



Collibra for Mobile
User Guide

Collibra for Mobile

User Guide

Revision: 20 Apr 2022

You can find the most up-to-date technical documentation online at

<https://community.collibra.com/docs/collibra4mobile/1.5>

Contents

Contents	ii
What's new	iv
What is Collibra for Mobile?	1
Installing Collibra for Mobile	3
Install Collibra for Mobile on iOS	4
Install Collibra for Mobile for Android	4
Mobile device management	5
Signing in and signing out of Collibra for Mobile	7
Sign in	7
Sign out	8
	8
Collibra for Mobile user interface	9
Search page	10
Asset details tabs	11
About Table assets details	13
About Column assets details	15
Searching with Collibra for Mobile	19
Search for assets	20
Filter search results	22
Wildcards and symbols for searching	24
Working with assets	25
Working with comments	27
Share an asset	28

Ratings	29
Working with workflows	35
Starting workflows	36
Working with tasks	39
Tasks with forms	42
Multi-step workflow	43
Profile	47
Open the Profile page	47
About	48
Settings	50

What's new

- You can [enable the option](#) to receive [push notifications](#) when tasks are assigned to you.
- [Workflows](#) are integrated in Collibra for Mobile
 - You can [start workflows](#) from the interface.
 - You can [complete tasks](#).
 - You can [define which workflows to become available](#) in the app.
- [Add an introduction message](#) before you sign in to the app.
- Expand [mobile device management](#) capabilities.
- You can now [add](#), [edit](#) and [delete](#) your ratings.
- Search for business terms, reports, KPIs, policies, and rules in Collibra Data Intelligence Cloud.
- Use the [filters](#) defined in Collibra Data Intelligence Cloud to narrow your search results.
- See the list of your more recent searches to quickly retrieve previous search results.
- Within [asset details](#), tap on characteristics, relations, and tags to see related data.
- Add [comments](#) to assets, and then mention users to automatically send them notifications.



What is Collibra for Mobile?

Collibra for Mobile is a cross-platform application for iOS and for Android that gives you seamless access to your data. From any mobile device, you can search for business terms, reports, KPIs, policies, and rules and get detailed information about governed assets in Collibra Data Intelligence Cloud on the go.

You don't have to wait to get back to your desktop to collaborate with other users, you can add [comments](#) to assets by mentioning them in an asset so they are automatically notified.

For more information, you can watch [this extensive demo](#) to explore the possibilities of Collibra for Mobile.



Installing Collibra for Mobile

This section describes how to install Collibra for Mobile on Android and iOS mobile devices.

Install Collibra for Mobile on iOS	4
Install Collibra for Mobile for Android	4
Mobile device management	5



Install Collibra for Mobile on iOS

Collibra for Mobile for iOS is available for installation in the [Apple App Store](#). Search for "Collibra" or follow the link below:

<https://apps.apple.com/app/collibra-for-mobile/id1498743475>

Compatibility

- Collibra for Mobile for iOS is compatible with iOS 12 or newer.
- Collibra Data Intelligence Cloud 2020.11 or newer.

Updates

The app is automatically updated via the Apple App Store.

Install Collibra for Mobile for Android

You can install Collibra for Mobile for Android from the [Google Play](#). Search for "Collibra" or follow the link below:

<https://play.google.com/store/apps/details?id=com.collibra.otg.everywhere>

Compatibility

- Collibra for Mobile for Android is compatible with Android 7 or newer.
- Collibra Data Intelligence Cloud 2020.11 or newer.

Updates

The app is automatically updated via Google Play.

Mobile device management

If your organization company uses mobile device management (MDM) to control the apps on your mobile devices, you can apply custom settings for Collibra for Mobile, for example a preconfigured URL of the Collibra Data Intelligence Cloud environment.

Note Ensure that your organization's MDM solution, for example, Mobile Iron, is compatible with these custom settings.

This section describes the settings that you can configure.

Key	Description	Format	Default value
instanceURL	URL of the Collibra Data Intelligence Cloud environment.	String	n/a
initialMessage	A text message that is shown before the user signs in to the app.	String	n/a
forceUseMFA	Option to enable secure the user credentials with biometric authentication or an authentication code or pattern.	Boolean	False

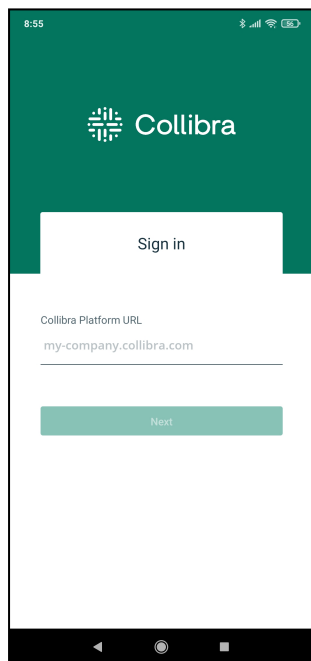
Key	Description	Format	Default value
browserScheme	<p>The browser on your mobile device that is used to sign in to the app.</p> <p>If the browser is not installed on the device, you will receive an error message.</p> <ul style="list-style-type: none"> • googlechrome(s) • firefox • microsoft-edge(-https) • opera • dolphin • brave 	String	If not specified, the default browser of the device is used.
sessionTimeout	<p>The period of inactivity after which users are automatically signed out from Collibra for Mobile.</p> <p>The timeout is set in seconds. Without this setting, there is no timeout.</p>	Number	n/a

Signing in and signing out of Collibra for Mobile

Sign in

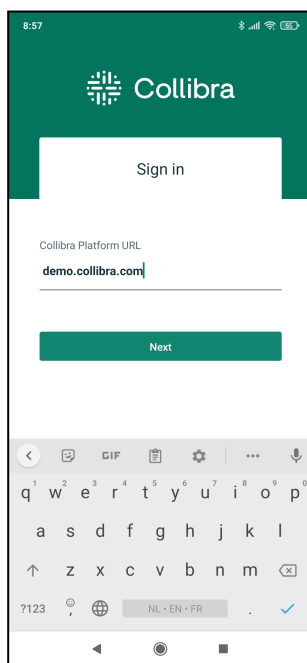
Step 1

Open Collibra for Mobile on your device.



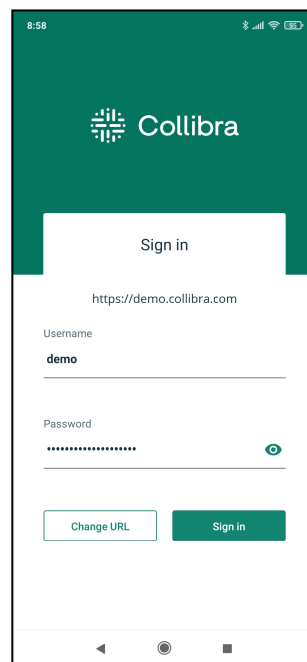
Step 2

In the **URL** field, enter the address of the Collibra Data Intelligence Cloud environment to which you want to connect, and then tap **Next**.



Step 3


Enter your Collibra credentials, and then tap **Sign in**.

