



Collibra Everywhere for iOS
User Guide

Collibra Everywhere for iOS

User Guide

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

<https://community.collibra.com/docs/everywhere4ios/2.4>

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Collibra Everywhere for iOS

Collibra Everywhere for iOS is a mobile app for devices, running iOS, that enables you to work with Collibra Data Intelligence Cloud.

The app is currently available for iPhone 4S or newer, with iOS version 9.0 or newer, and it interfaces with Collibra 4.6.1 and 5.x.



Sign in to Collibra Everywhere for iOS

This section describes the sign-in and sign-out procedure to access and leave Collibra Everywhere for iOS.

In this chapter

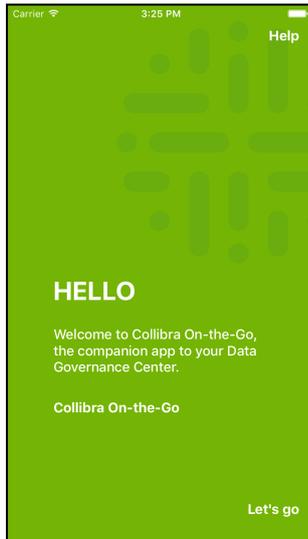
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First-time sign-in

Step 1

Open Collibra Everywhere for iOS on your device and tap **Let's go**.

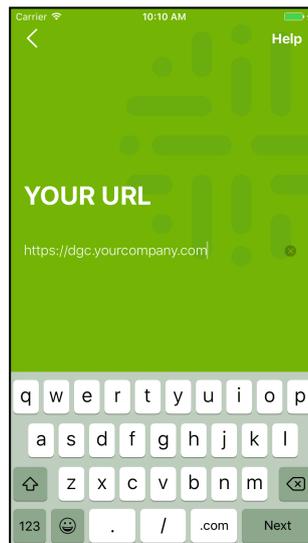


Step 2

Fill in the URL of your Collibra Data Intelligence Cloud environment and tap **Next**.

The system checks if the URL is a valid Collibra address.

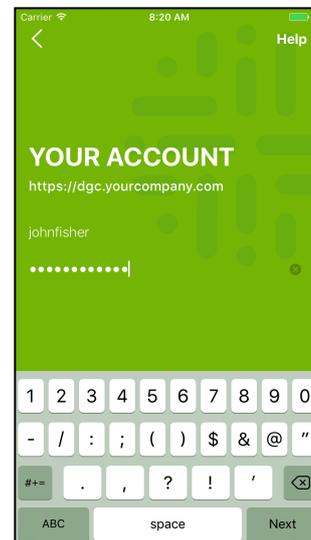
If the instance uses SSO, go to step 3 of [First-time sign-in with SSO](#).



Step 3

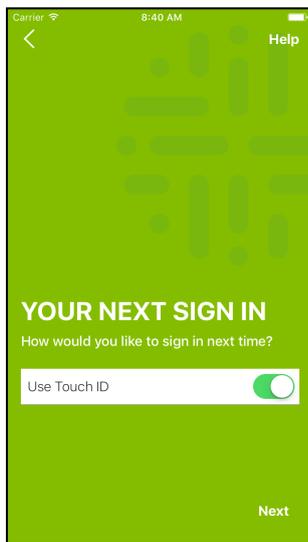
Fill in your Collibra credentials and tap **Next**.

If Touch ID is available, you go to Step 4, if your device doesn't have Touch ID, you go to Step 5, but then there is no Touch ID option.



Step 4

If Touch ID is available on your iPhone, it is by default selected. Tap **Next** if you want to use Touch ID, you then go to Step 6. Disable the option if you do not want to use Touch ID, then tap **Next** (Go to Step 5).

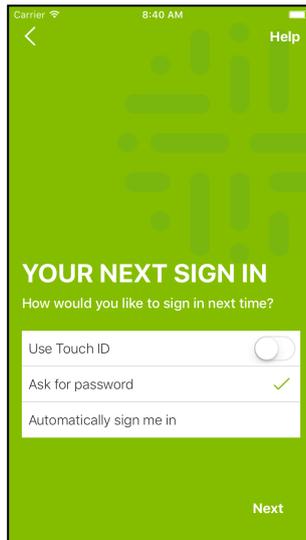


We recommend you to use Touch ID.

Tip You can always change the sign-in settings in the app settings.

Step 5

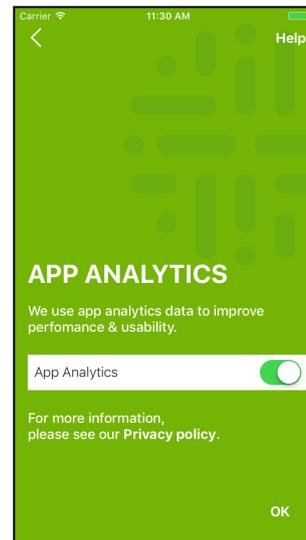
Select how you want to sign in from now on and tap **Next**. If your device has no Touch ID, the first option is not available.



Step 6

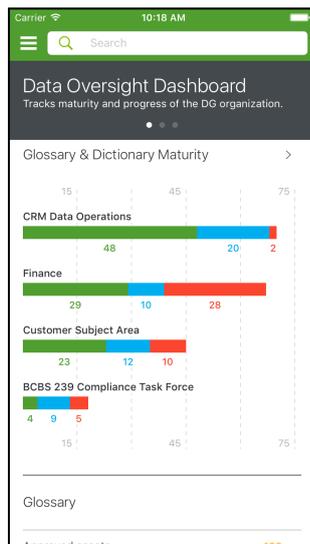
Indicate whether you want to send usage information to Collibra and tap **OK**. If enabled, information is gathered and sent to Collibra if the app stops responding.

You can enable or disable this option afterwards in the settings.



Result

You land on a dashboard. The settings you selected are stored for your next sign-in, but you can always change them in the app settings.

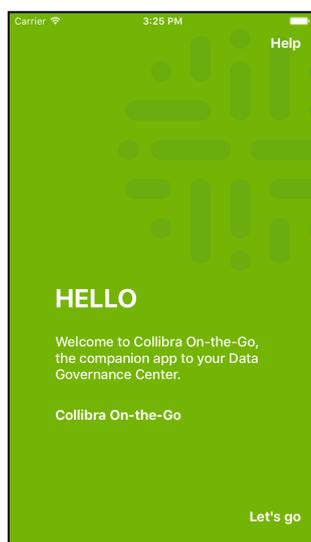


First-time sign-in with SSO

Note Your environment must be Collibra Data Intelligence Cloud 2020.11 or Collibra Data Governance Center 5.7.7 or newer. If you use Collibra Everywhere for iOS 2.3.x or older, you can still use SSO with older Collibra versions.

Step 1

Open Collibra Everywhere for iOS on your device and tap **Let's go**.

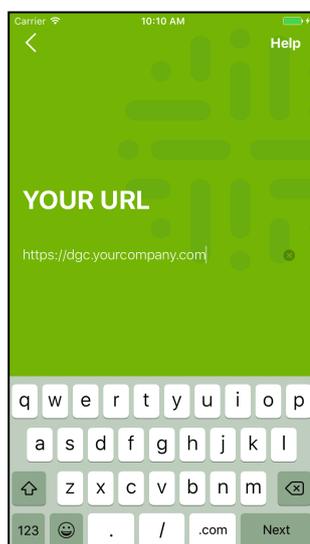


Step 2

Fill in the URL of your Collibra Data Intelligence Cloud environment and tap **Next**.

The system checks if the URL is a valid Collibra address.

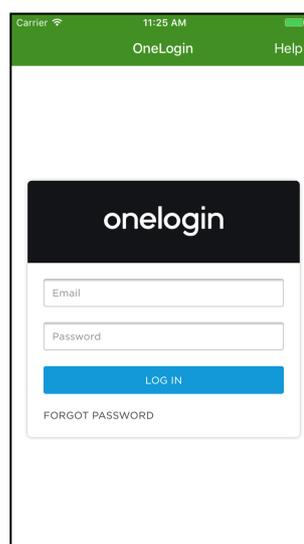
If the instance does not use SSO, go to step 3 of [First-time sign-in](#).



Step 3

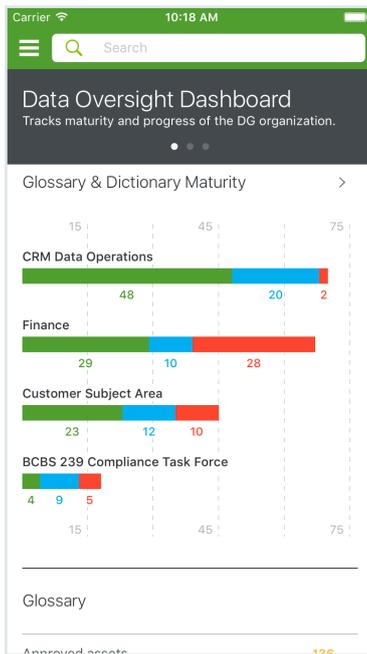
Follow your company's sign in procedure.

For example, with OneLogin, fill in your SSO credentials and tap **LOG IN**.



Result

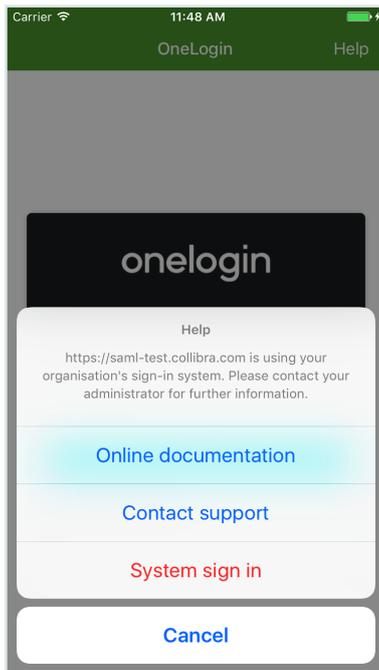
You land on a dashboard. The settings you selected are stored for your next sign-in, but you can always change them in the app settings.



Switch from SSO to system sign-in

When Collibra is configured with SSO to sign in, you can still switch to the Collibra sign-in system.

