

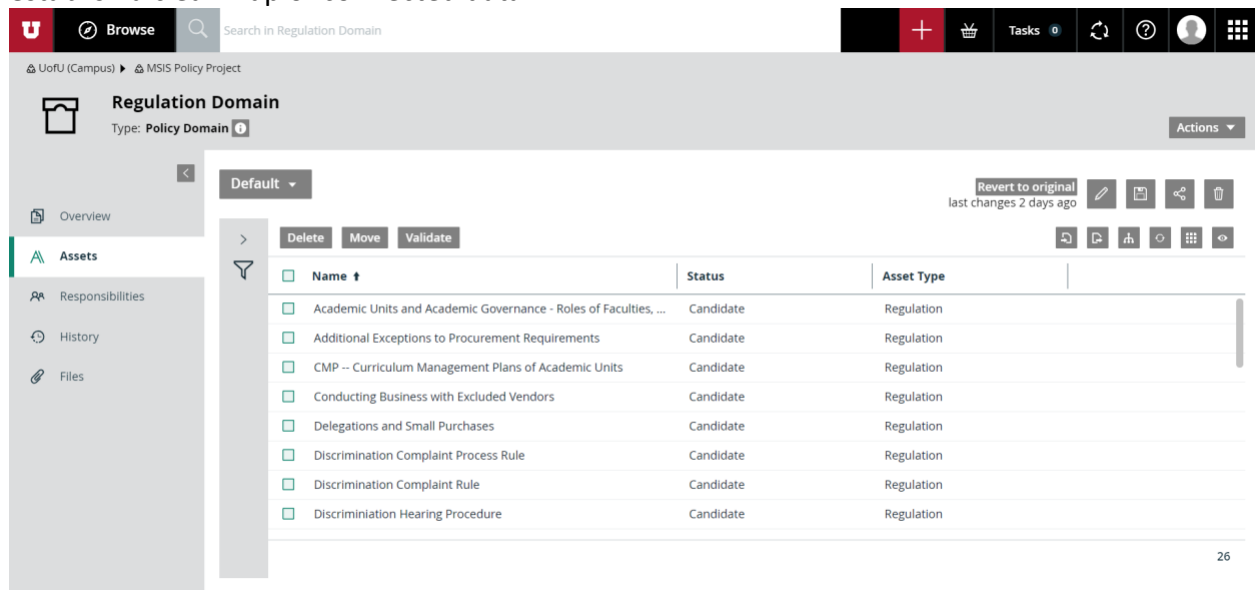
# Collibra Documentation Guide for the University of Utah's Regulation Office

## Introduction

Welcome to the UReg Collibra Database documentation! This document aims to provide a comprehensive understanding of the fundamentals of the Collibra graph database created for The University of Utah's Regulations Office. This database serves as a centralized system for managing and organizing policies, regulations, citations, stakeholders, and revision processes related to the University's regulations. This database reflects the original UReg relational database, relationships, and entities created in MySQL.

## Domains, Assets, Attributes, and Relationships

In Collibra, the **Domain** is a dedicated space to group related assets together, similar to a database table. Assets within the domain can be linked together through relationships to establish a clear map of connected data.



The screenshot displays the Collibra interface for a 'Regulation Domain'. The top navigation bar includes a 'Browse' button and a search bar labeled 'Search in Regulation Domain'. Below the navigation bar, the breadcrumb path shows 'UofU (Campus) > MSIS Policy Project'. The main header area displays 'Regulation Domain' with a sub-header 'Type: Policy Domain' and an 'Actions' dropdown menu. On the left sidebar, there are navigation options: 'Overview', 'Assets', 'Responsibilities', 'History', and 'Files'. The 'Assets' section is currently selected, showing a list of assets. Above the list, there are buttons for 'Delete', 'Move', and 'Validate', along with a 'Revert to original' button indicating 'last changes 2 days ago'. The asset list has columns for 'Name', 'Status', and 'Asset Type'. The assets listed are all 'Candidate' status and 'Regulation' type.