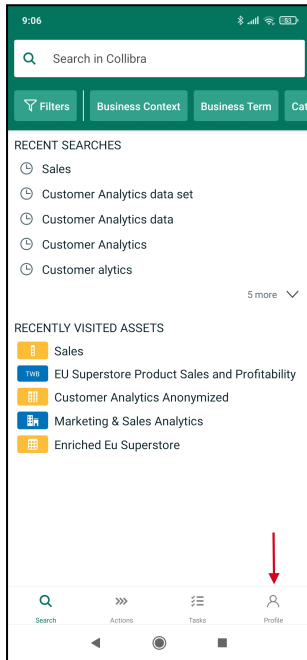


Note If authentication for your environment is set up with an SSO system, then enter your SSO credentials.

Sign out

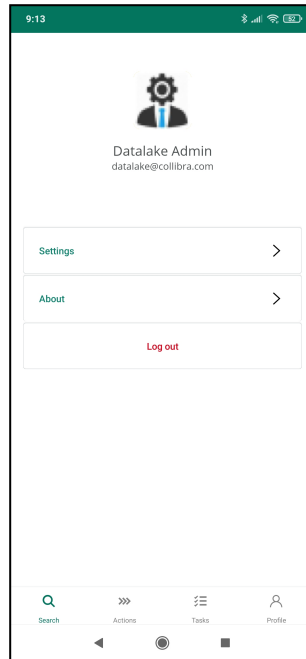
Step 1

Tap on the  icon in the bottom navigation.



Step 2

Tap **Log out**.



» You return to the Collibra for Mobile [Sign in](#) page.

Collibra for Mobile user interface

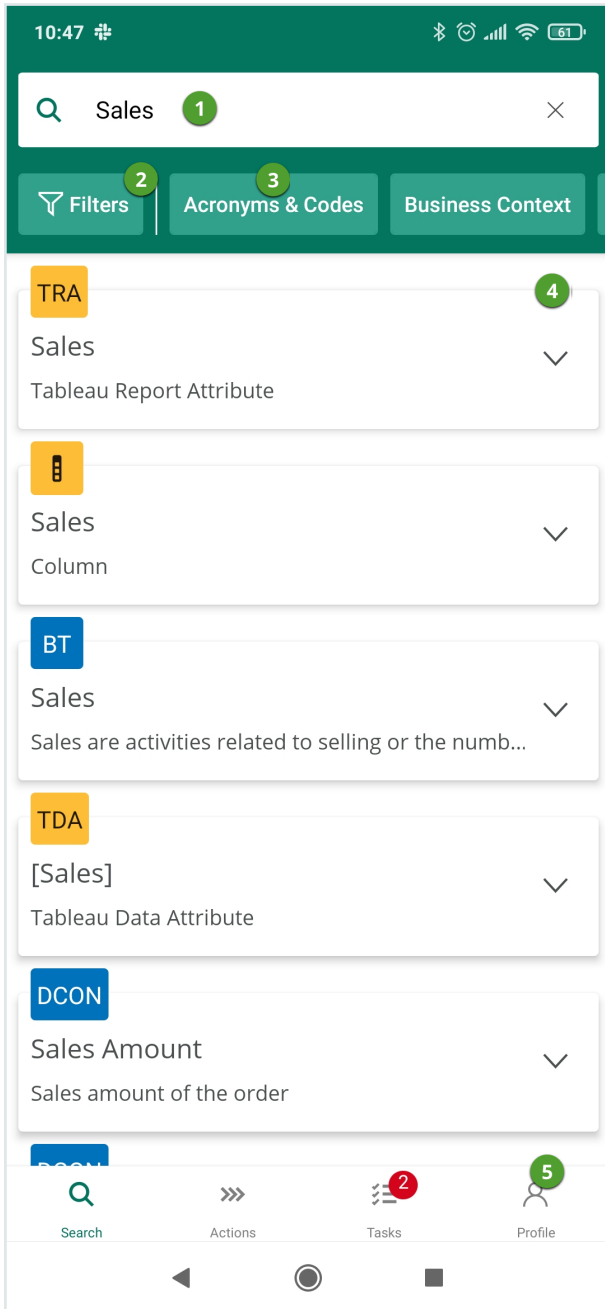
In this section, you will become familiar with the Collibra for Mobile user interface.

Search page	10
Asset details tabs	11
About Table assets details	13
About Column assets details	15



Search page


The Collibra for Mobile search page contains the following elements.




Item	Description
1	The search field to enter your search query.
2	The default filters taken from your Colibra Data Intelligence Cloud environment.
3	The filters you can apply to your search results.
4	The search results showing the asset type, asset name and some basic information about the asset to help you find the correct asset.
5	The bottom navigation bar to open the search interface, start workflows, view your tasks and profile.





Asset details tabs

The details of an asset are shown on the **Overview**, **Responsibilities** and **Comments** tabs.


14:59 [3] [3] 

< EU Superstore Product Sales and Pr... 

Overview Responsibilities Comments (1)

 Business Analysts Community >  Collibra Demo Tableau Server >
 Collibra Demo Tableau Server > Product Demo >
 Product Sales & Profitability

Type Tableau Workbook
Status Accepted

 (1)

Certified
true


Description
EU Superstore Product Sales and Profitability analysis.


Document creation date
14/10/2019

Document modification date
28/10/2019

Document size
1

Original Name
EU Superstore Product Sales and Profitability

Report Image 



Tab	Description
Overview	<p>The Overview tab gives an overview of the asset, its status and characteristics, such as relations and complex relations.</p> <ul style="list-style-type: none"> • If you tap on a related asset, the details of the related asset are shown. • If you tap on a tag, the search engine automatically returns all the data that have the selected tag. • If you follow a link to another asset in your Collibra environment, for example in the description of the asset, the linked asset opens.
Responsibilities	<p>The Responsibilities tab gives an overview of the roles and users assigned to the asset.</p>
Comments	<p>The Comments tab shows all comments and allows you to add a comment.</p>

About Table assets details

The Table assets details page gives you a comprehensive overview of a table's properties.

9:09 [Bluetooth] [Signal] [Wi-Fi] [53%]

Enriched Eu Superstore

Overview Responsibilities Comments

Business Analysts Community > Schemas > Enriched Eu Superstore

Type Table
Status Candidate





contains Column



- Basket Discount Amount
- Order ID
- Basket Discount Range
- Discount
- Category
- State
- Customer Lifetime Spend Range
- Basket Amount Before Discount
- Country
- Ship Date
- Basket Profit
- Discount Amount
- Manufacturer
- Item Discount Range
- Profit Ratio
- Quantity
- Amount Before Discount
- Sales
- Item Profit Ratio Range
- Segment
- Basket Discount
- Customer Name
- Basket Profit Ratio
- Sub-Category
- Ship Mode
- Basket Profit Range
- City
- Customer Total Orders
- Profit

Tab	Description
Overview	<p>The Overview tab gives an overview of the table, such as the original name, row count, and links to the part of the table and related assets.</p> <ul style="list-style-type: none">• If you tap on a related asset, the details of the related asset are shown.• If you follow a link to another asset in your Collibra environment, for example in the description of the asset, the linked asset opens.
Responsibilities	<p>The Responsibilities tab gives an overview of the roles and users assigned to the asset.</p>
Comments	<p>The Comments tab shows all comments and allows you to add a comment.</p>




About Column assets details

The Column assets details page gives you a comprehensive overview of a column's properties.