To switch to the Collibra sign-in system, tap **Help** in the SSO window, then tap **System sign in** in the context menu.

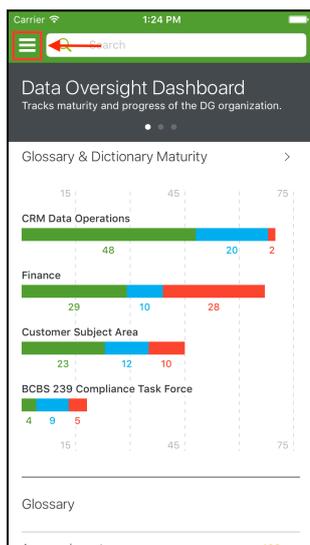


Sign out

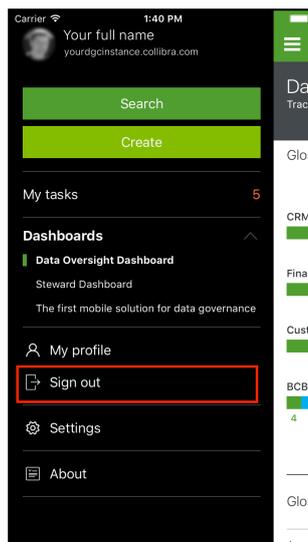
To sign out from Collibra Everywhere for iOS, follow these steps:

Step 1

In the upper left corner, tap  Tap **Sign out**.

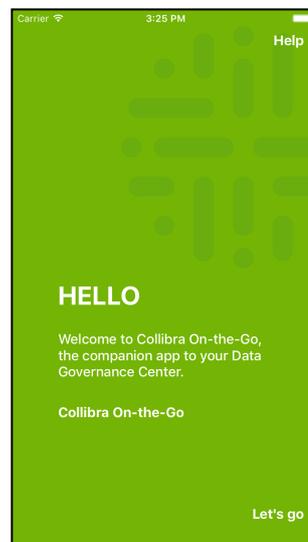


Step 2



Result

You return to the Collibra Everywhere for iOS welcome screen.



Working with assets

In this section, you find more information about working with assets in Collibra Everywhere for iOS, such as searching for assets, working with tags and using comments.

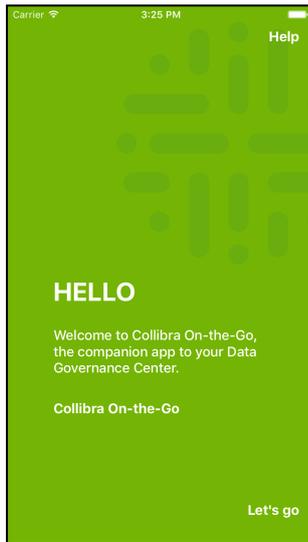
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Search for and view assets

Step 1

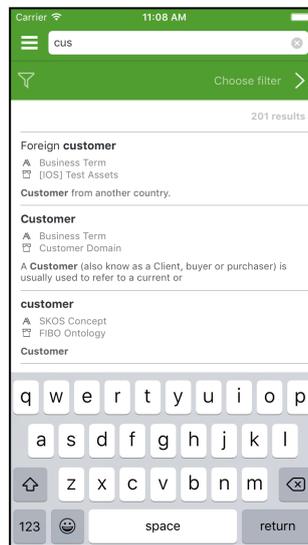
Open the Collibra Everywhere for iOS app on your device and sign in if necessary.



Step 2

On the dashboard screen, in the search bar, start typing the name of the asset you want to find.

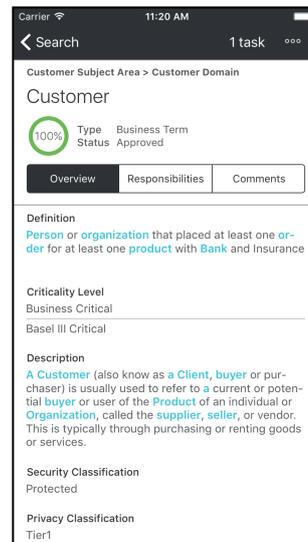
A list with possible results is displayed and adjusted while you are typing.



Step 3

View an asset page by tapping an asset in the results list.

Example result:

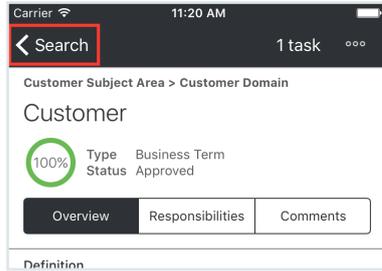


Tips

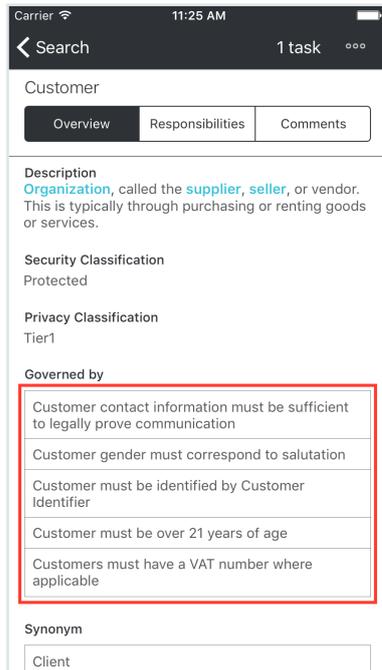
You can:

- Navigate to related assets (direct relations or complex relations) by tapping them.

- Navigate back to previous assets or the search page by tapping the button in the upper left corner.



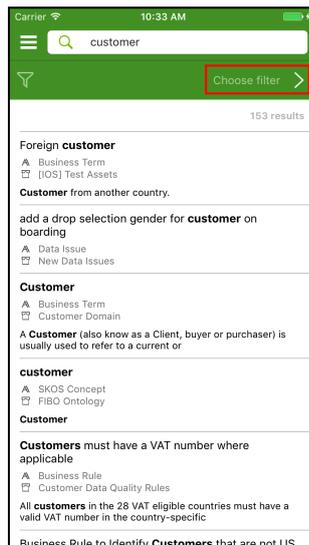
- Tap any item that is in a box.



Search filters

Search asset

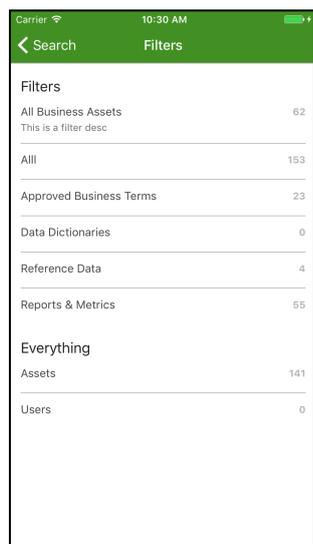
You can use a filter to refine your search by tapping **Choose filter**:



Filters page

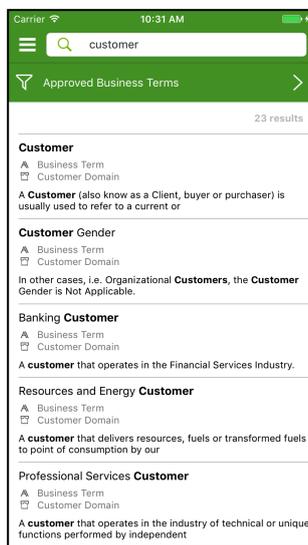
Tap one of the available filters.

Note You can only use one filter at a time.



Selected filter

The selected filter appears above the search results:



Share items

If you want to share an asset or a person's data, follow these steps.

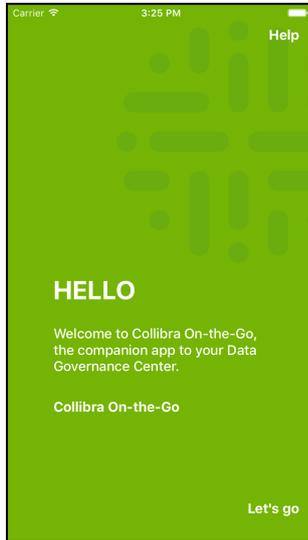
If you want to share a bar chart, see [Share a bar chart](#).

The filters that you have at your disposal are the same filters that you have in your Collibra instance. They can only be created there, not in Collibra Everywhere for iOS.

Note If you are connecting to Collibra 5.7.4 or newer, the **Everything** section is not available.

Step 1

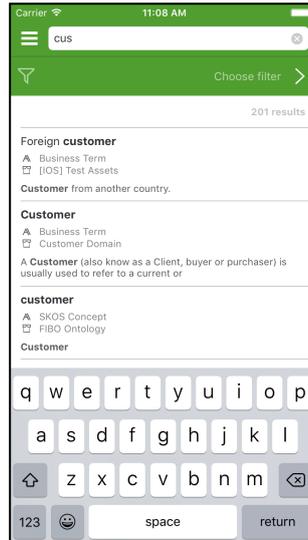
Open the app on your device and sign in if necessary.



Step 2

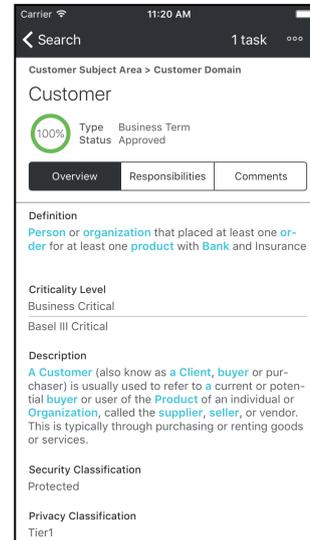
Search for the asset or person that you want to share.

Example:



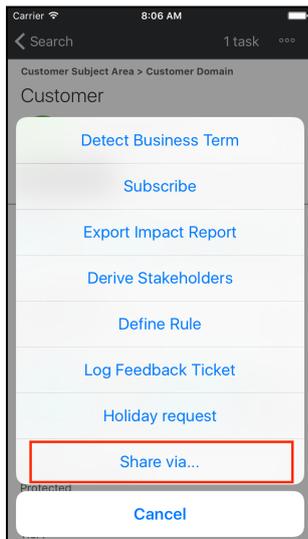
Step 3

Tap  at the top right of the screen.