Name	Status	Asset Type
Academic Units and Academic Governance - Roles of Faculties, ...	Candidate	Regulation
Additional Exceptions to Procurement Requirements	Candidate	Regulation
CMP -- Curriculum Management Plans of Academic Units	Candidate	Regulation
Conducting Business with Excluded Vendors	Candidate	Regulation
Delegations and Small Purchases	Candidate	Regulation
Discrimination Complaint Process Rule	Candidate	Regulation
Discrimination Complaint Rule	Candidate	Regulation
Discrimination Hearing Procedure	Candidate	Regulation

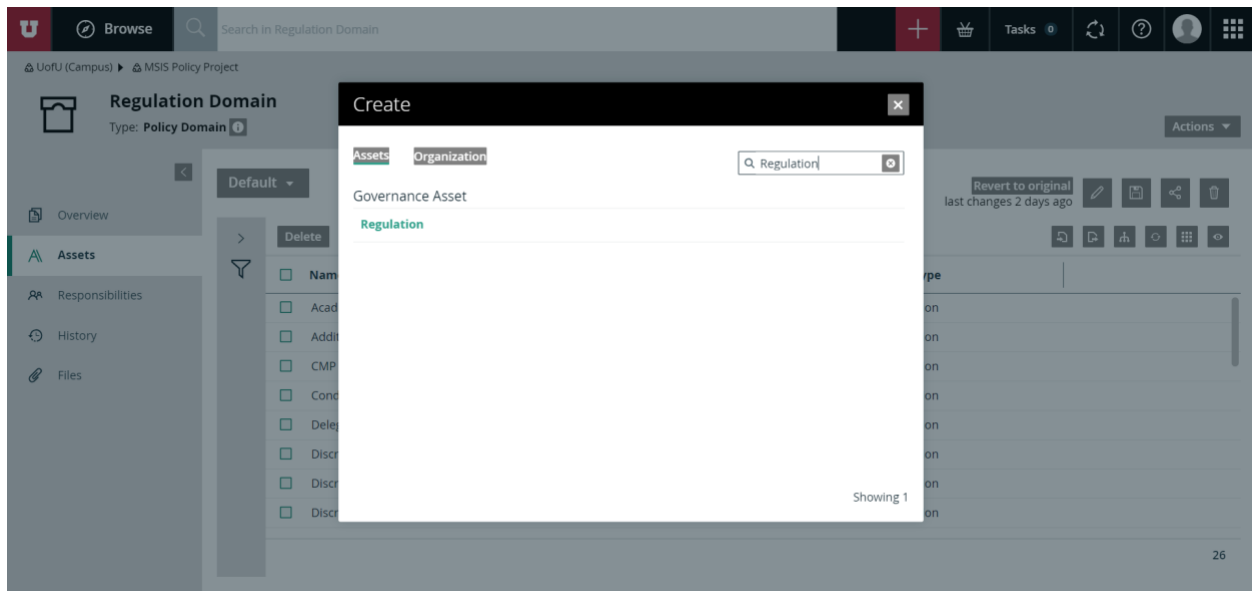
An **Asset** is a data point, such as a policy or regulation, which can be enriched with **Attributes**, such as policy number, title, or storage link. These attributes can either be mandatory or optional, depending on the requirements for the specific data point.

**Relationships** allow for connections between assets, denoting parent-child or referenced relationships, and aiding in understanding how different data points interrelate.

## Creating Assets and Attributes

To create new assets within a domain, follow these steps:

1. Click the large red plus button in the top left of the Collibra interface.
2. Select 'Create Asset'.
3. Search for the correct domain in the search box. The domain types include Policy, Regulation, Citation, Stakeholder, and Revision.
4. Upon selection, you will be prompted to fill in the details pertaining to the specific type of asset.



To add attributes to an asset, follow these steps:

1. Select the asset to which you want to add attributes.
2. Click the 'Add Characteristic' button.
3. Fill in the necessary details for the attribute, including the attribute name and whether it is mandatory or optional.

## Adding Characteristics

To add optional characteristics to each asset in the domain, as well as link relationships between assets, use the 'Add Characteristics' button. This is found in the top left of the Collibra interface.

## Adding a New Relationship

The screenshot shows the 'Add a Characteristic' dialog with the 'Relations' tab selected. The dialog lists 12 relationships, each with a name and a type of 'Relation'. The background shows the 'Discrimination Complaint Rule' page with fields for Description, Regulation Number, Version Number, Regulation Status, Regulation Effective Date, and a Note.

