



Collibra On-the-Go for Excel
User Guide

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What is Collibra On-the-Go for Excel?

Collibra On-the-Go for Excel is an add-in that brings some of the Collibra Data Governance Center functionality to your Microsoft Excel user experience.

The add-in enables you to:

- [Search for resources](#) in your Collibra DGC.
- [Import views](#) from Collibra DGC.
- Manage the imported data and update your [linked views](#) with a single click.



Installing Collibra On-the-Go for Excel

In this section we describe how to install Collibra On-the-Go for Excel.

Compatibility

Collibra On-the-Go for Excel is compatible with the following versions of Microsoft Office:

- Office 365
- Office 2016 for Mac
- Office 2016 for Windows
- Office Online

Note To use the Collibra On-the-Go for Excel add-in and ensure a secure connection with your external data and services, you must use a secure protocol, such as HTTPS.



Let's get started

The installation process is a three-step process:

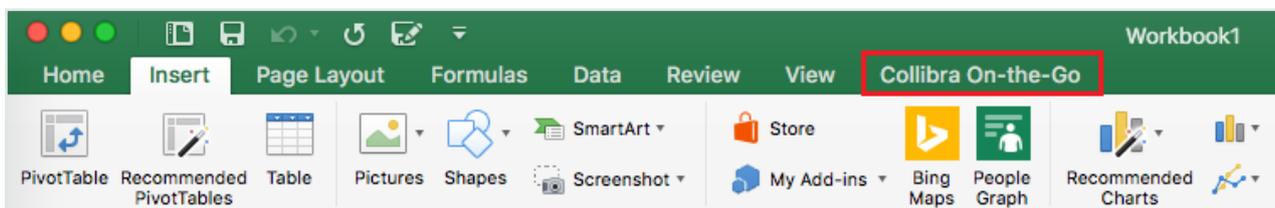
1. Download the Collibra On-the-Go for Excel add-in manifest file.
2. Upload the add-in into Microsoft Excel.
3. Launch the add-in in Excel.

One or all of these steps may have already been carried out by your administrator or IT department.

- I know that none of the installation steps have been carried out.
See [Download the Collibra On-the-Go for Excel add-in manifest file](#).
- I'm not sure which, if any, of the installation steps have been carried out.
See [Determine which of the installation steps have been carried out](#).

Determine which of the installation steps have been carried out

Open Microsoft Excel. Do you have the **Collibra On-the-Go** tab?



- **Yes** – there's nothing else to do. You're ready to use Collibra On-the-Go for Excel.
- **No** – see [I don't have the Collibra On-the-Go tab](#).

I don't have the Collibra On-the-Go tab

If you don't have the **Collibra On-the-Go** tab, check if the add-in has been uploaded to Excel.

Steps

Step	What to do									
1	Open Excel.									
2	<table border="1"> <thead> <tr> <th data-bbox="288 465 523 539">I'm using...</th> <th data-bbox="523 465 1430 539">What to do</th> </tr> </thead> <tbody> <tr> <td data-bbox="288 539 523 651">Office for Mac</td> <td data-bbox="523 539 1430 651">In the Insert tab, click Add-ins, and then click (missing or bad snippet) next to My Add-ins.</td> </tr> <tr> <td data-bbox="288 651 523 1144">Office for Windows</td> <td data-bbox="523 651 1430 1144"> In the Insert tab, click Add-ins: <ul style="list-style-type: none"> • If your administrator uploaded the add-in, it will appear under the My Add-ins tab. • If you uploaded the add-in, it will appear under the Shared Folder tab.  </td> </tr> <tr> <td data-bbox="288 1144 523 1525">Office Online</td> <td data-bbox="523 1144 1430 1525"> In the Insert tab, click Add-ins: <ul style="list-style-type: none"> • If your administrator uploaded the add-in, select the Admin Managed tab, and then click Upload My Add-in. • If you uploaded the add-in, select the My Add-ins tab, and then click Upload My Add-in.  </td> </tr> </tbody> </table>	I'm using...	What to do	Office for Mac	In the Insert tab, click Add-ins , and then click (missing or bad snippet) next to My Add-ins .	Office for Windows	In the Insert tab, click Add-ins : <ul style="list-style-type: none"> • If your administrator uploaded the add-in, it will appear under the My Add-ins tab. • If you uploaded the add-in, it will appear under the Shared Folder tab. 	Office Online	In the Insert tab, click Add-ins : <ul style="list-style-type: none"> • If your administrator uploaded the add-in, select the Admin Managed tab, and then click Upload My Add-in. • If you uploaded the add-in, select the My Add-ins tab, and then click Upload My Add-in. 	
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3	<p>Do you see the Collibra On-the-Go add-in?</p> <ul style="list-style-type: none"> • Yes – click the add-in. <ul style="list-style-type: none"> » The Collibra On-the-Go tab is displayed and you're ready to use Collibra On-the-Go for Excel. • No – Upload the Collibra On-the-Go for Excel add-in to Excel. 									

