



Collibra Data Governance Center

User Guide



Collibra Data Governance Center User Guide

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You can find the most up-to-date technical documentation on our documentation site at
<https://productresources.collibra.com/docs/on-premises-user/5.7>

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New and updated topics

Important TLS 1.2 weak ciphers will be deprecated on **Sunday, May 23, 2021**. See the [release notes](#) for more information.

- The [Tableau business logic](#) now shows how business users can profit from the [Tableau integration](#) in Collibra Data Governance Center.
- The [Tableau permissions](#) table is updated to show changes for Tableau users with version 2020.2 or newer. In addition, we now also support Tableau version 2021.1.
- When working with an assessment template, a [Governance option](#) now allows you to specify whether or not an assessment conducted from the template will trigger the Assessments workflow.
- The Catalog connector documentation now has different ways to filter the list of available data sources.
- The Catalog connector for Jira Service Desk is now listed.
- If you upgraded to Tableau 2020.2 or newer, you can now synchronize your Tableau Server without losing manually added characteristics, tags, comments and stitching results after preparing the [migration procedure](#).
- Dynamic filtering by [Business Qualifier](#) is now promoted from beta feature to general availability.
- You can now add the new "Manage all resources" global permission to a global role to give its users access to all communities, domains and assets. Users with this global permission do not need the relevant responsibilities to create, edit or delete resources.
- The Catalog connector for Apache Kafka can now profile data.
- You can now use the [physical data connector](#) to:
 - Manually [classify](#) individual columns
 - [Connect](#) the physical data layer to the logical data layer.
- Since Collibra Data Intelligence Cloud 2020.11 or Collibra Data Governance Center 5.7.7, the you need specific [permissions](#) to synchronize an S3 File System.
- You can now enable the Anonymize data option to [anonymize](#) data of a columns with data type Geo or Text after the [profiling](#) process.
- You can now ingest or synchronize Tableau 2020.2 and newer if you enable the [Tableau metadata API](#).
- The [packaged data classes](#) have been updated.

- The [Looker](#) metamodel is now available out of the box. However, you cannot yet register a Looker data source.
- The [Power BI](#) metamodel is now available out of the box.
- New [views](#) are now private by default.
- You can now register new data sources: [Denodo](#), [Google Spanner](#) and [Apache Kafka](#).
- You can now use push down sampling for [data profiling](#).
- You can now enable the [refreshed navigation](#) in Collibra Console.
 - You now see a Home button in the upper left corner.
 - You now see an expandable browser pane with the Organization Browser and Asset Views.
 - [Dashboards](#) are now presented as tabs.
 - You now see an expandable product menu to switch between products.
 - [Quick search](#) is now contextual for communities and domains, but you can no longer select a search filter or category.
- The [Responsibilities page](#) is now improved.
- The Catalog connector for ServiceNow is now certified.
- The Catalog connector for MarkLogic is now certified.
- The Catalog connector for Parquet is now certified.
- In the JSON text editor for diagram views, you can now specify the maximum flow depth.
- The search engine now takes into account partial exact matching of the search text in the Name field.
- You can now [download](#) a PDF of an assessment.
- You can now [copy](#) and [delete](#) assessments.
- You can now [delete](#) any of your customized templates.
- If a search filter was configured with a field that is no longer available, the invalid field is now [highlighted](#), so that you can easily identify it and delete it from the search filter.

Getting started with Collibra Data Governance Center

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A word about permissions

In Collibra Data Governance Center, the following factors determine the extent to which you, or any other user, can configure Collibra DGC and carry out various actions:

- Your user license.
- Your roles and permissions.
- Whether or not you are a Collibra Console user.
- The Collibra products and applications authorized in your organization's license file.

User license

The first consideration in determining the actions available to you as a Collibra DGC user is your user license. A user license is the overall authorization for a user to perform certain actions in Collibra DGC.

There are currently two license types:

License type	Actions
Consumer	Consult information.
Author	Consult, add, edit and delete information.

Roles and permissions

A role is a collection of permissions that can be assigned to users and user groups. In Collibra DGC, we can generally think of an administrator as a user with a comprehensive combination of global roles and resource roles. From those roles, the user inherits global permissions and resource permissions.

We cannot specify which role or roles might grant you certain permissions, because your administrator can:

- Create new roles and configure the permissions for them.
- Edit the permissions for the packaged roles.

Sysadmin global role

The Sysadmin global role has the System administration global permission, which allows you to configure and manage Collibra DGC settings and the operating model.

Note All permissions refer to Collibra DGC alone and do not apply to Collibra Console, where you can configure the foundational Collibra DGC settings.

Collibra Console

[Collibra Console](#) is a Java web application that you can use, among other things, to install, configure and maintain the Collibra DGC environment. To work with Collibra Console, you need a separate Collibra Console user account. There are three different roles you can assign to Collibra Console users, each granting a different level of permissions:

- The READ role: This role gives you read-only access to Collibra Console.
- The ADMIN role: This role includes extra functionality on top of the READ role, for example restoring a backup.
- The SUPER role: This role includes all permissions, for example stopping an environment.

Collibra products and applications

Your organization's license file defines:

- The Collibra products and applications that your organization can use.
- The expiration date of the user licenses.
- The maximum number of users.

Example If your license file does not include Data Catalog, this application will not be available in your Collibra DGC environment.

Collibra DGC packaged components

In this section, we present the Collibra Data Governance Center packaged components.

Tip Most of the packaged components cannot be deleted.

Overview of packaged asset types

An asset type defines the semantics of an asset, as a kind of template. Via its [assignment](#), it defines which [attribute types](#), [relation types](#) and [statuses](#) the asset can have. It also determines which [articulation rules](#), [data quality rules](#) and [validation rules](#) are applied, and the [domain types](#) in which it can be created.

Note If you want to create an asset of a specific type, you need access to one or more domains of the required type. For example, you can only create KPI assets in a Report Catalog domain. As an admin, you can see and edit the required domain types in the assignment.

The table below contains all packaged [asset types](#) and their description.

Tip For an interactive overview of all packaged asset types, including the relevant domain types and applications, see the online [admin guide](#).

Asset type	Asset type	Description	Required global permission
Business Asset	Business Asset	A type of asset that is exclusively used and governed by the business user community. Its instance assets, and all instances instantiating its subtypes, pertain to the business organization. Business assets typically include business concepts like Business Term, Business Process, Line of Business, etc. that help to build the semantics of any organization with insufficient details to build an actual business application.	Business Semantics Glossary
Business Context	Business Asset ► Business Context	A type of asset that binds certain assets by a specific business context. They can be used as filters in Business Context Diagrams.	Business Semantics Glossary
Business Dimension	Business Asset ► Business Dimension	A set of reference information that categorizes and describes business terms in a way that provides context and meaningful answers to business questions. Examples: business process, line of business, region	Data Stewardship Manager

Asset type	Asset type	Description	Required global permission
BI Folder	Business Asset ↳ Business Dimension ↳ BI Folder	A collection of BI content	Data Stewardship Manager
Looker Folder	Business Asset ↳ Business Dimension ↳ BI Folder ↳ Looker Folder	A container that stores Looker Looks, Dashboards and other folders.	Data Stewardship Manager
Power BI Capacity	Business Asset ↳ Business Dimension ↳ BI Folder ↳ Power BI Capacity	A resource that hosts Power BI Workspaces.	Data Stewardship Manager
Power BI Folder	Business Asset ↳ Business Dimension ↳ BI Folder ↳ Power BI Folder	A collection of Power BI Report Server Dashboards, Reports and Data Models.	Data Stewardship
Power BI Workspace	Business Asset ↳ Business Dimension ↳ BI Folder ↳ Power BI Workspace	A collection of Power BI Dashboards, Reports and Data Models.	Data Stewardship Manager

Asset type	Asset type	Description	Required global permission
SSRS Folder	Business Asset ↳ Business Dimension ↳ BI Folder ↳ SSRS Folder	A collection of SQL Server Reporting Services Dashboards, Reports and Data Sets.	Data Stewardship Manager
Tableau Project	Business Asset ↳ Business Dimension ↳ BI Folder ↳ Tableau Project	Collection of Tableau workbooks and data sources.	Data Stewardship Manager
Tableau Site	Business Asset ↳ Business Dimension ↳ BI Folder ↳ Tableau Site	Collection of content (workbooks, data sources, users, ...) that's walled off from any other content on that instance of Tableau Server.	Data Stewardship Manager
Business Process	Business Asset ↳ Business Dimension ↳ Business Process	A set of activities and tasks that, once completed, produces value to the business. Examples: campaign management, talent recruitment	Data Stewardship Manager

Asset type	Asset type	Description	Required global permission
Data Category	Business Asset ▶ Business Dimension ▶ Data Category	<p>A container for all the business definitions that encompass associated terminology and definitions that an organization is trying to govern.</p> <p>Examples: master data, reference data, transactional data</p>	Data Stewardship Manager
Data Concept	Business Asset ▶ Business Dimension ▶ Data Concept	<p>A data concept is a high level theoretical representation of the most common data properties of a data domain. A data concept is the business counterpart of a data attribute in a logical data dictionary, just as a data attribute is the logical counterpart of a field or column in the physical data dictionary. (Example: an address is a data concept of the data domain customer or organisation).</p>	Data Stewardship Manager

Asset type	Asset type	Description	Required global permission
Data Domain	Business Asset ↳ Business Dimension ↳ Data Domain	Also known as Data Category or Subject area, this is a container of all the business data domains and data concepts that encompass associated terminology and definitions that an organization is trying to govern. Examples: Master Data (Customer, Product), Reference Data. Business Data Domains group Data Concepts (Year, Date, Address, Name, etc.)	Data Stewardship Manager
Line of Business	Business Asset ↳ Business Dimension ↳ Line of Business	A logical element or segment of an organization that serves a particular business need. Line of business is also known as business unit or business area. Examples: retail, e-commerce, investment management	Data Stewardship Manager
Business Qualifier	Business Asset ↳ Business Qualifier	Business Qualifiers qualify certain assets. This can be used as filters in Business Qualifier Diagrams.	Business Semantics Glossary

Asset type	Asset type	Description	Required global permission
Business Term	Business Asset ↳ Business Term	A word or phrase that describes a concept that is used in a particular branch of business. Examples: customer, person purchase count, loan amount	Business Semantics Glossary
Acronym	Business Asset ↳ Business Term ↳ Acronym	An abbreviation of a business term that forms a word or a name. It is formed by stringing the initial components of a business term together. It is often pronounced as a word. Examples: ERP, EDW, EAD	Business Semantics Glossary
Measure	Business Asset ↳ Measure	An asset type that is used for calculations, such as sum, count, average, minimum or maximum. Examples: net sales, top customers, on-hand inventory	Business Semantics Glossary
KPI	Business Asset ↳ Measure ↳ KPI	Key Performance Indicator, an indicator to periodically measure the success of or the progress towards a strategic goal of a particular activity or of an organization. Examples: employee turnover, customer attrition, claims denial rate	Business Semantics Glossary

Asset type	Asset type	Description	Required global permission
Report	Business Asset » Report	A document containing information that is organized in a narrative, graphic, or tabular form. The document is prepared on an ad hoc, periodic, recurring, regular or as-required basis. Reports can refer to specific periods, events, occurrences or subjects.	Business Semantics Glossary
BI Report	Business Asset » Report » BI Report	A visual representation of data or a collection of visualizations.	Business Semantics Glossary
Looker Dashboard	Business Asset » Report » BI Report » Looker Dashboard	A collection of Looker tiles with metrics from one or more Looker Looks.	Business Semantics Glossary
Looker Look	Business Asset » Report » BI Report » Looker Look	A detailed view of a Looker Data Set, with visualizations of findings and insights.	Business Semantics Glossary
Looker Query	Business Asset » Report » BI Report » Looker Query	A query that creates a simple report in a Looker Tile or Looker Look.	Business Semantics Glossary

Asset type	Asset type	Description	Required global permission
Looker Tile	Business Asset ↳ Report ↳ BI Report ↳ Looker Tile	An element that represents data on the Looker Dashboard.	Business Semantics Glossary
Power BI Dashboard	Business Asset ↳ Report ↳ BI Report ↳ Power BI Dashboard	A collection of Power BI tiles with metrics from one or more Reports and Data Models.	Business Semantics Glossary
Power BI KPI	Business Asset ↳ Report ↳ BI Report ↳ Power BI KPI	A key performance indicator of Power BI Report Server.	Business Semantics Glossary
Power BI Report	Business Asset ↳ Report ↳ BI Report ↳ Power BI Report	A detailed view of a Power BI Data Model, with visualizations of findings and insights.	Business Semantics Glossary
Power BI Tile	Business Asset ↳ Report ↳ BI Report ↳ Power BI Tile	An element representing data on the Power BI Dashboard.	Business Semantics Glossary
SSRS KPI	Business Asset ↳ Report ↳ BI Report ↳ SSRS KPI	A key performance indicator of SQL Server Reporting Services.	Business Semantics Glossary

Asset type	Asset type	Description	Required global permission
SSRS Report	Business Asset ↳ Report ▶ BI Report ↳ SSRS Report	A detailed view of an SQL Server Reporting Services Data Set, with visualizations of findings and insights.	Business Semantics Glossary
Tableau View	Business Asset ↳ Report ▶ BI Report ↳ Tableau View	A representation of your data in a Tableau worksheet or dashboard.	Business Semantics Glossary
Tableau Dashboard	Business Asset ↳ Report ▶ BI Report ↳ Tableau View ▶ Tableau Dashboard	A collection of several worksheets and supporting information, shown on a single screen, so that you can simultaneously compare and monitor a variety of data.	Business Semantics Glossary
Tableau Story	Business Asset ↳ Report ▶ BI Report ↳ Tableau View ▶ Tableau Story	Sequence of visualisations that work together to convey information.	Business Semantics Glossary
Tableau Worksheet	Business Asset ↳ Report ▶ BI Report ↳ Tableau View ▶ Tableau Worksheet	A worksheet is a single sheet on which you can build views of your data.	Business Semantics Glossary

Asset type	Asset type	Description	Required global permission
Tableau Workbook	Business Asset ↳ Report ↳ BI Report ↳ Tableau Workbook	Collection of sheets. A sheet can be a worksheet, a dashboard or a story.	Business Semantics Glossary
Data Asset	Data Asset	A type of asset that represents details of organizational data in two layers. One layer is independent of any particular technology for non-technical stakeholder communication. The other one is taking the implementation system for technical stakeholder communication into account. Examples: Data Element, Table	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Code Set	Data Asset ↳ Code Set	An enumerated list of valid code values for a specific topic, where the code set is the whole and the code values are parts of that whole. It is a data asset that defines the set of permissible values to be used by other data assets. Examples: Product Code Set, Person Gender Code, ISO 3166 Country Code	Reference Data Manager

Asset type	Asset type	Description	Required global permission
Code Value	Data Asset › Code Value	<p>A valid form of representation for an asset, shortened or covert.</p> <p>Examples:</p> <ul style="list-style-type: none"> • In the Person Gender Code, "male", "female", "not known" and "not specified" are represented by the valid code values "1", "2", "0" and "9". • "US" is part of the "ISO 3166 code set" and refers to The United States of America. 	Reference Data Manager
Crosswalk	Data Asset › Crosswalk	Mapping between two or more code sets.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Data Element	Data Asset › Data Element	<p>A construct that documents aspects of something abstract, especially one that is essential for business.</p> <p>Examples: person birth date, person address</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Column	Data Asset › Data Element › Column	<p>An atomic unit of data that can be stored in a database table.</p> <p>Examples: FST_NM, EMPID</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Data Attribute	Data Asset › Data Element › Data Attribute	A specification that defines a property of a data entity. Examples: CustomerBirthDate, EmployeeFirstName	<ul style="list-style-type: none"> • Catalog • Data Dictionary
BI Data Attribute	Data Asset › Data Element › Data Attribute › BI Data Attribute	An atomic unit of data that represents a BI report.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Looker Data Set Column	Data Asset › Data Element › Data Attribute › BI Data Attribute › Looker Data Set Column	An atomic unit of data that is used in a Looker Look or Looker Tile. It represents a column in a Looker Data Set.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Power BI Column	Data Asset › Data Element › Data Attribute › BI Data Attribute › Power BI Column	A column in a Power BI Data Model.	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
SSRS Column	Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ SSRS Column	A column in an SQL Server Reporting Services Report Data Set.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Tableau Data Attribute	Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ Tableau Data Attribute	<p>A specification that defines a property of a Tableau data entity.</p> <p>Examples: CustomerBirthDate, EmployeeFirstName.</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Field	Data Asset ▶ Data Element ▶ Field	<p>An atomic unit of data that can be stored in a file.</p> <p>Examples: FirstName, EmpID</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Report Attribute	Data Asset ▶ Data Element ▶ Report Attribute	An atomic unit of data that represents a report.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
BI Report Attribute	Data Asset ▶ Data Element ▶ Report Attribute ▶ BI Report Attribute	An atomic unit of data that represents a BI report.	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Looker Report Attribute	Data Asset › Data Element › Report Attribute › BI Report Attribute › Looker Report Attribute	An atomic unit of data that is used in a Looker Look or Looker Tile. It represents the actual use a Looker Data Set Column.	<ul style="list-style-type: none"> Catalog Data Dictionary
Power BI Parameter	Data Asset › Data Element › Report Attribute › BI Report Attribute › Power BI Parameter	A column that is part of a Power BI Report Server Data Model and that is used in a KPI.	<ul style="list-style-type: none"> Catalog Data Dictionary
SSRS Parameter	Data Asset › Data Element › Report Attribute › BI Report Attribute › SSRS Parameter	A column that is part of an SQL Server Reporting Services Data Set and that is used in a KPI.	<ul style="list-style-type: none"> Catalog Data Dictionary
Tableau Report Attribute	Data Asset › Data Element › Report Attribute › BI Report Attribute › Tableau Report Attribute	An atomic unit of data that represents a Tableau report. Examples: ExpenseAmount, RiskAmount	<ul style="list-style-type: none"> Catalog Data Dictionary