9:06    

 Sales 

Overview Responsibilities Comments

 Business Analysts Community >  Schemas >  Enriched Eu Superstore

Type Column
Status Candidate

Categorical Data
false

Column Position
31

Data Type
Text

Empty Values Count
0

Maximum Text Length
10

Maximum Value
999,09 €

Minimum Text Length
6


Minimum Value
1.000,98 €


Number of distinct values
6056


Original Name
Sales

Row Count
10000

Technical Data Type
Text

is part of Table
 Enriched Eu Superstore

is source for Data Attribute
 [Sales]



Tab	Description
Overview	<p>The Overview tab gives an overview of the column, such as the primary key, data type, number of row and links to the part of the table to which the column belongs.</p> <ul style="list-style-type: none">• If you tap on the related table, the details are shown.• If you follow a link to another asset in your Collibra environment, for example in the description of the asset, the linked asset opens.
Responsibilities	<p>The Responsibilities tab gives an overview of the roles and users assigned to the asset.</p>
Comments	<p>The Comments tab shows all comments and allows you to add a comment.</p>

Searching with Collibra for Mobile

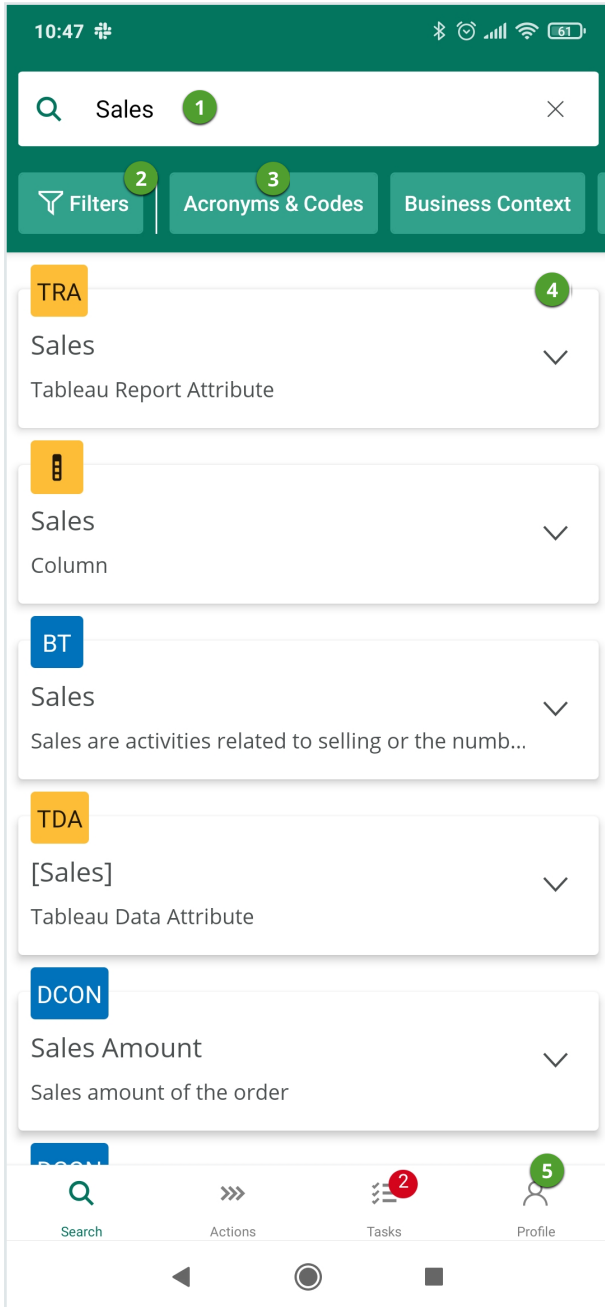
You can use Collibra for Mobile to quickly [search](#) for business terms, reports, KPIs, policies, and rules and more in your Collibra Data Intelligence Cloud environment.

Search for assets	20
Filter search results	22
Wildcards and symbols for searching	24



Search for assets

Enter the text you want to search for in the **Search** field. As you type, suggestions appear in the search results.

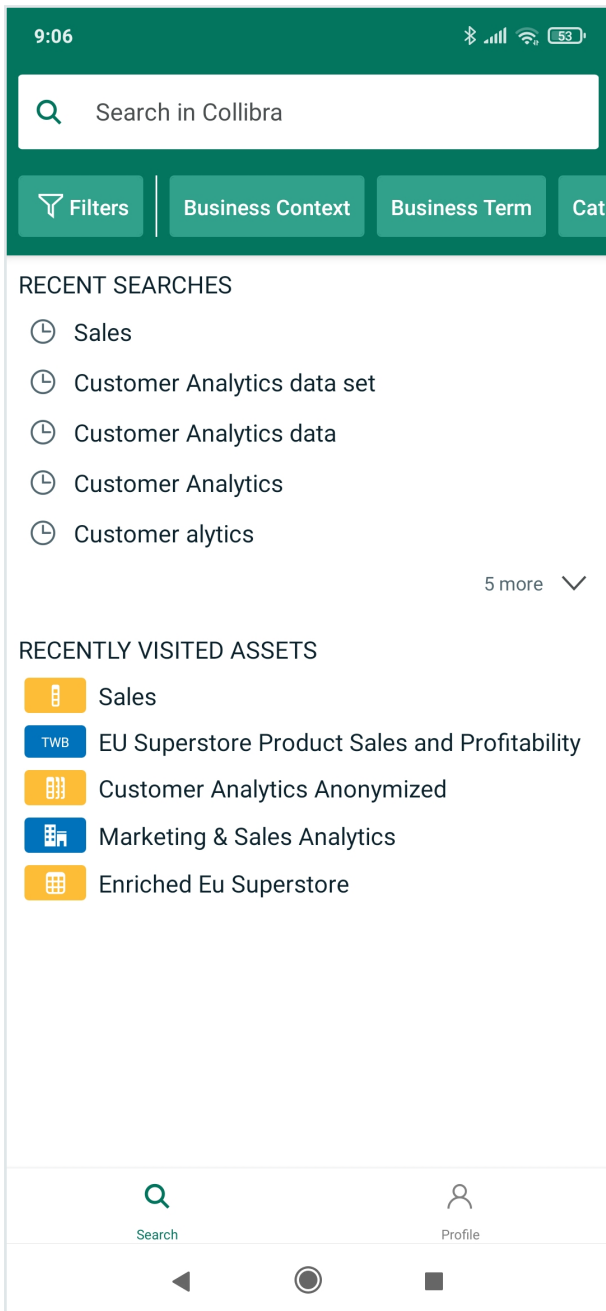


Tip

- You can use [wildcards](#) to aid your search.
- If you enter a unique asset ID or paste a shared asset link, the corresponding asset page opens immediately.

Recent search and recent assets

So you can pick up where you left off, the search results page saves your most recent searches and remembers the list of assets you recently viewed. Tap on a search term or asset to view the details.

