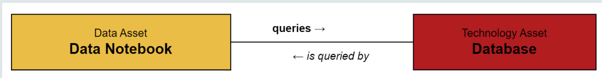
Publish the notebook to create an asset.

Data Notebook asset

A Data Notebook asset is an asset that is automatically created when you publish a notebook. The asset page of a Data Notebook asset shows the content of the notebook, including its queries, on the **Notebook** tab. The asset page also shows the databases that were queried in the notebook, in the **Data** section on the **Summary** tab.

Tip

- The content on the **Notebook** tab is shown only if you have a resource role that has the following resource permission: **Asset** > **Data** > **View notebook content**.
- The Data Notebook asset uses the following relation type to show the queried databases: **Data Notebook queries/is queried by Database**.



- If you want the queries to be hidden on the **Notebook** tab, in the associated notebook, click ⋯, and then clear the **Show SQL on Asset view** option.
- The asset type of a Data Notebook asset is **Data Notebook**.
- The domain type of the domain in which a Data Notebook asset is created is **Data Notebook Catalog**.

Publish a notebook

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- You are assigned a responsibility on the Data Notebook Catalog domain with a resource role that has the following resource permission: **Asset** > **Add**

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.

2. Click **Publish**.
   » The **Publish as an Asset** dialog box appears.

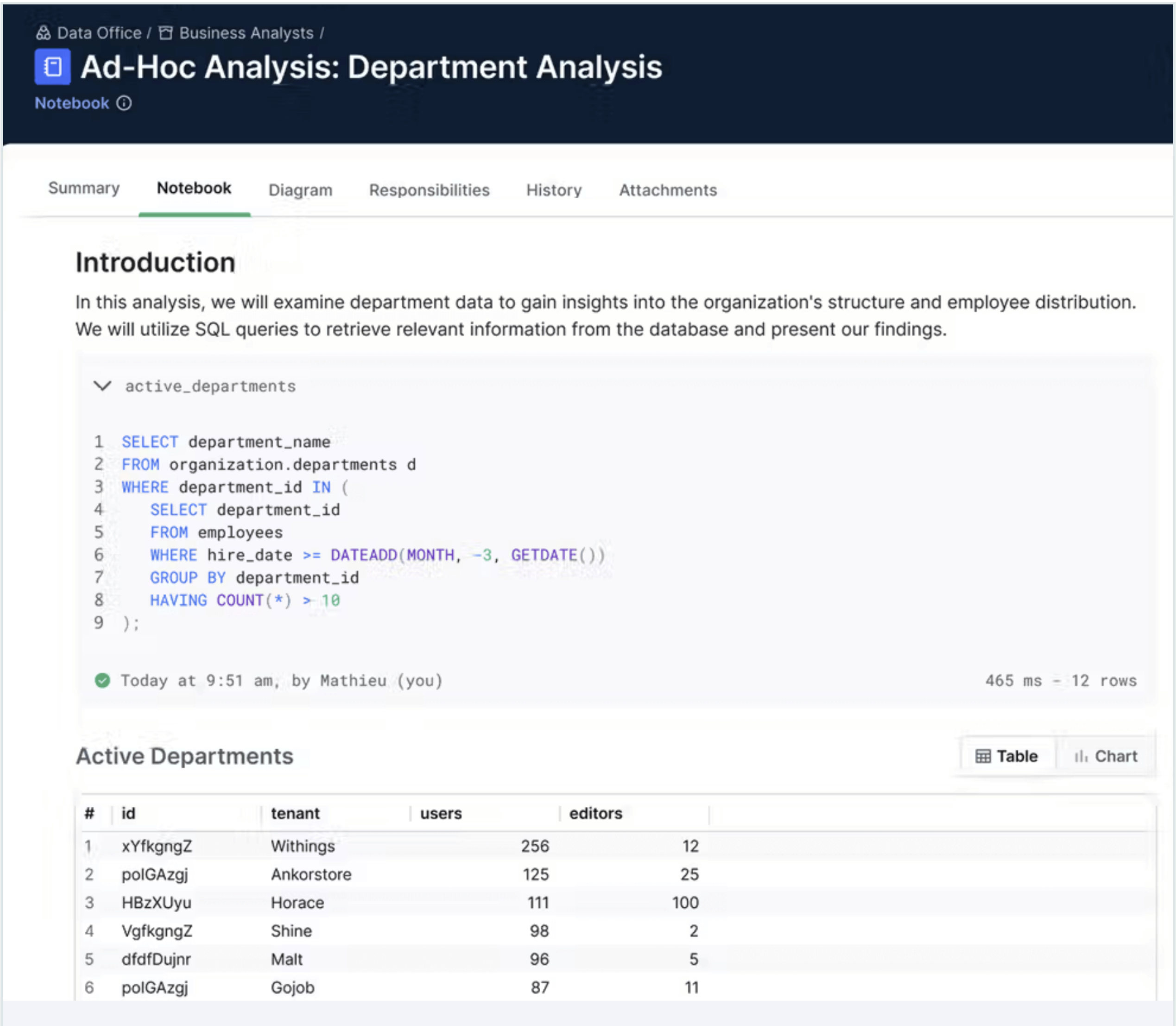
   > **Tip** This dialog box doesn't appear if the notebook was previously published.

