

Collibra Everywhere for iOS User Guide



Collibra Everywhere for iOS

User Guide

Revision: 02 Apr 2021

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

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

# Contents

Contents ii
Collibra Everywhere for iOS 1
Sign in to Collibra Everywhere for iOS
First-time sign-in
First-time sign-in with SSO
Sign out
Working with assets
Search for and view assets
Search filters
Share items
Use comments
Asset responsibilities
Tags in Collibra Everywhere for iOS
Export a user to your contacts
Dashboards
Widgets
Sort a bar chart
Share a bar chart
Tasks
Open outstanding tasks
Complete a task
Complete tasks in bulk
Reassign a task

Cancel a task	47
Sort tasks	50
View a task in a workflow diagram	52
Workflows	55
Start a global workflow	
Start an asset workflow	58
App settings	61
Application settings	62
Mobile device management	64
FAQ	67

# **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.

Chapter 1

# 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

First-time sign-in	4
First-time sign-in with SSO	7
Sign out	

## 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.



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 to send usage information Next. If your device has no Touch ID, the first option is enabled, information is not available.



#### Step 6

Indicate whether you want to Collibra and tap OK. If 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.

Carrier 🗢 📃 🔍 Se	10:18 AM		
Data Ove Tracks maturity	rsight Das and progress of • • •	hboard the DG organiz	zation.
Glossary & D	ictionary Mat	urity	>
15 CRM Data Opera	45 ations		75
Finance	48	20	2
29 Customer Subje	10 ct Area	28	
23 BCBS 239 Com	12 10 Dliance Task For	ce	
4 9 5 15	45		75
Glossary			
Approved accel	-		400

## **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

#### Step 2

Open Collibra Everywhere Fill in the URL of your for iOS on your device and Collibra Data Intelligence tap Let's go.



Let's d

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.

	10:18 AM	-
📃 🔍 Sea	irch	
Data Over Tracks maturity a	sight Dashbo nd progress of the Do • • •	Oard G organization.
Glossary & Dio	ctionary Maturity	>
15 CRM Data Operat	45 tions	75
4 Finance	.8	20 2
29 Customer Subjec	10 : t Area	28
BCBS 239 Compl 4 9 5 15	iance Task Force	75
Glossary		
Approved accest		196

## 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

Step 2

#### Result

In the upper left corner, tap  $\equiv$  Tap Sign out.





You return to the Collibra Everywhere for iOS welcome screen.



#### **Chapter 3**

# 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.

## In this chapter

Search for and view assets	12
Search filters	14
Share items	15
Use comments	. 18
Asset responsibilities	19
Tags in Collibra Everywhere for iOS	20
Export a user to your contacts	. 22

## Search for and view assets

#### Step 1

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



#### Step 2

On the dashboard screen, 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.

Carrier 🗢	11:25 AM		
<b>〈</b> Search		1 task 👓	
Customer			
Overview	Responsibilities	Comments	
Description Organization, cal This is typically th or services. Security Classifica Protected Privacy Classificat Tier1 Governed by	led the supplier, s irough purchasing ition	eller, or vendor or renting good	ls
Customer contact to legally prove of	ct information mus	t he sufficient	
		st be sufficient	
Customer gende	er must correspond	d to salutation	
Customer gende Customer must Identifier	er must correspond be identified by Cu	d to salutation	
Customer gende Customer must Identifier Customer must	er must correspond be identified by Cu be over 21 years o	d to salutation ustomer	
Customer gende Customer must Identifier Customer must Customers must applicable	er must correspond be identified by Cu be over 21 years o : have a VAT numb	d to salutation ustomer f age er where	
Customer gende Customer must I Identifier Customer must I Customers must applicable	er must correspond be identified by Cu be over 21 years o : have a VAT numb	d to salutation ustomer f age er where	