Asset type	Asset type	Description	Required global permission
Data Set	Data Asset ▶ Data Set	A collection of related sets of data assets that are data elements or composed of data elements. Example: Customer Contact information	<ul style="list-style-type: none"> • Catalog • Data Dictionary
BI Data Set	Data Asset ▶ Data Set ▶ BI Data Set	A collection of data that is used for BI report creation	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Looker Data Set	Data Asset ▶ Data Set ▶ BI Data Set ▶ Looker Data Set	A collection of data that is used to define Looker Dimensions and Measures.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
SSRS Data Model	Data Asset ▶ Data Set ▶ BI Data Set ▶ SSRS Data Model	A collection of data that is used to create an SQL Server Reporting Services Report.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Data structure	Data Asset ▶ Data structure	A logical grouping (through whole-part relation) of data elements. Example: cfPerson is a data structure that contains the cfBirthDate, cfPersonFullName data elements.	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Data Entity	Data Asset ▶ Data Structure ▶ Data Entity	A unit of data that can be classified and can have a stated relationship to other units of data. Examples: Customer, Employee	<ul style="list-style-type: none"> • Catalog • Data Dictionary
BI Data Entity	Data Asset ▶ Data Structure ▶ Data Entity ▶ BI Data Entity	A unit of data in a BI data source that can be classified and can have a stated relationship to other units of data.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Power BI Table	Data Asset ▶ Data Structure ▶ Data Entity ▶ BI Data Entity ▶ Power BI Table	A table in a Power BI Data Model.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
SSRS Table	Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ Power BI Table ▶ SSRS Table	A table in an SQL Server Reporting Services Report Data Set.	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Tableau Data Entity	Data Asset ▶ Data Structure ▶ Data Entity ▶ BI Data Entity ▶ Tableau Data Entity	An abstraction from the physical implementation of database tables, used for Tableau report creation.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Data Model	Data Asset ▶ Data Structure ▶ Data Model	<p>Organizes data elements and standardizes how the data elements relate to one another. The data model often facilitates the communication between business and technology.</p> <p>Examples: customer subject area model, event subject area model</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary
BI Data Model	Data Asset ▶ Data Structure ▶ Data Model ▶ BI Data Model	<p>A diagram that organizes data elements and standardizes how the data elements relate to one another. The Data Model is often used as a communication aid between business and technology.</p> <p>Examples: Customer Subject area model, Event Subject area model</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Tableau Data Model	Data Asset ▶ Data Structure ▶ Data Model ▶ BI Data Model ▶ Tableau Data Model	An abstraction from the physical implementation of database, schema, file, etc., used for Tableau report creation.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Power BI Data Model	Data Asset ▶ Data Structure ▶ Data Model ▶ BI Data Model ▶ Power BI Data Model	A collection of data that is used to create a Power BI report.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Schema	Data Asset ▶ Data Structure ▶ Schema	An asset that contains the location of specific data. It provides all the details that are required for setting up a connection to a database or server.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Table	Data Asset ▶ Data Structure ▶ Table	<p>An implementation of data entities in columns and rows, in a given database system. It is the basic structure of a relational database.</p> <p>Examples: Account_tbl, CUST_ADDR</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Database View	Data Asset › Data Structure › Table › Database View	A Database View is a virtual table based on the result-set of an SQL statement.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Data Usage	Data Asset › Data Usage	<p>An asset that clearly documents how the data can be used between data producers and consumers for specific purpose</p> <p>Example: Sales growth information that is available to share for read-only requirements</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Foreign Key	Data Asset › Foreign Key	Asset type used to model the Primary key - Foreign key relations in relational databases.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Mapping Specification	Data Asset › Mapping Specification	Mapping between two or more data structures.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Governance Asset	Governance Asset	A type of asset that is used to monitor and advocates to maximize performance or utilization of other Business and Data assets while minimizing the risk factors in alignment with Organisational/Business goals.	Policy Manager

Asset type	Asset type	Description	Required global permission
Assessment Review	Governance Asset ▶ Assessment Review	An asset of this type is created when an assessment is conducted on an asset and submitted for review.	Policy Manager
Data Quality Dimension	Governance Asset ▶ Data Quality Dimension	Represents criteria that are relevant for assessing quality and categorizes different aspects of how data quality is measured. Examples: accuracy, completeness, consistency	Data Helpdesk
Data Sharing Agreement	Governance Asset ▶ Data Sharing Agreement	An agreement between data producers and consumers with terms and conditions including provisions concerning access and dissemination to 'pool' a set of data for specific purposes. Examples: Sales growth information that is available only to the Risk team for generating internal reports.	Policy Manager
Issue Category	Governance Asset ▶ Issue Category		Data Helpdesk

Asset type	Asset type	Description	Required global permission
Policy	Governance Asset ▶ Policy	<p>A statement of intent that is set by a council and is implemented by a set of standards.</p> <p>Example: Personal information must be adequately protected.</p>	Policy Manager
Standard	Governance Asset ▶ Policy ▶ Standard	<p>Consists of specific low-level mandatory controls that help enforce and support the policy.</p> <p>Example: All personal information is encrypted with a specific encryption type.</p>	Policy Manager
Rule	Governance Asset ▶ Rule	<p>Defines or constrains some aspect of specific business data categories. It is intended to control or influence the behavior of the business.</p> <p>Example: Every customer must have a unique identifier.</p>	Policy Manager
Business Rule	Governance Asset ▶ Rule ▶ Business Rule	<p>Defines or constrains some aspect of specific business data. It is intended to control or influence the behavior of business data.</p> <p>Example: Customer numbers have to be unique.</p>	Policy Manager

Asset type	Asset type	Description	Required global permission
Data Quality Metric	Governance Asset ▶ Rule ▶ Data Quality Metric	An implementation of data quality rules in a selected physical database system using a particular data quality tool. Example: CRM.ACT.Tx_ID cannot be null, must be a 9-digit number and has to take the 999-99-9999 format in the CRM system, and ERP.Cust.SSN has to take the 999999999 format in the ERP system.	Data Helpdesk
Data Quality Rule	Governance Asset ▶ Rule ▶ Data Quality Rule	A specification that defines which actions are required to measure the quality level of a data element for its intended use. Example: SSN must be a unique 9-digit identification number for 100% of US personal accounts for tax processing.	Data Helpdesk
Validation Rule	Governance Asset ▶ Rule ▶ Validation Rule	A rule that describes a criterion to which content in DGC has to comply.	Reference Data Manager
Issue	Issue	The parent asset type of all issues.	Data Helpdesk

Asset type	Asset type	Description	Required global permission
Data Issue	Issue ▶ Data Issue	A problem related to issue management, also referred to as "issue".	Data Helpdesk
Technology Asset	Technology Asset	<p>A piece of information technology (hardware, software, database, software platform) that helps an organization to run a business application.</p> <p>Examples: Database, File</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Database	Technology Asset ▶ Database	<p>A collection of data that is systematically organized or structured, to make it is easy to create, update and query the information.</p> <p>Examples: Ora_DGC_V45, SalesDB2020</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Directory	Technology Asset ▶ Directory	<p>An organizational structure that contains files and other directories.</p> <p>Examples: C:\Collibra, D:\Collibra\DGС, /opt/collibra</p>	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
File	Technology Asset ▶ File	A collection of data that is treated by a computer as a unit, for the purposes of input and output. Examples: businessGlossary.xls, dataDictionary05220.csv, datacatalogv25.txt	<ul style="list-style-type: none"> • Catalog • Data Dictionary
File Group	Technology Asset ▶ File Group	A collection of physical files which together represent a single logical file.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
S3 Bucket	Technology Asset ▶ S3 Bucket	A container for S3 objects.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Server	Technology Asset ▶ Server	A computer program or device that supports other computer programs and their users	<ul style="list-style-type: none"> • Catalog • Data Dictionary
BI Server	Technology Asset ▶ Server ▶ BI Server	A visual analytics platform for creating and storing visualizations.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Looker Tenant	Technology Asset ▶ Server ▶ BI Server ▶ Looker Tenant	A platform to create Looker Dashboards and rich visualizations.	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Power BI Server	Technology Asset ▶ Server ▶ BI Server ▶ Power BI Server	A visual analytics platform for creating and storing Power BI Reports and Data Models.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
SSRS Server	Technology Asset ▶ Server ▶ BI Server ▶ SSRS Server	A visual analytics platform for creating and storing SQL Server Reporting Services Reports and Data Sets.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
Tableau Server	Technology Asset ▶ Server ▶ BI Server ▶ Tableau Server	A visual analytics platform for creating interactive dashboards and rich visualisations	<ul style="list-style-type: none"> • Catalog • Data Dictionary
System	Technology Asset ▶ System	Executable software that you can buy commercially off the shelf (COTS), or build internally, to automate one or more business functions that help run a business smoothly and efficiently. Examples: CRM, ERP, EDW	<ul style="list-style-type: none"> • Catalog • Data Dictionary
BI Data Source	Technology Asset ▶ System ▶ BI Data Source	The link between a BI System and an external system.	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Asset type	Asset type	Description	Required global permission
Tableau Data Source	Technology Asset ▶ System ▶ BI Data Source ▶ Tableau Data Source	The link between Tableau and an external system. A Tableau data source contains the information to connect to external data, table names, the table relationships, and any customizations that you make.	<ul style="list-style-type: none"> • Catalog • Data Dictionary
S3 File System	Technology Asset ▶ System ▶ S3 File System	Amazon S3 (Simple Storage Service) file system abstraction.	<ul style="list-style-type: none"> • Catalog • Data Dictionary

Overview of packaged statuses

Use statuses to reflect the life cycle of resources. The following statuses can be used out of the box in your [workflows](#).

Status	Description	Use
Accepted	<p>The stewards approved an asset definition.</p> <p>The technical stewards are granting the requested access.</p> <p>The reviewer is appointing an assignee to resolve an issue.</p>	<p>An asset is accepted at the end of the Approval and Simple Approval workflows.</p> <p>A data usage asset is accepted when the approvers, who are the owners of the resources that are part of an access request, have approved the request in the Request Assets Access workflow.</p> <p>An issue is accepted after the stewards approved its proposed solution. At this stage of the Issue Management workflow, the reviewer either appoints an assignee or marks the issue as resolved.</p>
Access Granted	The requester has been granted access to the requested resources.	The requester is assigned a Data Analyst Level 2 role for the newly granted resources, as the final step in the Request Assets Access workflow .
Approval Pending	The approvers are voting for the approval of a data usage request.	A data usage asset has this status during the voting sub-process of the Request Assets Access workflow .
Approved		Currently not in use.
Candidate	The initial status of an asset.	Newly created assets receive this status.
Deployed	The initial status of a workflow.	Refers to workflow definitions.

Status	Description	Use
Disabled	The workflow is currently not in use.	Refers to workflow definitions.
Enabled	The workflow is currently active.	Refers to workflow definitions.
Implemented		Currently not in use.
In Progress	The assignee is solving the issue.	The status is used in the Issue Management workflow .
Invalid	The reviewer rejected an issue. The initial status of a data usage asset.	Reviewers can reject invalid issues during the Issue Management workflow . Newly created data usage requests receive this status in the Request Assets Access workflow .
Monitored		Currently not in use.
New	The initial status of an issue.	Newly created issues receive this status.
Obsolete		Currently not in use.
Pending	The requester is providing more information about an issue.	The status is used in the Issue Management workflow .
Rejected	The approvers rejected the data usage request.	The status is used in the Request Assets Access workflow .
Resolution Pending	The reviewer is validating the assignee's solution to an issue.	
Resolved	The issue is resolved.	The status is used in the Issue Management workflow .
Reviewed		Currently not in use.
Submitted for Approval	The stakeholders are verifying the proposed solution to an issue.	The status is used in the Issue Management workflow .

Status	Description	Use
Under Review	<p>The stakeholders are reviewing an asset.</p> <p>The reviewer is analyzing an issue and proposing a solution.</p>	<p>An asset is under review from the moment the subject matter experts have approved its definition until it is accepted in the Approval workflow. There is no intermediary status in the Simple Approval workflow.</p> <p>After being submitted or after being rejected by the stakeholders, an issue is under review while a reviewer analyzes it, in the Issue Management workflow.</p>

Overview of packaged domain types

A domain type is a property of a [domain](#) that determines which assets can be included in the domain, based the [asset's type](#).

The table below contains all packaged [domain types](#) and their description.

Tip For an interactive overview of all packaged domain types, including the relevant asset types and applications, see the online [admin guide](#).

Type	Type	Description
BI Catalog	BI Catalog	A collection of Tableau assets with the list of related attributes.
Business Asset Domain	Business Asset Domain	

Type	Type	Description
Business Dimensions	Business Asset Domain ▶ Business Dimensions	A set of business dimensions that categorize and describe business terms.
Report Catalog	Business Asset Domain ▶ Report Catalog	A collection of reports and their definitions with the list of related report characteristics.
Codelist	Codelist	Any kind of data that is used solely to categorize other data found in a database, or solely for relating data in a database to information beyond the boundaries of the enterprise.
Hierarchies	Codelist ▶ Hierarchies	A Code list with a hierarchical structure in its Code Values
Data Asset Domain	Data Asset Domain	
Data Usage Registry	Data Asset Domain ▶ Data Usage Registry	A collection of data usage agreements and related data structures.
Logical Data Dictionary	Data Asset Domain ▶ Logical Data Dictionary	Represents details of organizational data, independent of any particular technology, and uses vocabulary of a business area to communicate with non-technical stakeholders.
Mapping Domain	Data Asset Domain ▶ Mapping Domain	Groups data assets of the crosswalk type (to map between code sets) and mapping specification (used to map between data structures).

Type	Type	Description
Physical Data Dictionary	Data Asset Domain › Physical Data Dictionary	A collection of physical objects, such as tables, columns, file fields, views and APIs, to describe how data is stored, arranged and related to each other in a data storage technology/location.
Glossary	Glossary	A prioritized list of business terms and acronyms, and their meanings.
Governance Asset Domain	Governance Asset Domain	
Assessment Review Register	Data Governance Domain › Assessment Review Register	Domain type for Assessment Review assets, which are created when an assessment is conducted on an asset and submitted for review.
Policy Domain	Data Governance Domain › Policy Domain	A set of policies and standards related to an organization.
Rulebook	Data Governance Domain › Rulebook	A set of rules that are used as a basis for making decisions and governing programs or policies.
Issue Classification	Issue Classification	
S3 Catalog	S3 Catalog	A domain type that contains assets of the asset type S3 File System.
Technology Asset Domain	Technology Asset Domain	An inventory of all technology assets and their business benefits.
Validation Rule Domain	Validation Rule Domain	A domain type for domains containing validation rules.

Overview of packaged communities and domains

Collibra DGC uses some packaged [communities](#) and [domains](#). You can edit them, but you cannot delete them. If required, you can hide them by restricting their [view permissions](#).

Name	Domain type	ID	URL
Business Analysts Community	NA	00000000-0000-0000-0001-000100000001	<your environment>/community/00000000-0000-0000-0001-000100000001
Data Governance Council	NA	bc40c085-352c-4a8c-8ee7-494fe821308e	<your environment>/community/bc40c085-352c-4a8c-8ee7-494fe821308e
Data Quality Dimensions	Business Asset Domain	00000000-0000-0000-0000-000000006019	<your environment>/domain/00000000-0000-0000-0000-000000006019
Issue Classification	Issue Classification	00000000-0000-0000-0000-000000006011	<your environment>/domain/00000000-0000-0000-0000-000000006011
New Applications	Technology Asset Domain	00000000-0000-0000-0000-000000006018	<your environment>/domain/00000000-0000-0000-0000-000000006018
New Business Terms	Glossary	00000000-0000-0000-0000-000000006013	<your environment>/domain/00000000-0000-0000-0000-000000006013
New Data Assets	Data Asset Domain	00000000-0000-0000-0000-000000006015	<your environment>/domain/00000000-0000-0000-0000-000000006015
New Data Sets	Data Usage Registry	00000000-0000-0001-000200000001	<your environment>/domain/00000000-0000-0001-000200000001

Name	Domain type	ID	URL
New Policies & Business Rules	Governance Asset Domain	00000000-0000-0000-0000-000000006016	<your environment>/domain/00000000-0000-0000-0000-000000006016
New Processes	Business Asset Domain	00000000-0000-0000-0000-000000006017	domain/00000000-0000-0000-0000-000000006017
New Reference Data	Codelist	00000000-0000-0000-0000-000000006014	<your environment>/domain/00000000-0000-0000-0000-000000006014
Schemas	NA	00000000-0000-0001-000100000002	<your environment>/community/00000000-0000-0001-000100000002

Overview of packaged characteristic types

Collibra DGC provides packaged [attribute types](#), [relation types](#) and [complex relation types](#).

Overview of packaged attribute types

An [attribute](#) is a characteristic that describes an asset by means of an individual field. The attribute's type defines the class of information that the attribute contains.

The table below contains all packaged [attribute types](#). You can also [create new attribute types](#).

Type	Description	Assigned to asset type	Kind
1st Decile	The data 1st decile value.	Column	Text
1st Percentile	The data 1st percentile value.	Column	Text
1st Quartile	The data 1st quartile value.	Column	Text

Type	Description	Assigned to asset type	Kind
3rd Quartile	The data 3rd quartile value.	Column	Text
5th Percentile	The data 5th percentile value.	Column	Text
95th Percentile	The data 95th percentile value.	Column	Text
99th Percentile	The 99th percentile value.	Column	Text
9th Decile	The data 9th decile value.	Column	Text
Abbreviation	A shorthand signifier for an asset.	Report	Text
Analysis	The analysis of this issue.	Issue	Text
Application Regulation		Directory, System, Technology Asset	Text
Application Standards		Directory, System, Technology Asset	Text
Background	Background information on the asset.		Text
Calculation Rule	The rule that specifies how the KPI or metric is calculated.	KPI, Tableau Report Attribute	Text
Categorical Data	Data is considered categorical if it can only take a limited set of different values.	Column	True/False
Category	A possible value for Categorical Data.	Column	Text

Type	Description	Assigned to asset type	Kind
Certified		Data Set, Looker Dashboard, Looker Data Set, Looker Look, Looker Tile, Power BI Dashboard, Power BI Data Model, Power BI Report, Power BI Tile, Tableau Data Source, Tableau View, Tableau Workbook	True/False
Char octet Length	For character types, the maximum number of bytes in the column.	Column	Numeric
Column Position	The index of the column in the table.	Column	Numeric
Conformity Score	The amount of rows that passed the rule.	Business Rule, Data Quality Metric	Numeric
Co-role	Relationship name from tail to head.		Text
Criticality Indicator	Indicate the criticality of an asset.		True/False
Data Source	The data source of an asset. It specifies where the data corresponding to this asset is coming from.		Text
Data Source Type	The type of the registered data source.	Schema	Text
Data Type	The logical Data type detected by Collibra profiling.	Column	Text

Type	Description	Assigned to asset type	Kind
Data Type Precision	The precision of the data type. For example how many characters it can contain.	Data Attribute, Data Element, Report Attribute	Numeric
Date and/or Time Pattern	The pattern used to encode a time, date or both. Format must be compatible with a java DateTimeFormatter. Example: yyyy-MM-dd HH:mm:ss.	Column	Text
Default Value	The default value for the column.	Column	Text
Definition	The definition of the business asset. This is the shortest possible description that clearly defines the business asset.	Business Asset, Business Process, Business Term, Data Category, KPI, Line of Business, Measure, Report, Report Attribute	Text

Type	Description	Assigned to asset type	Kind
Description	The description of the asset. This is typically a more verbose way to describe what the asset means.	Asset, Business Dimension, Business Rule, Code Set, Code Value, Column, Crosswalk, Data Asset, Data Attribute, Database, Data Element, Data Entity, Data Model, Data Quality Dimension, Data Quality Metric, Data Quality Rule, Data Set, Data Sharing Agreement, Data Structure, Data Usage, Directory, File, File Group, Governance Asset, Issue, Issue Category, Looker Dashboard, Looker Data Set, Looker Data Set Column, Looker Folder, Looker Look, Looker Query, Looker Report Attribute, Looker Tenant, Looker Tile, Mapping Specification, Policy, Power BI Capacity, Power BI Dashboard,	Text

Type	Description	Assigned to asset type	Kind
		Power BI Data Model, Power BI Table, Power BI Column, Power BI Report, Power BI Server, Power BI Tile, Power BI Workspace, Report, Report Attribute, Role Type, Rule, S3 Bucket, S3 File System, Schema, Standard, System, Table, Tableau Data Source, Tableau Project, Tableau Report Attribute, Tableau Server, Tableau Site, Tableau View, Tableau Workbook, Technology Asset, Validation Rule, Workflow Definition	