3. Enter the required information.

Field	Description
Domain	The Data Notebook Catalog domain in which you want the asset to be created.
Asset name	A name to identify the asset.

4. Click **Publish**.
   » A Data Notebook asset is created. Your notebook is now visible to others.

   > **Tip**
   > - To go to the asset page, in the notebook, click **Open Asset Details**.
   > - If the notebook was previously published, a new Data Notebook asset isn't created. Instead, the existing Data Notebook asset is updated.


Data Office / Business Analysts /
Ad-Hoc Analysis: Department Analysis
Notebook
Summary
Notebook
Diagram
Responsibilities
History
Attachments
Introduction
In this analysis, we will examine department data to gain insights into the organization's structure and employee distribution. We will utilize SQL queries to retrieve relevant information from the database and present our findings.
active_departments
SELECT department_name
FROM organization.departments d
WHERE department_id IN (
SELECT department_id
FROM employees
WHERE hire_date >= DATEADD(MONTH, -3, GETDATE())
GROUP BY department_id
HAVING COUNT(*) > 10
);
Today at 9:51 am, by Mathieu (you)
465 ms - 12 rows
Active Departments
Table
Chart
id tenant users editors
1 xYfkgngZ Withings 256 12
2 polGAzgj Ankorstore 125 25
3 HBzXUyu Horace 111 100
4 VgfkgngZ Shine 98 2
5 dfdfDujnr Malt 96 5
6 polGAzgj Gojob 87 11

Explore a notebook

This section describes the types of notebook, the sections shown in a notebook, and the actions you can perform on a notebook.

Notebook types

The following table describes the two types of notebook.

Type of notebook	Description
Private	A notebook that you created but haven't published. A private notebook isn't visible to others until you publish it. Private notebooks are shown on the Data Notebook homepage and the **Your Private Notebooks** section in the left pane on the Data Notebook homepage.
Published	A notebook that is published. It could have been created by you or anyone. A published notebook is visible to anyone who can access Data Notebook. Published notebooks are shown on the Data Notebook homepage and the **Published Notebooks** section in the left pane on the Data Notebook homepage.

Notebook sections

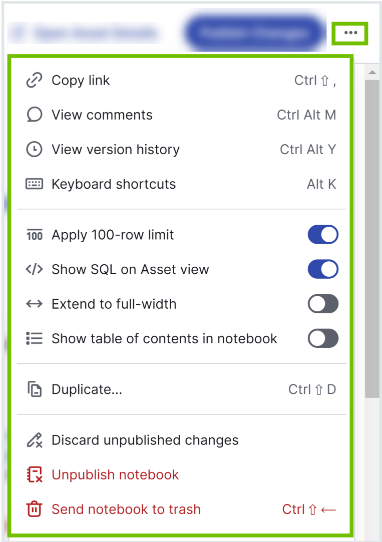
The following table describes the sections shown in the leftmost pane of a notebook.