Step 4

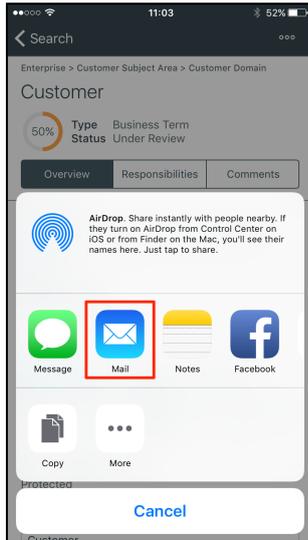
Tap **Share via**.



Step 5

Tap the icon of the way you want to share the information.

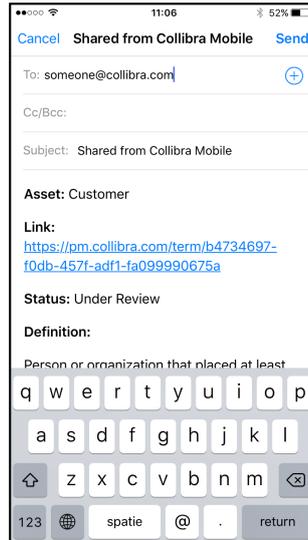
Example:



Step 6

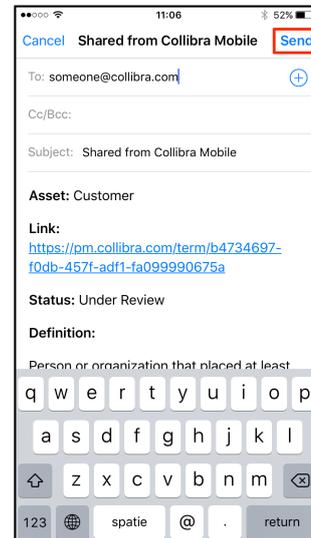
Fill in the required information, mainly the recipient.

Example:



Step 7

Tap the equivalent of the **Send** button.

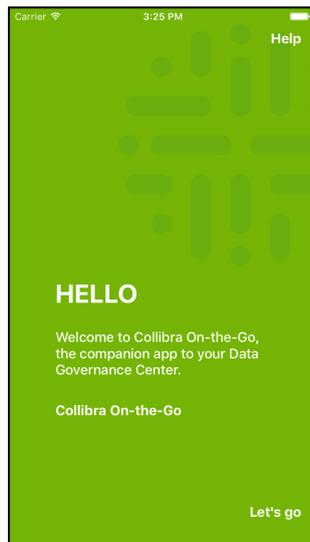


Use comments

To ask or answer questions, comment on assets, or give other input, follow these steps:

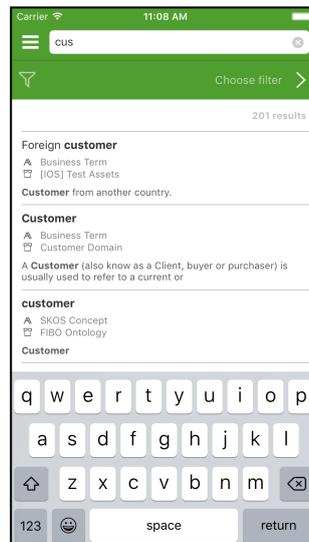
Step 1

Open the app on your device and sign in if necessary.



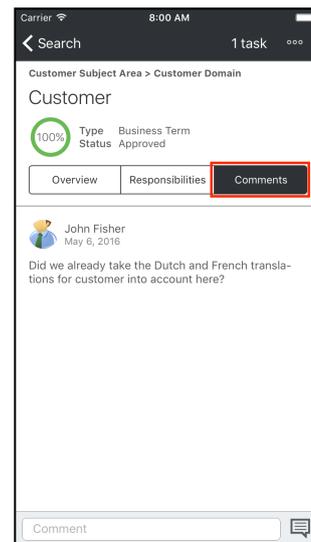
Step 2

Search for the asset for which you want to leave input.



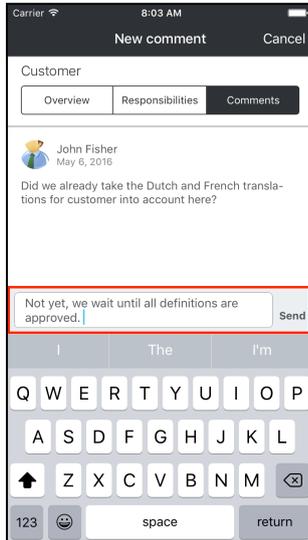
Step 3

Tap the asset to open its page and tap **Comments**.



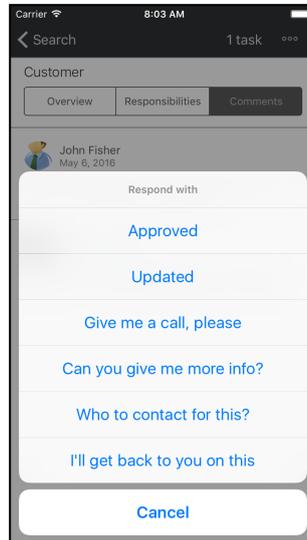
Step 4

In the **Comment** field, type the input you want to provide and tap **Send**.



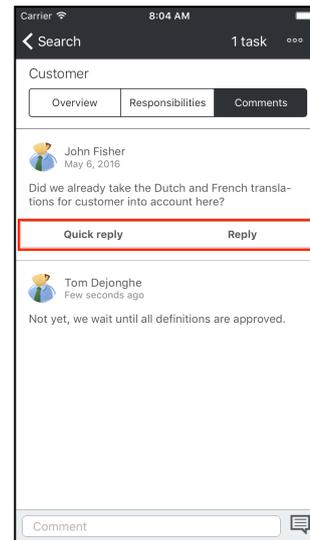
Tip 1

You can tap  to provide a ready-made response.



Tip 2

You can reply to a comment by tapping the comment, followed by **Quick reply** or **Reply**.

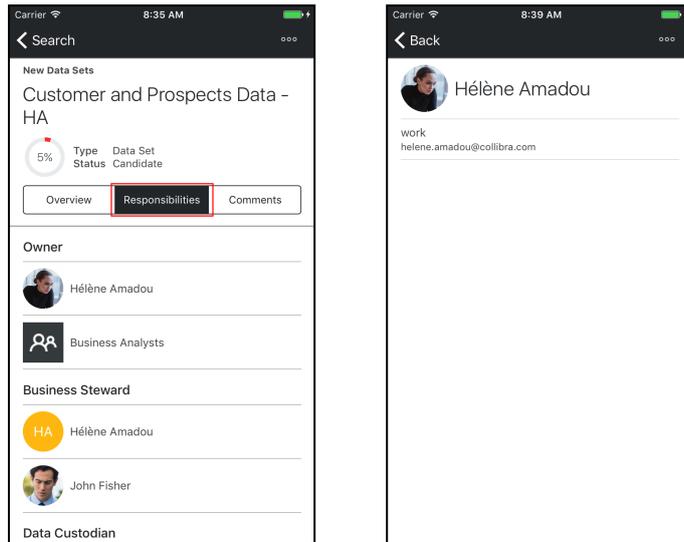


Note You can reply on a comment's reply, but this is not shown in a hierarchical way. Replies on a reply are displayed as a reply on the comment.

Asset responsibilities

On every asset page, you can find the persons that are responsible for the asset. With this information, you can immediately see who has which responsibility for the asset.

You can tap on the user to open the details.



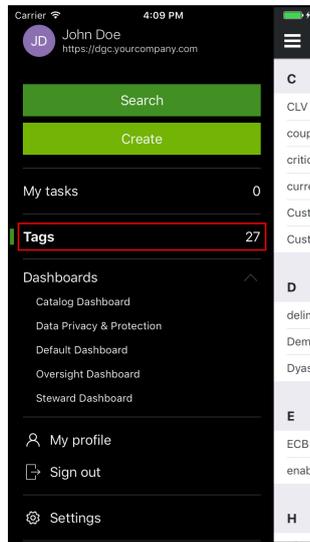
Tags in Collibra Everywhere for iOS

A tag is a piece of metadata that is used to label an asset, to help categorize the asset. Even though the tags are stored in the Collibra Data Intelligence Cloud database, they are not strictly governed inside Collibra. For more information, consult the [Collibra user guide](#).

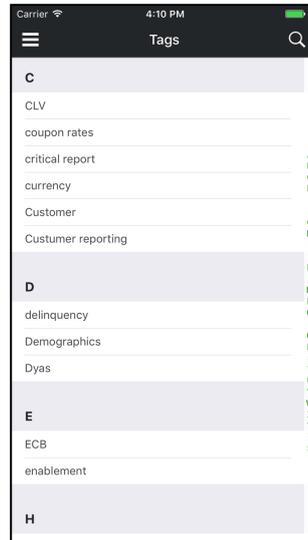
You can find tags in the Collibra Everywhere for iOS app in the main menu and on every asset page:

Chapter 3

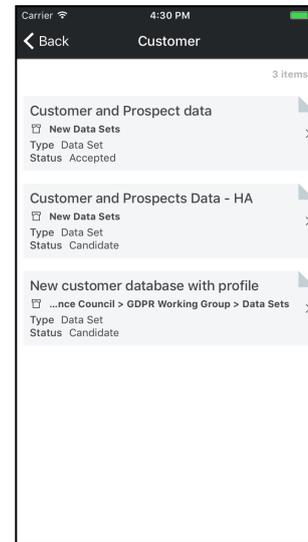
In the main menu, tap **Tags** to open the list of tags:



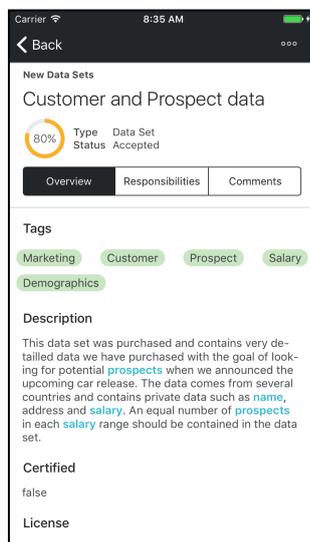
Tap a tag to display all related assets. You can tap a character on the right to quickly navigate through the tags.