Download the Collibra On-the-Go for Excel add-in manifest file

To download the add-in manifest file, enter the following URL in your browser and save the file to a known location: <https://<your DGC environment>/otg/office/index.html>

Note The add-in installation file is linked to a specific instance of Collibra Data Governance Center. That means that when you start using Collibra On-the-Go for Excel, the data you retrieve will come from that same instance of your Collibra DGC.

What's next?

- [Upload the Collibra On-the-Go add-in into Microsoft Excel](#)

Upload the Collibra On-the-Go for Excel add-in to Microsoft Excel

After you or someone in your organization has [downloaded Collibra On-the-Go for Excel the add-in manifest file](#), you need to upload the add-in to Excel.

Upload the add-in

The following table includes external links to detailed instructions for uploading the add-in to Excel.

You are using...	Do you have access to the Office 365 admin center?	How to upload the add-in
Office 365	Yes	See Publish an Office Add-in via Centralized Deployment .
	No	You need access to the Office 365 admin center to access the Collibra On-the-Go add-in after downloading it from your Collibra Data Governance Center. Ask your Collibra DGC administrator or IT department for help with this.
Office for Windows 2016	Not applicable	See Sideload Office Add-ins for testing .
Office for Mac 2016	Not applicable	See Sideload an Add-in on Office for Mac .
Office Online	Not applicable	See Sideload Office Add-ins in Office Online for testing .

What's next?

- [Launch the Collibra On-the-Go for Excel add-in in Microsoft Excel](#)

Launch the Collibra On-the-Go for Excel add-in in Microsoft Excel

To start using Collibra On-the-Go for Excel, you need to launch the add-in in Excel.

Prerequisites

1. You have [downloaded](#) the Collibra On-the-Go for Excel add-in manifest file.
2. You have [uploaded](#) the Collibra On-the-Go for Excel add-in to Microsoft Excel.

Steps

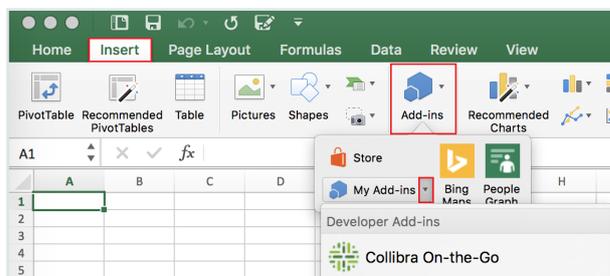
Follow the appropriate steps, based on your operating system.

Note In the steps below, we refer to the **Insert** tab in the ribbon.

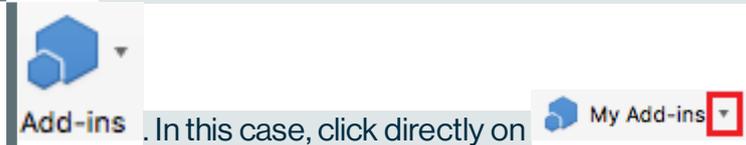


Office for Mac

1. Open a new or existing workbook in Excel.
2. In the **Insert** tab, click **Add-ins**, and then click (missing or bad snippet) next to **My Add-ins**.



Note Depending on the size of your Excel window, you may not see this button:



3. Click Collibra On-the-Go.
 - » The Collibra On-the-Go tab appears in Excel.

Office for Windows

1. Open a new or existing workbook in Excel.
2. In the **Insert** tab, click **Add-ins**, and then click:
 - The **My Add-ins** tab if your administrator uploaded the add-in to Excel.
 - The **Shared Folder** if you uploaded the add-in to Excel.