Section	Description
Data Explorer	Tree of all data elements, such as data sources, schemas, tables, and columns, to which you have access depending on the connection method. When an asset is ingested, this section shows its critical attributes and a direct link to the asset of the element. **Tip** • If an element is shown loading, it means that Collibra is still fetching information from your database. • You can expand a data source to explore its data structure, including tables and columns. You can also add and manage data sources directly from this section.

Section	Description
Query History	List of all the queries run in all the notebooks to which you have access. This includes queries run not only by you but also by other users. **Tip** • You can filter the queries by database using the drop-down menu next to **Query History**. For example, selecting a database named **DB** will show only the queries run on DB. • By hovering your pointer over a query, you can copy the query for reuse, open it a new tab for further examination, or view it in a full screen for better visibility and analysis.
Execution	List of all the queries used in the current notebook. **Tip** • Clicking a query takes you to that query within the notebook. • If you have multiple queries in the notebook, you can use this section to quickly locate and access a specific query without manually searching for the query through the entire notebook.
Table of Contents	List of all the headings present in the content of the current notebook. **Tip** • Clicking a heading takes you to that heading within the notebook. • If you have multiple sections or subsections in the notebook, you can use this section to quickly locate and access a specific section without manually searching for the section through the entire notebook.

Notebook options

The following table describes the options shown when you click ⋯ in a notebook.



Option	Description
Copy link	Copies the link of the notebook to your clipboard for potential use later. This allows you to easily share the notebook with others.
View comments	Shows a thread with all the comments that have been added to the notebook. This allows you to review feedback, collaborate with others, and address any questions or suggestions.
View version history	Shows a list of all the versions of the notebook and allows you to restore an earlier version.
Keyboard shortcuts	Shows a list of key combinations that you can use to perform various actions quickly, for example, running all queries at once, publishing the notebook, and formatting text.
Apply 100-row limit	Returns only 100 rows of query results when a query is run. This helps reduce database load and improve readability by limiting the amount of data shown at once. By applying this limit, you can focus on a manageable subset of data, making it easier to analyze and work with the notebook. **Tip** • This 100-row limit is set using JDBC's `setMaxRows` method instead of adding the `LIMIT` clause to the SQL query. • The maximum number of rows of query results that can be returned is 100,000. This option is enabled by default.

Option	Description
Show SQL on asset view	Shows queries on the **Notebook** tab of the Data Notebook asset, which is created when the notebook is published. This option is enabled by default.
Extend to full-width	Expands the notebook's interface to use the entire width of the screen. This allows you to view more content on each line, making it easier to work with wide tables or charts. This option is disabled by default.
Show table of contents in notebook	Shows a structured outline of the headings in the notebook. This provides a quick overview and easy access to different parts of the content. This option is disabled by default.
Duplicate	Allows you to create an exact copy of the notebook. This helps you easily replicate the content for reuse or further development without altering the original notebook.
Discard unpublished changes	Allows you to revert the notebook to its last published state, removing any changes that haven't been published. This helps you avoid unintentional modifications and maintain the integrity of your notebook. This option is shown only in a published notebook in which you have made changes.
Unpublish notebook	Allows you to remove the notebook from public view. This helps you control access to the content and make updates or corrections as needed. This option is shown only in a published notebook.
Send notebook to trash	Allows you to move a notebook to the trash, where it can be permanently deleted or restored later. This helps you manage and organize notebooks by removing unnecessary or outdated content. By sending a notebook to the trash, you can declutter your workspace while still retaining the option to recover it if needed.