## **Search filters**

#### Search asset

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

Carrier 🗢		
	tomer	
$\mathbf{r}$		Choose filter >
		153 results
Foreign custom	er	
A Business Term	ote	
Customer from an	other country.	
add a drop selec boarding	tion gender for <b>cu</b>	istomer on
A Data Issue	es	
Customer		
A Business Term	ain	
A Customer (also usually used to ref	know as a Client, buy er to a current or	ver or purchaser) is
customer		
A SKOS Concept ☐ FIBO Ontology		
Customer		
Customers mus applicable	t have a VAT numl	per where
▲ Business Rule ☑ Customer Data	Quality Rules	
All <b>customers</b> in the valid VAT number i	e 28 VAT eligible co n the country-specif	untries must have a ic
Rusiness Rule to	Identify Custome	ars that are not US

#### **Filters** page

Tap one of the available filters.

**Note** You can only use one filter at a time.

Carrier 🗢	10:30 AM	
🗸 Search	Filters	
Filters		
All Business Asset This is a filter desc	S	62
AIII		153
Approved Busines	s Terms	23
Data Dictionaries		0
Reference Data		4
Reports & Metrics		55
Everything		
Assets		141
Users		0

#### 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.

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



#### Step 2

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



#### Step 3

Tap •••• at the top right of the screen.



#### Step 4

#### Tap Share via.



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.

#### cus Foreign customer A Business Term ☐ [IOS] Test Assets Customer from another country Customer A Business Term A Customer (also know as a Client, buyer or purchaser) is usually used to refer to a current or Customer A SKOS Concept Customer qwertyuiop s d f g h j k l а zxcvbnm 🗵 $\mathbf{\hat{O}}$ 123 😅 space return

Step 3

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



# Step 4Tip 1Tip 2In the Comment field, type<br/>the input you want to<br/>provide and tap Send.You can tap I to provide a<br/>ready-made response.You can reply to a<br/>comment by tapping the<br/>comment, followed by

	Carrier 중 8:03 AM	
	✓ Search 1 task °°°	Quick reply or Reply.
rrier 🗢 8:03 AM 🖿	Customer	querreply of heply.
New comment Cancel	Overview Responsibilities Comments	Carrier 🗢 8:04 AM
Customer		✓ Search 1 task °°°
Overview Responsibilities Comments	John Fisher May 6, 2016	Customer
John Fisher May 6, 2016	Respond with	Overview Responsibilities Comments
id we already take the Dutch and French transla- ons for customer into account here?	Approved	John Fisher
	Updated	Did we already take the Dutch and French transla- tions for customer into account here?
	Give me a call, please	Quick reply Reply
lot yet, we wait until all definitions are pproved.	Can you give me more info?	Tom Dejonghe Few seconds ago
	Who to contact for this?	Not yet, we wait until all definitions are approved.
WERTYUIOP	I'll get back to you on this	
ASDFGHJKL		
ZXCVBNM	Cancel	
3 😂 space return		
		Comment

**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.

#### **Chapter 3**





## **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:

In the main menu, tap **Tags** Tap a tag to display all to open the list of tags: related assets. You can

С	arrier 🗢 4:09 PM	
	JD John Doe https://dgc.yourcompany.com	≡
		с
	Search	CL
	Create	COL
		crit
	My tasks 0	cur
		Cu
l	Tags 27	Cu
	Dashboards	
	Catalog Dashboard	D
	Data Privacy & Protection	del
	Default Dashboard	Der
	Oversight Dashboard	Dya
	Steward Dashboard	
		E
	A My profile	ECI
	G Sign out	ena
	Settings	н

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

Carrier 🗟	4:10 PM	
≡	Tags	Q
с		
CLV		
coupon rates		
critical report		AB
currency		C
Customer		F
Custumer report	ting	H
D		J K L M
delinquency		O
Demographics		Q
Dyas		S T
E		V W X Y
ECB		Z #
enablement		
н		

# 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

Step 2



On the user's details page, Tap **Save in your contact** tap <sup>•••</sup> at the top right of the **book**.

screen.