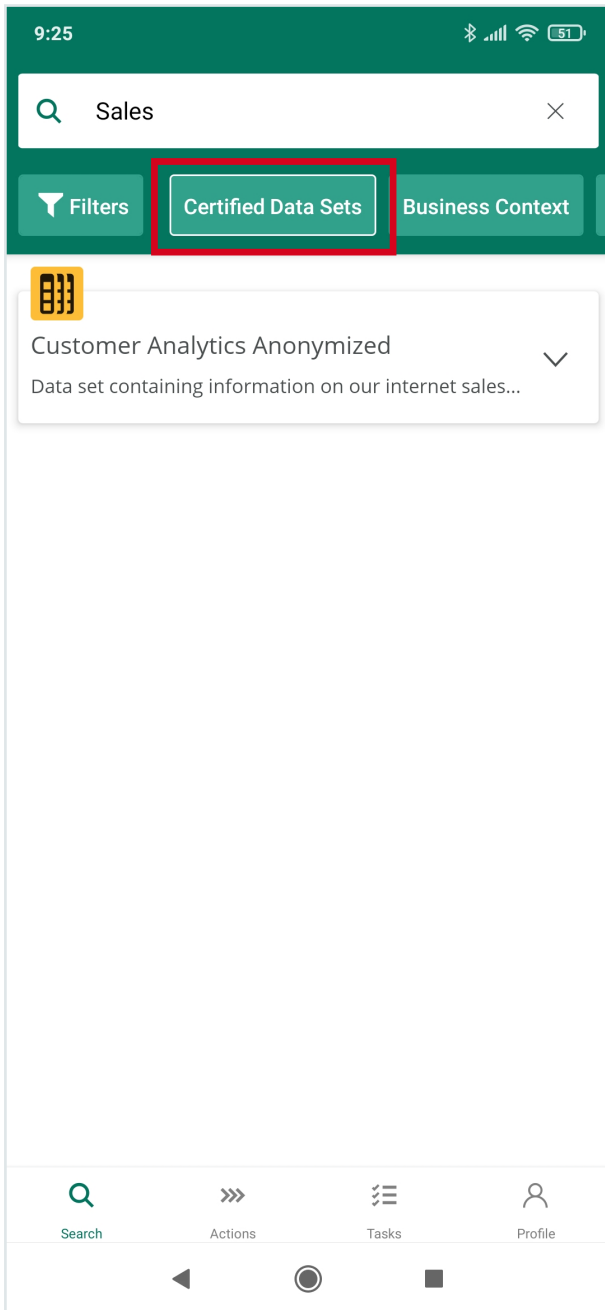


If you want to erase your recent search and asset history, [clear your local storage](#) to remove the items from the page.

Filter search results

When searching for data, the number of results can be huge and it can be difficult to find what you're looking for.

To find your data more easily, you can apply filters to the search results. The filters are taken from your Collibra Data Intelligence Cloud environment. Only the filters that you created and those that were shared with you are available to you.



Note To show more or fewer filters, you have to [add](#) or [delete](#) them in your Collibra environment.

Wildcards and symbols for searching

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

Wildcard	Description
?	Replaces any single character. Example: by typing ?owie, you can find Bowie, Rowie, Mowie, and so on.
*	Replaces any string of characters. Example: by typing B*e, you can find Bowie, Badge, Byte, and so on.

Working with assets

With Collibra for Mobile you can quickly look up data in Collibra Data Intelligence Cloud from any mobile device.

In this chapter



Working with comments

When you open an asset page, you can add, reply to or delete comments. You don't have to navigate to your Colibra Data Intelligence Cloud environment to do so.



Add a comment

1. [Search](#) for an asset.
2. Open the details of the asset.
3. Go to the **Comments** tab.
4. Type your comment.

Tip In your comments, you can use the @ symbol to mention a user so they automatically receive a notification.

5. Tap **Save**.


Reply to a comment

1. [Search](#) for an asset.
2. Open the details of the asset.
3. Go to the **Comments** tab.
4. Press and hold the comment to which you want to reply, and then tap .
5. Type your comment in the text field, and then tap .

Delete a comment

1. [Search](#) for an asset.
2. Open the details of the asset.
3. Go to the **Comments** tab.



4. Press and hold the comment you want to delete, and then tap .


Tip You can only delete your own comments.

5. Tap **Delete** to confirm.

Share an asset

If you want to share an asset with someone, you can retrieve the link to the asset and send it to another person. The link can be opened in any web browser or in Collibra for Mobile.

Steps

1. [Search](#) for an asset.
2. On the search results page, tap the asset you want to share.
3. In the header of the page, tap .
4. Select an app to send the link to the user with whom you want to share the asset. The apps via which you can share depend on your phone.

Ratings

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

Enabling ratings

Ratings are enabled by asset type. When ratings are enabled for a particular asset type, users can [rate](#) any asset of that asset type.

Permissions

No particular license is needed to rate assets or to edit or delete your own ratings; you do, however, need certain resource permissions.

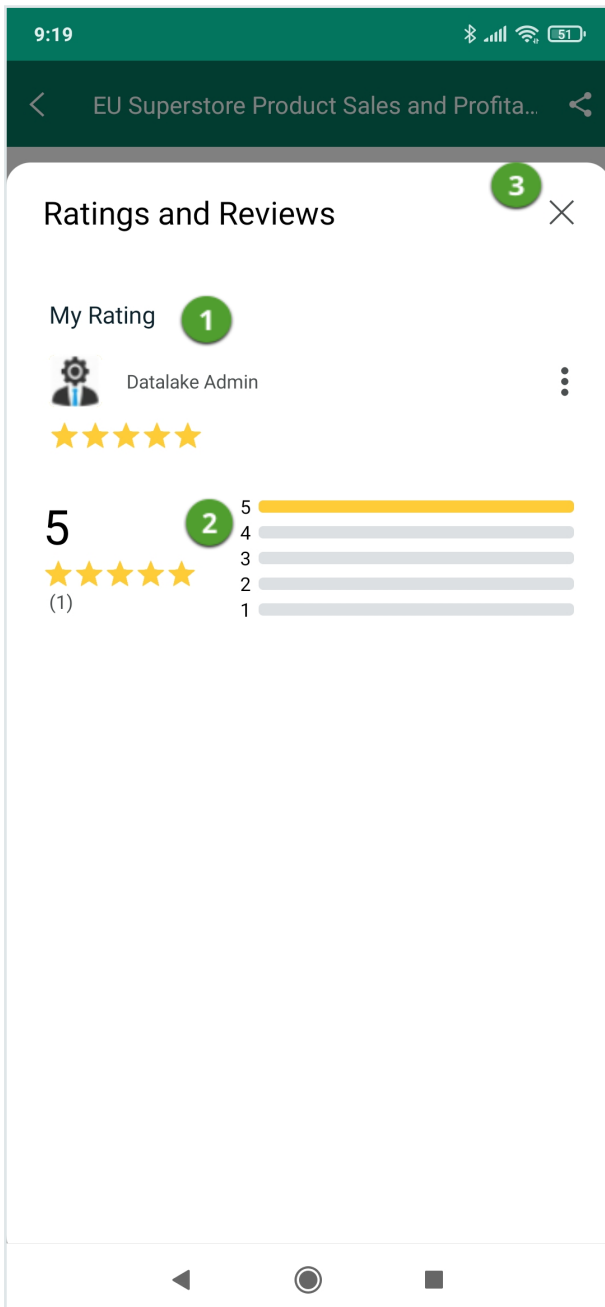
Permission	With this resource permission, you can...
Rating > Add	<ul style="list-style-type: none">• Rate any asset of an asset type for which the feature is enabled.• Edit or delete your own ratings.
Rating > Modify	<ul style="list-style-type: none">• Edit other users' ratings.
Rating > Remove	<ul style="list-style-type: none">• Delete other users' ratings.