Manage a notebook

This section describes the additional actions you can perform on a notebook.

Share a notebook

You can invite others to work on your notebook together by simply sharing the link of the notebook with them. A notebook can be shared only if it has been published. The recipient can view or edit the notebook you shared only if they have the following permissions.

Tip

- You can also use the **Copy link** option in the notebook to copy the link of the notebook to your clipboard for potential use later.
- You can also share the link to a specific query block from a notebook or from the Data Notebook asset page.
  - To copy this link from a notebook, hover your pointer over the block, click , and then click **Copy block link**.
  - To copy this link from the Data Notebook asset page, on the **Notebook** tab, hover your pointer over the block, click , and then click **Copy link to block**.

Permissions

For viewing your shared notebook

If you want the recipient to be able to simply view your notebook, they need to have the following permissions:

- A global role that has the following global permission: **Product Rights** > **Data Notebook**
- A resource role that has the following resource permission on the Data Notebook asset (or its domain, Data Notebook Catalog): **Asset** > **Data** > **View notebook content**

  > **Tip** This is done via responsibilities. For more information, go to View and edit responsibilities.

For editing your shared notebook

If you want the recipient to be able to edit your notebook, they need to have the following permissions:

- A global role that has the following global permission: **Product Rights** > **Data Notebook**
- A resource role that has the following resource permissions on the Data Notebook asset (or its domain, Data Notebook Catalog):
  - **Asset** > **Data** > **View notebook content**
  - **Asset** > **Update**
  - **Asset** > **Attribute** > **Update**

Edit a notebook

When you edit a notebook, your changes are automatically saved, creating new versions.

Editing a published notebook unpublishes the notebook. When you republish the edited notebook, a new Data Notebook asset isn't created. Instead, the existing Data Notebook asset is updated with your changes.

> **Tip** You can also edit a published notebook by clicking **Edit Notebook** on the Data Notebook asset page. If you want to open the notebook for editing in a new tab, you can right-click the button.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- To edit a private notebook: You are the creator of the notebook or its editor if it was previously published.
- To edit a published notebook: You have a resource role that has the following resource permissions:
    - **Asset** > **Data** > **View notebook content**
    - **Asset** > **Update**
    - **Asset** > **Attribute** > **Update**

Steps

1. Open the notebook.

   Show more information

    a. On the main toolbar, click → **Data Notebook**.
    b. Click the notebook.
2. Edit the information.

   » Your changes are automatically saved.

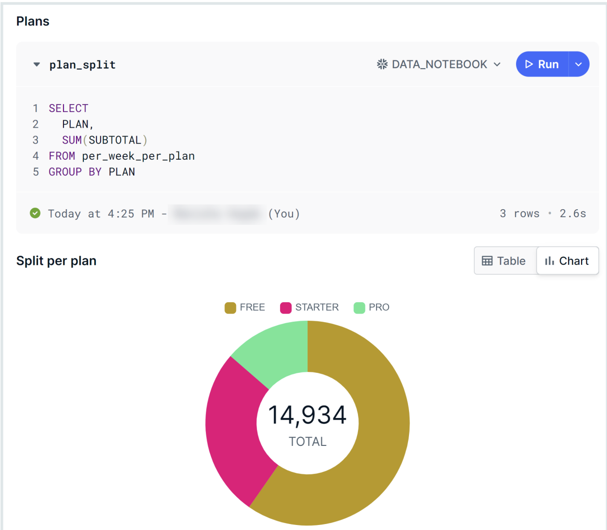
> **Tip**
> - If the notebook was previously published and you want to undo all the changes you made to it since it was last published, click ··· → **Discard unpublished changes**.
> - If you want to publish your changes, click **Publish** or **Publish Changes**.
> - You can also restore a previous version of the notebook.

What's next?

Publish the notebook.