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



#### Result

#### Tip

The user is added to your contact book.



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.

Chapter 3

# 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.

## In this chapter

Widgets	
Sort a bar chart	
Share a bar chart	

## Widgets

The following widgets are supported in Collibra 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 Collibra 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

Step 3

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

Carrier 후 10:18	АМ
Q Search	
Data Oversight D Tracks maturity and progress	ashboard of the DG organization.
Glossary & Dictionary N	laturity >
15 CRM Data Operations	45 75
48 Finance	20 2
29 10 Customer Subject Area	28
23 12 1	0
BCBS 239 Compliance Task	Force
<b>4 9 5</b> 15 !	45 75
Glossary	

**Result:** 



## Step 5

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



# 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

Step 3

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

Carrier 중	10:18 AM		
Data Oversigh Tracks maturity and prog	t Dashl gress of the	00ard DG organiza	ation.
Glossary & Dictiona	ry Maturit	y	>
15 CRM Data Operations	45		75
48 Finance		20	2
29 Customer Subject Area	10	28	
23 12	10		
BCBS 239 Compliance	Fask Force		
15	45		75
Glossary			

#### **Result:**



#### Step 5

#### Tap 🚥 at the top of the

#### screen.



# 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:



# Fill in the required information, mainly the recipient.

#### Example:

•••••	Ŷ			09	:41		<b>0</b> \$	100%	•
Ca	ncel		Ne	ew M	essa	ge		Se	end
To:	some	one@	collit	ora.co	m,				$\oplus$
Cc/	Bcc, I	-rom:	dgc(	ayour	comp	any.c	om		
Sub	ject:								
	OSSA Approv n Prog Candid 15 1 Data	ed ress ate	& Di	ctio	45	/ Ma	ituri	ty 75	
а	z	е	r	t	у	u	i	0	р
q	s	d	f	g	h	j	k	1	m
¢		w	x	С	V	b	n		$\langle \times \rangle$
123		)	) s	bace	@	ŀ		retu	ırn

## Step 8

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



## **Chapter 5**

# Tasks

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

## In this chapter

Open outstanding tasks	
Complete a task	
Complete tasks in bulk	
Reassign a task	
Cancel a task	47
Sort tasks	
View a task in a workflow diagram	52

## **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



Step 3

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









#### The list of your outstanding tasks appear:

Carrier ᅙ	10:46 AM	<b></b> +		
≡	My tasks (61)	Sort		
Identify and link Critial Data Elements				
Churn Rate Trend	Analysis	Feb 25, 2016		
Process Comm	ents	Select		
EEPRD-0002		in 2 weeks		
EEPRD-0004		in 2 weeks		
EEPRD-0006		in 2 weeks		
EEPRD-0012		in 2 weeks		
EEPRD-0016		in 2 weeks		
EEPRD-0018		in 2 weeks		
Exposure at Defau	lt (EAD)	Feb 19, 2016		
Provide Informa	ation	Select		
add a drop selection	on gender for custome			

## **Complete a task**

To complete a task, follow these steps:

#### Step 1

Step 2

Step 3

In the upper left corner, tap  $\equiv$  In the menu bar, tap My

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







## Step 5

to complete.

Carrier 🗢	10:46 AM	
≡	My tasks (61)	Sort
Identify and	link Critial Data Elem	ents
Churn Rate Tre	nd Analysis	Feb 25, 2016
Process Con	nments	Select
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
Exposure at De	efault (EAD)	Feb 19, 2016
Provide Info	rmation	Select
add a drop sele	ection gender for custom	er in 2 wooko

Tap the task that you want In the task details window, complete the task, for example approve a business term.

Carrier 🗢 💈	2:48 PM I	
🗙 My tasks		
Due March 17, 2017		
Approval		
Please vote for the approve reject, please provide a rea	al of the Business Term. If you ason for doing so.	I
All attributes asset		
Test domain		>
Status Candidate		
What is your reason for ap	proving/rejecting?	
Type here		
А	pprove	
	Reject	

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

#### Step 2

tasks.