Type	Description	Assigned to asset type	Kind
Descriptive Example	An example of the asset.	Asset, Business Asset, Business Process, Business Rule, Business Term, Code Set, Code Value, Data Asset, Data Attribute, Data Category, Data Element, Data Entity, Data Model, Data Quality Metric, Data Quality Rule, Data Structure, Directory, Governance Asset, Issue Category, KPI, Line of Business, Measure, Policy, Report, Role Type, Rule, Standard, System, Technology Asset	Text
Document creation date	Date the document was created.	Looker Dashboard, Looker Folder, Looker Look, Tableau Data Source, Tableau View, Tableau Workbook	Date
Document last accessed date	Date the document was last accessed.	Looker Dashboard, Looker Look	Date
Document last viewed data	Date the document was last viewed.	Looker Dashboard, Looker Look	Date

Type	Description	Assigned to asset type	Kind
Document modification date	Date the document was last edited.	Looker Look, Tableau Data Source, Tableau View, Tableau Workbook	Date
Document size	Size of the document in megabytes.	File, File Group, Tableau Workbook	Numeric
Effective End Date	Date as of which an asset is scheduled to end.	Business Rule, Code Set, Code Value, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Rule	Date
Effective Start Date	Date on which asset takes effect.	Business Rule, Code Set, Code Value, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Rule	Date
Empty Values Count	The number of empty values for that column	Column	Numeric
Empty values definition override	Overrides the default list of values to consider as empty or missing values during data profiling. It must be a comma separated list of text values with each value enclosed in double quotes.	Column, Schema, Table	Text

Type	Description	Assigned to asset type	Kind
Entity Load Date	The load date of the entities from the external system.	Data Quality Metric	Text
Exception Scenario	The exception scenario.	Business Rule, Data Quality Metric, Data Quality Rule, Data Sharing Agreement, Governance Asset, Issue Category, Policy, Rule, Standard	Text
Favorites count	The number of Looker Looks and Looker Dashboards that are marked as favorite.	Looker Dashboard, Looker Look	Number
File Location		File, Schema	Text
File Type	The type of a File, which may constrain its format, its content or both.	File, File Group	Text
Foreign Key Delete Rule	What happens to the foreign key when primary is deleted.	Foreign Key	Text
Foreign Key Evaluation Deferrability	Can the evaluation of the foreign key constraints be deferred until commit.	Foreign Key	Text
Foreign Key Update Rule	What happens to foreign key when primary is updated.	Foreign Key	Text
Frequency	Rate at which an asset changes over a particular period of time.	Report, Report Attribute	Text

Type	Description	Assigned to asset type	Kind
Inclusion Scenario	The inclusion scenario	Business Rule, Data Quality Metric, Data Quality Rule, Data Usage, Governance Asset, Issue Category, Policy, Report, Report Attribute, Rule, Standard	Text
Inferred Data Type	The data type of a data asset that was automatically inferred by profiling corresponding instance data.		Text
Is Auto Incremented	Indicates whether this column is auto incremented.	Column	True/False
Is Generated	Indicates whether this is a generated column.	Column	True/False
Is Mandatory	Is the asset mandatory or not.	Data Attribute	True/False
Is Nullable	Determines if the column can store NULL values.	Column	True/False
Is Primary Key	Indicates if the column is a primary key.	Column	True/False
Is Unique	If the asset is unique or not.	Data Attribute	True/False
IT Requirements	Describes the requirements from an IT perspective for the asset.	Crosswalk, Mapping Specification	Text
Key sequence	Key Sequence of an element in a foreign key		Numeric

Type	Description	Assigned to asset type	Kind
Last Review Date	Date on which asset was last reviewed.	Code Set, Data Usage, Report, Report Attribute, Standard	Date
Last Sync Date	Date on which asset was synchronized with external system.	Code Set, Code Value, Database, Data Quality Metric, File	Date
License		Data Set	Text
Loaded Rows	The number of rows that were loaded.	Business Rule, Data Quality Metric	Numeric
Loaded Values	The number of values that were loaded.		Numeric
Load Sample			Text
Location	The location where the actual asset is stored or can be found.	Asset, Code Set, Code Value, Data Asset, Data Attribute, Database, Data Element, Data Entity, Data Model, Data Structure, Directory, Report, Report Attribute, Role Type, S3 Bucket, System, Technology Asset	Text
Materiality		Data Usage	Text
Maximum Text Length	The length of the longest text value in this column	Column	Numeric

Type	Description	Assigned to asset type	Kind
Maximum Value	The maximum value, using alphabetical order for text	Column	Text
Max Length	The maximum length of any value corresponding to the data asset.		Numeric
Mean	The mean of values (numeric only), excluding missing values	Column	Numeric
Measurement	The measurement of the asset.	Business Rule, Data Quality Rule, Governance Asset, Issue Category, Policy, Rule	Numeric
Median	The data median value	Column	Text
Minimum Text Length	The length of the shortest text value in this column	Column	Numeric
Minimum Value	The minimum value, using alphabetical order for text	Column	Text
Min Length	The minimum length of any value corresponding to the data asset.		Numeric
Mode	The value with the highest frequency for a categorical feature.	Column	Text
Non Conformity Score	The amount of rows that failed the rule.	Business Rule, Data Quality Metric	Numeric

Type	Description	Assigned to asset type	Kind
Note	A note.	Asset, Business Asset, Business Process, Business Rule, Business Term, Code Set, Code Value, Data Asset, Data Attribute, Database, Data Category, Data Element, Data Entity, Data Model, Data Quality Rule, Data Structure, Directory, File, KPI, Line of Business, Measure, Policy, Report Attribute, Role Type, Standard, System, Technology Asset	Text
Null Count	The number of null values in the data corresponding to the data asset.		Numeric
Number of Attributes	The number of attributes of the data entity.		Numeric
Number of distinct values	The number of different values stored in this column	Column	Numeric
Number of Files	The number of files in a File Group.	File Group	Numeric
Number Of Fractional Digits	The number of fractional digits.	Column	Numeric

Type	Description	Assigned to asset type	Kind
Number of Values	The number of distinct instance values in the data corresponding to the data asset.		Numeric
Original Name	Name of this object in its source environment. The 'Original Name' may differ from the asset's name in Data Governance Center.	Column, Tableau Data Source, Tableau Project, Tableau Report Attribute, Tableau Site, Tableau View, Tableau Workbook	Text
Passing Fraction	The % of rows or entities that have passed the rule.	Business Rule, Data Quality Metric	Numeric
Personally Identifiable Information	An indicator to flag an asset that could potentially be used to identify a specific individual.	Column	True/False
Predicate	The logical formula that will be executed to implement the rule.	Data Quality Rule	Text
Primary Key Name	The name of the primary key composed by the column.	Column	Text
Priority	The priority of this issue.	Issue	Text
Profiling Information	Provides additional information related to the status of the profiling results.	Table	Text
Purpose	The reason why the asset exists.	Business Rule, Data Sharing Agreement, Data Usage, File, Governance Asset, Issue Category, Policy, Rule, Standard	Text

Type	Description	Assigned to asset type	Kind
Rating			Numeric
Refresh Conflict	Provides the information about the conflict detected on the Data Asset during a Schema refresh if any.	Column, Table	Text
Refresh Frequency			Text
Report Image	Image of the report view	Looker Look, Tableau View, Tableau Workbook	Text
Resolution	The solution of how this issue can or is resolved.	Issue	Text
Result	The result.	Business Rule, Data Quality Metric	True/False
Role	Relationship name from head to tail.		Text
Role in Report	The use of Report Attribute in Report (for example, measure or dimension)	Tableau Report Attribute	Text
Row Count	The number of rows inside the data set, possibly including duplicated or missing values	Column	Numeric
Rows Failed	The amount of rows that failed the rule.	Data Quality Metric	Numeric
Rows Passed	The amount of rows that passed the rule.	Data Quality Metric	Numeric
Rule	The description of the rule.		Text
Schema Name	The name of the schema.		Text

Type	Description	Assigned to asset type	Kind
Scope	The scope of applications that correspond to this policy.	Crosswalk, Database, Data Usage, Directory, Mapping Specification, Policy, Report, Report Attribute, System, Technology Asset	Text
Security Classification	Classification of assets based on sensitivity.	Column, Data Usage, Report, Report Attribute	Text
Sequence Number	The sequence number of the asset. Often used to order assets in a specific way.	Data Attribute	Numeric
Size	The size of the column in the table.	Column	Numeric
Source Type	The source type of an asset.		Text
Standard Deviation	The statistical standard deviation of values (numeric only)	Column	Numeric
State			Text
State Changed by			Text
State Changed Date		Data Sharing Agreement	Text
Synchronization Status	Provides information about the status of the Schema synchronization.	Schema	Text
Table Type	The table type that is declared in the data source. For example: TABLE, VIEW, ...	Table	Text

Type	Description	Assigned to asset type	Kind
Technical Data Type	The Data Type of a data asset as it is declared by the data source. For example: String, Integer, Varchar, Blob, Boolean, ...	Column, Data Attribute, Data Element, Report Attribute, Power BI Column, Tableau Report Attribute	Text
Threshold	The minimum percentage of all rows or entities that must pass the rule.	Data Quality Metric	Numeric
Transformation Logic			Text
URL	Uniform Resource Locator, also colloquially known as web address.	Directory, File, File Group, Looker Look, S3 Bucket, Tableau Server, Tableau Site, Tableau View	Text
Validation Result			True/False
Validation Script		Validation Rule	Script
Value Distribution	The distribution percentage of the values		Numeric
Variance	The statistical variance of values (numeric only)	Column	Numeric
Visible on server	Worksheet is uploaded to Tableau server.	Tableau View	True/False
Visits count	Number of visits on Tableau report	Looker Dashboard, Looker Look, Tableau View	Numeric

Type	Description	Assigned to asset type	Kind
Weighting Factor	A factor by which some quantity is multiplied in order to make it comparable with others.		Numeric

Overview of packaged complex relation types

A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The complex relation's type defines the relations type and attributes the complex relation can have.

The table below contains all packaged [complex relation types](#). You can also [create new complex relation types](#).

Name	Description	Relation types	Attribute types	Assigned asset types
Code Mapping	Complex mapping between two or more code values	Source - Code Value (1:-)	<ul style="list-style-type: none"> • Description (0:1) • Transformation Logic (0:1) 	<ul style="list-style-type: none"> • Code Value • Crosswalk
		Target - Code Value (1:-)		
		Crosswalk - Crosswalk (1: 1)		
Data Usage	Data Usage	Uses - Data Asset (1:-)	<ul style="list-style-type: none"> • Description (0:1) • Materiality (0:1) 	
		Used in - Business Asset (1:-)		
		Governed by - Rule (1:-)		
Fact Type		Head - Asset (1: 1)	<ul style="list-style-type: none"> • Role (1:-) • Co-role (1:-) 	
		Tail - Asset (1: 1)		

Name	Description	Relation types	Attribute types	Assigned asset types
Field Mapping	Complex mapping between two or more data fields	Source - Data Element (1:-)	<ul style="list-style-type: none"> • Description (0:1) • Transformation Logic (0:1) 	<ul style="list-style-type: none"> • Column • Data Attribute • Data Element • Field • Mapping Specification • Report Attribute
		Target - Data Element (1:-)		
		Mapping specification - Mapping Specification (1: 1)		
Foreign Key Mapping	Complex mapping between two columns representing a primary key and a foreign key	Constrains - Column (1: 1)	<ul style="list-style-type: none"> • Key sequence (1:1) 	<ul style="list-style-type: none"> • Column • Foreign Key
		References - Column (1: 1)		
		Is part of - Foreign Key (1: 1)		

Overview of packaged relation types

A relation is a characteristic that describes how two assets relate to each other. The relation's type defines the relation and determines which assets can be related.

The following table shows packaged [relation types](#). You can also [create](#) new relation types.

Note

- **role** is the description of the relation type going from the head asset type to the tail asset type.
- **co-role** is the description of the relation type going from the tail asset type to the head asset type.

This is a table of all packaged relation types. For a sortable overview of all packaged relation types, see the online [user guide](#).

Head	Role	Co-role	Tail
Asset	complies to	applies to	Governance Asset
Asset	governed by	governs	Governance Asset
Asset	is essential for	requires	Data Usage
Asset	related to	impacted by	Asset
Asset	specializes	generalizes	Asset
Asset	uses	used in	Asset
Business Asset	groups	grouped by	Business Asset
Business Asset	has acronym	is acronym for	Acronym
Business Asset	represents	represented by	Data Asset
Business Dimension	classifies	is classified by	Asset
Business Dimension	groups	is grouped into	Report
Business Dimension	source	is source of	System
Business Process	consumes	is consumed by	Business Asset
Business Process	produces	is produced by	Business Asset
Business Term	allowed value	allowed value of	Business Term
Business Term	has code	is code for	Code Value
Business Term	synonym	synonym of	Business Term
Code Set	source of	source	Crosswalk
Code Set	target of	target	Crosswalk
Code Value	groups	grouped by	Code Value
Code Value	is part of	contains	Code Set
Column	is part of	contains	Table
Data Asset	groups	is grouped by	Data Asset
Data Asset	implemented in	implements	Technology Asset

Head	Role	Co-role	Tail
Data Asset	is essential for	is constrained by	Data Usage
Data Element	allowed value	allowed value for	Code Value
Data Element	allowed value set	applies to	Code Set
Data Element	is part of	contains	Data Structure
Data Entity	contains	is part of	Data Attribute
Data Entity	is part of	contains	Data Model
Data Quality Rule	allowed value	allowed value for	Code Value
Data Quality Rule	allowed value set	allowed value set for	Code Set
Data Quality Rule	classified by	classifies	Data Quality Dimension
Data Quality Rule	executed by	executes	Data Quality Metric
Data Quality Rule	governs	is governed by	Data Element
Data Set	contains	is part of	Data Element
Data Set	related to	impacted by	Business Asset
Data Sharing Agreement	is requested by	requests	Business Dimension
Data Structure	source of	source	Mapping Specification
Data Structure	target of	target	Mapping Specification
Data Usage	is required by	requires	Data Sharing Agreement
Directory	contains	contained in	File
Directory	contains	is part of	Directory
Directory	contains	is part of	File Group
File	contains	is part of	Table
File Group	contains	is part of	Table
Governance Asset	groups	is grouped by	Governance Asset

Head	Role	Co-role	Tail
Governance Asset	resolves	resolved by	Issue
Governance Asset	violated by	violates	Issue
Issue	categorized by	categorizes	Issue Category
Issue	has duplicate	is duplicate for	Issue
Issue	impacts	impacted by	Asset
Line of Business	associates	is associated with	Business Asset
Policy	is enforced by	enforces	Rule
Report	groups	is grouped into	Report
Report	related to	is impacted by	Business Asset
Report	uses	used in	Report
Report Attribute	contained in	contains	Report
Report Attribute	is source for	is target of	Report Attribute
Role Type	is responsible for	is responsibility of	Asset
Rule	is implemented by	implements	Business Rule
S3 Bucket	contains	is part of	Directory
S3 File System	contains	is part of	S3 Bucket
Schema	contains	is part of	Table
Server	hosts	is hosted in	Business Dimension
Standard	is included in	includes	Policy
System	implements	is implemented in	Data Set
Table	is input for	has input	Transformation Rule
Table	is part of	contains	Database
Tableau Site	assembles	is assembled in	Tableau Project
Technology Asset	groups	is grouped by	Technology Asset
Technology Asset	has	belongs to	Schema
Technology Asset	source system for	source system	Business Term

Head	Role	Co-role	Tail
Technology Asset	source system for	source system	Data Asset
Technology Asset	system of record for	system of record	Business Term
Technology Asset	system of record for	system of record	Data Asset
Technology Asset	system of use for	system of use	Business Term
Technology Asset	system of use for	system of use	Data Asset
Transformation Rule	is input for	has input	Transformation Rule
Transformation Rule	produces	is produced by	Table

Overview of roles

A role is a collection of permissions that can be assigned to users and user groups.

Role types

The role type determines whether the permissions in the role apply to resources or the Collibra Data Governance Center applications.

Collibra DGC has two types of roles:

- Global roles

A global role is a role that consists of [global permissions](#). You assign a user to a global role to determine which Collibra applications the user can use.

- Resource roles

A resource role is a role that consists of [resource permissions](#) and applies to a resource and its children. For example, if you assign a resource role to a domain, it also applies to all assets in the domain. If you assign a resource role to a community, it also applies to all its subcommunities, domains and assets in the community. The purpose of resource roles is to grant resource permissions to users through a [responsibility](#). For example, they determine which users can edit assets via the asset page or in a workflow.

Note Depending on the permissions in the role, users assigned to this role require an author or consumer [license](#).

Global roles

The following table contains the packaged global roles.

Global role	Description
Catalog	A user who can access Data Catalog. The global permissions in this role only require a consumer license.
Catalog Author	A user who can access Data Catalog. Users with this role can also create, edit and delete advanced data types .
Data Dictionary	A user who can access the Data Dictionary application, which contains all the technical metadata of the physical data sources and other data assets.
DataSteward	A user who can access the Data Stewardship application for viewing tags, Business Dimensions and the organization structure, including the responsibilities of the communities and domains.
DataSteward Author	A user who can access the Data Stewardship application to see tags, Business Dimensions and the organization structure, including the responsibilities of the communities and domains. Users with this role can also manage tags on the tags overview page .
Edge integration engineer	A user who can add, edit and delete Edge connections and capabilities.
Edge manager	A user who can create, edit and delete Edge sites.
Edge site	A user who can create a connection between itself, as an Edge site, and Collibra Data Governance Center.
	<p>Note The user is not a person, but an Edge site. The user is automatically created when you install an Edge site.</p>

Global role	Description
Edge site administrator	A user who can download the download and installer files to install an Edge site.
Glossary	<p>A user who can access the Business Glossary application.</p> <p>Users with this role are typically allowed to:</p> <ul style="list-style-type: none"> Access all business semantics glossary functionality and workflows concerning business term proposal and approval, data element usage, structure and glossary alignment. Define and manage the business asset types, data structure asset types, data element asset types and technology asset types and their subtypes. Define and manage complex relation types such as field mapping.
Data Helpdesk	A user who can access the Data Helpdesk application, where users can log issues and check issue statuses and assignees.
Policy Manager	A user who can access the Policy Manager application, which is a collection of all governance assets.
ReferenceData	<p>A user who can access the reference data accelerator.</p> <p>Users with this role are typically allowed to:</p> <ul style="list-style-type: none"> Access all reference data functionality and workflows concerning code proposal, code approval and code mapping. Define and manage the crosswalk, code value and codes set asset types and their subtypes. Define and manage complex relation types such as code mapping.
SysAdmin	<p>A user who can configure and manage the Collibra Data Governance Center.</p> <p>Users with this role are typically allowed to:</p> <ul style="list-style-type: none"> Access and modify the  Settings. Define and manage the operating model.

Resource roles

A resource role is a role that consists of [resource permissions](#) and applies to a resource and its children. For example, if you assign a resource role to a domain, it also applies to all assets in the domain. If you assign a resource role to a community, it also applies to all its subcommunities, domains and assets in the community. The purpose of resource roles is to grant resource permissions to users through a [responsibility](#). For example, they determine which users can edit assets via the asset page or in a workflow.

The following table shows the packaged resource roles.