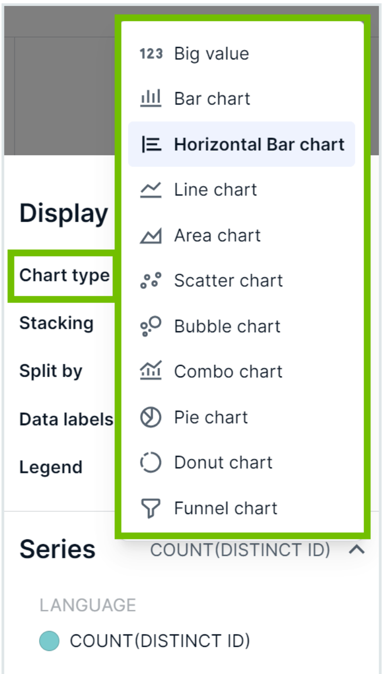
Customize the notebook chart

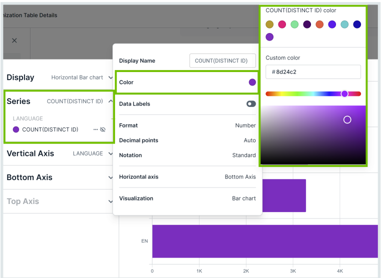
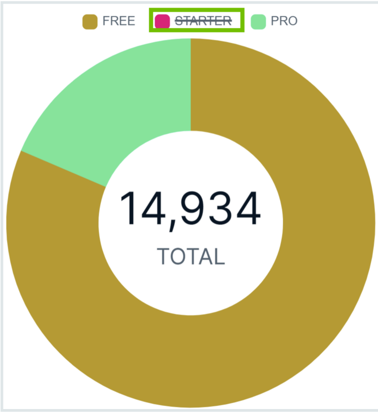
After running a query in a notebook, you can view the query results as a chart instead of a table by clicking **Chart**. You can also customize the chart by clicking **Edit chart**, which appears when you hover your pointer over the chart.



The following table describes some of the options available for customizing the chart.

Option	Description
Change the type of chart.	Use the **Chart type** field.



Option	Description
Change the chart colors.	Use the **Series** section. 
Exclude a specific category from the chart. **Tip** This option is available only in certain types of charts, such as donut and pie charts.	Click the legend representing the category. 

Unpublish a notebook

When you unpublish a notebook, the associated Data Notebook asset is deleted.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- You are assigned a responsibility on the Data Notebook Catalog domain with a resource role that has the following resource permissions:
  - **Asset** > **Data** > **View notebook content**
  - **Asset** > **Remove**
- You have a view permission on the Data Notebook Catalog domain.

Steps

1. Open the notebook.
   Show more information
   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.
2. In the upper-right corner, click ··· → **Unpublish notebook**.
   » The notebook is unpublished.

Restore a notebook version

When you edit a notebook, your changes are automatically saved, creating new versions. You can replace the current version of the notebook with any of the previous versions.

Restoring a published notebook unpublishes the notebook. When you republish the restored notebook, a new Data Notebook asset isn't created. Instead, the existing Data Notebook asset is updated with your changes.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- To restore a version in a private notebook: You are the creator of the notebook or its editor if it was previously published.
- To restore a version in a published notebook: You have a resource role that has the following resource permissions:
  - **Asset** > **Data** > **View notebook content**
  - **Asset** > **Update**
  - **Asset** > **Attribute** > **Update**

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.
2. In the upper-right corner, click ··· → **View version history**.

   The **Restore previous version** dialog box appears.
3. Click **Restore** next to the version you want to restore.

   » The notebook is replaced by the version you restored.

Comment on a notebook

You can leave comments on your own notebooks or on other published notebooks. Comments can be used for asking questions, giving answers, or providing feedback.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- To comment on a private notebook: You are the creator of the notebook or its editor if it was previously published.

- To comment on a published notebook: You have a resource role that has the **Asset** > **Data** > **View notebook content** resource permission.

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.