Relation Name	Type
previous version Regulation	Relation
current version Regulation	Relation
noted Change Tracking Records the changes that have been made to the data an asset represents in Colibra.	Relation
dictates Colibra Policy	Relation
referenced by Revision	Relation
referenced by Citation	Relation
referenced by Stakeholder	Relation
impacted by Issue Indicates that an Asset is strongly affected by a particular Issue.	Relation

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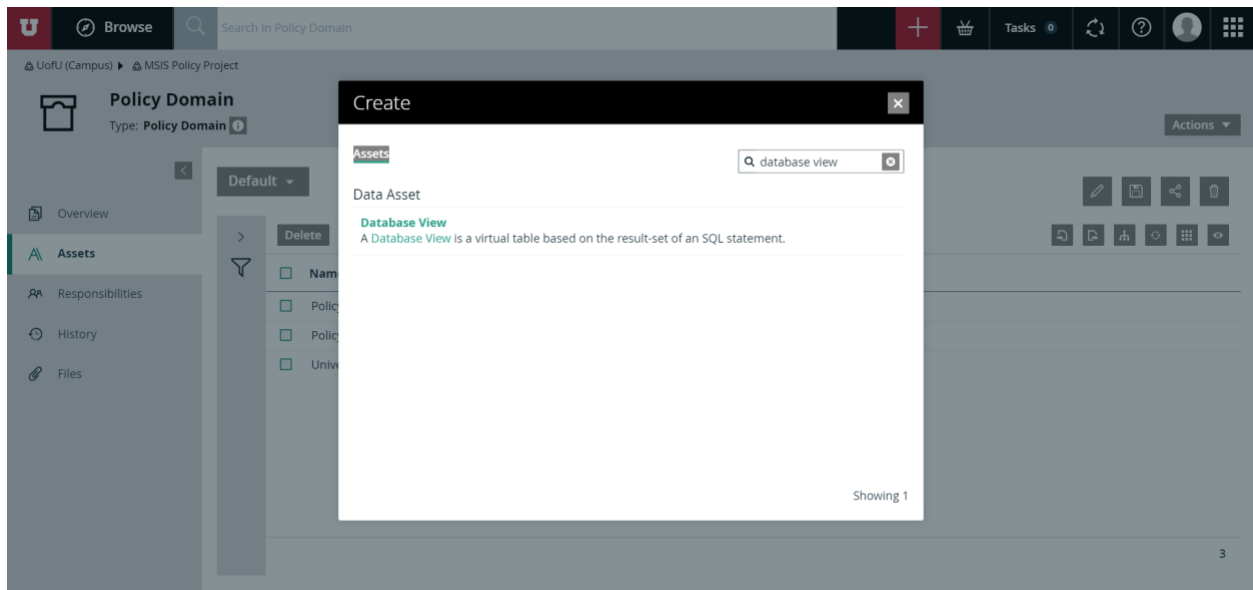
## Adding an Optional Attribute

The screenshot shows the 'Add a Characteristic' dialog with the 'Attributes' tab selected. The dialog lists 16 attributes, each with a name and a type of 'Text'. The background shows the 'Discrimination Complaint Rule' page with fields for Description, Regulation Number, Version Number, Regulation Status, Regulation Effective Date, and a Note.

Attribute Name	Type
Regulation Effective Date	Text
Regulation Metadata	Text
Regulation Last Review Date	Text
Note (WSO2 Needed) A note. Use Case: Understand any exceptions to an asset.	Text
Regulation Interim or Final	Text
Regulation Editorial Revision YN	Text
Regulation Revision Flag YN	Text
Regulation Revision Flag Notes	Text