3. Click **Collibra On-the-Go**.
 - » The **Collibra On-the-Go** tab appears in Excel.

Office Online

1. Open a new or existing workbook in Excel.
2. In the **Insert** tab, click **Add-ins**, and then click:
 - The **Admin Managed** tab if your administrator uploaded the add-in to Excel.
 - The **My Add-ins** if you uploaded the add-in to Excel.



3. Click **Upload My Add-in**.
4. Click **Collibra On-the-Go**.
 - » The **Collibra On-the-Go** tab appears in Excel.

Signing in

You will be prompted to sign in at the first action you take in the Collibra On-the-Go tab. To sign in, enter your Collibra Data Governance Center credentials.

Hello

Welcome to Collibra On-the-Go for Excel, a companion add-in to your Collibra Data Governance Center.

Username
Admin

Password

Sign In

Note Collibra On-the-Go for Excel does not currently support sign on via single sign-on authentication services.

Working with Collibra On-the-Go for Excel

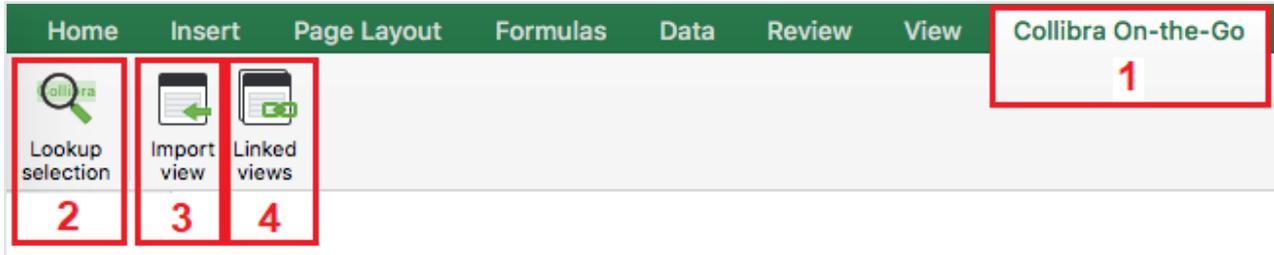
In this section, we describe how to use the Collibra On-the-Go for Excel features.

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Collibra On-the-Go tab in Excel

Collibra On-the-Go for Excel appears as a new tab in your menu bar.



No.	Element name	Description
1	Collibra On-the-Go tab	Provides access to Collibra On-the-Go for Excel features.
2	Lookup selection	Enables you to search for resources in your Collibra Data Governance Center and show the results in Excel.
3	Import view	Enables you to import views from your Collibra DGC into Microsoft Excel.
4	Linked views	Enables you to manage your imported views .

Look up a resource

The Lookup selection feature enables you to search for resources (meaning assets, communities or domains) in your Collibra Data Governance Center and show the results in Excel.

Note You can use wildcards to aid your search. See [Wildcards and symbols for searching](#).

Prerequisites

- You have an Excel file open.

Steps

1. In the Collibra On-the-Go tab, click **Lookup selection**.
 - » The search field appears.
2. Enter a query and then press Enter on your keyboard.
OR
Click on the cell that contains the term you want to look up.

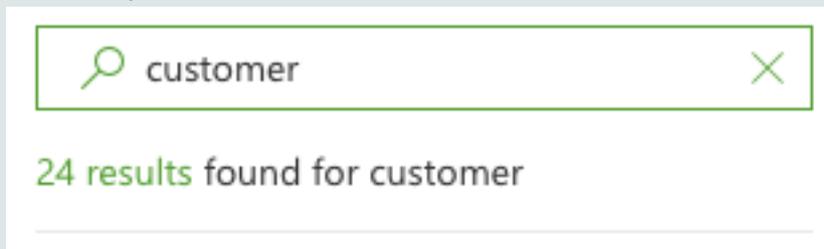
What's next?

If the term you are searching for exists as a resource in your Collibra DGC, every instance of the term is shown as a result in the search panel.

For every result, you can see:

- the resource name.
- the resource definition or description.
- the breadcrumb for the resource's location in your Collibra DGC.
- option to [open an asset page in Collibra DGC](#).

Tip You can click on the number of search results to launch the search and see the results in your Collibra DGC.



Open an asset page from your search results

If a search for an asset in your Collibra Data Governance Center yields one or more results, you can open the resulting asset page(s) directly in Collibra DGC from within Excel, by clicking **Open in browser** next to the desired asset(s).