Resource role	Description
Assignee	A user who is assigned to complete a task.
Business Steward	A user who is involved in daily, business-related decisions about the best ways to turn policy into practice.
Chief Data Officer	A high-level decision maker who is responsible for enterprise-wide data governance and the utilization of information as an asset.
Community Manager	A user who acts as liaison between all the different roles and groups. This user can also analyze and pack up issues, so that the data governance council can make decisions. Assigning and removing roles and responsibilities are also among this user's duties.
Council Member	A user who represents business and technical data stakeholder functional groups.
Data Analyst Level 1	This role is assigned to a user on a date element level when this user is allowed to see a data sample of this data element.
Data Analyst Level 2	This role is assigned to a user on a date element level when this user has full access to the data.
Data Category Manager	
Data Custodian	A user who collects and holds information on behalf of a data provider or requester and who is responsible for managing the use, disclosure and protection of data.

Resource role	Description
Issue Manager	A user who identifies and prioritizes issues with business impact, directs resources to the most urgent issues and reassigns tasks to different users in the absence of the assigned user.
Normal	A user who does not have any assigned responsibilities.
Owner	A user who is responsible for accuracy, integrity, and timeliness of an information asset and for establishing the controls for its generation, collection, processing, access, dissemination and disposal.
Requester	A user who makes a request related to an information asset.
Reviewer	A user who is assigned to review an outcome of a user task.
Stakeholder	A user who can use, affect or be affected by an asset under discussion. This user wants to be involved or notified, but can only provide comments and reviews.
Subject Matter Expert	A user who performs specific data-related tasks and is consulted to provide guidance and feedback to individuals with stewardship responsibilities.
Technical Steward	A user who is involved in daily, data-related decisions, executes business decisions and implements business requirements in a technology platform.

Screen elements in the user interface

The Collibra Data Governance Center user interface contains a number of common elements that appear throughout the product.

You can navigate through Collibra Data Governance Center using your mouse or keyboard. For more information, see [Accessibility](#).

Refreshed navigation

You can now use a new, refreshed navigation. It is disabled by default but you can [enable it in Collibra Console](#). The improvements include:

- The top navigation is centered around the current application.
- The application menu in the upper right corner gives you access to the applications the **global view** and the **settings**.
- The Home button points to your default **dashboard**.
- Dashboards are now organized in tabs instead of a view selector.
- The **Search box** is takes a more prominent part of the menu bar.
- The search results are now automatically filtered by the current domain or community if you search with a domain or community page open.

Warning When you enable refreshed navigation, you lose your UI customizations such as color scheme and logo. For more information about customizing the UI with refreshed navigation, see the [Collibra Developer portal](#).

Page layout

The screenshot shows the Collibra interface with various UI elements numbered 1 through 17:

- 1: Top-left navigation icon.
- 2: Search icon.
- 3: Application menu icon.
- 4: Plus sign icon.
- 5: Cart icon.
- 6: Tasks icon.
- 7: Refresh icon.
- 8: Help icon.
- 9: User profile icon.
- 10: Grid icon.
- 11: Glossaries tab.
- 12: Business Terms tab.
- 13: Action menu for a selected row.
- 14: Filter icon.
- 15: Row selection handle.
- 16: Action icons for the selected row.
- 17: A callout box for the '6 Month Forecast' term, showing its definition and asset type.

Name	Definition	Status	Domain	Asset Type
1 Month Actual Sales	Total Actual Sales of the past Month.	Accepted	SCPM Glossary	Business Term
3 Month Actual Sales	Total Actual Sales of the past 3 months (past quarter).	Accepted	SCPM Glossary	Business Term
3 Month Forecast	Forecasted Total Sales (Revenue) for the next 3 Months (...)	Accepted	SCPM Glossary	Business Term
3 Month Forecast Price	Forecasted Unit Price 3 months from today.	Accepted	SCPM Glossary	Business Term
6 Month Actual Sales	Total Actual Sales of the past 6 months (past 2 quarters).	Accepted	SCPM Glossary	Business Term
6 Month Forecast	Forecasted Total Sales for the next 6 months (2 quarters).	Accepted	SCPM Glossary	Business Term
9 Month Actual Sales	Total Actual Sales of the past 9 months (3 quarters).	Accepted	SCPM Glossary	Business Term
9 Month Forecast	Forecasted Total Sales (Revenue) for the next 9 months.	Accepted	SCPM Glossary	Business Term
Actuals	Actuals - the actuals reflect how much revenue an ac...	Accepted	SCPM Glossary	Business Term
Backorder	An order for a product which is temporarily out of...	Accepted	SCPM Glossary	Business Term
Broker	a person who buys and sells goods or services for...	Accepted	SCPM Glossary	Business Term
Buy Sell Flag	a flag which indicates whether a transaction is a b...	Accepted	SCPM Glossary	Business Term
Counterparty		Accepted	SCPM Glossary	Business Term
Current Price		Accepted	SCPM Glossary	Business Term
Department		Accepted	SCPM Glossary	Business Term
Definition		Accepted	SCPM Glossary	Business Term
Total Actual Sales	Total Actual Sales of the past 9 months (3 quarters).	Accepted	SCPM Glossary	Business Term

No.	Element name	Description
1	Home button	Open your default dashboard .
2	Navigation browser	Open the navigation browser.
3	Search field	Search for any resource in Collibra DGC.
4	+ button	Create any resource from any location.
5	Shopping basket	Request access to data sets and reports .
6	Tasks indicator	See how many workflow tasks are awaiting your attention and manage those tasks from the My tasks page .
7	Activities tracker	Check Collibra DGC activities and see the history of all the jobs you started.
8	Info	Get access to the product documentation, to Collibra Product Resource Center and University and to the Collibra support portal. <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note If you have the Sysadmin role, you also have direct link to the API documentation.</p> </div>
9	Avatar	View and modify your profile , sign out, and report a problem.

No.	Element name	Description
10	Application menu	<p>Open another application:</p> <ul style="list-style-type: none"> ☒ Business Glossary: Manage your business terms. ☒ Catalog: Manage data sets. ☒ Policy manager: Manage your organization's policies. ☒ Reference Data: Manage your code values and code sets. ⌚ Global view: See all assets in a single view. ⌚ Data Helpdesk: Manage issues. ⌚ Stewardship: Manage your tasks. ⌚ Settings: Manage your data governance operating model and your users.
11	Submenu	Open one of the subpages of the current application.
12	View selector	Switch between views .
13	View toolbar	Manage the current view .
14	Filter pane	Filter the resources in the view.
15	Action toolbar	Perform actions on the assets that you selected in the view or start a workflow .
16	Content toolbar	Manage the resources in the current view.
17	Table or set of tiles	See the resources in the current view in a table or as tiles .

Arranging list items

On some pages and in some dialog boxes, you can arrange list items to change the order of their appearance on the page. For example when adding fields to a view or editing an asset type assignment.

Example

You can have arrangeable lists in dialog boxes and on regular pages. You can arrange the list items in the same way.

In a dialog box	On a page
<p>The screenshot shows a 'Fields' dialog box with a list of items: Name, Definition, Business Steward, Status, and Domain. A context menu is open over the 'Definition' item, with options: Top, Bottom, Before, and After. The 'Before' option is highlighted. A tooltip 'Move to' is visible above the menu.</p>	<p>The screenshot shows a list of items on a page: Name, Note, Top, Bottom, Before, >, Definition, Descriptive Example, Name is classified by Business Asset, groups/grouped by Business Asset, Name has acronym, represents Business Asset, Name is associated, is classified by Business Dimension, Name is produced by Business Asset, and is associated. The 'Before' item in the list has a context menu open with options: Top, Bottom, and Before. The 'Before' option is highlighted. A tooltip 'Move to' is visible above the menu.</p>

Moving items by dragging and dropping

The easiest way to move items up or down is typically by dragging and dropping:

1. Click in front of an item and hold down the mouse button.
2. Move your mouse to the desired location in the order.
3. Release the mouse button.

Moving items via the drop-down menu

Each item also has a drop-down menu that allows you to quickly change the position of the item in the list:

1. Click in front of an item.
2. Do one of the following:
 - o Click **Top** to move the item to the top of the list.
 - o Click **Bottom** to move the item to the bottom of the list.

- Point to **Before** and click an item in the list to move the current item to the position above the clicked item.

Accessibility

In an effort to make all Collibra applications accessible for visually or physically impaired users, all applications are gradually being upgraded to meet accessibility requirements as set out in the [Section 508 Standards \(US\)](#) and [WCAG 2.0 \(Worldwide\)](#).

Collibra has taken measures to ensure accessibility, for example:

- Icons and text have sufficient contrast with the background.
- Images have clear alternative text to facilitate the use of third-party assistive technology.
- Navigation on our pages is enhanced, for example, you can open a link in a new tab.
- You can [navigate](#) through most screen sections by keyboard.
- You can edit interface text to make messages less dependent on visual screen elements.

Navigating using your keyboard

As part of the accessibility goals of Collibra, you can navigate using your keyboard.

Action	Description		
	Type	Unfocused element	Focused element
Moving the focus point	Button	Create	Create
	Link	Customer account <input type="checkbox"/> New Data Dictionary	Customer account <input checked="" type="checkbox"/> New Data Dictionary
Clicking and activating screen elements	Press enter to activate an element when it is the focus point. This allows you to press a button or open a link, using your keyboard rather than clicking.		
Opening and closing dialog boxes and pop-ups	Click any dialog box or pop-up to open it. You can navigate in the dialog boxes and pop-ups just as you would anywhere else. To close it, press escape .		
Selecting and clearing checkboxes	Navigate to a checkbox and press the space bar to select it or clear it.		
Selecting radio buttons	Use the arrow keys on your keyboard to select radio buttons. Navigate to the radio buttons using the tab key, then press ← , → , ↓ or ↑ to change which radio button is selected.		

Action	Description
Skipping repetitive sections	<p>Most pages in Collibra Data Governance Center contain repetitive sections at the top of the page, such as the main menu. You can skip this section using the Skip to content button.</p> <p>This button is the first available element when you start navigating in a repetitive section using your keyboard.</p> 

Signing in and signing out

As soon as you have a user account, you can sign in to Collibra Data Governance Center.

Sign in

1. Navigate to any page of your environment.
 - If you are on a public page, click **Sign in** in the top right corner of the page.
 - » The Sign in page appears.
2. Enter your username and password.

Tip

- If Single Sign-On (SSO) is configured for your environment, you can be signed in automatically if you are signed in to the SSO system.
- The username is case-sensitive; however, if you use LDAP with a specific configuration, it is possible that it's not case-sensitive.

Sign out

1. Click your avatar in the top-right corner and then click **Sign out**.
 - » The Sign in page appears.

Note Depending on your environment's configuration, you may be signed out automatically if you are inactive for a certain period of time. Most of the changes you have made during your session will be saved. However, if you had a text field or dialog box open when you were signed out, that information may be lost.

Collibra DGC functionalities

In this section, you find more information about the general functionalities of Collibra Data Governance Center such as searching for data, using dashboards and the global Create button.

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A word about permissions

In Collibra Data Governance Center, the following factors determine the extent to which you, or any other user, can configure Collibra DGC and carry out various actions:

- Your user license.
- Your roles and permissions.
- Whether or not you are a Collibra Console user.
- The Collibra products and applications authorized in your organization's license file.

User license

The first consideration in determining the actions available to you as a Collibra DGC user is your user license. A user license is the overall authorization for a user to perform certain actions in Collibra DGC.

There are currently two license types:

License type	Actions
Consumer	Consult information.
Author	Consult, add, edit and delete information.

Roles and permissions

A role is a collection of permissions that can be assigned to users and user groups. In Collibra DGC, we can generally think of an administrator as a user with a comprehensive combination of global roles and resource roles. From those roles, the user inherits global permissions and resource permissions.

We cannot specify which role or roles might grant you certain permissions, because your administrator can:

- Create new roles and configure the permissions for them.
- Edit the permissions for the packaged roles.

Sysadmin global role

The Sysadmin global role has the System administration global permission, which allows you to configure and manage Collibra DGC settings and the operating model.

Note All permissions refer to Collibra DGC alone and do not apply to Collibra Console, where you can configure the foundational Collibra DGC settings.

Collibra Console

[Collibra Console](#) is a Java web application that you can use, among other things, to install, configure and maintain the Collibra DGC environment. To work with Collibra Console, you need a separate Collibra Console user account. There are three different roles you can assign to Collibra Console users, each granting a different level of permissions:

- The READ role: This role gives you read-only access to Collibra Console.
- The ADMIN role: This role includes extra functionality on top of the READ role, for example restoring a backup.
- The SUPER role: This role includes all permissions, for example stopping an environment.

Collibra products and applications

Your organization's license file defines:

- The Collibra products and applications that your organization can use.
- The expiration date of the user licenses.
- The maximum number of users.

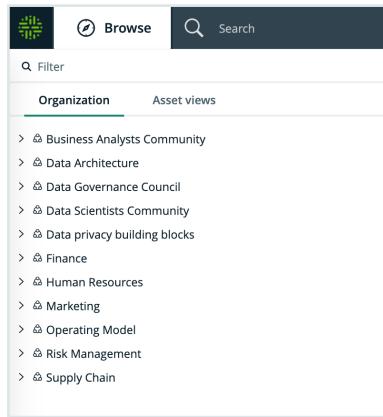
Example If your license file does not include Data Catalog, this application will not be available in your Collibra DGC environment.

Navigating through domains and communities

The **Browse pane** provides an overview of all communities and domains.

To navigate through the communities and domains, click  **Browse** in the main menu.

Initially, the browser only shows the top-level communities. To see the community's sub-communities and domains, click  in front of the community name.



Start typing in the **Filter** field to search for a community or domain.

When you click a community or domain name, you navigate to the corresponding community or domain page. This page shows all details and allows you to make changes.

Dashboards

A dashboard is a page that provides a high level overview on different areas in the product. It is composed of one or several configurable **dashboard widgets**, which can show text, a shortcut to the search, the organization browser, buttons to start a workflow and much more.

You can [create](#) more than one dashboard, each with a specific purpose. The default dashboard is the first page that you see when you sign in to Collibra Data Governance Center.

Permissions

No particular [license](#) is needed to manage and share your own dashboards; however, certain [global permissions](#) are needed.

Permission	With this global permission, you can...
Manage your own Views, Dashboards, Search filters	Create new dashboards or copy existing ones.
Share your own Views, Dashboards, Search filters	Share any of the dashboards you copied or created.
Manage and share anyone's Views, Dashboards, Search filters	<ul style="list-style-type: none"> • Create new dashboards or copy existing ones. • Edit the properties of any dashboard. • Share any dashboard. • Delete any dashboard.

Create a dashboard

You can create a new dashboard, and then [add](#) and [edit](#) widgets to suit your needs.

Prerequisites

You have a [global role](#) with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. In the dashboard toolbar, click  → Add Dashboard.

3. Enter the required information.

Property	Description
Name	The name of the dashboard.
Description	A description of the dashboard.
Layout	The layout of the dashboard. Select the number of columns for the dashboard.
Pin	Try to show this dashboard in the dashboard tab bar.

4. Click **Save**.

What's next?

You can now [add widgets](#) to your new dashboard.

Copy a dashboard

If, for example, you like the configuration of a certain [dashboard](#), but would like to reconfigure one of the [widgets](#) to better suit your needs, you can copy the dashboard, instead of [creating](#) a new one.

Prerequisites

You have a [global role](#) with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. In the dashboard toolbar, click  → **Save as**

3. Enter the required information.

Property	Description
Name	The name of the dashboard.
Description	A description of the dashboard.
Sharing options	Options to keep the dashboard private or share it.
Promote	Options that determine the location of the dashboard tab.
Default	Open this dashboard by default.
Pin	Try to show this dashboard in the dashboard tab bar.

4. Click **Save**.

What's next?

You can now edit the dashboard [properties](#) and [widgets](#) to suit your needs.

Edit the properties of a dashboard

You can edit the properties of a [dashboard](#), including the name, description and layout.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.

3. In the dashboard toolbar, click  → **Edit properties**.
4. Enter the required information.

Property	Description
Name	The name of the dashboard.
Description	A description of the dashboard.
Layout	The layout of the dashboard. Select the number of columns for the dashboard.
Pin	Try to show this dashboard in the dashboard tab bar.

5. Click **Save**.

Switch to another dashboard

You can switch from one [dashboard](#) to another.

Steps

1. In the main menu, click .
2. In the dashboard toolbar, click the name of dashboard.

Share a dashboard

You can share a [dashboard](#) with other users if the [widgets](#) provide information that is useful to them.

Prerequisites

- If you want to share your own dashboard, you have a global role with the Share your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to share another user's dashboards, you have Manage shared Views, Dashboard and Search Filter [global permission](#).

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Share**.
4. Select with whom you want to share the dashboard.
5. Specify whether or not you want to make the dashboard the default dashboard for the users with whom you are sharing it.
6. Click **Save**.

Delete a dashboard

If a [dashboard](#) is no longer useful, you can delete it.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Delete**.
4. Click **Yes**.

Dashboard widgets

A dashboard widget is an individual pane in a [dashboard](#). Depending on its type, it has a different purpose. For example, it can contain quick links to important or useful information, statistics in a bar chart or a button to quickly start a workflow.

Widgets

Collibra Data Governance Center comes with the following widgets:

Widget	Description
Bar Chart	Asset or task metrics depicted in a bar chart.
Search	A search field by which users can search for resources.
Text	A block of text, or message.
Counters	Asset or task metrics depicted by a graphic element with the total count.
Workflow	A collection of workflow buttons by which users can start workflows.
To Do	An overview of open tasks and issues.
Browser	A hierarchical tree-structure of all communities, subcommunities and domains.
Most Viewed	A list of the ten most viewed assets over the last week, month or year.
Recent	A list of your ten most recently viewed assets.

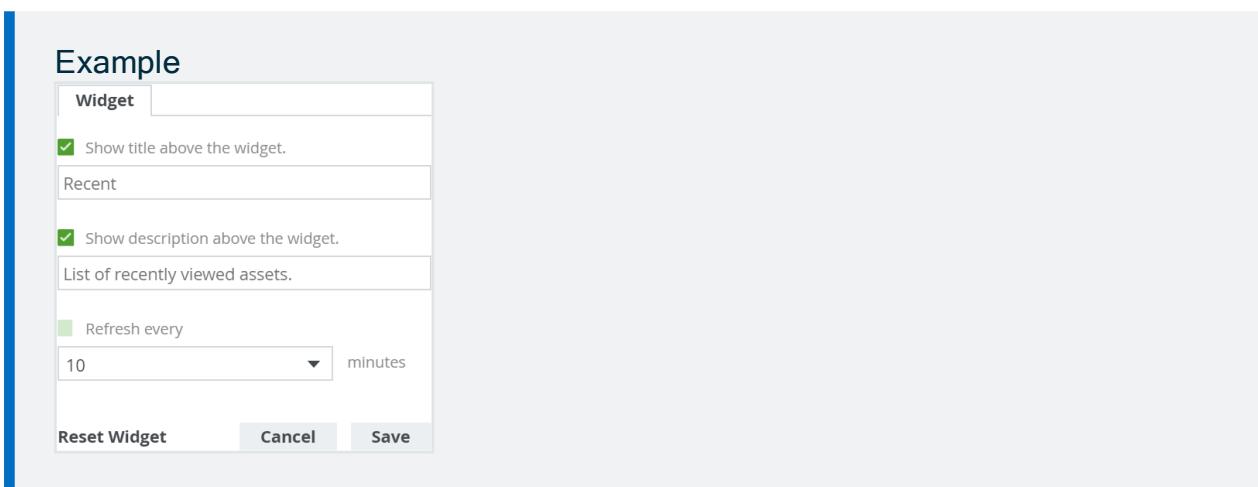
The Widgets tab

All widgets have:

- A specific tab for configuring and editing the widget.
- The **Widget** tab, which is common to all widgets and contains the common configuration options.