In the main menu, open your tasks, see Open outstanding tasks.

Carrier 🗢 11:47 AM	
John Fisher https://dgc.yourcompany.com	
Search	Dat Track
Create	Glos
My tasks 6	61
Dashboards /	CRM
Data Oversight Dashboard     Steward Dashboard	Finan
A My profile	Cust
G Sign out	
Settings	BCBS
🖹 About	
	Glos
	Appr

Carrier 🗢	10:46 AM	
≡	My tasks (61)	Sort
Identify and	link Critial Data Elemo	ents
Churn Rate Tre	end Analysis	Feb 25, 2016
Process Cor	nments	Select
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
Exposure at D	efault (EAD)	Feb 19, 2016
Provide Info	rmation	Select
add a drop sel	ection gender for custome	er i e i

Ensure that the tasks are

sorted by type, see Sort

#### Step 3

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

Carrier 🗢	10:46 AM	- 7
=	My tasks (61)	Sort
Identify and I	link Critial Data Eleme	nts
Churn Rate Tre	nd Analysis	Feb 25, 2016
Process Com	iments _	Select
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
Exposure at De	fault (EAD)	Feb 19, 2016
Provide Infor	mation	Select
add a drop sele	ction gender for customer	

## Step 5

Tap the assets one by oneTap Start in the top-rightor tap Select ▼ to make acorner.bulk selection.corner.

Carrier 2	1:27 DM	
	None selected	Start
		oturt
Process Comm	ients	Select 🔻
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
	Select all	
S	elect all overdue	
	Select none	
	Cancel	

Carrier 穼	3:02 PM	
×	3 selected	> Start
Process Comm	ients	Select 🔻
EEPRD-0002		in 2 days
EEPRD-0004		in 2 days
EEPRD-0006		in 2 days
EEPRD-0012		in 3 days
EEPRD-0016		in 3 days
EEPRD-0018		in 3 days
Exposure at D	Default (EAD)	Feb 19, 2016

## Step 6

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



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**.

Carrier 🗢	1:53 PM	
🗙 My tasks		000
Provide Inforn Please provide more inf	Nation formation about this issue.	
2 assets		>
Additional Information	•	
Type here		
	Submit	

## Open asset preview

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

Carrier 🗢 11:34 AM	
🗙 My tasks	000
Process Comments Please process the given commen	ts.
3 assets	>
Done	

## Asset preview

Tap an asset to open its details.

Carrier 🗢	11:34 AM	•
🗸 Process Com	ments	
EEPRD-0002 Tupe Status	ion > ERP Product Reference Data	>
EEPRD-0004	ion > ERP Product Reference Data	>
EEPRD-0006	ion > ERP Product Reference Data	>

## 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

Step 2



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



In the upper left corner, tap  $\equiv$  In the menu bar, tap My

tasks.





#### Step 5

Tap the task that you wantIn the upper right corner,to reassign.tap ••••.

Carrier 🗢	10:46 AM	
=	My tasks (61)	Sort
Identify and	l link Critial Data Elem	ents
Churn Rate Tr	end Analysis	Feb 25, 2016
Process Co	mments	Select
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
Exposure at D	efault (EAD)	Feb 19, 2016
Provide Info	ormation	Select
add a drop se	lection gender for custom	er in 2 works



## Step 6

#### Tap Reassign.



#### Step 8

the Reassign 'Review' window.

Carrier 穼	2:59 PM	ļ
<b>&lt;</b> Review		
Reassign 'Re	view'	
Capture/update Metad	lata	
User		
Touch here to select		>
Role		
Touch here to select		>
Group		
Touch here to select		>
	Reassign	

Tap User, Role or Group in Search for the right user, role or group and tap the name when it appears.