Importing views from your Collibra Data Governance Center

When you [import a view](#), you create a link to the source view in your Collibra Data Governance Center. You can then work with the data in Microsoft Excel for your reporting needs.

You can search for a view in your Collibra DGC:

- By application, for example, Business Glossary, Reference Data or Catalog.
- By organization, meaning a community or domain.
- By the view's URL.

You can also import the global view. The global view includes every asset in your organization's Collibra DGC instance, independent of community, domain or asset type. For more information on the global view, refer to the Collibra Data Governance Center User Guide.

Note

- You can only import a view from your Collibra DGC, meaning you cannot export the data back into Collibra DGC.
- It is not possible to import:
 - Views for which the hierarchy feature has been enabled in Collibra DGC.
 - Working views, meaning a view that has been edited in Collibra DGC and not yet saved. Once the edited view has been saved or reverted to the original view, you can import it.

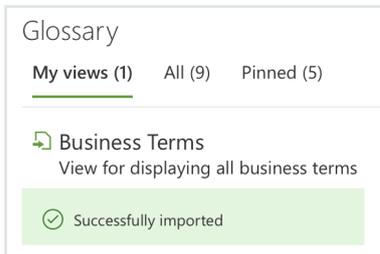
Import a view

You can import views and then work with the data in Microsoft Excel for your reporting needs.

Steps

1. In the Collibra On-the-Go tab, click **Import view**.
 - » The Import view pane appears.
2. Do one of the following:
 - Select a view based on the application to which it belongs.
 - Search for a view by organization or the view's URL.
 - Select a global view.

3. When you've found the view you want to import, click on it.
 - » You are notified that the view has been successfully imported. The view appears as a new worksheet in Excel and also appears in your [linked views](#).



Wildcards and symbols for searching

If you want to find something, but are not quite sure of the name, you can use wildcards.

You can use the following wildcards:

Wildcard	Description
?	Replaces any single character. Example: by typing <i>?ar</i> , you can find Car, Bar, Tar, and so on.
*	Replaces any string of characters. Example: by typing <i>C*r</i> , you can find Car, Crosshair, and so on.
~	Represents a fuzzy search, words with spelling similar to the search query. Example: by typing <i>Owi~</i> , you can find Ozi, Zowie, Bowie, and so on.
!	Excludes words. Example: by typing <i>!David Bowie</i> , you can find Lester Bowie, Joe Bowie, and so on.

If you want to find a piece of text, you can use double quotation marks.

Example: by typing *"Customer account"* you can find 'This is a customer account', but not 'New Customer' or 'Account'.

Linked views

Linked views enable you to manage your [imported views](#) in a single click.

Refresh linked views

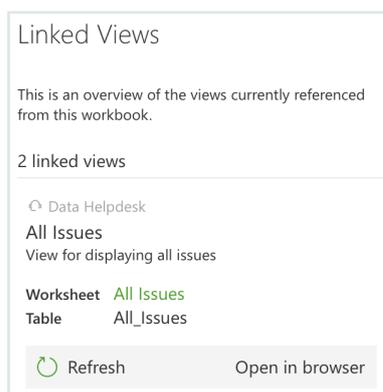
You can update the views that you've imported with any changes that have been made to the respective source views in Collibra Data Governance Center.

Prerequisites

- You have [imported](#) one or more views from Collibra DGC into Microsoft Excel.

Steps

1. In the Collibra On-the-Go tab, click **Linked views**.
 - » The Linked view pane appears.
2. To refresh a specific view, click  **Refresh** underneath the view you want to refresh, in the **Linked view** panel.