   > **Tip** To view all the comments in the notebook, in the upper-right corner of the notebook, click ⋯ → **View comments**.

2. Click next to where you want to comment. Alternatively, above the title of the notebook, click **Comments**.

   > **Tip** You can't add comments to business goals and takeaways.

3. Enter your comment.

   > **Tip** To mention someone in a comment, enter @, and then enter their username. If the notebook isn't published yet, the user is notified of the comment only after the notebook is published.

4. Click **Post**.

   » Your comment is saved.

   > **Tip** To edit or delete your comment, click ⋯.

Duplicate a notebook

You can copy the entire content of any existing notebook into a new notebook, eliminating the need to begin from scratch. Comments, if any, aren't copied to the new notebook.

> **Tip** You can also duplicate a published notebook by clicking **Duplicate Notebook** (found on the More menu) on the Data Notebook asset page.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- To duplicate a private notebook: You are the creator of the notebook or its editor if it was previously published.
- To duplicate a published notebook: You have a resource role that has the following resource permission: **Asset** > **Data** > **View notebook content**

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.
   b. Click the notebook.
2. In the upper-right corner, click ··· → **Duplicate**.
   » The **Duplicate notebook** dialog box appears.
3. Enter a name to identify the new notebook.
4. Click **Duplicate**.
   » The new notebook is created and shown.

Delete a notebook

You can delete a notebook either temporarily or permanently. Deleting a published notebook also deletes the associated Data Notebook asset.

If a notebook is temporarily deleted, it can be restored at any time. When you restore a published notebook, the notebook automatically becomes private.

Prerequisites

- You have a global role that has the following global permission: **Product Rights** > **Data Notebook**
- To delete a private notebook: You are the creator of the notebook or its editor if it was previously published.
- To delete a published notebook: You have a resource role that has the following resource permissions:
  - **Asset** > **Data** > **View notebook content**
  - **Asset** > **Remove**

Steps

1. Open the notebook.

   Show more information

   a. On the main toolbar, click → **Data Notebook**.

   b. Click the notebook.
2. To temporarily delete the notebook, in the upper-right corner, click ··· → **Send notebook to trash**.

   » The Data Notebook homepage opens. The notebook is temporarily deleted and is no longer shown on the homepage.

   > **Tip** To restore the notebook, in the left pane of the homepage, click **Trash** → ↺.
3. To permanently delete the notebook, in the left pane of the homepage, click **Trash** → 🗑 .

Notebook settings

As an administrator, you can manage settings for SQL statements, query results, chart color palettes, number formats in query results, and access requests to Data Notebook.

The following table describes the settings for Data Notebook. These settings can be accessed via Data Notebook homepage → **Settings** or via Collibra settings → **Data Notebook**.

Setting	Required global permission	Description
Data sources		
Data sources	Data Notebook > Manage data sources	Allows registering data sources for Data Notebook and removing the registered data sources. You can register a data source via **Register data source**. For more information, go to Register a data source for Data Notebook. The **Connected** section shows a list of registered data sources. You can remove a registered data source by clicking ··· → **Remove data source**. Users will then no longer be able to run queries against that data source.
Queries governance		
Enforce data retention for query results	Data Notebook > Manage settings	Determines whether data retention of query results in notebooks is enforced. By default, when a notebook is permanently deleted, any query results associated with the notebook are also automatically deleted from the database. You can specify the duration for which the query results should be kept in the database. Once the retention period has passed for a set of query results, it is automatically deleted from the database. Users can still re-run a query to generate results. For example, if you set the retention period to 1 year, the results of a query run in a notebook will be deleted from the database after 1 year, even if the notebook still exists.