Carrier 奈 ✔ Back	2:49 PM	_
Role		
् st		8
Steward		
Stakeholder		
Sysadmin		
DataSteward		
Glossary		
Assignee		
Requester		
Issue Manag	er	
Subject Mat	er Expert	
q w	ertyui	o p
a s	d f g h j	k I
ΰZ	xcvbn	m 🗵
123 😅	space	Search

## Step 9

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

Carrier 🗢 2:50 PM Kack	-
Reassign 'Review Stakeholder List' Use of PII Data - USA	
User Touch here to select	>
Role Steward	>
Group Touch here to select	>
Reassign	

## **Cancel a task**

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

#### Step 1

#### Step 2

Step 3

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









### Step 5

Tap the task that you wantIn the upper right corner,to cancel.tap ••••.

Carrier 🗢	10:46 AM	<b>••</b> +
≡	My tasks (61)	Sort
Identify and	d link Critial Data Flem	ents
intering and		01110
Churn Rate Tr	rend Analysis	Feb 25, 2016
Process Co	mments	Select
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
Exposure at D	efault (EAD)	Feb 19, 2016
Provide Info	ormation	Select
add a drop se	election gender for custom	er in A wooko

Carrier 후 4:30 PM
✓ My tasks → ····
Due October 13, 2016
Approval
Please vote for the approval of the Business Term. If you reject, please provide a reason for doing so.
Customer Customer Subject Area > Customer Domain Type Business Term Status Approved
What is your reason for approving/rejecting? Type here
Approve
Reject

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

Step 6



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 <sup>-</sup>	
-------------------	--

Step 2

CRM Data Operations

9 5

Glossary

Financ

48



Dat <sup>Track</sup>

Glos

CRM

Finar

Cust

BCBS

Glos

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

Carrier 🗟	3:25 PM	Help
HE	LLO	
Welcc the cc Gover	ome to Collibra On-the- ompanion app to your D nance Center.	Go, ata
Collib	ra On-the-Go	
		Let's go

In the upper left corner, tap  $\equiv$  In the menu bar, tap My tasks.



## Step 5

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

Carrier 중	10:46 AM	
≡	My tasks (61)	Sort
		1
Identify and lin	k Critial Data Elem	ents
Churn Rate Trend	Analysis	Feb 25, 2016
Process Comm	ents	Select
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
Exposure at Defau	ılt (EAD)	Feb 19, 2016
Provide Inform	ation	Select
add a drop selecti	on gender for custom	er in 2 wooko

# Tap the sorting method you want to apply:

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

Carrier 奈	4:03 PM	
≡	My tasks (0)	
	How would you like to sort your tasks?	
	Due Date (most urgent first)	
	Due Date (less urgent first)	
	Creation Date (newest first)	
	Creation Date (oldest first)	
	Task type	
	Cancel	

## View a task in a workflow diagram

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

#### Step 1

Step 2

Step 3

In the upper left corner, tap  $\equiv$  In the menu bar, tap My

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







#### Step 5

to see in a workflow diagram.

Carrier 후	10:46 AM	
	My tasks (61)	Sort
Identify and lin	k Critial Data Eleme	ents
Churn Rate Trend	Analysis	Feb 25, 2016
Process Comm	ients	Select
EEPRD-0002		in 2 weeks
EEPRD-0004		in 2 weeks
EEPRD-0006		in 2 weeks
EEPRD-0012		in 2 weeks
EEPRD-0016		in 2 weeks
EEPRD-0018		in 2 weeks
Exposure at Defau	ult (EAD)	Feb 19, 2016
Provide Inform	ation	Select
add a drop select	ion gender for custome	er in 2 works





# Step 6

#### Tap View in workflow diagram.



## Step 7

Step 8

The workflow diagram appears.



Tap  $\otimes$  to close the diagram.



**Chapter 6** 

## 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	
Start an asset workflow	

## 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 3

In the menu bar, tap

Anywhere in Collibra In the m Everywhere for iOS, tap  $\equiv$ . Create.