Open a source view in Collibra Data Governance Center from within Excel

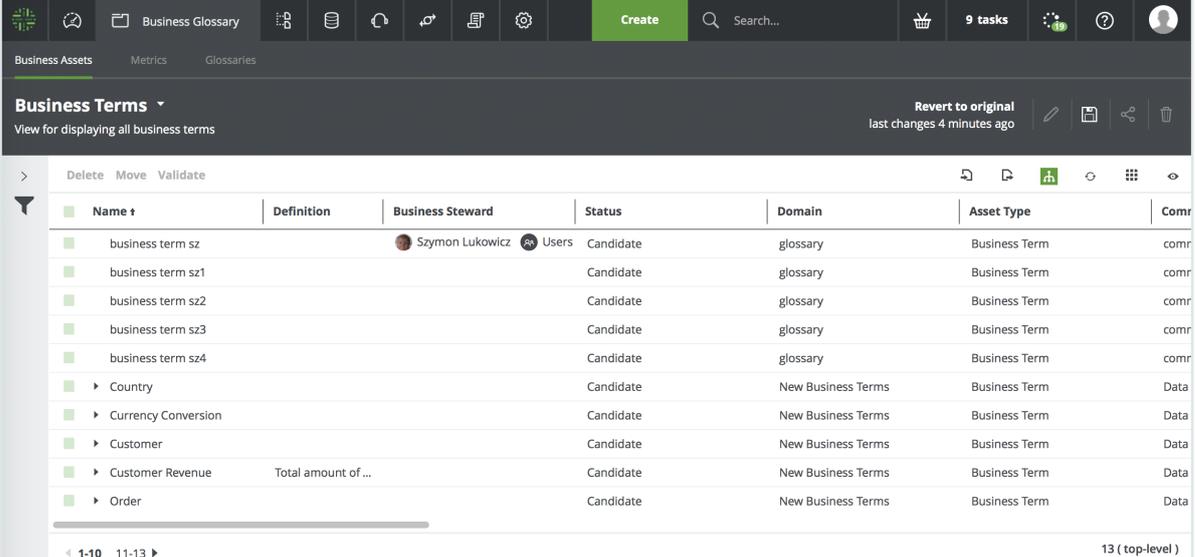
If you have imported a view, you can open the source view in a browser window directly from within Excel.

Prerequisites

- You have [imported](#) one or more views from Collibra DGC to Microsoft Excel.

Steps

- In the Collibra On-the-Go tab, click **Linked views**.
 - » The Linked view pane appears.
- Click **Open in browser** under the view for which you want to open the source view in Collibra DGC.
 - » The source view in Collibra DGC opens in a browser window.



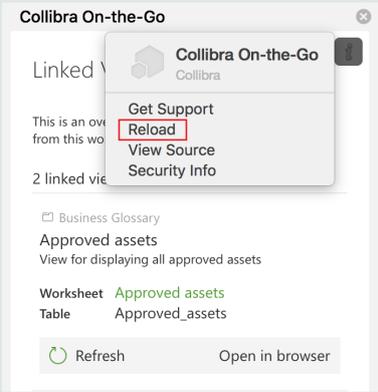
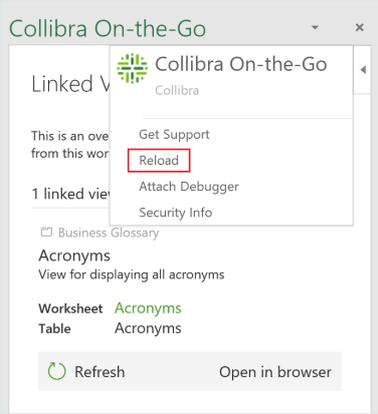
The screenshot shows the Collibra Data Governance Center interface. At the top, there is a navigation bar with tabs for 'Business Assets', 'Metrics', and 'Glossaries'. Below this, a header for 'Business Terms' is visible, along with a 'Revert to original' button and a timestamp 'last changes 4 minutes ago'. The main content area displays a table with the following columns: Name, Definition, Business Steward, Status, Domain, Asset Type, and Comr. The table contains several rows of business terms, including 'business term sz', 'Country', 'Currency Conversion', 'Customer', 'Customer Revenue', and 'Order'. The 'Business Steward' column for the first row shows 'Szymon Lukowicz' and 'Users'. The 'Status' column for all rows shows 'Candidate'. The 'Domain' column shows 'glossary' for the first five rows and 'New Business Terms' for the last five rows. The 'Asset Type' column shows 'Business Term' for all rows. The 'Comr' column shows 'comr' for the first five rows and 'Data' for the last five rows. At the bottom of the table, there is a pagination bar showing '1-10' and '11-13', and a total count of '13 (top-level)'.