View ratings

If ratings are enabled for an asset type, the overall rating of an asset is shown on the asset page of that asset type.

Tap the rating to open the details of the rating and to [add](#), [edit](#) or [delete](#) your rating.



No.	Description
1	Your rating and review.
2	The average of all user ratings for that asset and total number of ratings. A horizontal bar chart showing the distribution of ratings.
3	Close the ratings and review page.

Rate an asset

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

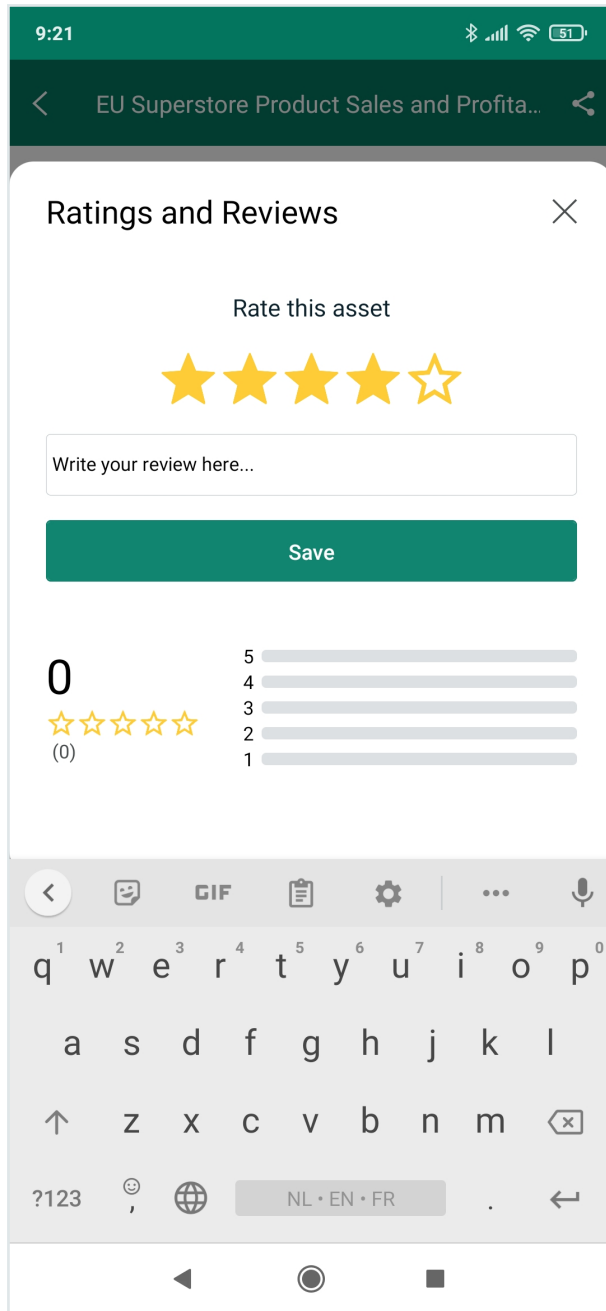
You can [edit](#) or [delete](#) your ratings at any time.

Steps

1. Open the asset page of the asset that you want to rate.
2. On the **OVERVIEW** tab, tap the **Ratings** section.
 - » The Ratings and Reviews page opens.
3. Tap the star that corresponds most closely to your opinion of the quality level of the asset.

The rating range is from one to five stars, with five representing the highest level of qual-

ity and one representing the lowest.



4. Optionally, enter a review of the asset in the text field.


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

5. Click **Save**.
 - » The average user rating is recalculated.

Edit your ratings

You can edit or delete the ratings you've given if, for example, your opinion of the quality of an asset changes. It doesn't matter whether the rating has been given in Collibra Data Intelligence Cloud or in the Collibra for Mobile app.

Steps


1. Open the asset page of the asset for which you want to edit your rating.
2. On the **OVERVIEW** tab, tap the **Ratings** section.
 - » The Ratings and Reviews page opens.
3. At the right side of the rating that you want to edit, tap  and tap **Edit**.
4. Edit your rating and review.
5. Click **Save**
 - » The average user rating is recalculated.

Delete your ratings

If, for any reason, your opinion of the quality of an asset changes, you can [edit](#) or delete the ratings you've given, at any time.

Steps

1. Open the asset page of the asset for which you want to delete your rating.
2. On the **OVERVIEW** tab, tap the **Ratings** section.
 - » The Ratings and Reviews page opens.

3. At the right side of the rating that you want to delete, tap  and tap **Delete**.
4. Click **DELETE**, to confirm.
 - » The average user rating is recalculated.

Working with workflows

A workflow in Collibra Data Intelligence Cloud is an automated series of actions that produces a specified outcome. In the progression of a workflow, Collibra users may be required to complete tasks.

Workflows are essential for collaborating on assets and automating processes.

In Collibra for Mobile, you can start workflows and complete tasks that are assigned to you. Note that Collibra for Mobile retrieves all workflow information from the Collibra environment and that it as such respects roles, permissions, asset types, ... as defined in Collibra.

This section covers how to work with workflows and tasks.

Starting workflows	36
Working with tasks	39
Tasks with forms	42
Multi-step workflow	43

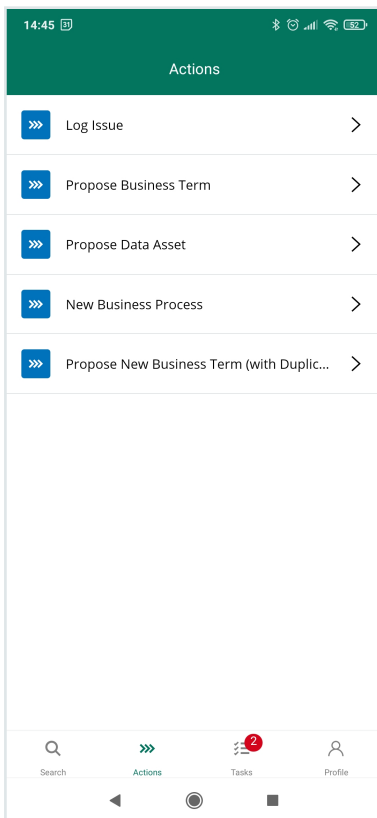
Starting workflows

In Collibra for Desktop, there are several ways to start a workflow.

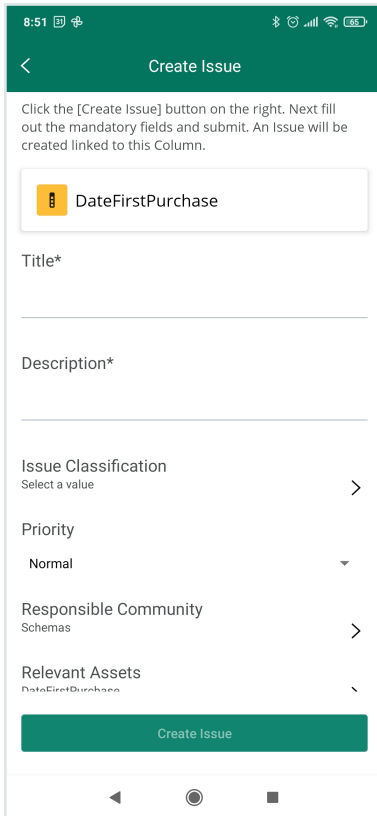
Starting workflows from the navigation bar

The following image shows the designated **Actions** section in the navigation bar.