Tap an asset to open its details:



Tags section on an asset page:



On every asset page, you can tap any tag to open all related assets.

Export a user to your contacts

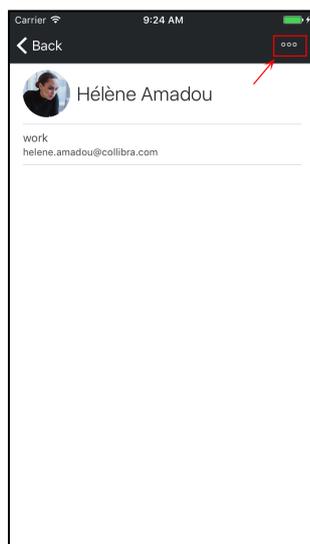
When you open a user's details, you can add them to your local contact book.

Note You need at least iOS 9.0 or newer to export a user.

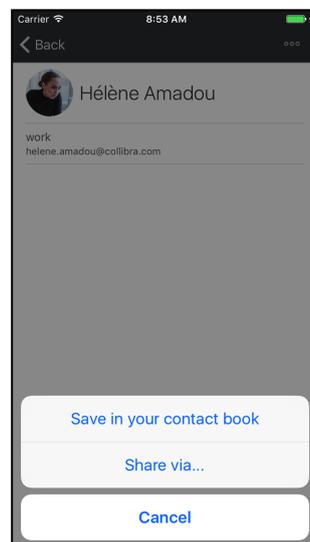
To do so, follow these steps:

Step 1

On the user's details page, Tap **Save in your contact book** tap  at the top right of the book screen.

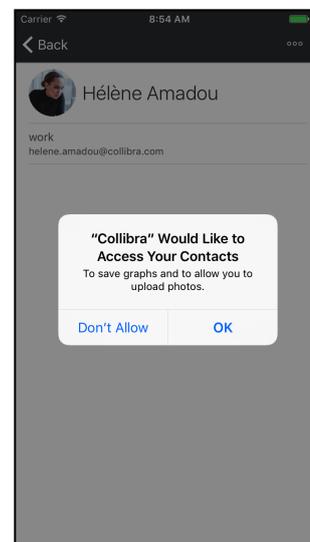


Step 2



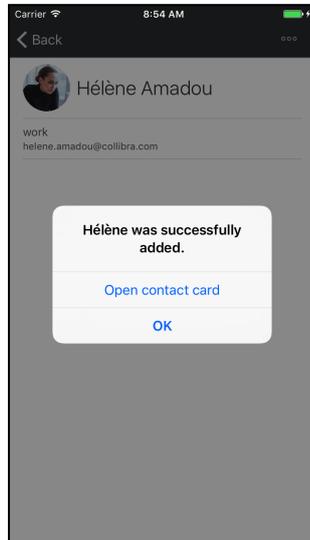
Step 3

Tap **OK** to allow access to your contact book.



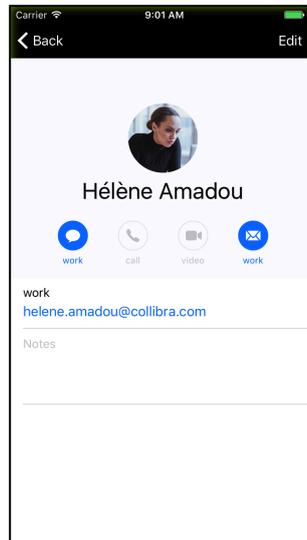
Result

The user is added to your contact book.



Tip

Tap **Open contact card** to open and optionally edit its details.



You can also share the contact via email or social media. See [Share items](#).

Dashboards

The dashboards that you can see in Collibra Everywhere for iOS, are the dashboards that exist in Collibra Data Intelligence Cloud. However, not everything that is available in Collibra is available in Collibra Everywhere for iOS.

Tip To navigate between dashboards, swipe horizontally.

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Widgets

The following widgets are supported in Colibra Everywhere for iOS:

- Text widget
- Counters
- Bar charts
- To Do
- Workflow
- Most viewed assets
- Recently viewed assets

Keep in mind that the widgets cannot be configured in the app, only in the Colibra Data Intelligence Cloud instance.

Counters

The following counters are clickable:

- Assets
- Communities
- Domains
- Users - The number that is displayed here, represents all registered users, not only the users that are signed in.

You can see that some numbers are colored, others are not and for other counters, there is no result at all.

- Orange numbers: Indicate that the warning level for that item has been reached.
- Red numbers: Indicate that the danger level for that item has been reached.
- Black numbers: Indicate that no warning or danger level has been set.
- Dash: Indicates that there is no result for that counter, which is due to a missing API.

Bar charts

You can consult the bar chart as it is displayed, or you can tap it to get more detailed and complete information about it.

Chapter 4

You can also share and sort the bar chart.

Sort a bar chart

To change the order of the bars on a bar chart, follow these steps:

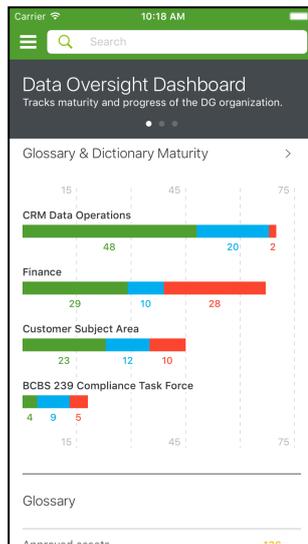
Step 1

Open the app on your device and sign in if necessary.



Step 2

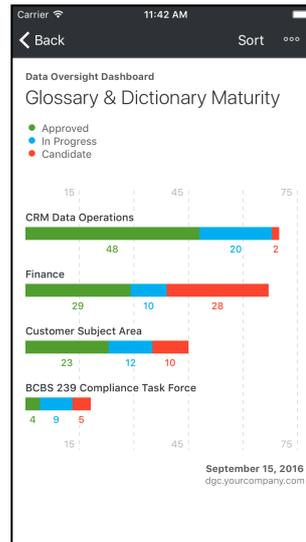
Navigate to the dashboard with the bar chart you want to consult by swiping horizontally.



Step 3

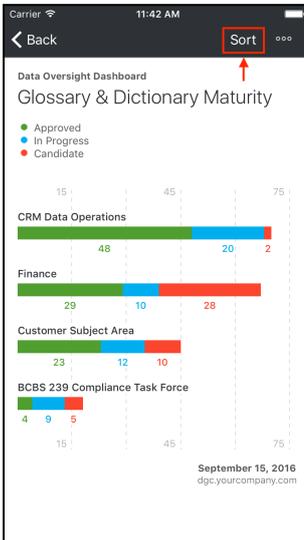
Tap the bar chart.

Result:



Step 4

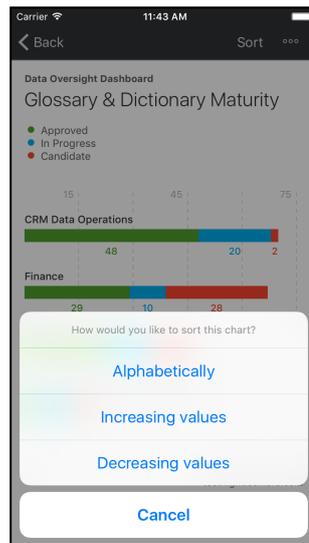
Tap the **Sort** button at the top of the screen.



Step 5

Tap the sorting method that you prefer:

- Alphabetically
- Increasing values
- Decreasing values



Share a bar chart

You can share every bar chart as image or as PDF. To do so, follow these steps:

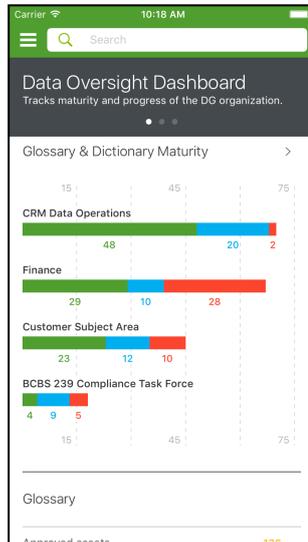
Step 1

Open the app on your device and sign in if necessary.



Step 2

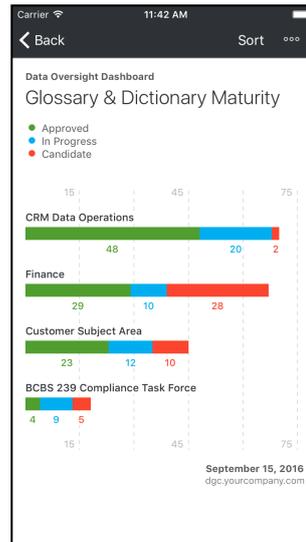
Navigate to the dashboard with the bar chart you want to consult by swiping horizontally.



Step 3

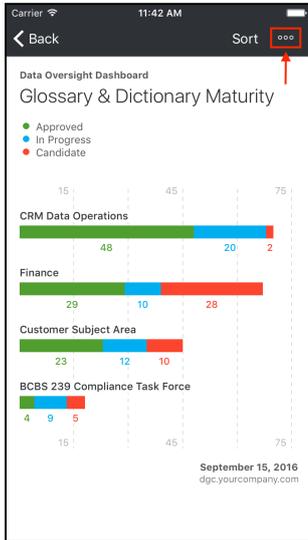
Tap the bar chart.

Result:



Step 4

Tap  at the top of the screen.



Step 5

Tap the method you want to use to share the chart:

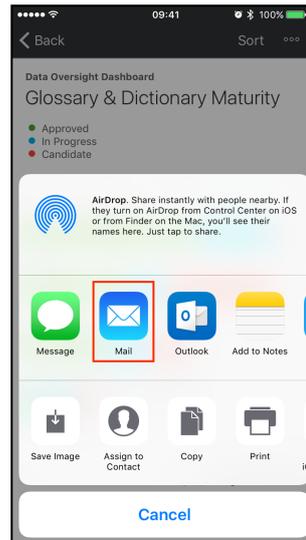
- Share as image
- Share as PDF



Step 6

Tap the icon of the way you want to share the image or PDF.