Field	Explanation
Show title above the widget	<ul style="list-style-type: none"> • True: A title is shown above the widget. In this case, specify a title. • False: No title is shown above the widget.

Field	Explanation
Show description above the widget	<ul style="list-style-type: none"> True: A description is shown above the widget. In this case, the packaged description is shown. False: No description is shown above the widget.
Refresh every	<ul style="list-style-type: none"> True: The counter is refreshed according to the refresh rate you specify. In this case, specify the refresh rate. Possible values are: 5, 10, 25, 50 or 100 minutes. False: The counter is not automatically refreshed.



Embedded Webpage widget

The Embedded Webpage widget enables you to embed a webpage on your dashboard.

Important Whether or not a third-party webpage can be embedded is determined by the security settings of the third-party.

You can open the website "in sandbox", meaning in an isolated environment without access to your files and systems. This helps to reduce security risks.

Configure the Embedded Webpage widget

You can embed a [webpage](#) in your dashboard.

Important Whether or not a third-party webpage can be embedded is determined by the security settings of the third-party.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. If required, **add** an **Embedded Webpage** widget to a dashboard.
5. In the widget, click .
6. Enter the URL of the webpage you want to embed.

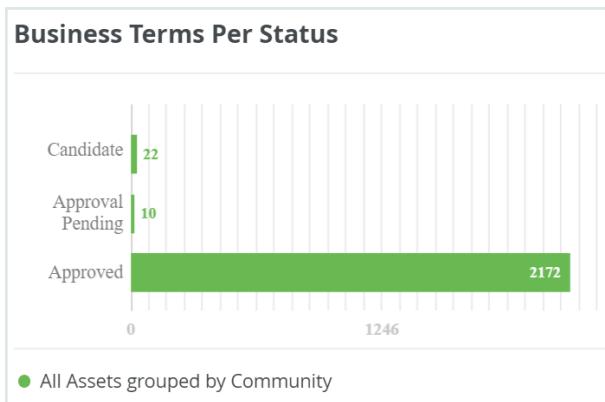


Warning To reduce security risks, we highly recommend that you leave the **Run in sandbox** checkbox selected.

7. Click **Save**.

Bar chart widget

The Bar Chart widget enables you to display advanced metrics in the form of a bar chart.



Configure a bar chart

You can add many different bar charts to the dashboard and configure them to suit your needs.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. If required, **add** a **Bar Chart** widget to a dashboard.
5. In the widget, click .
6. On the **Graph** tab, click **Create Template**.
7. In the **Bar Chart Configuration** wizard, click the type of data that you want to use.
 - **Assets**: If you want to display metric information about assets.
 - **Tasks**: If you want to display metric information about tasks.

8. In the **by** field, select how the data is grouped.

Note If you group by Attribute Value, you can only select "Boolean" or "Selection" characteristic types.

This setting defines how the bars in the bar chart, also known as groups, are constructed. Depending on what you select, additional fields are shown.

9. Optionally, add up to 25 sets of filtered data:

- a. Click **Add Data Set**.

- b. In the **Filter Label** field, fill in a label name for the bar chart legend.

This field is mandatory.

Example: *Business terms*

- c. In the row under the **Filter Label** field, specify a filter.

Example: *Asset Type equals Business Term*.

- d. Click **Save**.

- e. To add more data filters, repeat steps a - d.

10. Click **Next**.

11. Provide a template name.

12. Select how the items in the bar chart are ordered:

- Alphabetical.

- Numerical, meaning that the groups are sorted by their value (the length of the bar).

If necessary, select a graph type.

13. Click **Save & Apply**.

Browser widget

The Browser widget enables you to browse through the available communities and domains, via the dashboard.

You can use the search field at the top of the widget, to quickly find communities and domains.

The screenshot shows a sidebar titled "Browser" with the subtitle "Browse through communities and domains." Below this is a search bar labeled "Filter on community or domain...". A hierarchical tree structure follows:

- Business Analysts Community
 - Schemas
 - New Data Sets
- Data Governance Council
 - Issue Classification
 - New Applications
 - New Business Terms
 - New Data Assets
 - New Data Dictionary
 - New Mannequin

This widget has no specific configuration settings. Like all other widgets, common configuration settings are available via the [Widgets tab](#).

Tip You can also click the company logo at the top left-hand corner, to [Navigating through domains and communities](#) via the Organization Browser.

Most Viewed widget

The Most Viewed widget shows the ten most viewed assets over a specified time range.

The domain for each asset is shown under the asset name. You can:

- Click an asset name to go to that asset page.
- Click a domain name to go to that domain page.

Rank	Asset Name	Domain
1	Accuracy	Data Quality Dimensions
2	postg	postg
3	Duplication	Data Quality Dimensions
4	amazon domi	amazon domi
5	col8	amazon domi
6	a	New Business Terms
7	country	amazon domi
8	price	amazon domi
9	Completeness	Data Quality Dimensions
10	aaa > ee	Movie Metadata-kopia

Configure the Most Viewed widget

You can configure the widget to show the ten most viewed assets over the last week, month or year.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. If required, [add](#) a **Most Viewed** widget to a dashboard.
5. In the widget, click .
6. Select the time range over which to show the most viewed assets: last week, last month or last year.



7. Click **Save**.

Recent widget

The Recent widget shows your ten most recently viewed assets.

The domain for each asset is shown under the asset name. You can:

- Click an asset name to go to that asset page.
- Click a domain name to go to that domain page.

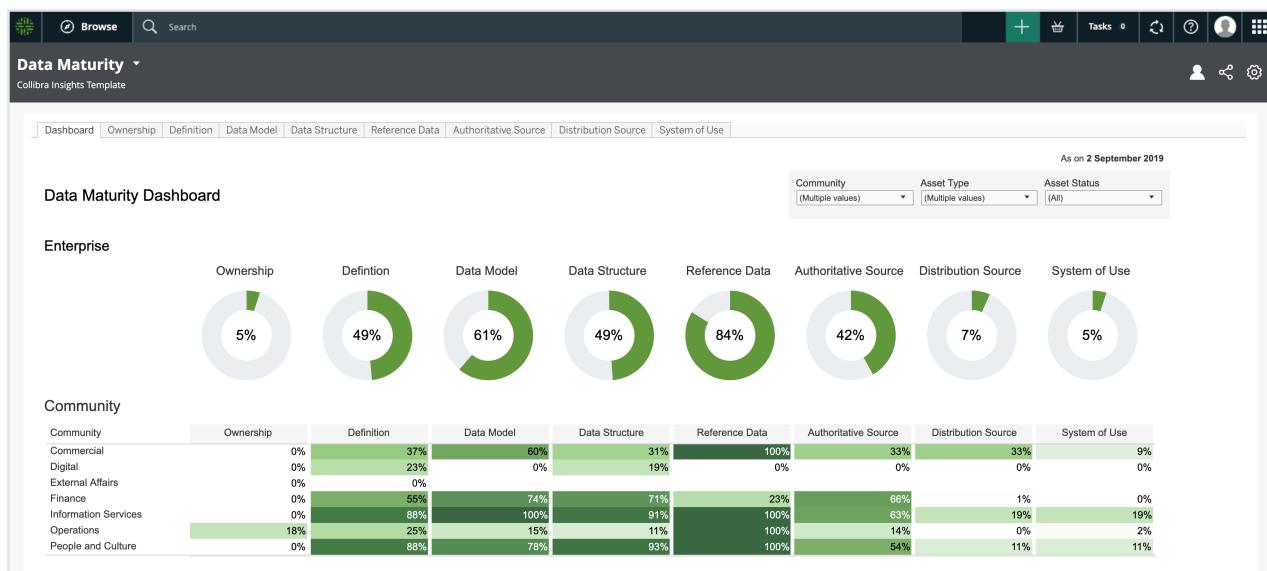
Recent		
price	amazon domi	17 m ago
Duplication	Data Quality Dimensions	17 m ago
country	amazon domi	19 m ago
price	amazon domi	20 m ago
Consistency	Data Quality Dimensions	21 m ago
Completeness	Data Quality Dimensions	21 m ago
col8	amazon domi	21 m ago
whole_number_string_80	amazon domi	22 m ago
aaa > ee	Movie Metadata-kopia	22 m ago
a	New Business Terms	28 m ago

This widget has no specific configuration settings. Like all other widgets, common configuration settings are available via the [Widgets tab](#).

Collibra Insights widget

The Collibra Insights widget enables you to include [dashboard reports](#) on your dashboard.

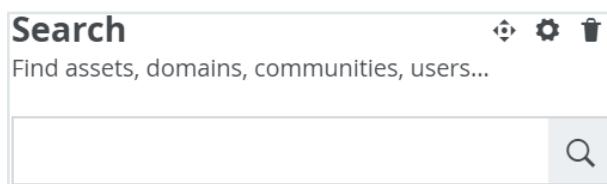
Important Whether or not a third-party webpage can be embedded is determined by the security settings of the third-party.



Before configuring dashboard reports, you have to [create](#) the reporting data layer. You can then [configure](#) dashboard reports via Collibra Data Intelligence Cloud Settings or [generate](#) them via a URL, from tools such as Tableau Online, Power BI, Qlik or ThoughtSpot.

Search widget

The Search widget on the dashboard is similar to the [Search field](#) in the main menu. If you type something and press [Enter](#), the same [search page](#) is shown as if you searched via the [Search field](#), and the search results are the same. The difference is that the Search widget does not show the most recently viewed resources or, while you are typing, the top results, as does the [Search field](#).



If the [Search](#) widget is not included on your dashboard, you can [add](#) it.

Counters widget

The Counters widget shows count statistics on your dashboard and the Metrics pages of the Collibra applications, for example the number of total assets in your environment or

the number of open tasks or issues.

When configuring a Counter widget, you choose from a fixed list of templates that determine the count statistics that are computed. The following table describes the computation for each template:

Template name	Description
Applications	Number of Technology Assets.
Approved Assets	Number of assets with the status "Accepted".
Assets	Number of assets.
Assets Created Past Day	Number of assets created in the past day (24 hours).
Assets Created Past Month	Number of assets created in the past month (28 days).
Assets Created Past Week	Number of assets created in the past week (7 days).
Business Terms	Number of Business Term assets.
Code Values	Number of Code Value assets.
Columns	Number of Column assets.
Communities	Number of communities.
Data Assets	Number of Data Assets.
Domains	Number of domains.
File Groups	Number of File Group assets.
Files	Number of File assets.
Governance Assets	Number of Governance Assets.

Template name	Description
Issues resolved past day	<p>Number of Issue assets for which the status became "Resolved" within the past day (24 hours).</p> <p>Note This counter does not show how many Issue assets were set to "Resolved" in the past 24 hours. Rather, it shows the total number of Issue assets that had the "Resolved" status at a specific point in time. By default, the Issue assets are counted once every 24 hours. The counting interval can be edited in Collibra Console. Keep in mind that increasing the frequency of the counts may negatively impact performance.</p>
Issues resolved past week	<p>Number of Issue assets for which the status became "Resolved" within the past week (7 days).</p> <p>Note This counter does not show how many Issue assets were set to "Resolved" in the past 7 days. Rather, it shows the total number of Issue assets that had the "Resolved" status at a specific point in time. By default, the Issue assets are counted once every 7 days. The counting interval can be edited in Collibra Console. Keep in mind that increasing the frequency of the counts may negatively impact performance.</p>
KPIs	Number of Key Performance Indicators.
My Open Tasks	<p>Total number of unfinished tasks for the user.</p> <p>Note "Unfinished" is the status of the task, as documented in the workflow.</p>
New Issues	Number of Issue assets with the status "New".

Template name	Description
Open Issues	<p>Number of unresolved Issue assets. Unresolved Issue assets can have the following statuses:</p> <ul style="list-style-type: none"> • New • Under Review • Accepted • Invalid • In Progress • Resolution Pending • Pending
Open Tasks	<p>Number of unfinished tasks for all users.</p> <p>Note "Unfinished" is the status of the task, as documented in the workflow.</p>
Processes	Number of Business Process assets.
Reference Data Domains	Number of Code-list domains.
Reports	Number of Report assets.
S3 Buckets	Number of S3 Bucket assets.
S3 File Systems	Number of S3 File System assets.
Schemas	Number of Schema assets.
Tableau Dashboards	Number of Tableau Dashboard assets.
Tableau Projects	Number of Tableau Project assets.
Tableau Servers	Number of Tableau Server assets.
Tableau Sites	Number of Tableau Site assets.
Tableau Stories	Number Tableau Story assets.

Template name	Description
Tableau Views	Number of Tableau View assets.
Tableau Workbooks	Number Tableau Workbook assets.
Tables	Number of Table assets.
Task Duration	Sum of all task durations.
Users	Number of users currently signed in to the environment.

Configure the Counters widget

You can add many different counters to the dashboard and configure them to suit your needs.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. If required, [add](#) a **Counters** widget to a dashboard.
5. In the widget, click .

6. Enter the required information.

The screenshot shows the 'Counters' configuration screen. At the top, there are tabs for 'Counters' and 'Widget'. Below the tabs, a dropdown menu shows 'ui.core.businessterms'. A 'Template' dropdown is set to 'Business Terms'. There are two progress bars: 'Warning Level' (orange) and 'Danger Level' (red). A text input field for 'URL' contains 'glossary'. At the bottom left is an 'Add Counter' button, and at the bottom right are 'Reset Widget', 'Cancel', and 'Save' buttons.

Tab	Field	Description
Counters	Existing counter or Add Counter	<p>Do one of the following:</p> <ul style="list-style-type: none"> ○ Click Add Counter, to add a new counter. ○ Expand the section of an existing counter, to edit its current configuration.
	Template	Select the template of the count statistic you want to show.
	Warning Level and Danger Level	<p>Optionally, enter the values that represent your warning and danger thresholds, respectively.</p> <p>Note The threshold settings are designed for use with the following issue-related templates:</p> <ul style="list-style-type: none"> ○ New Issues ○ Open Issues ○ Issues resolved past day ○ Issues resolved pas week
	URL	Optionally, specify a URL to be accessed if a user clicks the counter. The URL must lead to a page in your Collibra DGC environment. The webpage will open in the active browser window.

7. Click Save.

Warning and danger thresholds

The warning and danger thresholds are optional settings that allow you to visually communicate certain risk or tolerance levels for Issue assets.

The two threshold settings, "Warning level" and "Danger level", can be configured:

- Per counter.
- Alone or in combination with one another.

Note The threshold settings are designed for use with the following issue-related templates:

- New Issues
- Open Issues
- Issues resolved past day
- Issues resolved pas week

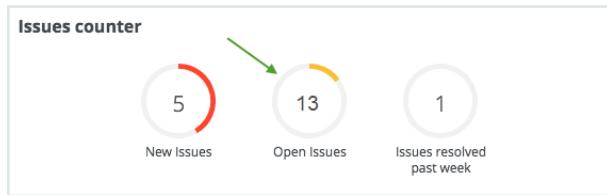
Example

Let's say that your organization has established that 20 open issues (meaning Issue assets with a status other than "Resolved") exceeds its risk appetite. To give this visibility within the appropriate community of Collibra DGC users, you [add](#) the Counters widget to the dashboard, and [configure](#) a counter to show the number of open issues, of which there are currently 13.

In accordance with your organization's risk appetite, and to give more meaning to the number of open issues, you set **Warning Level** to 10 and **Danger Level** to 20.

The screenshot shows the configuration interface for a template named "ui.core.openissues". The "Template" dropdown is set to "Open Issues". There are two input fields: "Warning Level" (set to 10) and "Danger Level" (set to 20). Both fields have a small colored square next to them: yellow for the warning level and red for the danger level. Below these fields is a URL input field containing "data-helpdesk".

The following example image shows the resulting Counters widget and, specifically, the Open Issues counter:



Understanding the color bands

When values are given to one or both of the threshold settings, the band around the counter will be green, orange or red. The colors have the following meanings:

Circle color	Meaning
Entirely gray	No value has been set for either the warning or danger thresholds.
Green	The issue count is lower than both threshold values, or if only one threshold has been set, lower than that value.
Orange	The issue count is higher than the warning threshold value, but lower than the danger threshold value (if the danger threshold has been set).
Red	The issue count is higher than the warning threshold value (if no danger threshold has been set) or higher than the danger threshold value, if it has been set.

Text widget

The Text widget is a free-text field that allows you to add text to the dashboard. You can use it, for example, to inform users your latest data governance news, point users to certain pages with hyperlinks to a specific view and so on.

When you add content to a Text widget, you can:

- Use the rich text editor in the **Content** tab, to format your text.
- Click to edit the HTML source code.

Warning

The text editor supports most HTML elements, inline CSS styling and table (`<t>`) structures. However, this means an attacker could potentially execute an XSS attack by injecting malicious HTML. However, you can automatically remove the following HTML elements to improve security:

- script
- svg
- frame
- frameset
- iframe
- any event handlers
- any JavaScript

You can enable this in Collibra Console. For more information, see the [Troubleshooting section](#).

Configure the Text widget

You can configure the Text widget to post a free-text message on the dashboard.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. If required, [add](#) a Text widget to a dashboard.
5. In the widget, click .

6. Type or cut and paste your text in the field and, optionally, format it using the rich text editor.



Tip If you want to copy and paste text from other sources into a text field, we recommend that you click , and then paste the text into the **Show source code** field. This will remove any unwanted formatting or tagging of the text. For detailed information, see the knowledge base article on [Collibra Support Portal](#).

7. Click **Save**.

Supported HTML tags

The following table shows the HTML tags you can use to format your text in the Text widget:

Supported HTML tags					
meta	option	small	font	dl	input
head	textarea	big	a	dt	select
title	h1	pre	map	em	strong
script	h2	code	style	table	col
noscript	h3	cite	span	td	br
svg	h4	samp	div	th	tfoot
iframe	h5	sub	img	tr	thead
frameset	h6	sup	link	colgroup	tbody

Supported HTML tags				
frame	p	strike	ul	col
label	i	center	ol	fieldset
form	b	blockquote	li	legend
button	u	hr	dd	no-hyperlink

To Do widget

The To Do widget provides a quick overview of open tasks and issues. You can:

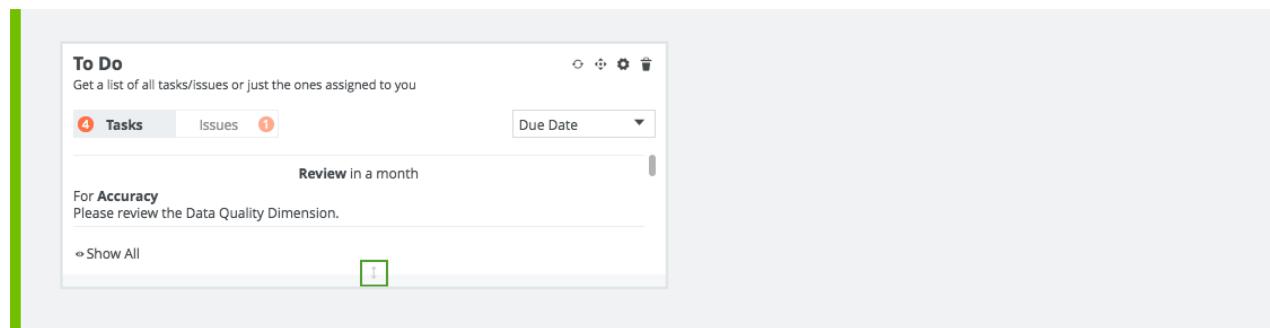
- Click the **Tasks** and **Issues** buttons, to switch between tasks and issues.
- Click ▼ in the drop-down list, to sort the tasks by due date, asset and title.
- Click **Show All**, to go to the [My Tasks page](#), where all tasks are shown.