Note The list of workflows that are available in the **Actions** section is defined in [Collibra Console](#).



Tap a workflow to start it and fill out the necessary fields to complete the first step of the workflow.

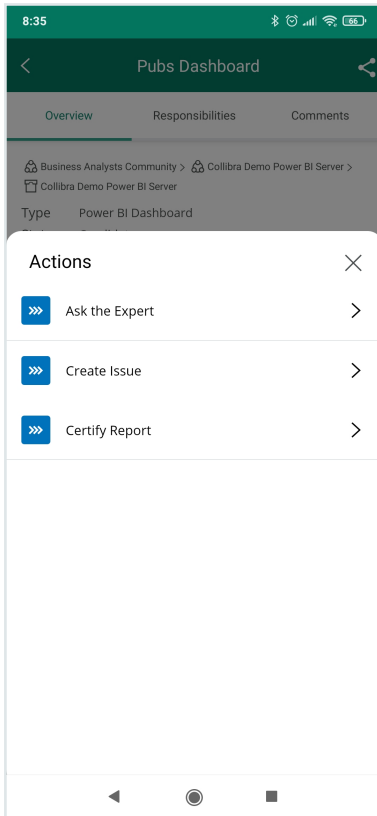


Starting actions from an asset page

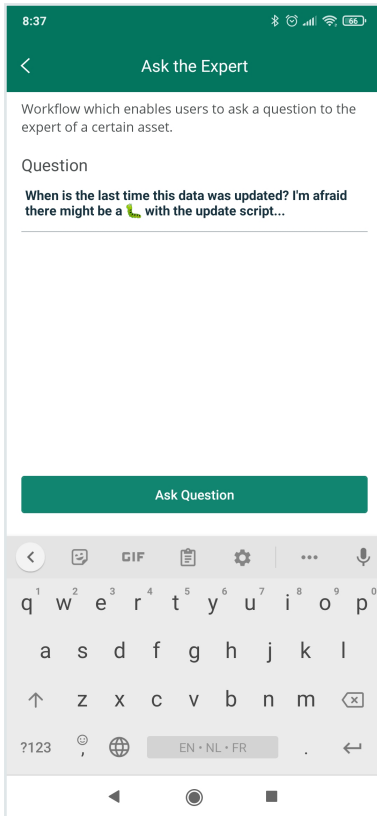
Each asset page has an **Actions** button to initiate workflows. When you tap this button, a menu expands from the bottom of the app.

Note The list of workflows that are available on an asset page is defined in [Collibra Console](#).

Chapter 9




Tap an action to select it. Fill out the necessary fields to proceed with the workflow.

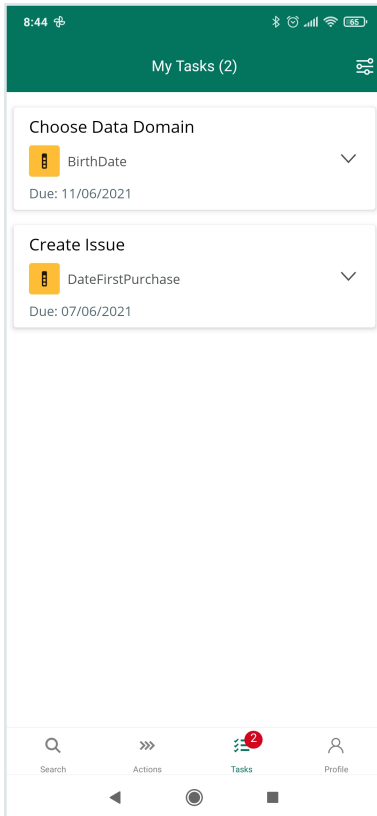


Working with tasks

In the progression of a workflow, Collibra you might be required to complete tasks. You can complete these tasks via Collibra Data Intelligence Cloud or Collibra for Mobile.

Tip You can receive [push notifications](#) when tasks are assigned to you.

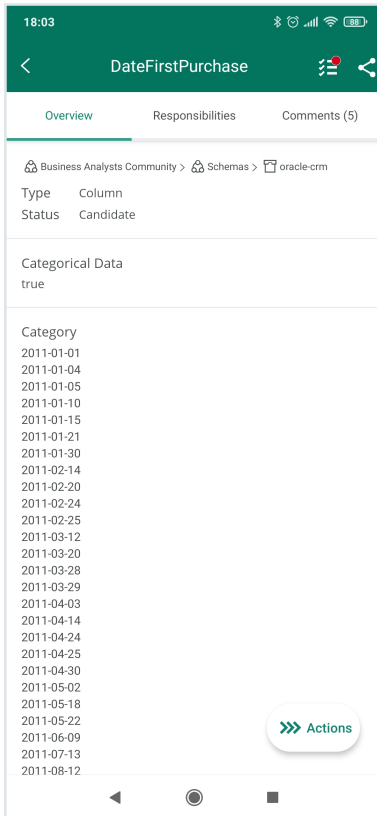
All tasks that are assigned to you are shown in the Tasks section in the navigation bar. On the My Tasks page, you can use the  button to sort the tasks by due date or task type.



When you click a task, the details of the task are shown. The task details vary depending on the task type and workflow.

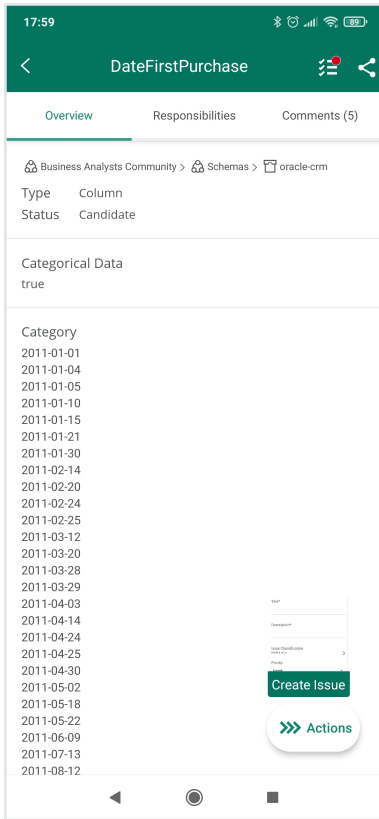
Pending tasks on an asset page

If you open an asset page with a pending task, the task icon (☰) is shown in the header of the task page. Tap the icon to open the task. If there are multiple pending tasks, the list of tasks appear. If there is only one task, the task opens immediately.



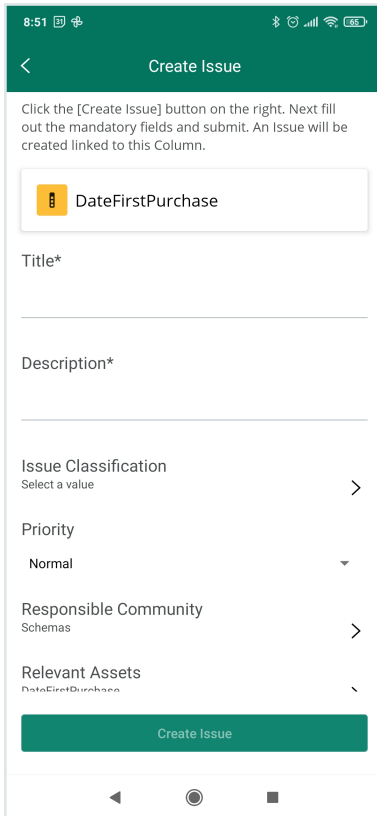
Task shown picture-in-picture

If you open a task via an asset page and you tap the back button (<), you return to the asset page and the task is shown picture-in-picture.