Tap the workflow that youFill in the necessarywant to start.information and tap

Carrier ≈ 3:21 PM	-
Propose Business Asset	>
Propose Technology Asset	>
Propose Business Term	>
Propose Code Value	>
Log Issue	>
Request DSA	>
Propose Governance Asset	>
Triage DSA	>
Propose Data Asset	>

#### 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.

Carrier 🗢	3:22 PM	
K Back		
<b>、</b>		
Type *		
Touch here to select		>
Proposed Description		
Type here		
Example		
Town have		
Type nere		
Deleted Accests		
Related Assets		
Reason for proposal		
Type here		
	Propose	

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:



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





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

carrier '∻'		3:55 PM	
<			
Working	Group on	I FIBO > FIBO Ontolo	ах
contr	act		
100%	Type Status	SKOS Concept Industry Standard	
Ove	rview	Responsibilities	Comments
Definition a volunta ment be Alternati	n ary, delib tween tv ve Label	perate, and legally b wo or more compete	binding <mark>agree-</mark> ent parties
Definition a volunta ment be Alternati Contract	n ary, delib tween tv ve Label :	perate, and legally b wo or more compete	binding <mark>agree-</mark> ent parties
Definition a volunta ment be Alternati Contract Groups	n ary, delib tween tv ve Label :	berate, and legally b wo or more compete tual agreement	oinding agree- ent parties
Definition a volunta ment be Alternati Contract Groups mutual unilater	n ary, delib tween tv ve Label : contrac	verate, and legally b vo or more compete tual agreement act	binding agree- ent parties
Definitio a volunta ment be Alternati Contract Groups mutual unilater verbal	n ary, delib tween tw ve Label : contract ral contract	verate, and legally b vo or more compete tual agreement act	inding agree- ent parties
Definitio a volunta ment be Alternati Contract Groups mutual unilater verbal written	n ary, delib tween tv ve Label : contrac: ral contrac contract contrac	verate, and legally b wo or more competi tual agreement act t	binding agree- ent parties
Definition a volunta ment be Alternati Contract Groups mutual unilater verbal written Grouped	n ary, delib tween tw ve Label : contract contract contract contract	vo or more compete tual agreement act	pinding agree- ent parties



Tap the workflow that you

Step 3

#### Tap Start workflow.



## **Chapter 7**

# **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

Application settings	62
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  $\equiv$  in the upper left corner, then tap  $\odot$  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



Carrier 🗢	9:00 AM	
	Settings	$\times$
GENERAL		
App Analytics		
Email app		>
Auto hyperlinks		
Enabling the autor Data Governance	natic detection of hype Center may result longe	rlinks in your er loading times.
ACCOUNT		
Use Touch ID		$\bigcirc$
Ask for password	1	
Automatically sig	n me in	~
Clear data		

## 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.

Кеу	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 act- ive window indication, <b>Search</b> button and num- ber of tasks.	String (hexa- decimal code)	#84BD00
Accent02	Color of the navigation bar in dashboards and search filters.	String (hexa- decimal code)	#509E2F
Accent03	Secondary color in the main menu, used for the <b>Create</b> button.	String (hexa- decimal code)	#9FD193

Кеу	Description	Format	Default value
Accent04	Not yet in use.	String (hexa- decimal code)	#D2E9CD
Accent05	Not yet in use.	String (hexa- decimal 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:

arrier 🗢 7:34 AM		Carrier 🗢 7:35 AM	
Q Search		John Fisher https://dgc.yourcompany.com	
Data Oversight Dashboard acks maturity and progress of the DG organiz	ation.	Search	
		Create	
15 45	75	My tasks	
RM Data Operations		Dashboards	
48 20 Finance	2	Data Oversight Dashboard Steward Dashboard	
29 10 28 Customer Subject Area		A My profile	
23 12 10		G Sign out	
3CBS 239 Compliance Task Force		Ø Settings	
15 45	75	E About	
Glossary			
Approved assots	140		

#### **Chapter 8**

# 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.