Name	Definition	Business Steward	Status	Domain	Asset Type	Comr
business term sz		Szymon Lukowicz Users	Candidate	glossary	Business Term	comr
business term sz1			Candidate	glossary	Business Term	comr
business term sz2			Candidate	glossary	Business Term	comr
business term sz3			Candidate	glossary	Business Term	comr
business term sz4			Candidate	glossary	Business Term	comr
Country			Candidate	New Business Terms	Business Term	Data
Currency Conversion			Candidate	New Business Terms	Business Term	Data
Customer			Candidate	New Business Terms	Business Term	Data
Customer Revenue	Total amount of ...		Candidate	New Business Terms	Business Term	Data
Order			Candidate	New Business Terms	Business Term	Data

Known issues

The following items are known issues that will be fixed in the next version of Collibra On-the-Go for Excel.

Context	Known issue
<p>You are working with data in Excel and the Search panel in the Collibra On-the-Go for Excel tab is open.</p>	<p>If you click on a cell, a search is launched for the contents of the cell, in your Collibra Data Governance Center. If you then click on another cell, a search should automatically be launched for the contents in the new cell; however, the new search is not launched if you are using Office 2016 for Windows.</p>
<p>You are working in a linked view, you have entered data in a cell outside of the table object in your linked view, and you want to refresh the linked view.</p>	<p>Example: you have imported a view that has 100 rows, and you have entered data in one or more cells in row 105. Sometime after you imported the view, 10 new assets were added in your Collibra DGC, so that the source view now has 110 rows. If you now try to refresh the view, you might encounter problems and you might lose all of the data in your linked view.</p>

Context	Known issue
<p>The Linked view panel is open in the Collibra On-the-Go for Excel tab and you import a view.</p>	<p>The import is successful, but you have to manually reload the Linked view panel to see the view listed in your linked views.</p> <p>The following figures show you where to find the Reload link if you are using Office for Mac or Windows. If you are using Office Online, you can simply refresh the webpage.</p> <h3>Reload via Office 2016 for Mac</h3>  <h3>Reload via Office 2016 for Windows</h3> 

Glossary

A

Admin

A resource role; the administrator of a resource who can do everything in that resource, including assigning and removing roles.

Articulation score

Indication of how well an asset is defined according to the Articulation Calculator.

Asset

The fundamental building block for which to capture information; examples are: KPI, business term, code, data element and so on.

Asset type

The fundamental building block for which to capture information; examples are: KPI, business term, code, data element and so on.

Assignment

Determines the visibility of a feature in the GUI.

Attribute

A distinctive, indivisible piece of information (field) that can be assigned to an asset.

Attribute kind

The kind of information that an attribute type can be; text, binary choice, multiple selection.

Attribute type

Specifies what the attribute represents (definition, example, note, security classification, ...).

B

Business asset

An asset type related to a business model; terms, reports, KPIs.

C

Code list

A domain that can only contain code values and code sets.

Code set

A grouping of code values.

Code value

A specific code.

Community

A grouping of one or more users or user groups. A community owns one or more domains and sub-communities. A community represents the business context of an asset.

Corole

The reverse role in a fact type or relation type.

D

Data issue

A problem related to issue management; also referred to as issue.

Domain

A logical container for assets. An asset is unique in its domain. A domain is owned by exactly one community. A domain represents the logical context of an asset.

F

Fact type

A bidirectional relation between two assets in terms of role and corole.

G

Global role

A role that can only be assigned to a user and that determines who has access to which part of the Data Governance Center.

Glossary

A domain that can only contain business terms, KPIs and acronyms.

Governance asset

An asset type related to data governance; business rules, data rules, policies.

H

Head

The first asset or asset type of a relation between two assets or asset types.

M

Metamodel

The model as defined by default in the Data Governance Center Settings.

R

Reference data

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.

Relation type

A fact type between two asset types.

Resource

An asset, a domain or a community.

Resource role

A type of role that can be assigned to one or more resources.

Role

A grouping of rights and responsibilities that can be assigned to users or user groups.

S

Stakeholder

A resource role; a user who wants to be involved/notified and can only provide comments/reviews.

Steward

A resource role; a user who is responsible at the content level and can make all changes in a domain/community apart from assigning roles.

Subject matter expert (SME)

A resource role; a user who can be requested to provide feedback on changes.

T

Tail

The second asset or asset type of a relation between two assets or asset types.

Technology asset

An asset type related to technology; database, system.

U

User

An individual who has access to Collibra Data Governance Center.

User group

A grouping of users.

V

View

A selection of table elements in the GUI; can be saved and displayed locally.

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