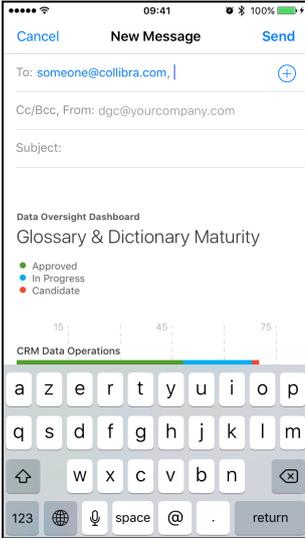
For example **Mail**:



Step 7

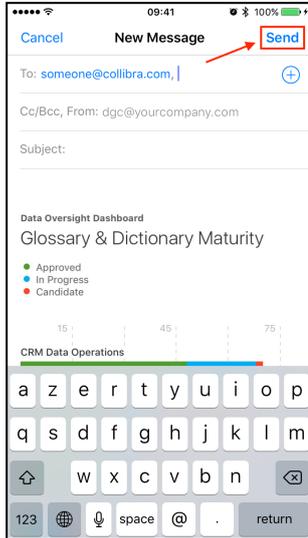
Fill in the required information, mainly the recipient.

Example:



Step 8

Tap the equivalent of the **Send** button.



Tasks

With Collibra Everywhere for iOS you can manage your tasks, such as completing, canceling and reassigning them.

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Reassign a task	44
Cancel a task	47
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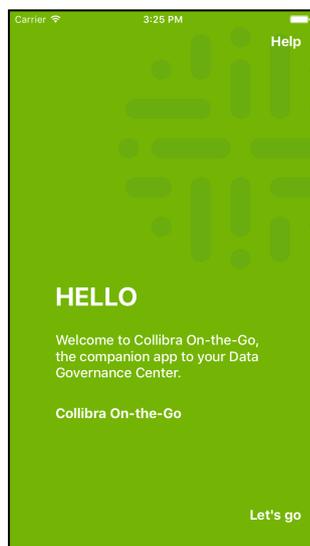


Open outstanding tasks

In the Collibra Everywhere for iOS app, you can quickly access the tasks that are assigned to you. To access your tasks, follow these steps:

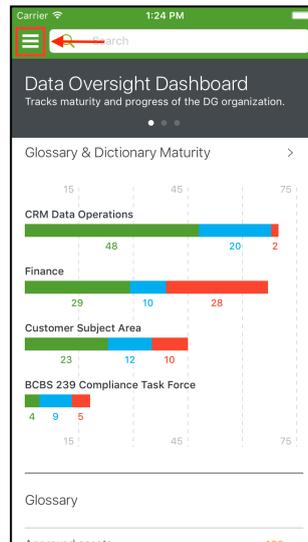
Step 1

Open the app on your device and sign in if necessary.



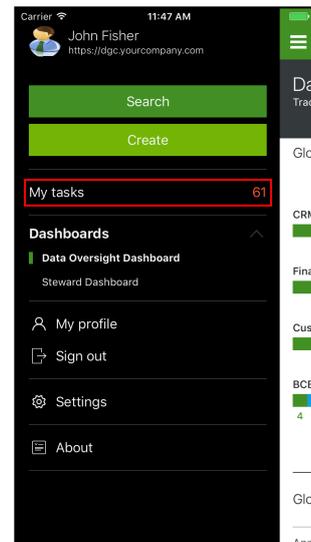
Step 2

In the upper left corner, tap  .



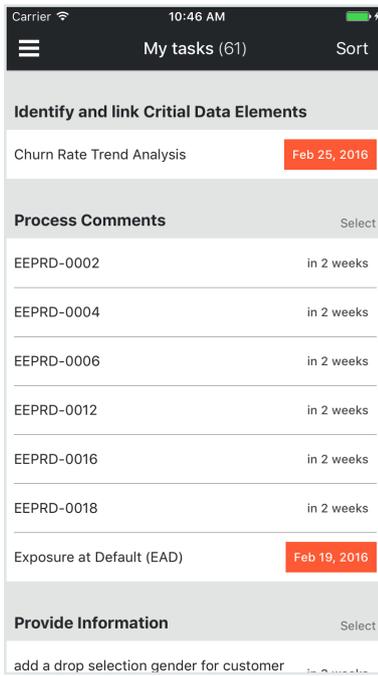
Step 3

In the menu bar, tap **My tasks**.



Chapter 5

The list of your outstanding tasks appear:



Complete a task

To complete a task, follow these steps:

Step 1

Open the app on your device and sign in if necessary.



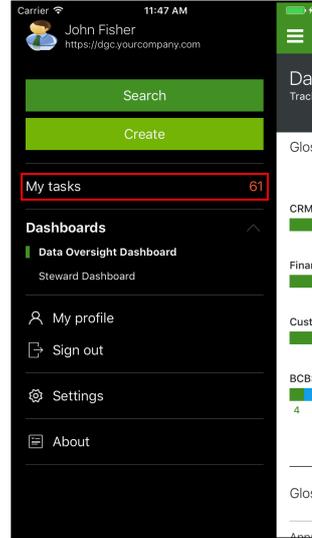
Step 2

In the upper left corner, tap  .



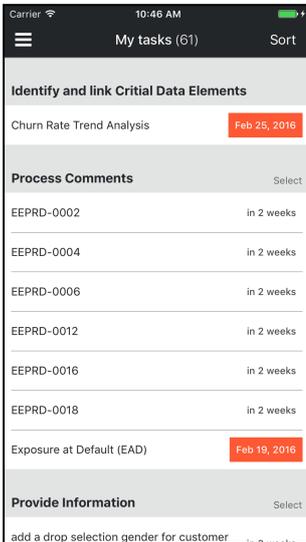
Step 3

In the menu bar, tap **My tasks**.



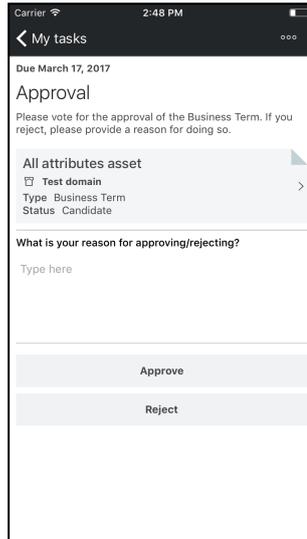
Step 4

Tap the task that you want to complete.

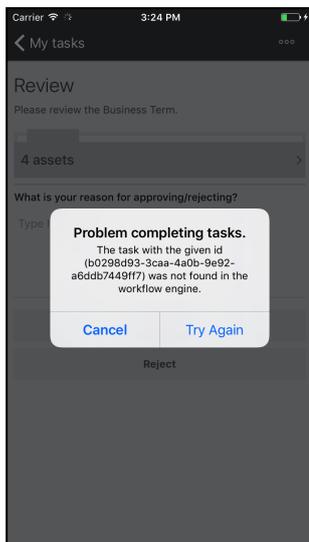
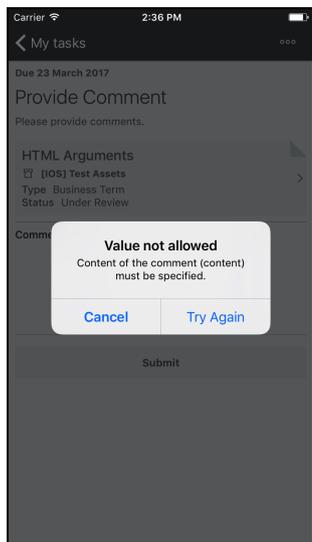


Step 5

In the task details window, complete the task, for example approve a business term.



If a task should fail, for example when your input has an incorrect format, a warning appears. From that warning, you can tap **Try Again** to retry to complete the task.

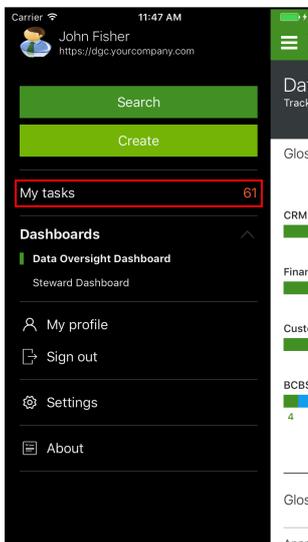


Complete tasks in bulk

This productivity feature enables you to process multiple tasks of the same type in bulk instead of one by one. With the bulk process, you can select tasks of the same type to review them before processing and to select the correct processing action.

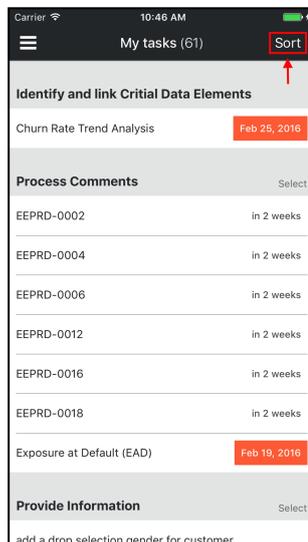
Step 1

In the main menu, open your tasks, see [Open outstanding tasks](#).



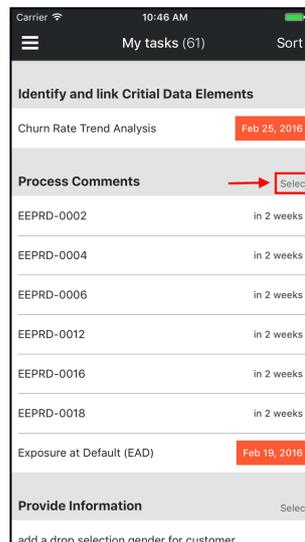
Step 2

Ensure that the tasks are sorted by type, see [Sort tasks](#).



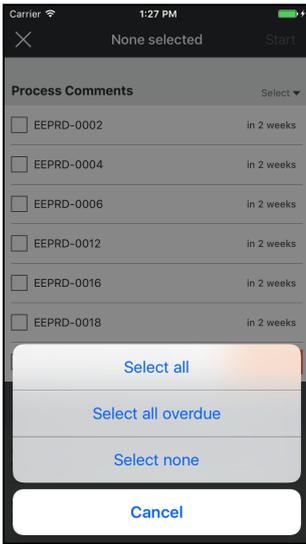
Step 3

Tap **Select** next to a group of tasks that you want to complete.