Tasks with forms

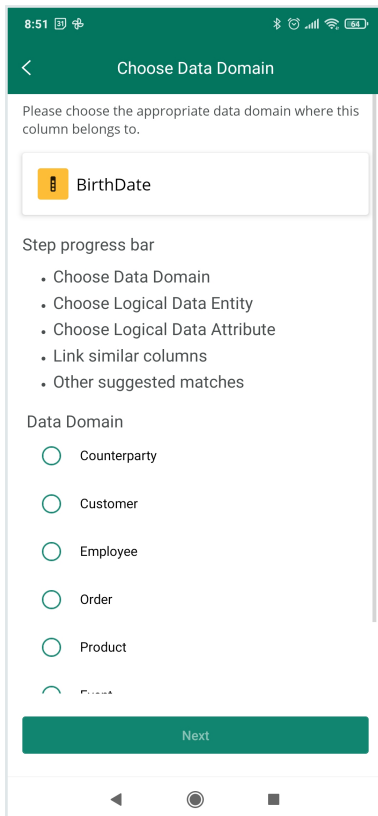
The following image shows a workflow form when you opened a task via the **Tasks** section in the navigation bar.



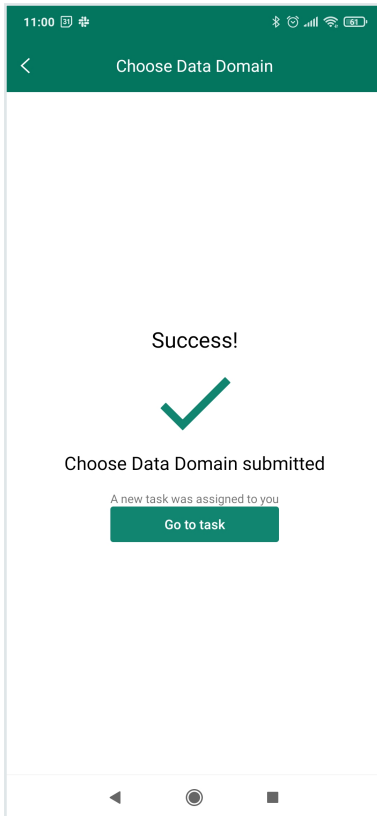
Values that you enter in the form are immediately stored in memory. You won't have to reenter any of the values if you navigate away and back to the task.

Multi-step workflow

As shown in the following image, you are prompted to assign a domain type to an asset. The **Step progress bar** section identifies the various steps in the workflow.



When you successfully complete a task, a success message is shown. If the next task in the workflow is also assigned to you, you can immediately open the task. If you choose not to, the task appears in the task list, which shows the active workflow step.



Profile

The profile page contains all of the options you need to manage your Collibra for Mobile settings, access documentation and support resources, and completely log out of the app.

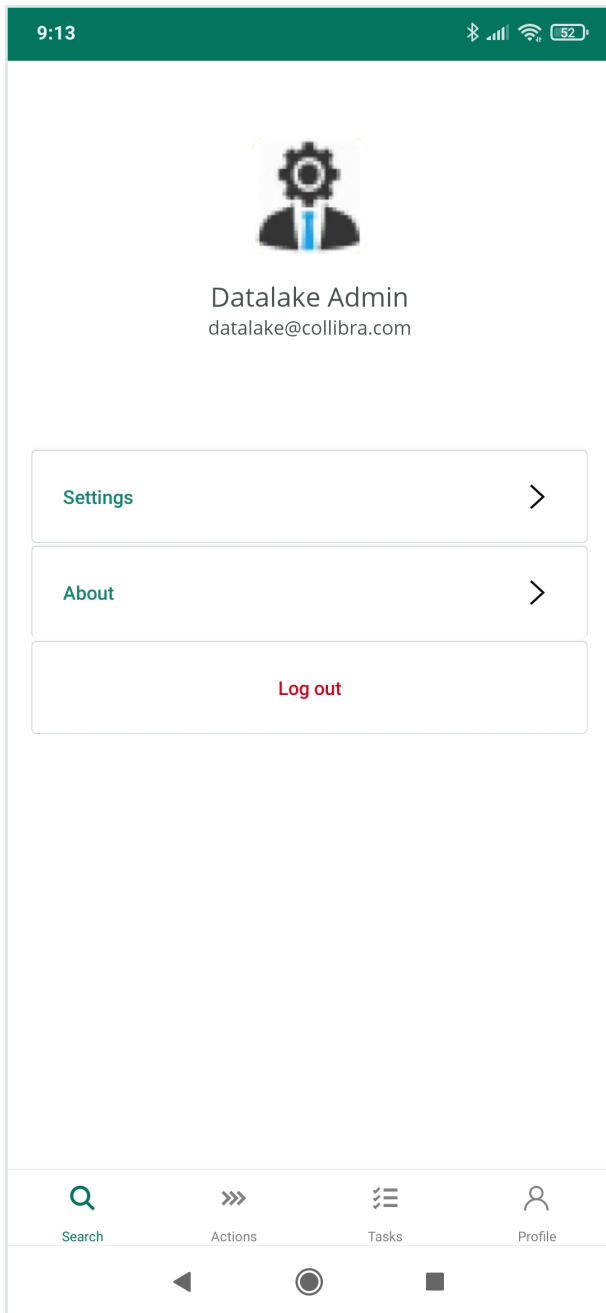
Open the Profile page	47
About	48
Settings	50

Open the Profile page

In the bottom navigation bar, tap on the **Profile**  icon.

» The profile page opens. Here, you can access [Settings](#), [About](#) and [Log out](#).