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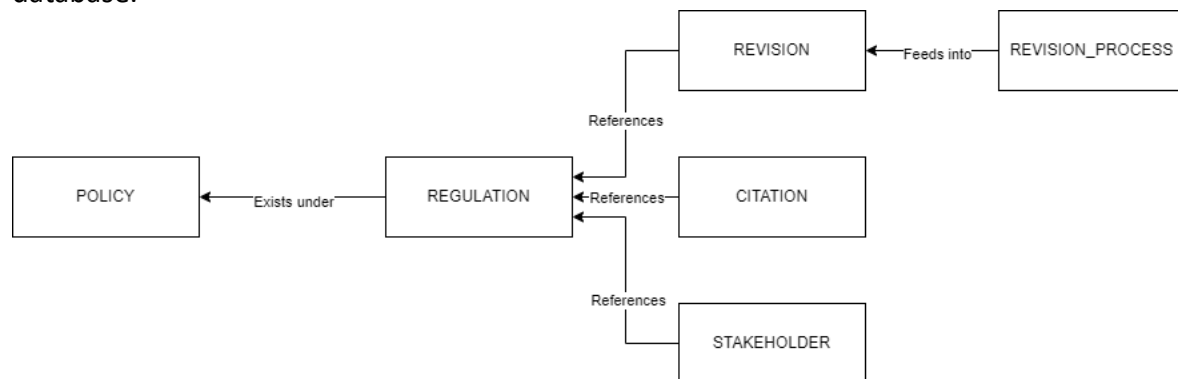
## Creating a Database View (UIT Assistance Required)



## Understanding the Conversion Guide

The provided conversion guide in the hand-off package outlines the conversion process from a relational database into Collibra, indicating the corresponding Assets, Attributes, whether the attributes are mandatory or optional, and their relationships.

Always refer to this conversion guide when moving data from a relational database to Collibra, as it ensures that the data is structured correctly and consistently throughout the Collibra database.



## Interacting with the Graph Database

1. Navigate to the [MSIS Policy Project within Collibra](#).

UofU (Campus)  
Type: Community

Description  
No value has been given yet. Double click or use the edit button.

Organization

Name	Description	Domain Type	Owner	Stakeholder	Data C
Auxiliary Departments			DM&A Team Members		
Box System			CLAYTON NORLEN		
Enrollment Management			Collibra SysAdmin Test	...	
Financial Services	Appoints data steward - AVP of F		DM&A Team Members		
Human Resources			DM&A Team Members		
Institutional Advanceme...	Appoints Owner/Data Steward -		Institutional Advancement - ...	DM&A Team Members	( ...
MSIS Policy Project					

1 ( top-level )