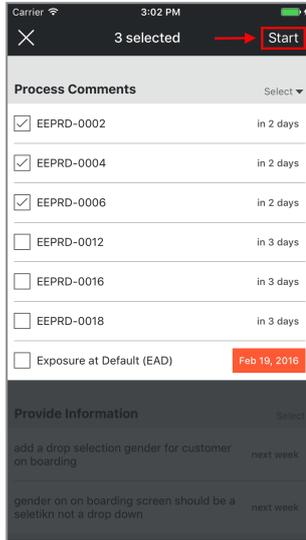
Step 4

Tap the assets one by one or tap **Select** ▼ to make a bulk selection.



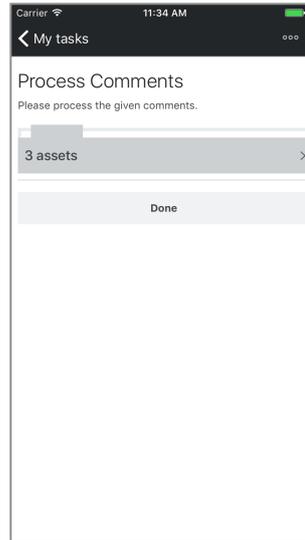
Step 5

Tap **Start** in the top-right corner.



Step 6

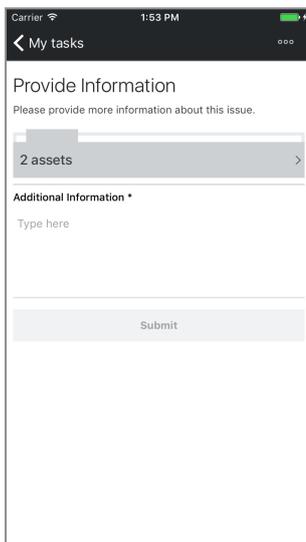
In the asset preview list, select the action that you want to execute.



Step 7

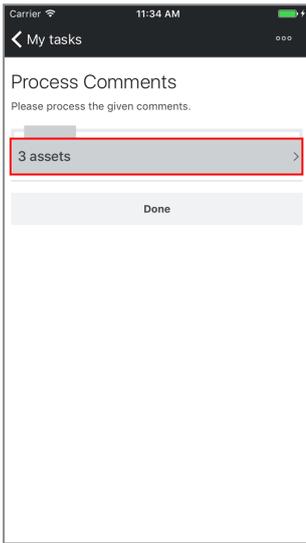
Depending on the action that you have selected, you can perform different actions.

In the next example, you have to provide extra information in the **Additional Information** field and then tap **Submit**.



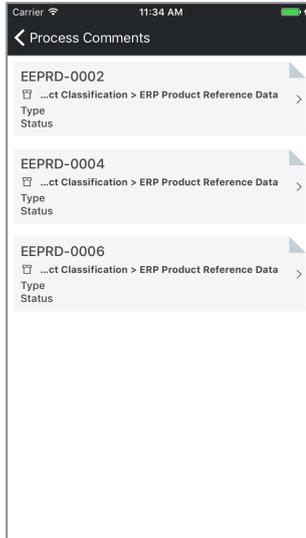
Open asset preview

Tap the number of assets to open a preview of every asset.

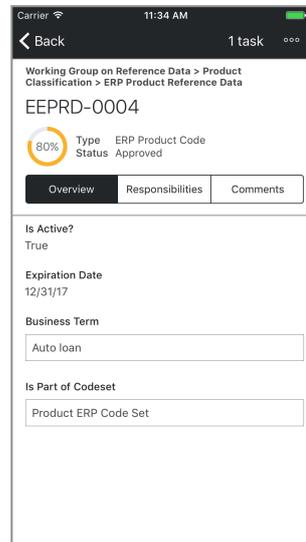


Asset preview

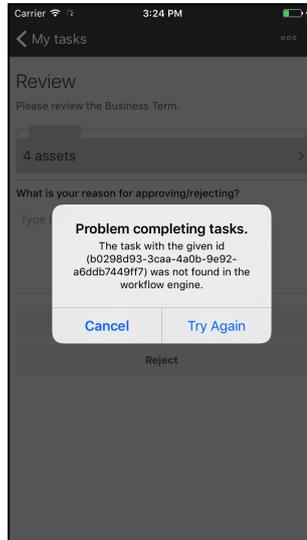
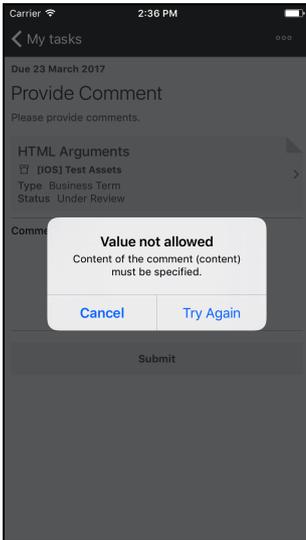
Tap an asset to open its details.



Asset details



If a task should fail, for example when your input has an incorrect format, a warning appears. From that warning, you can tap **Try Again** to retry to complete the task.



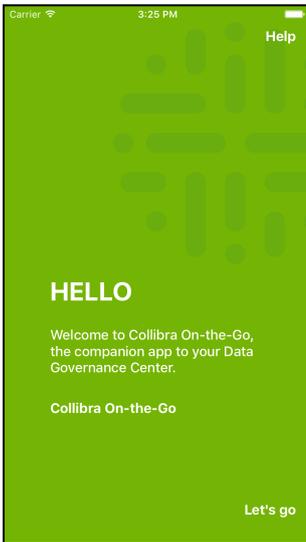
Reassign a task

You can reassign a task to an other user, an other role or an other group.

To reassign a task, follow these steps:

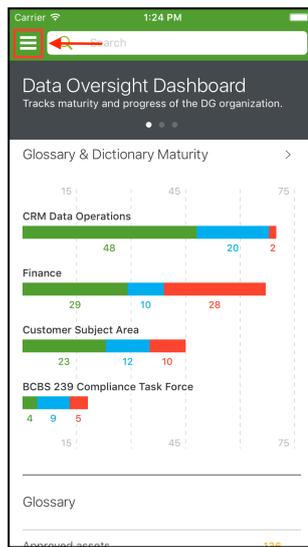
Step 1

Open the app on your device and sign in if necessary.



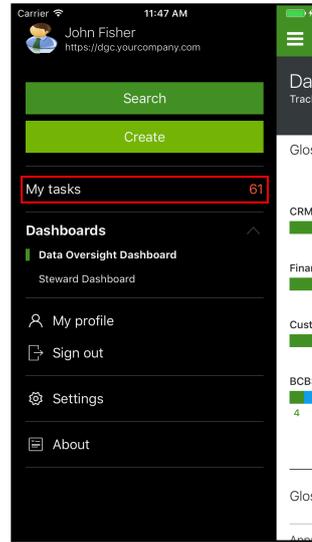
Step 2

In the upper left corner, tap  .



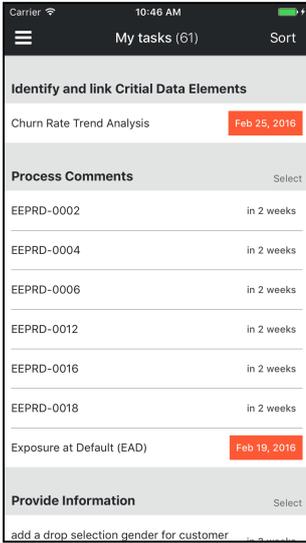
Step 3

In the menu bar, tap **My tasks**.



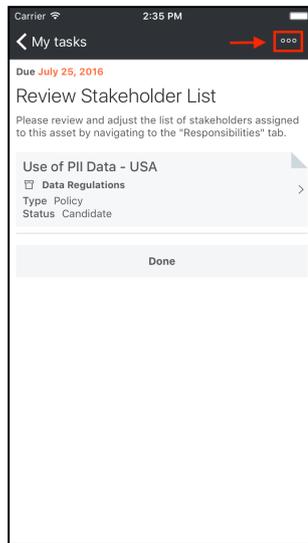
Step 4

Tap the task that you want to reassign.



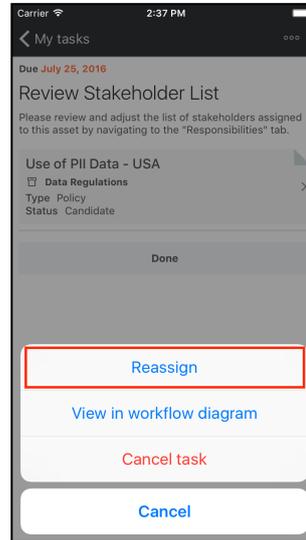
Step 5

In the upper right corner, tap .



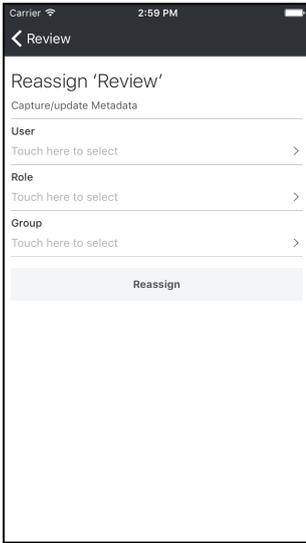
Step 6

Tap **Reassign**.



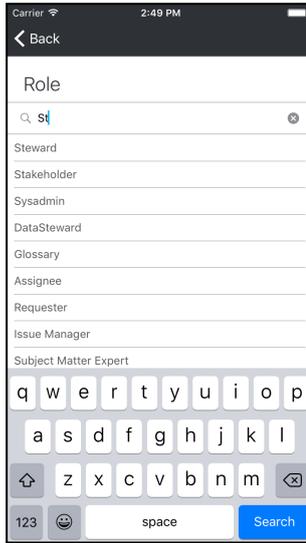
Step 7

Tap User, Role or Group in the Reassign 'Review' window.