The screenshot shows the 'To Do' widget interface. At the top, there are three buttons: 'Tasks' (highlighted), 'Issues', and a red notification badge with the number '1'. To the right is a dropdown menu labeled 'Due Date' with a downward arrow. Below this, the list of items is displayed:

- Rejected Definition** (7 months ago) - For Chat Log Data Standard. Description: Correct the definition after it was rejected by System.
- Assign Technical steward** (in 14 days) - For All Data-2. Description: Please assign a Technical Steward to the domain.
- Assign Technical steward** (in 21 days) - For Worldwide-co2-emissions3. Description: Please assign a Technical Steward to the domain.
- Assign Technical steward** (in 21 days) - For Worldwide-co2-emissions 2. Description: Please assign a Technical Steward to the domain.
- Assign Technical steward** (in 21 days) - For Global-migration 2. Description: Please assign a Technical Steward to the domain.

At the bottom left of the list area, there is a link labeled 'Show All'.

Tip If there are several tasks or issues shown in the widget, you can vertically resize the widget, to see more items without having to scroll as much in the widget. To resize the widget, click the gray, bi-directional arrow at the bottom of the widget and drag it to size.



Note Issues with the following statuses are not included in the list of open issues:

- Resolved
- Invalid
- Obsolete
- Disabled

You cannot add to, or remove, these excluded statuses. This means that if you create your own statuses, you cannot add them to the excluded statuses.

Configure the To Do widget

You can configure the widget to show either:

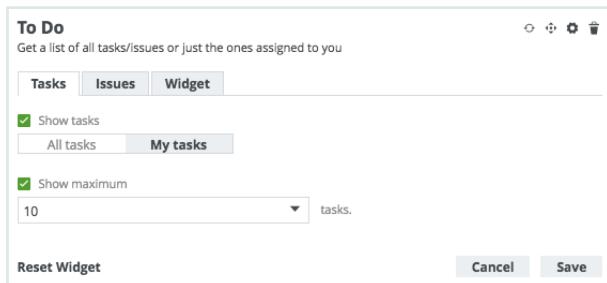
- Only tasks that are assigned to you and open issues that you have created.
- All open tasks and issues across your Collibra DGC environment.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. If required, **add a To Do widget** to a dashboard.
5. In the widget, click .
6. Enter the required information.



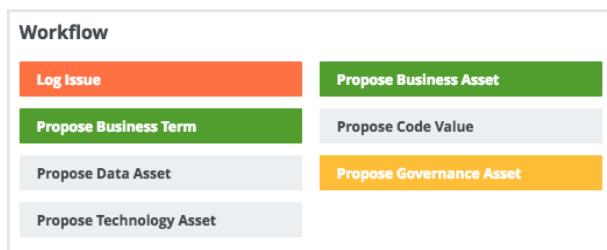
Tab	Field	Explanation
Tasks	Show tasks	<ul style="list-style-type: none"> ○ True: Show tasks in the widget. In this case, specify whether to show all tasks or only tasks assigned to you. ○ False: Tasks are not shown in the widget.
	Show maximum	<ul style="list-style-type: none"> ○ True: Limit the number of tasks shown in the widget. In this case, specify the maximum number of tasks that can be shown. Possible values are: 5, 10, 15, 20, 25, 50 or 100. ○ False: There is no limit to the number of tasks that can be shown.

Tab	Field	Explanation
Issues	Show issues	<ul style="list-style-type: none"> True: Show issues in the widget. In this case, specify whether to show all open issues or only open issues that you created. False: Issues are not shown in the widget.
	Show maximum	<ul style="list-style-type: none"> True: Limit the number of issues shown in the widget. In this case, specify the maximum number of issues that can be shown. Possible values are: 5, 10, 15, 20, 25, 50 or 100. False: There is no limit to the number of issues that can be shown.

7. Click **Save**.

Workflow widget

The Workflow widget adds one or more buttons to the dashboard, allowing users to start global workflows from the dashboard.



When you customize this widget, there is a **Buttons** tab instead of a **Content** tab. You can specify which workflows have to be available and how they are displayed.

You can specify the following parameters for each button:

1. The label to display on the button
2. The global workflow that is started by clicking the button
3. The styling of the button

Configure the Workflow widget

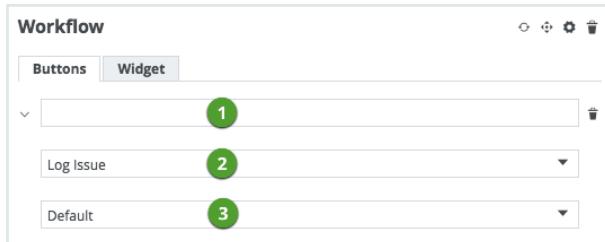
You can add and configure buttons for any enabled workflow.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. If required, [add](#) a **Workflow** widget to a dashboard.
5. In the widget, click .
6. Enter the required information.



Tab	Field	Description
Buttons	1	The button text.
	2	The workflow that will be started when a user clicks the button.
	3	<p>The color of the button, based on the type of workflow. Possible values and their associated colors are as follows:</p> <ul style="list-style-type: none"> ◦ Default: gray ◦ Danger: red ◦ Info: gray ◦ Success: green ◦ Warning: yellow <p>Note This field only determines the color of the button. It has no bearing on the workflow.</p>

7. Click **Save**.

Add a widget to a dashboard

You can add widgets to curate information-rich dashboards.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. Click a widget and drag it onto the dashboard.

You can browse through the widgets by using the page numbers below them.



5. [Edit a widget](#) as required.
6. Click **Close & save edits**.

Move a widget

You can move a widget if you feel like a widget belongs in a different location on the dashboard.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the [Manage your own Views, Dashboards, Search filters](#) **global permission**, for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the [Manage shared Views, Dashboard and Search Filter](#) **global permission**, for example Sysadmin.

Steps

1. In the main menu, click .
2. In the view bar, select the dashboard that you want to change. See [Switch to another dashboard](#).
3. In the dashboard toolbar, click  → **Edit widgets**. In the dashboard toolbar, click  → **Edit widgets**.
4. Click  and hold the button (move) on the widget that you want to move.

5. Drag the widget to where you want it on the dashboard and release the mouse button.
6. Click **Close & save edits**.

Edit a widget

You can edit the dashboard widgets to curate the information shown on the dashboard.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

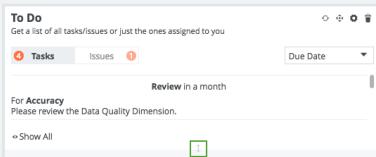
Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. Edit the content of the widget, to meet your needs.

Note

- Not every widget has the same tabs.
- The **Widget** tab is the same for each widget. Your configuration of the **Widget** tab defines how the widget is displayed on the dashboard.

Tip You can vertically resize any dashboard widget, by clicking and dragging the gray, bi-directional arrow at the bottom of the widget.



5. Click Save.

Delete a widget from a dashboard

If a specific widget is no longer useful on a certain dashboard, you can delete it from that dashboard.

Prerequisites

- If you want to manage your own dashboard, you have a global role with the Manage your own Views, Dashboards, Search filters [global permission](#), for example Sysadmin.
- If you want to manage another user's dashboard, you have a global role with the Manage shared Views, Dashboard and Search Filter [global permission](#), for example Sysadmin.

Steps

1. In the main menu, click .
2. If required, switch to the relevant dashboard.
3. In the dashboard toolbar, click  → **Edit widgets**.
4. In the widget, click .
5. Click **Delete** to confirm.
6. Click **Close & save edits**.

The Create button

In Collibra Data Governance Center, there is a green **Create** button at the top of the screen. It enables you to create any resource from any location, if you have the correct permissions.



The following table describes the categories of resources you can create with the **Create** button:

Item	Description
Suggested	<p>A list of resources that you might want to create.</p> <p>The resources available to you here depend on your location in Collibra DGC:</p> <ul style="list-style-type: none"> • If you are on one of the submenu pages, for example, Business assets, Metrics or Glossaries, the suggested resources are specific to that submenu page. • If you are on a domain page, the suggested resources are all the asset types that are assigned to the domain. • If you are on a community page, the suggested resources are all the asset types that are assigned to the domains in the community. • If you are on an asset page, the suggested resource is an asset of that same type. <p>This list is not available when you click the Create button from the default dashboard.</p>
Recent	A list of recently created resources, most recent first.
Actions	A list of global workflows that have the option Show in global create enabled.
Asset	A list of all the asset types that are available in your data governance model. The list is divided into sections, according to the parent asset type, for example, Business Asset or Data Asset.
Organization	A list of organizational resources, such as a Community or a Business Asset Domain.

To quickly find what you are looking for, you can type a search term in the **Filter** field. The results are based on the category you selected.

Note You can only create assets of a certain type in a certain domain if that asset type has been assigned to that domain.

If you try to create an asset of a type that is not assigned to the domain you are currently in, the **Domain** field in the **Create** dialog box is not automatically filled in.

Create a resource

To create any resource by using the green + button.

Steps

1. Click the green + button.
2. Search for the resource you want to create and click it.
3. Fill in the required data and follow the on-screen steps.
4. Click **Create**.

Create a community

You can create a new **community** at the top level of your organization, or under another community.

Steps

1. In the main menu, click the **Create** (+) button.
 - » The **Create** dialog box appears.
2. Click the **Organization** tab.
3. In the **Community** section, click **Community**.
 - » The **Create Community** dialog box appears.

- Enter the required information.

Field	Description
Community	The community under which the new communities will be located. If you leave this field empty, the communities will be located at the top level of your organization.
Name	<p>The names of the new communities.</p> <p>Tip You can create multiple communities in one go. To do this, press Enter after typing a value and then type the next. Community names have to be globally unique. If you type a name that already exists, it will appear in strike-through style.</p>

- Click **Create**.

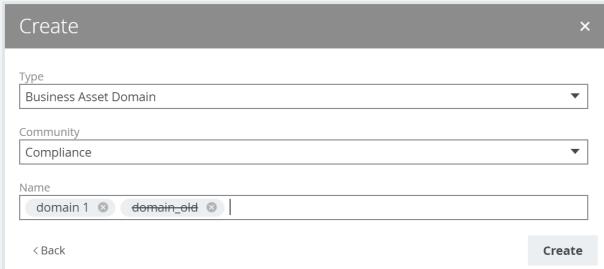
Create a domain

You can create a new [domain](#) in a [community](#).

Steps

- In the main menu, click the **Create** (+) button.
 » The **Create** dialog box appears.
- Click the **Organization** tab.
- Click a domain type from the list.
 If you selected the wrong domain type here, you can still change it in the **Type** field in the next screen.
 » The **Create Domain** dialog box appears.

- Enter the required information.

Field	Description
Type	<p>The domain type of the domain you are creating.</p> <p>This field contains the domain type that you clicked in the previous step. You can change it if needed.</p>
Community	The community under which the domain will be located.
Name	<p>The name of the new domain.</p> <p>Tip You can create multiple domains in one go. To do this, press <code>Enter</code> after typing a value and then type the next. Domain names have to be unique in their parent community. If you type a name that already exists, it will appear in strike-through style.</p> <p>Example</p> 

- Click **Create**.

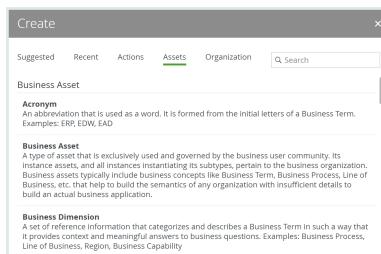
Create an asset

In Collibra Data Governance Center, asset types have assigned domain types. You can only add assets to domains whose domain type is assigned to the asset type of the asset.

Steps

- Open the product for which you want to create the asset, for example the Business Glossary.

2. In the main menu, click the **Create** (+) button.
» The **Create** dialog box appears.
3. Click the **Assets** tab.



4. Click an asset type from the list.
» The **Create Asset** dialog box appears.
5. Enter the required information.

Field	Description
Type	The asset type of the assets that you are creating.
Domain	The domain to which the new assets will belong. You can only create a asset type in any domain of a domain type that is assigned to a selected asset type.
Name	<p>The names of the new assets.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> Tip You can create multiple assets in one go. To do this, press Enter after typing a value and then type the next. Depending on the settings, asset names may have to be unique in their domain. If you type a name that already exists, it will appear in strike-through style. </div>

6. Click **Create**.
» A message at the top-right of your screen confirms that one or more assets are created.

History in Collibra DGC

Collibra Data Governance Center automatically keeps a history of users and resources such as assets, domain and communities. This history keeps track of most changes to that resource and its children, as well as who made the changes.

Example

Users can provide a definition of a business term, edit its name, move it to a new domain, and change the status. These changes are in the history of the affected assets, their parent domain, all parent communities and the history of the users themselves.

You can view the history of any resource in the **History** tab of the resource's page, as shown in the following image.

The screenshot shows the 'customer revenue' resource page with the 'History' tab selected. The left sidebar includes links for Overview, Tags, Comments, Diagram, Pictures, Responsibilities, References, History, and Files. The main area displays a table of history entries:

Action	Who	from	to
Select	Select	1/11/2019	2/11/2019
+ Attachment customer revenue report calculation.xlsx	All customer revenue	John Fisher	2/11/2019 2:01 PM
- Update Simple Approval Process Ended	Simple Approval Process	John Fisher	2/11/2019 2:00 PM
- Status Candidate > Accepted	All customer revenue	John Fisher	2/11/2019 2:00 PM
- Simple Approval Process Started	Simple Approval Process	John Fisher	2/11/2019 2:00 PM
- tag SaaS	All customer revenue	John Fisher	2/11/2019 1:59 PM
- Definition Customer Revenue is the revenue associated with the customer or customer contract.	All customer revenue	John Fisher	2/11/2019 1:59 PM
+ Comment Don't confuse with customer lifetime value!	All customer revenue	John Fisher	2/11/2019 1:58 PM
+ tag SaaS	All customer revenue	John Fisher	2/11/2019 1:58 PM
+ Rating ★★★★★ customer revenue	All customer revenue	John Fisher	2/11/2019 1:58 PM
+ represents represents 35168	All customer revenue	John Fisher	2/11/2019 1:58 PM
+ Business Steward John Fisher	All customer revenue	John Fisher	2/11/2019 1:57 PM
+ Definition Customer Revenue is the revenue associated with the customer or customer contract.	All customer revenue	John Fisher	2/11/2019 1:54 PM
+ customer revenue	All customer revenue	John Fisher	2/11/2019 1:54 PM

History page

The History page provides an overview of the history of a user or a resource and its children. For examples, it contains all actions related to the following:

- Creating, editing and deleting resources.

Note

In some cases, an edit is logged as a delete plus a create.

For example, if you edit a Description attribute of a Data Usage complex relation, the original Description attribute is deleted, and a new Description attribute is created with the new content.

- Moving assets to a different domain.
- Adding, editing and removing characteristics.
- Changes to the asset status.
- Social features such as comments, tags and ratings.
- Uploading and deleting attachments.
- Workflows and the resulting changes.
- Creating, editing and deleting responsibilities.

Note

- The history does not show changes to inherited responsibilities.
- The history does not show changes to the view permissions.

- In the case of the user history, adding and removing the user to or from user groups.

The screenshot shows a Business Steward interface for a business term named "customer revenue". The main area displays a history of actions taken on this term. A green box highlights the timeline section, which is annotated with numbers 1 through 6. The interface includes a sidebar with various navigation options.

Column	Content
1	The filter that allows you to filter the history based on the type of action, the user or a time period.
2	The icon that represents the type of action that was applied to the resource: <ul style="list-style-type: none"> + : Added information. ✎ : Edited information. trash : Deleted information. ▶ : Multiple changes in one go. Click the icon to expand and show the individual changes
3	The summary of the action.
4	The name of the affected resource.
5	The user who applied the action.
6	The date and time when the action was applied.

Column	Content
1	The filter that allows you to filter the history based on the type of action, the user or a time period.
2	The icon that represents the type of action that was applied to the resource: <ul style="list-style-type: none"> + : Added information. ✎ : Edited information. trash : Deleted information. ▶ : Multiple changes in one go. Click the icon to expand and show the individual changes
3	The summary of the action.
4	The name of the affected resource.
5	The user who applied the action.
6	The date and time when the action was applied.

View the history of a resource

You can view the change history of an asset, domain or community.

Steps

1. Open an asset page.
2. In the tab pane, click  History.
 - » The history is shown in a table.

Note By default, the filter only shows the 10 latest changes in the last month.

3. If required, do one of the following:
 - a. Click **Load More** below the table to load more history items.
 - b. Edit the filter criteria above the table to see only specific history items.

Criterion	Description
Action	<p>Choose one of the actions:</p> <ul style="list-style-type: none">■ Add■ Edit■ Delete <p>The effect of this filter criterion depends on the resource:</p> <ul style="list-style-type: none">■ For assets, this includes action that affect an attribute.■ For domains, this includes actions affecting the domain itself, but also actions affecting assets in the domain.■ For communities, this includes actions affecting the community itself, but also actions affecting assets, domains and subcommunities of the community.
Who	Choose a user whose actions you want to see.

Criterion	Description
from	<p>Choose the start date of the period of which you want to see the actions.</p> <p>The default value of this criterion is one month before the current date.</p>
to	<p>Choose the end date of the period of which you want to see the actions.</p> <p>The default value of this criterion is the current date.</p>

- c. Remove one or more filter criteria by deleting the value in the filter box using the `Delete` key of your keyboard.

Views in Collibra DGC

Views in Collibra Data Governance Center define how you can look at lists of assets. You can configure views to see, for example, tables or a set of tiles. A view is also the basis for [Importing and exporting](#).

While you are working with a view, Collibra DGC stores your view configuration when you navigate to a different page and even when you sign out. You can also undo your changes.

Views

A view defines a table or set of tiles by storing the following data:

- The [display mode](#), to specify whether assets are shown in a table or as tiles.
- Filters, to specify which assets are displayed.
- Applied sorting, to specify the order of the assets.
- Visible columns (for tables) or fields (for tiles), to specify which information about assets is displayed.
- Hierarchy, to display, optionally, a hierarchy of assets instead of a flat list (not applicable in tile display mode).

A view is also the basis for Importing and exporting.