Comments

2. Click on the desired domain to view all the assets within it.

Regulation Domain  
Type: Policy Domain

Default

Revert to original  
last changes 2 days ago

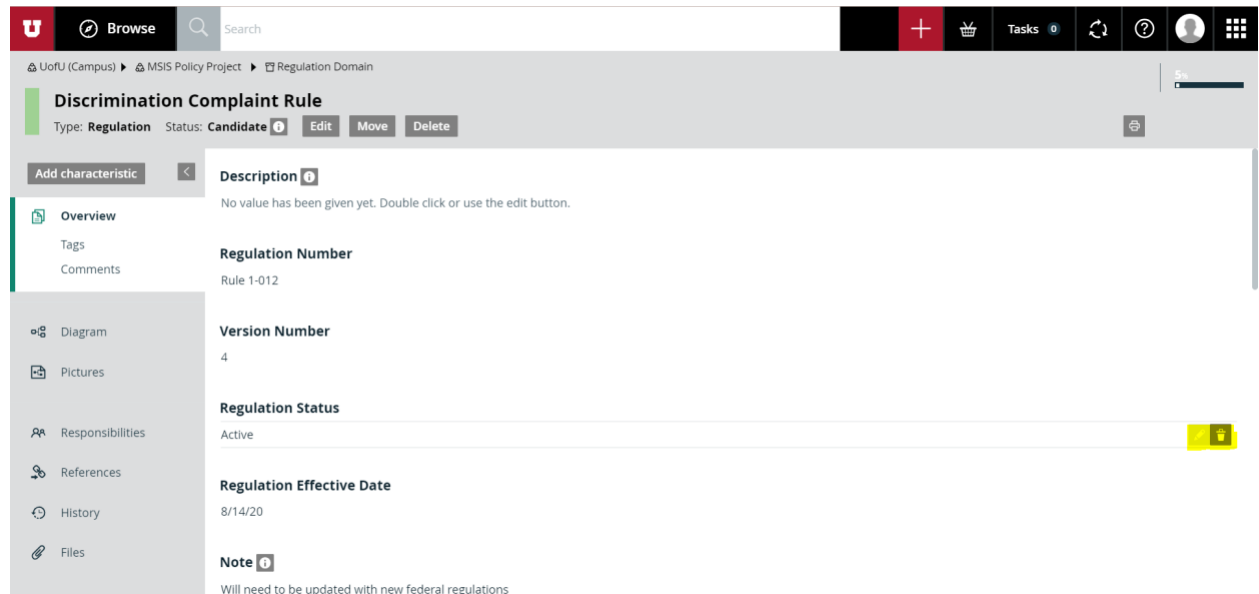
Delete Move Validate

Name	Status	Asset Type
Academic Units and Academic Governance - Roles of Faculties, ...	Candidate	Regulation
Additional Exceptions to Procurement Requirements	Candidate	Regulation
CMP -- Curriculum Management Plans of Academic Units	Candidate	Regulation
Conducting Business with Excluded Vendors	Candidate	Regulation
Delegations and Small Purchases	Candidate	Regulation
Discrimination Complaint Process Rule	Candidate	Regulation
Discrimination Complaint Rule	Candidate	Regulation
Discrimination Hearing Procedure	Candidate	Regulation

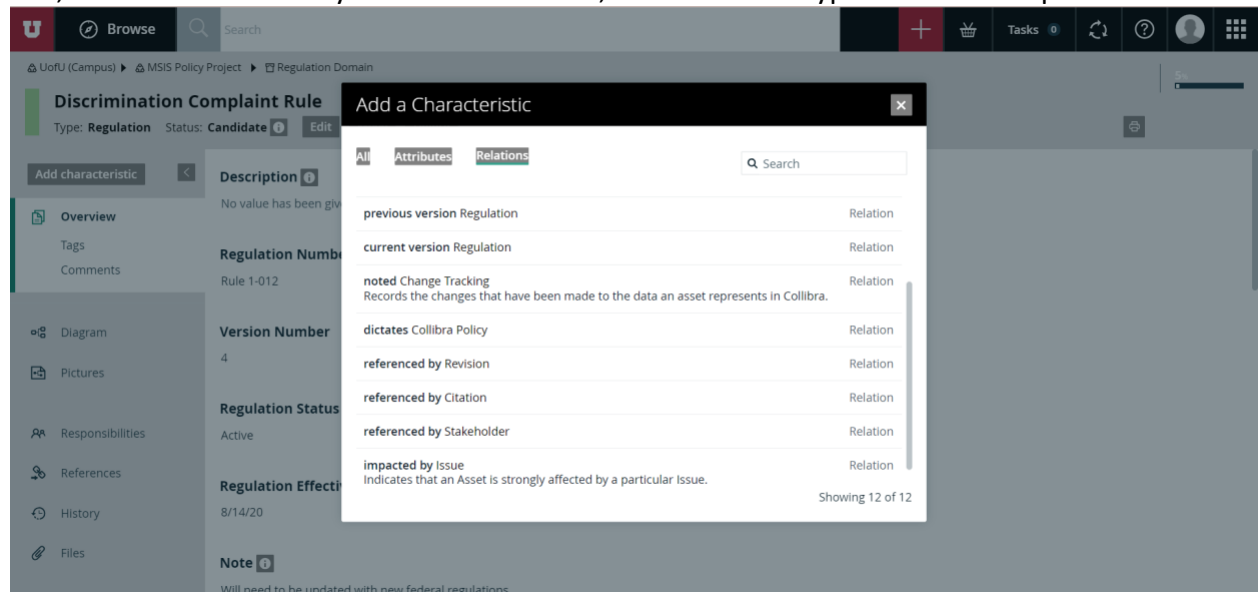
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3. Select an asset to view its attributes and relationships, you can also click on the *Edit* icon to change the entry. The graph view will show a node for the asset and lines to

connected assets.



4. Click on other nodes to navigate through the graph and inspect the details of connected assets.
5. To add relationships, select the 'Relations' option within the *Add a Characteristic* dialog box, search for the asset you want to connect, and select the type of relationship.



6. Save your changes. The graph will update to reflect the new relationships.

## Creating and Managing Views

Colibra allows users to create and manage SQL Views, when connected to a database - which are customized presentations of the data to meet specific business requirements.