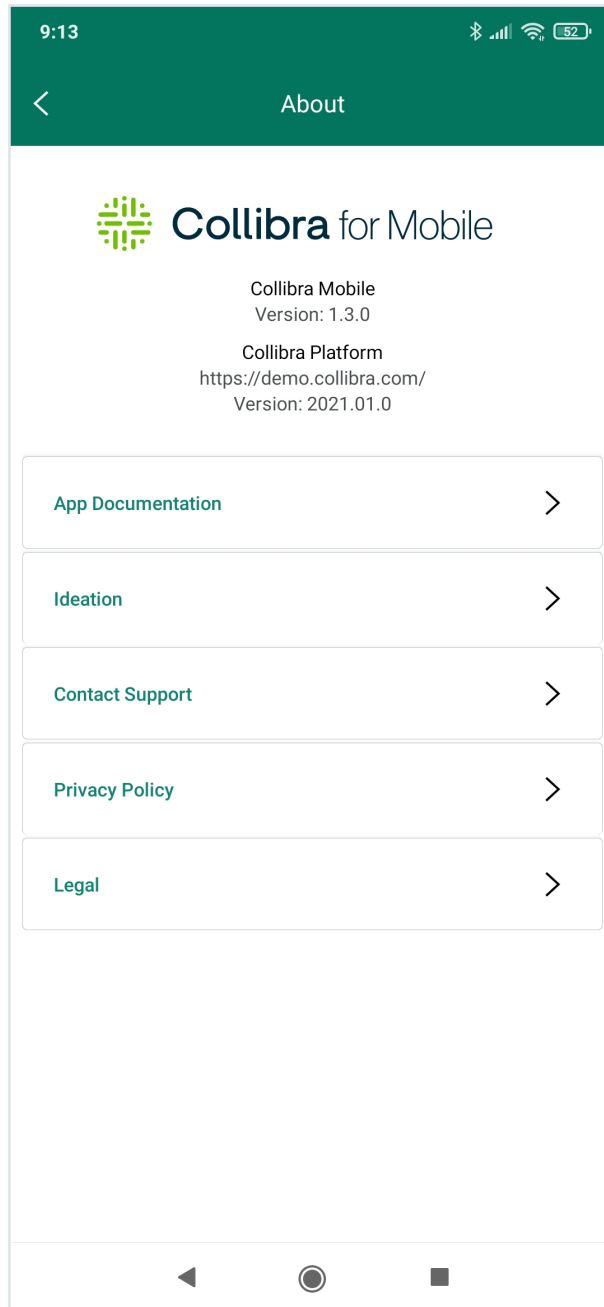


About

The About page shows basic details about your Collibra for Mobile installation and gives you access to additional documentation and support options.

Open the About page

1. Tap on the **Profile**  icon in the bottom navigation bar, and then tap **About**.



2. Tap on any of the following pages.

Setting	Description
App Documentation	Access the HTML and PDF user guides and documentation for Collibra for Mobile.
Ideation	Submit a feature request on the Collibra Ideation platform.
Contact Support	Submit a ticket to our Collibra Customer Support team.
Privacy Policy	Read the latest version of the Collibra privacy policy.
Legal	Read the Collibra legal disclaimer.

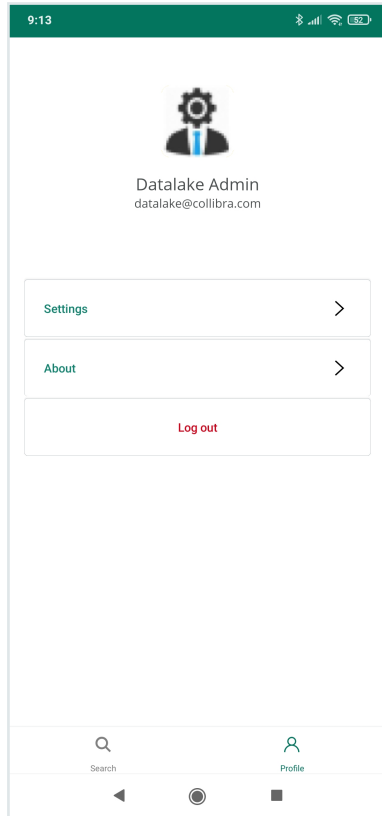
Settings

In the [Collibra for Mobile settings](#), you can edit options such as tracking and filters.

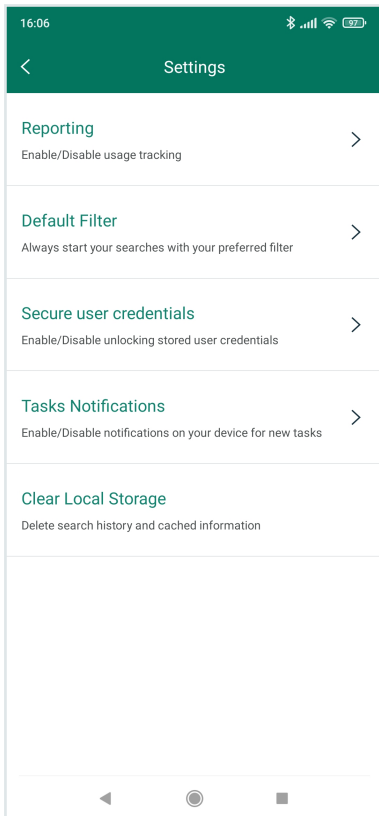
Via [Collibra Console](#) of the Collibra Data Intelligence Cloud environment, you can also edit settings. These settings will overrule the settings that are set in Collibra for Mobile.

Settings in Collibra for Mobile

1. Tap on the **Profile** icon (👤) in the bottom navigation bar, and then tap **Settings**.



2. Tap on any of the following options to open the page.



Setting	Description
Reporting	<p>The option to track and share product usage data with Collibra. If enabled, you cannot disable it in Collibra for Mobile.</p> <p>The data that is gathered by Collibra is anonymized.</p> <p>Also, if this option is enabled and the app crashes, a crash report is automatically sent to Collibra.</p>
Default filter	<p>The filter that is applied, by default, to your search results.</p> <p>A default filter that has been set via Collibra Console overrules the filter set in the app.</p>

Setting	Description
Secure user credentials	The option to store your credentials securely on your device. If enabled, Collibra for Mobile stores your user credentials encrypted on your device. You need to use biometric authentication or your device's authentication code or pattern to decrypt your credentials so that you can sign in to Collibra.
Task Notifications	The option to receive push notifications when tasks are assigned to you. If you enable this option, ensure that your mobile operating system does not block notifications for the Collibra for Mobile application.
Clear Local Storage	Deletes your search history and cached information from the app.

Settings in Collibra Console

1. Open Collibra Console of your Collibra environment.
2. In the tab pane, click the **Data Governance Center** service of your environment.
3. Click **Configuration**.
4. Click **Edit configuration**.
5. Scroll to the **Everywhere Mobile configuration** section.

31 Everywhere Mobile configuration ▾

Everywhere Mobile

31.a Default search filter	Select a default filter to apply on the search results.
31.b Custom Search box placeholder Search in Collibra	Set a new name in the search field to replace "Collibra".
31.c Enable Workflows ✘	Allow the use of workflows inside the mobile application.
31.d Global workflows	The list of workflows that will be available in the app's main menu. Enter the UUID of the workflow.
31.e Asset workflow	The list of workflows that will be available on the asset page. Enter the UUID of the workflow.
31.f No search result workflows	The list of workflows that will be available if there are no results. Enter the UUID of the workflow.

6. Edit the options:

Option	Description
Default search filter	<p>The filter that is applied, by default, to your search results. This must be the UUID of the filter.</p> <p>This filter overrules any search filter that is set in the app.</p> <p>To find the UUID, open the Collibra environment and click in the Search box. Click the name of a search filter. In the address bar you will see the UUID of the filter.</p>
Custom Search box placeholder	The text that is shown in the search box of Collibra for Mobile before a user enters search text.
Enable Workflows	<p>Option to enable workflows in Collibra for Mobile.</p> <p>This allows you to complete tasks or start a workflow in the app. The available workflows depend on the ones that you add to the Global workflows and Asset workflow configuration.</p>
Global workflows	<p>The list of workflows that is available in the app's main menu.</p> <p>Enter the UUIDs of the workflows. An example workflow could be "Create issue".</p>
Asset workflow	<p>The list of workflows that is available on an asset page in the app.</p> <p>Enter the UUIDs of the workflows. An example workflow could be "Ask the expert".</p>
No search result workflows	<p>The workflows that are available if there are no search results found.</p> <p>Enter the UUIDs of the workflows. An example workflow could be "Propose new business term".</p>

7. Click **Save all**.