Example of a view in table display mode:

Name	Definition	Business Steward	Status	Domain	Asset Type
1 Month Actual Sales	Total Actual Sales of the past ...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Actual Sales	Total Actual Sales of the past 3...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast	Forecasted Total Sales (Revenue...)	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast Price	Forecasted Unit Price 3 month...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Actual Sales	Total Actual Sales of the past 6...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Forecast	Forecasted Total Sales for the ...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Actual Sales	Total Actual Sales of the past 9...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Forecast	Forecasted Total Sales (Revenue...)	John Fisher	Accepted	SCPM Glossary	Business Term
Actuals	Actuals - the actuals reflect ho...	John Fisher	Accepted	SCPM Glossary	Business Term
Backorder	An order for a product which is t		Accepted	SCPM Glossary	Business Term
Broker	a person who buys and sells g...		Candidate	Trading Glossary	Business Term

Example of a view in tile display mode:

Category	Title	Status	Definition	Business Steward	Asset Type
SCPM Glossary	BT 1 Month Actual Sales Accepted		Total Actual Sales of the past Month.	John Fisher	Business Term
SCPM Glossary	BT 3 Month Actual Sales Accepted		Total Actual Sales of the past 3 months (past quarter).	John Fisher	Business Term
SCPM Glossary	BT 3 Month Forecast Accepted		Forecasted Total Sales (Revenue) for the next 3 Months (one quarter).	John Fisher	Business Term
SCPM Glossary	BT 3 Month Forecast Price Accepted		Forecasted Unit Price 3 months from today.	John Fisher	Business Term
SCPM Glossary	BT 6 Month Actual Sales Accepted		Total Actual Sales of the past 6 months (past 2 quarters).	John Fisher	Business Term
SCPM Glossary	BT 6 Month Forecast Accepted		Forecasted Total Sales for the next 6 months (2 quarters).	John Fisher	Business Term

When you view a table or set of tiles for the first time, you are using the Collibra DGC default view, unless somebody already shared a custom view as default with you.

Each view has a unique URL. You can use this URL to open the view directly, without having to navigate to the location. For example, you can embed the view URL in a text widget on a dashboard, in an email and so on. You can simply copy the URL from the address bar and paste it where needed.

View types

Collibra offers different types of views:

- Dashboards
- Search filters
- Diagram views
- Relation views on an asset page
- Asset views, for example in a [domain](#) or [community](#), in the [global view](#) and in application views.

Asset views are available in the following applications:

Application	Tabs with a view selector
Business Glossary	<ul style="list-style-type: none">• Business Assets• Glossaries
Reference Data	<ul style="list-style-type: none">• Code Values/Sets• Hierarchies
Data Catalog	<ul style="list-style-type: none">• Reports• Data Sets• Data Dictionary• Technology Assets
Data Helpdesk	<ul style="list-style-type: none">• Issues• Data Quality
Data Stewardship	Business Dimensions
Policy Manager	Governance Assets

View selector and toolbar

The view selector allows you to switch between views and the view toolbar to manage the currently selected [view](#).

It appears in views containing a [table](#) or a [set of tiles](#).



The view bar has the following items:

Number	Button	Description
1	n/a	The view selector shows the name and description of the current view, and allows you to choose another view.
2		Button to edit the name and the description of the current view.
3		Button to save changes to the current view, or to create a new view.
4		Button to share the current view.
5		Button to delete the current view.

Create a view

You can create a [view](#), for example, if you want it to contain specific fields and display assets based on a filter.

Steps

1. Navigate to the set of assets (be it in table [display modes](#) or tile display mode) for which you want to create a view.
Example: Business Glossary
If you want to start from the configuration of an existing view, [switch](#) to that view.
2. Set the required [filters](#).
3. [Customize the table](#) or [customize the set of tiles](#).
4. Optionally, [enable hierarchy](#) (not applicable in tiles display mode).

5. On the right side of the view bar, click .
6. In the view toolbar, click , then **Save as**.
 - » The **Save view as** dialog box appears.
7. Enter the required information.

Option	Description
Name	The name of the new view.
Description	Optional. The description of the new view. You can add extra information about the view if necessary.
View sharing options	<p>The sharing options allow you to share the view:</p> <ul style="list-style-type: none"> ◦ Public: All Collibra Data Governance Center users can use the new view. ◦ Private: Only the creator of the view can use the new view. ◦ Share with specific roles, groups & users: The users with whom you want to share the new view. You can select Roles, Groups and Users.
Promote view	<p>You can promote the view by pinning it to the view or making it the default view:</p> <ul style="list-style-type: none"> ◦ Default: The new view becomes the default view when you open the table or set of tiles. ◦ Pin: The view is pinned to the view selector.

8. Click **Save**.

Edit a view

You can edit a [view](#), for example, if you want it to change its name.

Steps

1. Navigate to the set of assets (be it in table [display mode](#) or tile display mode) for which you want to edit a view.
Example: Business Glossary
2. Switch to the view that you want to edit.

3. In the view toolbar, click .

 - » The **Edit name & description** dialog box appears.

4. Enter the required information.

Option	Description
Name	The name of the new view.
Description	Optional. The description of the new view. You can add extra information about the view if necessary.

5. Click **Save**.

Edit a view's configuration

You can edit a [view](#), for example, if you want it to change its fields and filters.

Steps

1. Navigate to the set of assets (be it in table [display mode](#) or tile display mode) for which you want to edit a view.
Example: Business Glossary
2. Switch to the view that you want to edit.
3. If required, do the following:
 - a. Edit the view's [filters](#).
 - b. [Customize the table](#) or [customize the set of tiles](#).
 - c. [Enable hierarchy](#)
4. In the view toolbar, click , then **Save**.

Share a view

You can share a [view](#), for example, if you want to give other users access to it.

Steps

1. Navigate to the set of assets (be it in table [display mode](#) or tile display mode) for which you want to edit a view.
Example: Business Glossary

2. Switch to the view that you want to edit.
3. On the right side of the view bar, click < .
» The Share view dialog box appears.
4. Enter the required information.

Option	Description
View sharing options	<p>The sharing options allow you to share the view:</p> <ul style="list-style-type: none"> ◦ Public: All Collibra Data Governance Center users can use the new view. ◦ Private: Only the creator of the view can use the new view. ◦ Share with specific roles, groups & users: The users with whom you want to share the new view. You can select Roles, Groups and Users.
Promote view	<p>You can promote the view by pinning it to the view or making it the default view:</p> <ul style="list-style-type: none"> ◦ Default: The new view becomes the default view when you open the table or set of tiles. ◦ Pin: The view is pinned to the view selector.

5. Click **Save**.

Delete a view

You can delete a [view](#), for example, if you no longer need it.

You can delete a view in several ways:

- From the view bar.
- From the overview.

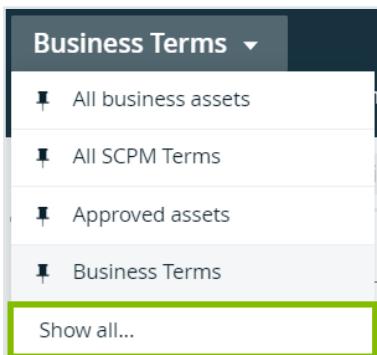
Delete a view from the view bar

1. Navigate to the set of assets (be it in table [display mode](#) or tile display mode) for which you want to delete a view.
Example: Business Glossary
2. Switch to the view that you want to delete.

3. In the view toolbar, click  .
 - » The Delete view <view name> dialog box appears.
4. Click Delete view.

Delete a view from the overview

1. Navigate to the set of assets (be it in table **display mode** or tile display mode) for which you want to delete a view.
Example: Business Glossary
2. In the view selector, click  , then **Show all**.



3. In the table, click  at the end of the row of the view you want to delete.
 - » The Delete view <view name> dialog box appears.
4. Click Delete view.

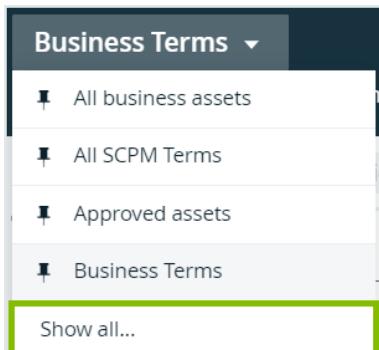
Pin a view to the view selector

You can pin a [view](#) to the view selector if you want to make it easier to open it.

Steps

1. Navigate to the set of assets (be it in table **display mode** or tile display mode) for which you want to edit a view.
Example: Business Glossary

2. Click the view selector, then **Show all...**



3. In the views table, click the thumbtack () to the left of the views you want to pin or unpin.

Business Assets views		
< Return to current view		
<input type="checkbox"/> My Views only	Name ↑	Description
	Acronyms	View for displaying all acronyms
	All business assets	View for displaying all business assets
	All SCPM Terms	View for displaying all business terms for...
	Approved assets	View for displaying all approved assets
	Business Terms	View for displaying all business terms
	In Progress	View for displaying all assets with status '...

Switch between views

You can switch between [views](#), for example, if you want to see the information of another view.

Steps

1. Navigate to the set of assets (be it in table [display mode](#) or tile display mode) for which you want to edit a view.
- Example: Business Glossary
2. In the view selector, click ▾ next to the name of the current view.
3. Do one of the following:

If...	then...
The view you want to display is in the list,	Click the view in the drop-down menu.
The view you want to display is not in the list,	a. Click Show all . b. Click the name of the view you want to display.

Global views

Global views enable you to show all assets of Collibra Data Governance Center in one view, regardless of their community, domain or application.

You can use all view features, such as:

- Change the [display mode](#) to table or tiles.
- Create views with different fields and filters.
- Import and export the assets or complex relations in the view.

Open a global view

1. In the main menu, click , then  **Global view**.
2. If required, [switch](#) to another view.

Timeout period for the loading of tables and tiles

In some cases, the loading of a table or set of tiles can take a while. This can happen if the view contains a lot of data, or if it has complex sorting and filtering applied. The timeout period is a time limit (in seconds) after which the loading task is stopped and a timeout error is shown.

If the timeout period expires before the view has loaded, you can try refreshing the view or, if applicable, simplifying its configuration by:

- Removing [basic or advanced asset filters](#).
- [Removing the sorting on multiple columns \(tables only\)](#).
- Reducing the [row count or tiles count](#).
- Reducing the number of [columns](#) (in a table) or [fields](#) (in a set of tiles).

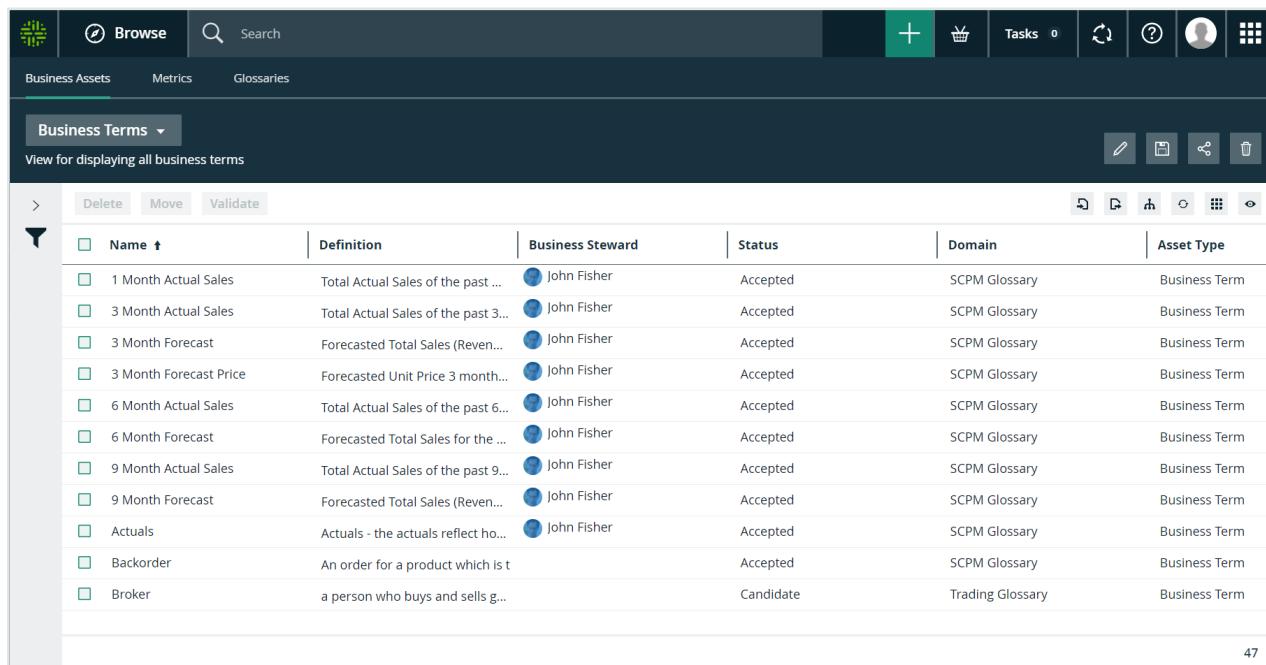
Console users with the ADMIN or SUPER role can [edit](#) the timeout period via the environment settings in Collibra Console.

Display modes

Throughout Collibra Data Governance Center, you can choose to view assets in tables (table display mode) or as sets of tiles (tiles display mode).

When assets are viewed in table display mode, each table row represents one asset. When they are shown in tile display mode, each tile represents one asset.

Example of a view in table display mode:



The screenshot shows the Collibra Data Governance Center interface with the following details:

- Header:** Includes a grid icon, "Browse" button, search bar, a green "+" button, a trash bin icon, "Tasks 0", a refresh icon, a help icon, a user profile icon, and a grid icon.
- Navigation:** Shows "Business Assets" (highlighted in blue), "Metrics", and "Glossaries".
- Section Header:** "Business Terms" with a dropdown arrow, and a sub-header "View for displaying all business terms".
- Table:** A grid view of 13 business terms. The columns are: Name (sorted by ascending name), Definition, Business Steward, Status, Domain, and Asset Type.
- Data:** The table contains the following rows:

Name	Definition	Business Steward	Status	Domain	Asset Type
1 Month Actual Sales	Total Actual Sales of the past ...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Actual Sales	Total Actual Sales of the past 3...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast	Forecasted Total Sales (Reven...	John Fisher	Accepted	SCPM Glossary	Business Term
3 Month Forecast Price	Forecasted Unit Price 3 month...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Actual Sales	Total Actual Sales of the past 6...	John Fisher	Accepted	SCPM Glossary	Business Term
6 Month Forecast	Forecasted Total Sales for the ...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Actual Sales	Total Actual Sales of the past 9...	John Fisher	Accepted	SCPM Glossary	Business Term
9 Month Forecast	Forecasted Total Sales (Reven...	John Fisher	Accepted	SCPM Glossary	Business Term
Actuals	Actuals - the actuals reflect ho...	John Fisher	Accepted	SCPM Glossary	Business Term
Backorder	An order for a product which is t...		Accepted	SCPM Glossary	Business Term
Broker	a person who buys and sells g...		Candidate	Trading Glossary	Business Term

Example of a view in tile display mode:

The screenshot shows the SAP Business Asset Management interface. At the top, there's a navigation bar with icons for Home, Browse, and Search, followed by a toolbar with various buttons like '+', 'Tasks 0', and user profile. Below the toolbar, there are tabs for 'Business Assets', 'Metrics', and 'Glossaries'. A dropdown menu 'Business Terms' is open, showing a list of terms. One term is selected: '1 Month Actual Sales'. The details for this term are displayed in a card format: 'Accepted', 'Definition: Total Actual Sales of the past Month.', 'Business Steward: John Fisher', and 'Asset Type: Business Term'. There are other cards for '3 Month Actual Sales', '3 Month Forecast', '3 Month Forecast Price', '6 Month Actual Sales', and '6 Month Forecast'. On the right side of the screen, there are buttons for 'Revert to original' and 'last changes a minute ago'.

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Switch to table display mode

If you are in tiles display mode, you can quickly convert the set of tiles to a table.

Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Display mode → Table**.

Switch to tiles display mode

If you are in table display mode, you can quickly convert the table to a set of tiles.

Steps

1. Open a view in table display mode.
2. In the content toolbar, click  → **Display mode** → **Tiles**.

Table display mode

When resources are viewed in table [display mode](#), each table row represents one community, domain, asset or so forth. You can also [switch](#) to tile display mode.

Working with tables

All tables in DGC have some common features and actions. For some tables, you can do additional actions.

The screenshot shows the SAP Fiori view for displaying all business assets. The interface consists of several key components:

- View Selector (1):** Shows "All business assets" and a dropdown arrow.
- View Bar (2):** Contains buttons for Edit, Save, Share, and Delete.
- Asset Filter (3):** A funnel icon.
- Action Toolbar (4):** Includes Delete, Move, and Validate buttons.
- Table Menu (5):** A gear icon.
- Table Headers (6):** Name (sorted ascending), Domain, and Asset Type.
- Table Data (7):** A list of 110 items, each with a green square icon, Name, Domain, and Asset Type. Some names include "customer" and "New Business Terms".
- Pagination (8):** Shows page numbers 1-10, ..., 31-40, 41-50, 51-60 (highlighted in blue), 61-70, 71-80, ..., 101-110, and a right arrow.
- Total Count (9):** Shows "110".

No.	Element name	Description
1	View selector	The view selector shows the name and description of the current view, and allows you to choose another view.
2	View toolbar	The view bar contains buttons to save , edit , share and delete the current view.
3	Asset filter	You can use an asset filter to limit the number of assets shown.
4	Action menu	The action toolbar contains a selection counter and actions that you can perform on assets you select in the table.
5	Table menu	The table menu contains buttons for actions that you can perform on the table.

No.	Element name	Description
6	Fields	<p>The fields are the column headers.</p> <p>You can customize the table to determine which fields are shown and in which order they're shown. You can also rename the field display names.</p> <p>From the header, you can</p> <ul style="list-style-type: none"> • Select all visible assets. • Sort on one or more columns, in ascending or descending order. • Apply a column filter. • Clear a column filter.
7	Body	<p>The body of the table shows the actual content of the table in rows.</p> <p>From a table, you can do the following:</p> <ul style="list-style-type: none"> • Select a row. • Edit the content of one, selected or all visible cells.
8	Pages	<p>The table pages. This section appears if the table contains more rows than you are displaying.</p> <p>You can do the following:</p> <ul style="list-style-type: none"> • Define the number of rows per page. • Navigate between table pages.
9	Counter	<p>The total number of assets in the table.</p> <p>If the table contains more than 10 000 rows, the counter displays 10 000 +. Click it to see the exact count.</p>

Action toolbar

The [action toolbar](#) contains a selection counter and actions that you can perform on assets you select in the table.

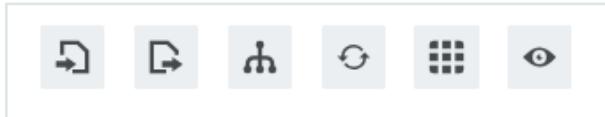
3 / 47		Delete	Move	Validate	Approval	Simple Approval	Vote
	Name	Asset Type					
<input checked="" type="checkbox"/>	1 Month Actual Sales	Business Term					
<input checked="" type="checkbox"/>	3 Month Actual Sales	Business Term					
<input checked="" type="checkbox"/>	3 Month Forecast	Business Term					
<input type="checkbox"/>	3 Month Forecast Price	Business Term					
<input type="checkbox"/>	6 Month Actual Sales	Business Term					
<input type="checkbox"/>	6 Month Forecast	Business Term					

You can:

- [Delete multiple assets.](#)
- [Move multiple assets to another domain.](#)
- [Validate assets.](#)
This is only visible if a [validation rule](#) is assigned to the [asset type](#).
- [Start an asset workflow from an asset table.](#)
Only workflows that apply to all the selected assets are available.