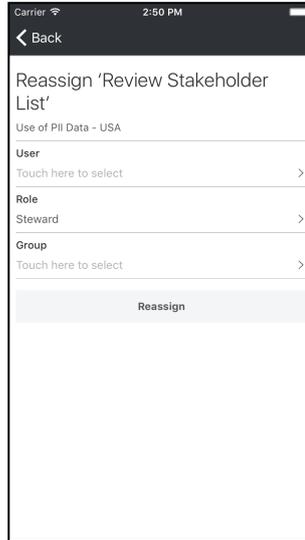
Step 8

Search for the right user, role or group and tap the name when it appears.



Step 9

Tap **Reassign** to apply the new assignment.



Cancel a task

At any moment, you can cancel a task. To do so, follow these steps:

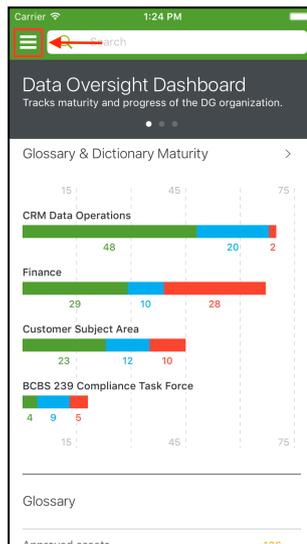
Step 1

Open the app on your device and sign in if necessary.



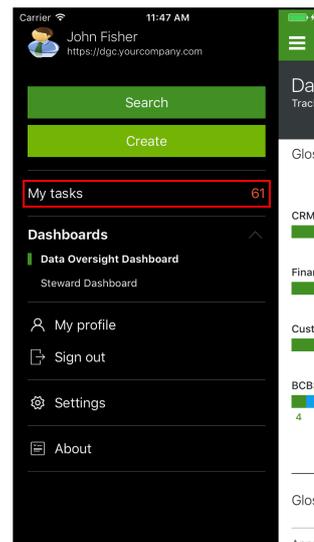
Step 2

In the upper left corner, tap .



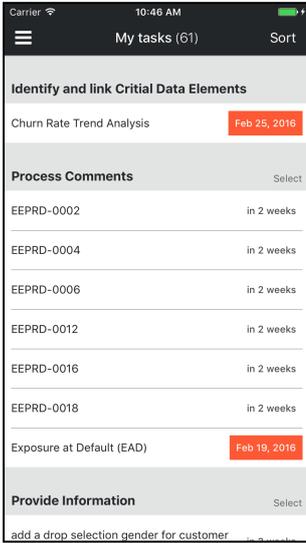
Step 3

In the menu bar, tap **My tasks**.



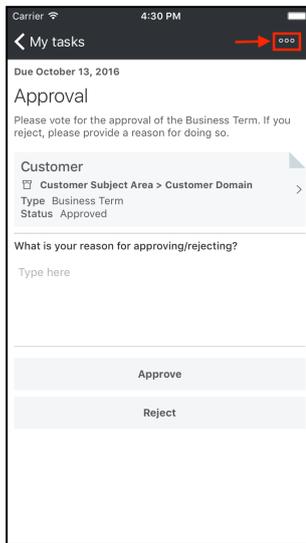
Step 4

Tap the task that you want to cancel.



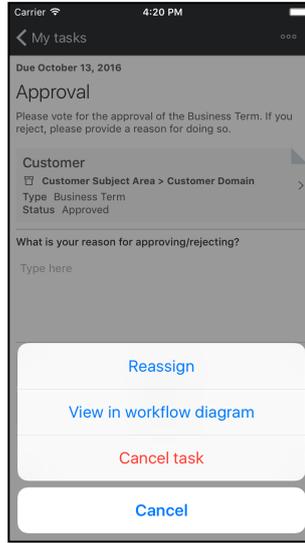
Step 5

In the upper right corner, tap .



Step 6

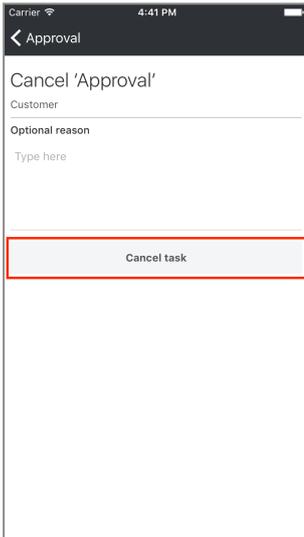
Tap **Cancel task** in the context menu.



Step 7

To confirm the cancellation of the task, tap **Cancel task**.

Optionally, you can provide a reason for the cancellation.



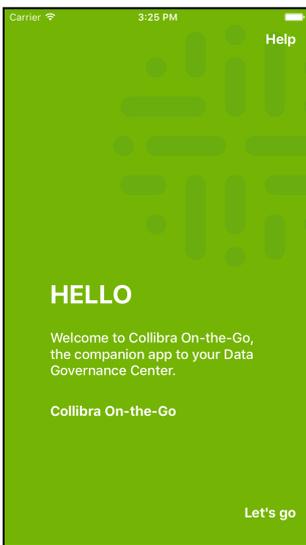
Sort tasks

If you have many tasks, you can sort your tasks by due date or by task type to help you manage your tasks.

To sort your tasks, follow these steps:

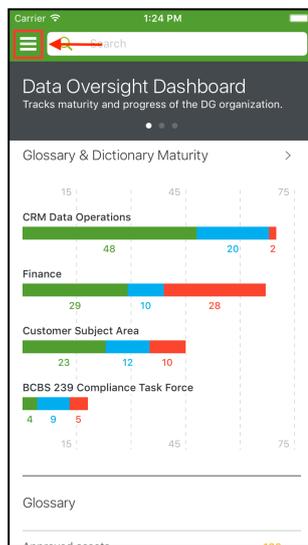
Step 1

Open the app on your device and sign in if necessary.



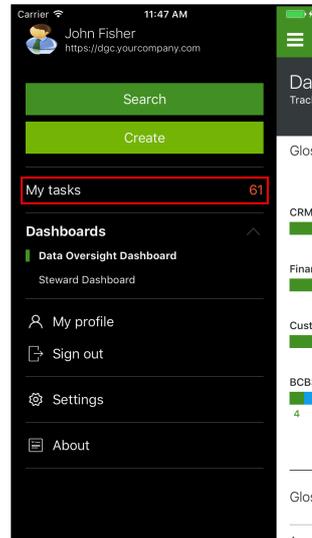
Step 2

In the upper left corner, tap .



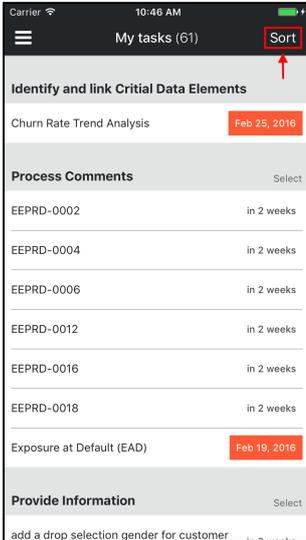
Step 3

In the menu bar, tap **My tasks**.



Step 4

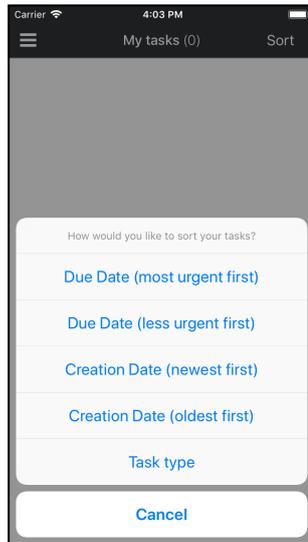
In the upper right corner, tap **Sort**.



Step 5

Tap the sorting method you want to apply:

- Due Date (sort by urgency)
- Creation Date
- Task type



View a task in a workflow diagram

To view a task's location in its workflow diagram, follow these steps:

Step 1

Open the app on your device and sign in if necessary.



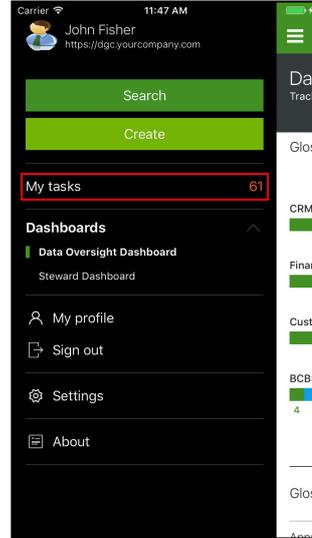
Step 2

In the upper left corner, tap .



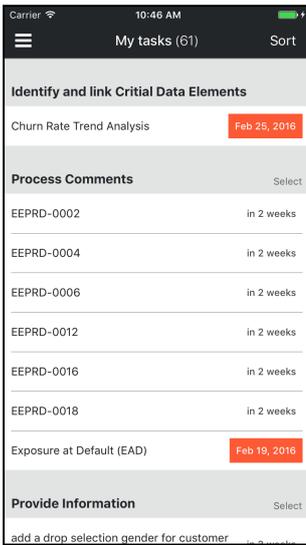
Step 3

In the menu bar, tap **My tasks**.



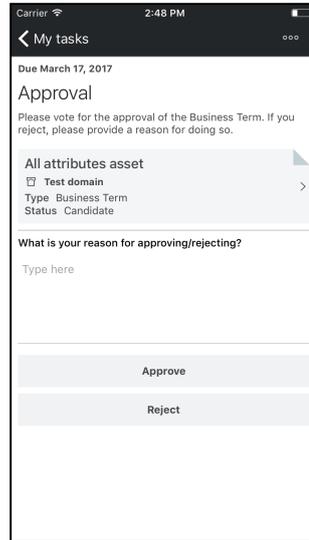
Step 4

Tap the task that you want to see in a workflow diagram.



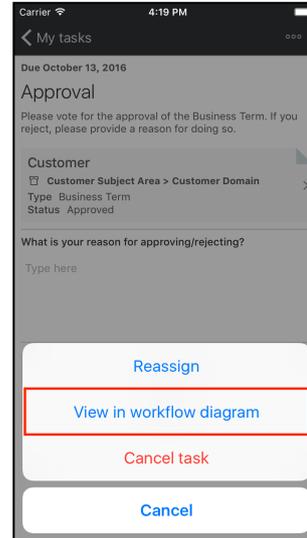
Step 5

In the upper right corner, tap .