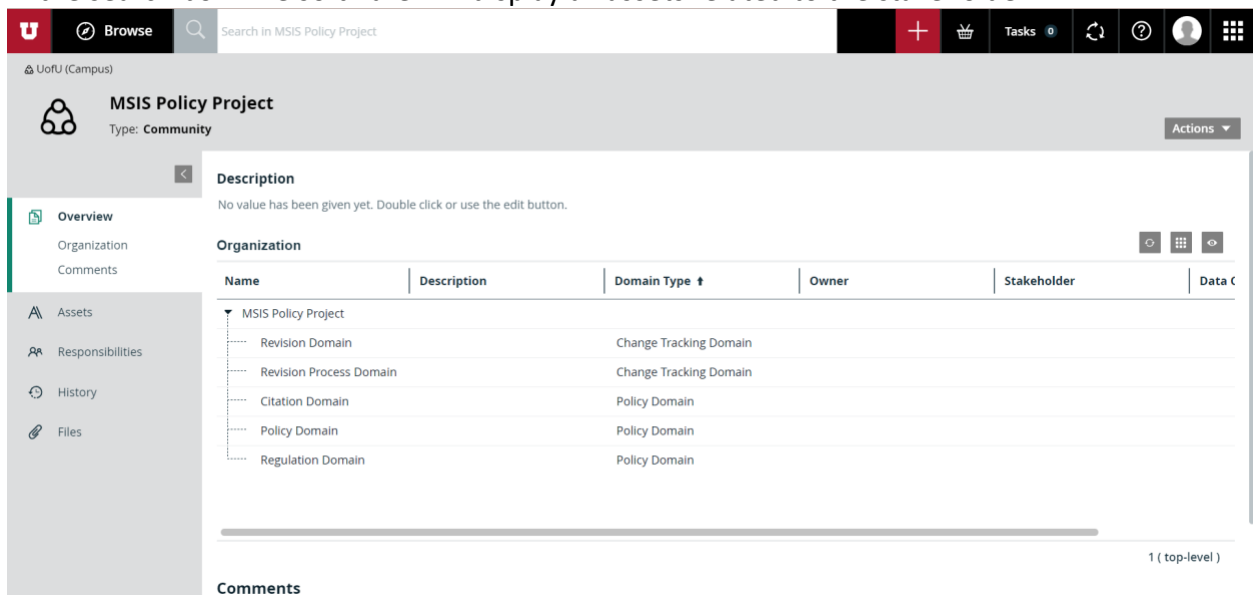
To create a View, contact UIT support staff to create the relational database using the provided MySQL schema and SQL files, then the views created as part of the hand-off package can be imported and utilized.

## Querying the Data

Collibra allows users to query all data directly from the top search bar. Here are two common business requirements:

Query by Regulation ID or Regulation Name: Navigate to the 'Regulation' domain and enter the id or name in the search box. The software will show all assets that match your search criteria.

Query by Stakeholder: Navigate to the 'Stakeholder' domain and enter the stakeholder's name in the search box. The software will display all assets related to the stakeholder.



The screenshot displays the Collibra interface for the 'MSIS Policy Project'. The top navigation bar includes a search bar with the text 'Search in MSIS Policy Project' and a 'Browse' button. The left sidebar shows a navigation menu with 'Overview' (selected), 'Organization', 'Comments', 'Assets', 'Responsibilities', 'History', and 'Files'. The main content area is titled 'MSIS Policy Project' and 'Type: Community'. It features a 'Description' section with a message: 'No value has been given yet. Double click or use the edit button.' Below this is an 'Organization' table with columns: Name, Description, Domain Type, Owner, Stakeholder, and Data. The table lists several domains under the 'MSIS Policy Project' category. At the bottom, there is a 'Comments' section.

Name	Description	Domain Type	Owner	Stakeholder	Data
MSIS Policy Project					
Revision Domain		Change Tracking Domain			
Revision Process Domain		Change Tracking Domain			
Citation Domain		Policy Domain			
Policy Domain		Policy Domain			
Regulation Domain		Policy Domain			

These are just some of the ways to interact with and utilize the Collibra software. For more specific scenarios, refer to Collibra's help documentation or contact the UIT support team.