Setting	Required global permission	Description
Query-only statements	Data Notebook > Manage settings	Determines which type of SQL statements can be run in notebooks. By default, users can run any type of SQL statements, including both read and write operations. You can allow only query statements such as SELECT to be run, to prevent users from running other types of statements, such as the following: ADD, ALTER, CREATE, DELETE, DROP, EXEC, GRANT, INSERT, TRUNCATE, UPDATE.
Allow download of result sets from data notebook user interface	Data Notebook > Manage settings	Determines whether query results in notebooks can be downloaded. By default, users can download query result tables by hovering over the tables and then clicking **Download results**. You can hide this button to prevent the download of query results from all notebooks. Users can still download query result charts.

Number and colors

<table>
<tr><th>Setting</th><th>Required global permission</th><th>Description</th></tr>
<tr><td>Default color palette for charts</td><td>Data Notebook > Manage settings</td><td>
Determines the color palette for charts in notebooks.
A default color palette is automatically applied to all the charts. You can change this default palette to suit your preferences.
How to change the default color palette?
To change the default color palette, select the color set, and then enter the following information in the Edit color palette dialog box.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Name</td><td>A name to identify the color.</td></tr>
<tr><td>Value</td><td> The hexadecimal code of the color you want. Clicking the color itself opens a color palette for finer adjustments. </td></tr>
<tr><td>Apply automatically to columns</td><td> Names of the columns to which you want the color to be applied when the columns are shown in charts. To separate the columns, use a comma. Example STARTER, number_of_users </td></tr>
</table>
Tip You can also override the default color palette by selecting specific colors for each chart directly within a notebook. For more information, go to Customize the notebook chart.
</td></tr>
</table>

Setting	Required global permission	Description
Number formatting	Data Notebook > Manage settings	Determines the format of numbers in query results in notebooks. By default, the numbers in query results are formatted according to the web browser settings of the user who is viewing the results. For example, if a user's browser is set to US English, the numbers are formatted according to the US English conventions. You can change the default number formatting to use a decimal point or a decimal comma. This ensures that numbers are formatted according to the locale you select, regardless of the individual browser settings.
Access requests (in preview)		
Access requests	Data Notebook > Manage settings	Determines whether users can request access to Data Notebook. By default, this setting is disabled and users can't request access. If you enable the setting, you can allow users of specific groups to request access. The **Data Notebook** option then appears for such users when they click on the main tollbar, but the option directs them to a request access form rather than the application, until their request is approved. For more information, go to Request Data Notebook access (in preview).
Users with request access	Data Notebook > Manage settings	Determines who can request access to Data Notebook. This setting allows you to activate the feature for only a selection of groups, allowing for targeted deployment. By default, all users can request access if the **Access requests** setting is enabled. You can limit access requests to specific user groups. If no groups are selected, all users can request access.
Users who can approve requests	Data Notebook > Manage settings	Determines who can review access requests for Data Notebook and approve or reject them. By default, review requests are sent to users who have the **System administration** global permission. You can select specific users and groups to review access requests. If no users or groups are selected, only system administrators can review access requests.

Setting	Required global permission	Description
Group and role assignment	Data Notebook > Manage settings	Determines which groups or roles can reviewers assign to users during approval. By default, all global roles can be assigned to users. You can select specific global roles or groups for assignment during approval. Your selected roles or groups become available for reviewers to assign to users when approving their access requests. If you don't select any roles or groups, reviewers can assign any roles or groups to requesters.

Manage notebook settings

As an administrator, you can manage the settings of SQL statements, query results, color palette for charts, number formatting in query results, and access requests to Data Notebook.

Prerequisites

You have a global role that has the following global permissions:

- **Product Rights** > **Data Notebook**
- **Data Notebook** > **Manage settings**

Steps

1. Open the Data Notebook settings page.

   More information

   a. On the main toolbar, click → **Settings**.
      » The **Settings** page opens.
   b. Click the **Data Notebook** tab, or in the **Data Notebook** section, click the required setting.

> **Tip** Alternatively, you can open the Data Notebook homepage, and then click **Settings**.

2. Edit the settings.
   » Your changes are saved and applied to all notebooks for all users.