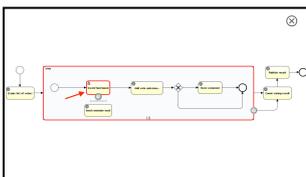
Step 6

Tap **View in workflow diagram**.



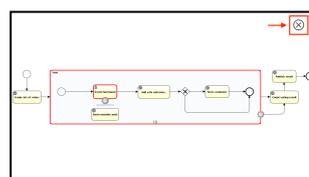
Step 7

The workflow diagram appears.



Step 8

Tap  to close the diagram.



Workflows

In Collibra Everywhere for iOS, you can start a global or an asset workflow. This section describes how to perform these two tasks.

In this chapter

Start a global workflow	56
Start an asset workflow	58

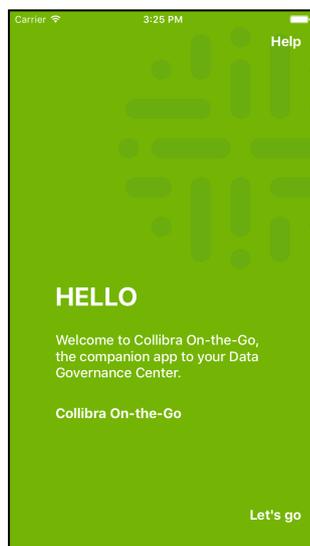


Start a global workflow

In Collibra Everywhere for iOS, you can start global workflows from anywhere in the app. To start a global workflow, follow these steps:

Step 1

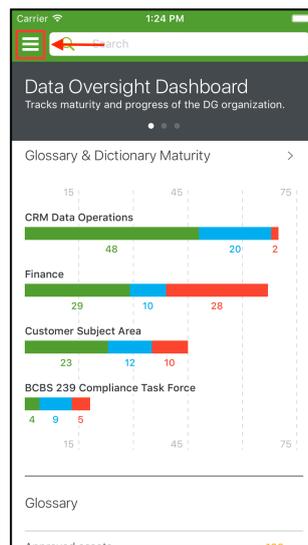
Open the app on your device and sign in if necessary.



Step 2

Anywhere in Collibra Everywhere for iOS, tap

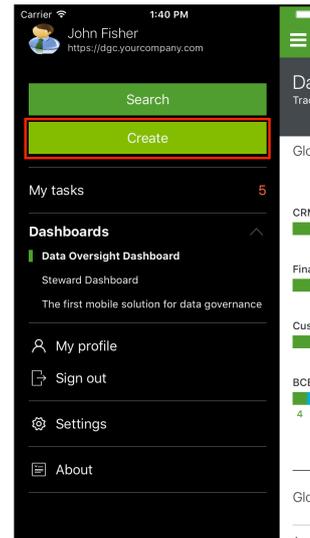
Everywhere for iOS, tap . **Create.**



Step 3

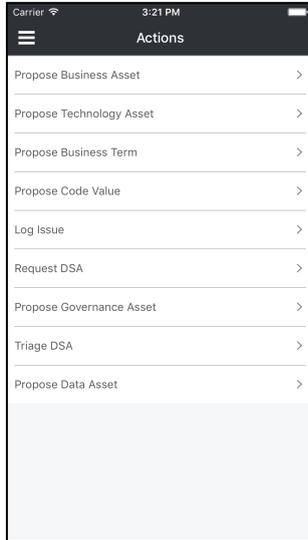
In the menu bar, tap

. **Create.**



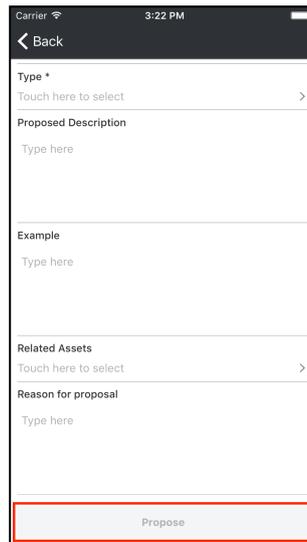
Step 4

Tap the workflow that you want to start.



Step 5

Fill in the necessary information and tap the button at the bottom of the form. The name of the button varies with the selected workflow.



You return to the list of workflows.

Start an asset workflow

Whenever you have an asset on your screen, you can immediately start a workflow for it. To do so, follow these steps:

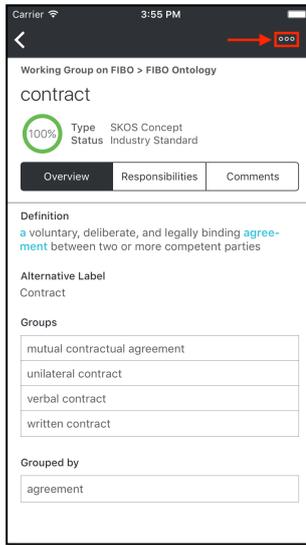
Step 1

Open the app on your device and sign in if necessary.



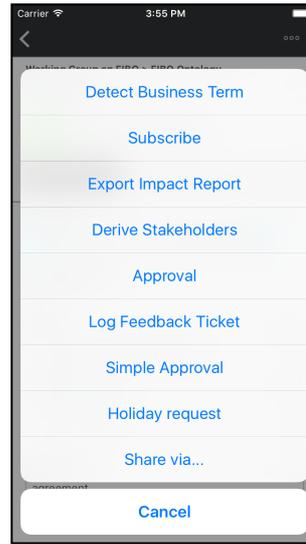
Step 2

In Collibra Everywhere for iOS, whenever you see an asset, tap .



Step 3

Tap the workflow that you want to start.



Step 4

Tap **Start workflow**.



App settings

You can change the Collibra Everywhere for iOS application settings from within the app but also when you use a mobile device management system.

In this section you learn how you can change the Collibra Everywhere for iOS settings.

In this chapter

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Mobile device management	64



Application settings

The first time you sign in to Collibra Everywhere for iOS, you can configure the settings of your app. If you want to change these settings, you can always update them in the **Settings** section of the app afterwards.

To open the settings, tap  in the upper left corner, then tap  **Settings**.

You can update the following settings: :

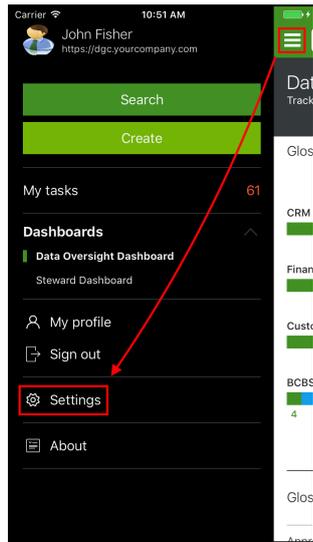
- Enable/disable App Analytics. If enabled, information is gathered and sent to Collibra if the app stops responding.

Note

- When you connect to a Collibra Data Intelligence Cloud environment 5.7 or newer with enabled analytics, the App Analytics are automatically enabled. You can not disable this setting.
- When you connect to an environment 5.7 or newer with disabled analytics, you can enable or disable the App Analytics.
- When you connect to an environment older than 5.7, you can enable or disable the App Analytics.

- Select email application.
- Enable/disable automatic hyperlink creation.
- Sign-in settings (disabled for Collibra instances with SSO):
 - Enable/disable Touch ID
 - Enable/disable automatic sign in
- Clear data (Search history and images)

Chapter 7



Mobile device management

If your company uses mobile device management (MDM) to control the apps on your iPhone, the company can apply custom settings for Collibra Everywhere for iOS, for example, the colors that are used in the app.

Pushing the settings to the mobile devices uses the built-in [iOS Managed App Configuration mechanism](#). Ensure that the company's MDM solution, for example, Mobile Iron, is compatible with this configuration system.

This section describes the settings that you can configure.

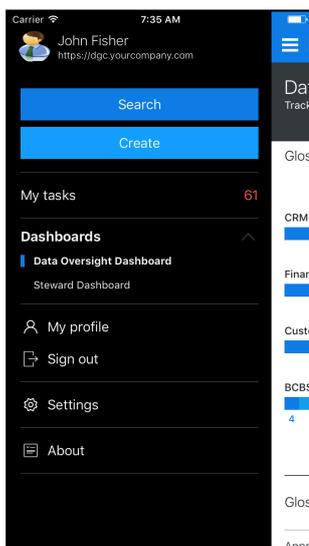
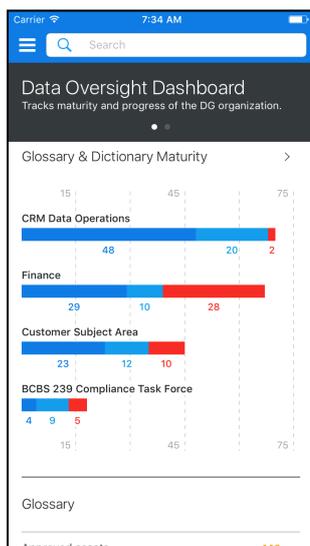
Key	Description	Format	Default value
serverURL	URL of the Collibra Data Intelligence Cloud instance	String	n/a
isSsoForced	If the Collibra DGC instance has SSO enabled, you can force the app to only use SSO (set to <i>True</i>).	Boolean	False
Accent01	Primary color in the main menu for the active window indication, Search button and number of tasks.	String (hexadecimal code)	#84BD00
Accent02	Color of the navigation bar in dashboards and search filters.	String (hexadecimal code)	#509E2F
Accent03	Secondary color in the main menu, used for the Create button.	String (hexadecimal code)	#9FD193

Key	Description	Format	Default value
Accent04	Not yet in use.	String (hexadecimal code)	#D2E9CD
Accent05	Not yet in use.	String (hexadecimal code)	#F1F8EF

For example, when you use the following colors:

- Accent01: #00B0FF
- Accent02: #0091EA
- Accent03: #40C4FF
- Accent04: #80D8FF
- Accent05: #E1F5FE

The screen looks as follows:



FAQ

Q: I can't connect to my instance. What could be the problem?

A: It is possible that you are trying to navigate to a certain page of your instance, for example `yourinstance.collibra.com/signin`. The URL is only valid if it points to the actual instance, not a particular Collibra page. This means that `yourinstance.collibra.com/dgc453`, as opposed to the previous example, works if that is the name of your instance.