Table content toolbar

When you are viewing assets in table display mode, the content toolbar contains buttons for actions that you can perform on the table.



The following table provides an overview of the possible actions:

Button	Description
	Import assets or complex relations.
	Export assets or complex relations.

Button	Description
	<p>Display a selection of assets as a hierarchy, or tree structure, based on their relation type.</p> <p>When you select only one relation type, Collibra Data Governance Center builds the hierarchy as deeply as possible, traversing occurrences of that single relation type as often as it can.</p> <p>Enable or disable hierarchies.</p>
	Refresh the table.
	<p>Manage columns and rows. You can add, remove and move columns and select the number of rows that are displayed on one page. See Customizing tables.</p> <p>You can also switch to tile display mode.</p>
	Display a preview of the selected row. You can select a row by clicking on the row itself, not the check box.

Select or clear rows

To edit or delete multiple rows in one go, you can select multiple rows in a table.

Note Do not confuse this with highlighting a row by clicking anywhere in the row.

Steps

To select or clear rows in a table, follow these steps:

1. Open a view in table display mode.
2. Do one of the following:

If you want to...	do...
select a single row:	Click the checkbox in front of the row.
select all visible rows:	Click the checkbox in the header of the column.
clear a selected row:	Click a selected checkbox again.

Tip In the table header, you can see how many of the available assets are selected.

A screenshot of a table view. At the top, there are buttons for 'Delete' and 'Move'. Below them is a header row with a checkbox icon and the text 'Name ↑'. The main body of the table contains six rows, each with a checkbox and a name. The first four rows have checked checkboxes, while the last two have unchecked checkboxes. The rows are as follows:

	Name ↑
<input checked="" type="checkbox"/>	1 Month Actual Sales
<input checked="" type="checkbox"/>	3MFctRevByProduct
<input type="checkbox"/>	3 Month Actual Sales
<input checked="" type="checkbox"/>	3 Month Forecast
<input type="checkbox"/>	3 Month Forecast Price

Edit cells in a table

You can edit most content in tables. You can do this for individual rows or multiple rows in one go.

Steps

1. Open a view in table display mode.
2. Do one of the following:
 - Double-click a cell.
 - Hover your mouse over a cell and click .
 - » The cell editor appears.
3. Do one of the following:
 - If the field is a free text field, you can edit the cell by typing.
 - If the field is a drop-down list, type the new value or use the drop-down menu ▾.
 - If the field is a date, type the new date or use the date editor □.
4. Do one of the following:

If you want to change...	do...
the current row only:	a. Click ✓.
all visible rows:	a. Click Apply to all visible rows . b. Click ✓.
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click ✓.

Customizing tables

If you want a table to display only the information you need about specific assets, you can change several aspects of the table.

Add columns to a table

In Collibra Data Governance Center, a table has a default view, displaying a default set of columns. You can edit the asset view by adding columns to it.

Note You can also [show responsibilities](#) as a column.

Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.
3. Click **Select fields**.
 - » The **Select fields** dialog box appears.
4. Select one or more items in the list.

Tip You can use predefined filters and the search box to quickly find columns.

5. Click **Update**.
 - » The **Select fields** dialog box appears.
6. If required, do the following:
 - [Edit a column name](#).
 - [Edit the column order](#).
7. Click **Save**.

Show responsibilities in an asset table

An asset view can show the **responsibilities** of a resource, these responsibilities are shown per role.

If you [enabled inherited responsibilities](#) in Collibra Console, you can show the [inherited responsibilities](#). Inherited responsibilities have a gray background and cannot be edited in an asset view. Direct responsibilities have a white background and can be [edited](#).

Example

Name	Asset Type	Business Steward
customer revenue	Business Term	Anita Morrison John Fisher

Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.

3. Click **Select fields**.
» The **Select fields** dialog box appears.
4. Select one or more roles in the list.

Tip You can find all roles in the **Roles** tab page.

5. Click **Update**.
» The **Select fields** dialog box appears.

Tip If you enabled inherited responsibilities in Collibra Console, you can select **Show inherited responsibilities** to show inherited responsibilities.

6. Click **Save**.

Edit the column order

You can edit the order in which the columns are arranged in a table.

Note If you enable hierarchies for a table, the Name column automatically appears as the leftmost column in the table and it is frozen. More information: [Freeze columns](#).

Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Fields**.
» The **Fields** dialog box appears.
3. Click and drag a row up or down.
4. Click **Save**.

Edit a column name

You can edit the column names in a table.

Steps

1. Open a view in table display mode.
2. In the content toolbar, click  →  **Fields**.
 - » The **Fields** dialog box appears.
3. In the **Display name** field, type a new name.
4. Click **Save**.

Remove columns from a table

You can remove columns from tables in two ways:

Remove columns from the **Table Columns** dialog box

Do this if you want to remove one column.

Steps

1. Open a view in table display mode.
2. In the content toolbar, click  →  **Fields**.
 - » The **Fields** dialog box appears.
3. At the end of the line, click .
4. Click **Save**.

Remove columns from the **Select Columns** dialog box

Do this if you want to remove several columns or add columns in one go.

Steps

1. Open a view in table display mode.
2. In the content toolbar, click  →  **Fields**.
 - » The **Fields** dialog box appears.
3. Click **Select fields**.
 - » The **Select fields** dialog box appears.

4. Clear the check box in front of one or more items in the list.

Tip You can use predefined filters and the search box to quickly find columns.

5. Click **Update**.
6. Click **Save**.

Change the number of rows per page

If a table contains a large amount of rows, they will be split across multiple pages. You can change the number of rows that are shown per page of the table.

Steps

To change the number of rows per page, follow these steps:

1. Open a view in table display mode.
2. In the content toolbar, click → **Rows per page** → <number>.

Freeze columns

Freezing columns keeps the leftmost columns in a table visible when you scroll horizontally to the right.

Note If you enable hierarchies for a table, the **Name** column automatically appears as the leftmost column in the table and it is frozen. You can still change the column order.

Steps

1. Open a view in table display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.
3. Click for the **Move to freeze column(s)** setting, and drag it below the last column

you want to freeze.

4. Click **Save**.

Sort on one or more columns

Sorting the contents of a table helps you visualize your content and find the data you want. You can sort on one or more columns.

Note

- The availability of multi-column sorting and the maximum number of columns on which you can simultaneously sort depends on your organization's environment settings in Collibra Console. See the Collibra Data Governance Center [Installation and Configuration Guide](#).
- Multi-column sorting is not available in tile [display mode](#); however, you can sort on more than one column while in table display mode and then [switch to tile display mode](#). The sort results will be accurately applied to the tiles. See [Sort a set of tiles](#).

Steps

To sort the contents of a table based on one or more columns, follow these steps:

1. Open a view in table display mode.
2. Click the column name of the column on which you want to sort.
↑ appears next to the column name and the table is sorted in ascending order.
To sort in descending order, click the column name again.
3. To sort the data on a second column, click the desired column name.
» ↑² appears next to the column name and the table is sorted in ascending order.
To sort in descending order, click the column name again.
To remove sorting, click the column name a third time.
4. To sort the data on a third column, click the desired column name.
» ↑³ appears next to the column name.
» The contents of the table are first sorted according to the first column you've selected. Within that sort result, the contents are further sorted according to the second column you've selected.
To sort by additional columns, continue as above.

Tip If you start sorting on a second column, the sorting icon of the first column changes into .

Navigate between table pages

If a table contains more rows than you are currently showing, it is split in several pages. You can navigate between these pages.

Tip You can define the number of rows per page. More information: [Change the number of rows per page](#).

Steps

To navigate between table pages, follow these steps:

1. Open a view in table display mode.
2. If the table contains more rows than those displayed, the lower left corner shows the pages.

Do one of the following:

To navigate to...	click...
the previous page	◀
the next page	▶
the first page	the first page. Example: 1-10
one of the 2 previous or following pages	the desired page.

To navigate to...	click...
the last page	the last page. Example: 100-110

Example

Name ▾	Asset Type
CSR	Acronym
CSS	Acronym
currency conversion	Business Term
customer	Business Term
customer activity cycle	Business Term
customer care	Business Term
customer communication	Business Term
customer engineering	Business Term
customer enticement	Business Term
customer input terminal	Business Term

◀ 1-10 ... 31-40 41-50 **51-60** 61-70 71-80 ... 101-110 ►

Filtering tables

You can filter tables in different ways:

- [Apply a column filter.](#)
Do this to quickly filter on a column using a simple string.
- [Asset filters.](#)
Do this to use advanced filters.

Apply a column filter

You can filter the content in a table using a column filter. When you apply a column filter, only rows containing the specified string are shown.

Tip You can also use asset filters to define complex criteria. More information: [Asset filters](#).

Steps

To apply a column filter, follow these steps:

1. Open a table.
2. In a column header, click .
3. The column header becomes a search box.
Type the text you want to filter on.

Clear a column filter

After you applied a column filter, you can clear it again to make more rows visible.

Steps

To clear a column filter, follow these steps:

1. [Apply a column filter](#).
2. In the table name, click .

Working with hierarchies

The hierarchy feature for asset views enables you to display a set of assets in a table as a hierarchy, or tree structure, based on the [relations](#) between the assets. You can select which relation types to display in the hierarchy.

A hierarchy is a visual representation of relations between assets, resulting in a tree-like path.

Note Collibra Data Governance Center uses dotted lines to graphically depict the relations between the assets in the hierarchy. Small carets (triangles) depict nodes in the hierarchy that you can expand.

When you [enable](#) hierarchies, you can choose between:

- A single-path hierarchy: for each node at a certain level in the hierarchy, there is only one path to nodes at the next level.
- A multi-path hierarchy: a hierarchy in which all relations are traversed for any asset, at any depth.

Note

- In a hierarchy, [filters](#) are only applied at the root level.
- You cannot export or import a hierarchy.
- You cannot use tile [display mode](#) in a hierarchy.

Example

Single-path hierarchy

Imagine you have assets that represent Reports. Each report asset contains Report Attribute assets.

You can depict this as a single-path hierarchy, using a single relation type:

- **[Report] contains [Report Attribute]**

In the resulting hierarchy, the maximum depth (meaning the number of relations between a root node and a leaf node) is one.

Now imagine some of those Report Attributes are represented by Business Assets, via the relation type:

- **[Data Asset] represented by [Business Asset]**

Note Keep in mind that Report Attribute is a child asset type of Data Asset.

You can depict this with a single-path hierarchy, consisting of two relation types:

- **[Report] contains [Report Attribute]**
- **[Data Asset] represented by [Business Asset]**

The maximum depth of this hierarchy will be two.

Now imagine that your Reports are grouped into other Reports, and you want to depict this as a hierarchy, as well. You can depict this as a single-path hierarchy, using a single relation type:

- [Report] groups [Report]

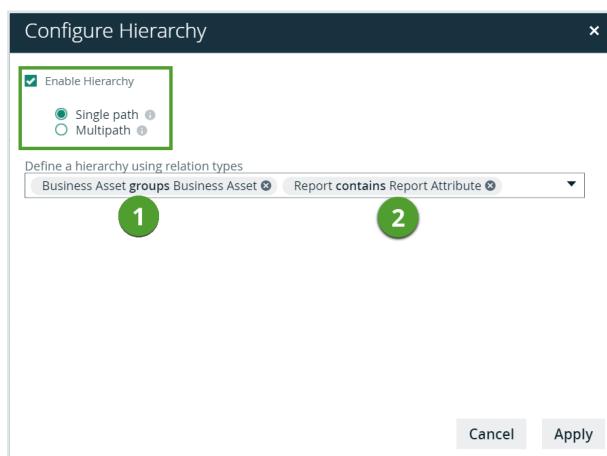
The fundamental difference between this hierarchy and the previous one is that the target asset type of the relation (Report) is the same as the source asset type (Report), which can result in a hierarchy of unlimited depth. For example:

- Report A groups Reports B and C
- Report B groups Reports D and E
- Report C groups Reports F

This hierarchy shows the Groups relations between the Reports, but it does not show the Report Attributes contained in each Report. Single-path hierarchy does not allow for these two relation types to be simultaneously depicted in a hierarchy:

- [Report] groups [Report]
- [Report] contains [Report Attribute]

In a single-path hierarchy, each Report node acts like a junction, at which you can view the instances of one relation type or the other, but not both.



Report Single-path Hierarchy ▾	
> Delete Move Validate	
Name	Asset Type
Customer Profitability Analysis	Report
Customer Lifetime Value	Report
Annual Profit Contribution	Report Attribute
Customer	Report Attribute
Customer Acquisition Cost	Report Attribute
Discount Rate	Report Attribute
Lifetime Value	Report Attribute
Retention Rate	Report Attribute
Financial Statements	Report
FRY-14M-CCAR	Report
FRY-14Q-CCAR	Report
FRY - 9C	Report

Multi-path hierarchy

This is where multi-path hierarchy comes into play: at each junction, any relation type in the hierarchy path is traversed to find more nodes. For example, you can simultaneously view:

- [Report] groups [Report]
- [Report] contains [Report Attribute]
- [Data Asset] represented by [Business Asset]

Report Multi-path Hierarchy

Name	Asset Type
Customer Profitability Analysis	Credit
Customer Lifetime Value	Credit
Annual Profit Contribution	Credit
Customer Acquisition Cost	Credit
Discount Rate	Credit
Lifetime Value	Credit
Retention Rate	Credit
Customer	Customer
Discount Rate	Credit
Retention Rate	Credit
▶ Financial Statements	Operational

Configure Hierarchy

Enable Hierarchy

Single path

Multipath

Construct a hierarchy based on the asset's relations.

Business Asset groups Business Asset Report: Has Schedule(s) Schedule
 Schedule Contains Report Attribute Report contains Report Attribute

Any level

Cancel **Apply**

Report Multi-path Hierarchy

Name	Asset Type
Customer Profitability Analysis	Report
Customer Lifetime Value	Report
Annual Profit Contribution	Report Attribute
Customer	Report Attribute
Customer Acquisition Cost	Report Attribute
Discount Rate	Report Attribute
Lifetime Value	Report Attribute
Retention Rate	Report Attribute
Discount Rate	Report Attribute
Retention Rate	Report Attribute
▶ Financial Statements	Report

Report Attributes at level 1

Enable or disable hierarchies

You can enable **hierarchies** to display an asset table in a tree structure, or disable hierarchies to display a 'flat' asset table.

Steps

1. Open a view in table display mode.
2. In the content toolbar, click .
- » The **Configure Hierarchy** dialog box appears.
3. Enter the required information.

Field	Description
Enable Hierarchy	Select or clear to respectively enable or disable hierarchies.
Single path	For each node at a certain level in the hierarchy, there is only one path to nodes at the next level.
Multipath	A hierarchy in which all relations are traversed for any asset, at any depth.
Construct a hierarchy based on the asset's relations	Enter the relation types that you want to use for your hierarchy.

4. Click **Apply**.

Tile display mode

When resources are shown in tile [display mode](#), each tile represents one asset. You can also [switch](#) to table display mode.

Working with tiles

In tile display mode, each tile represents one asset. The tiles have some common features and actions.

Chapter 2

The screenshot shows a user interface for managing data quality assets. The top navigation bar includes a 'View for displaying all asset' dropdown (1), a 'Revert to original' button (2), and a toolbar with save, edit, share, and delete icons.

The main area displays a grid of tiles representing different assets. Each tile contains a title, status, steward, type, and last modified date. The tiles are categorized by view:

- View 1 (Top Left):** Data Quality Dimensions. Contains one tile for 'Accuracy Issue'.
- View 2 (Top Middle):** Data Quality Dimensions. Contains one tile for 'Completeness Issue'.
- View 3 (Top Right):** Data Quality Dimensions. Contains one tile for 'Conformity Issue'.
- View 4 (Second Row Left):** Issue Classification. Contains one tile for 'Data Policy Issue'.
- View 5 (Second Row Middle):** Data Quality Dimensions. Contains one tile for 'Consistency Issue'.
- View 6 (Second Row Right):** Data Quality Dimensions. Contains one tile for 'Data Definition Issue'.
- View 7 (Third Row Left):** Issue Classification. Contains one tile for 'Accuracy Issue'.
- View 8 (Third Row Middle):** Data Quality Dimensions. Contains one tile for 'Completeness Issue'.
- View 9 (Third Row Right):** Issue Classification. Contains one tile for 'Conformity Issue'.

At the bottom left, there is a page navigation bar with buttons for 1-10, 11-20, 21-22, and a total count of 22.

No.	Element name	Description
1	View selector	The view selector shows the name and description of the current view, and allows you to choose another view.
2	View bar	The view bar contains buttons to save , edit , share and delete the current view.
3	Asset filter	You can use an Asset filters to limit the number of tiles that are displayed.

No.	Element name	Description
4	Tiles action menu	<p>The tiles action menu with a selection counter and buttons that enable you to:</p> <ul style="list-style-type: none"> • Sort the tiles in ascending or descending order, by field. • Delete multiple assets. • Move multiple assets to another domain. • Validate assets. <p>This is only visible if a validation rule is linked to the asset type.</p> <ul style="list-style-type: none"> • Start a workflow from a table. <p>Only workflows that apply to all the selected assets are available.</p>
5	Tiles menu	The Tiles content toolbar contains buttons for actions that you can perform on the set of tiles.
6	Fields and values	<p>Fields and values of the asset.</p> <p>You can customize a set of tiles by adding, moving and removing fields and selecting the number of tiles that are displayed per page.</p>
7	Pages	<p>The tiles pages. This section appears if there are more tiles than you are displaying on one page.</p> <p>You can:</p> <ul style="list-style-type: none"> • Change the number of per page. • Navigate between tiles pages.
8	Counter	<p>The total number of tiles.</p> <p>If a set of tiles contains more than 10 000 tiles, the counter displays 10 000 +. Click it to see the exact count.</p>

Tiles action toolbar

The tiles action toolbar contains a selection counter and actions you can perform on selected tiles.

The screenshot shows a user interface for managing assets. At the top, there's a toolbar with buttons for 'Sort by', 'Status', 'Delete', 'Move', 'Validate', 'Approval', and 'Vote'. Below the toolbar, the path 'Data Governance Council > Data Quality Dimensions' is displayed. A specific tile is selected, labeled 'DQD Accuracy' with a status of 'Accepted'. The tile also indicates it is an 'Asset Type' named 'Data Quality Dimension'.

You can:

- Sort the tiles in ascending or descending order, by field.
- Delete multiple assets.
- Move multiple assets to another domain.
- Validate assets.
This is only visible if a validation rule is linked to the asset type.
- Start a workflow from a table.
Only workflows that apply to all the selected assets are available.

Tiles content toolbar

When you are viewing assets in tile **display mode**, the content toolbar contains buttons for actions that you can perform on a set of tiles.



The following table provides an overview of the possible actions:

Button	Description
Import	Import assets or complex relations.
Export	Export assets or complex relations.
Hierarchy	Enable or disable hierarchies. Note The hierarchy feature is only available in table display mode.
Refresh	Refresh the table.

Button	Description
	<p>Manage fields and tiles count. You can customize a set of tiles by adding, moving and removing fields and selecting the number of tiles that are displayed per page.</p> <p>You can also switch to table display mode.</p>
	<p>Enable or disable the preview.</p> <p>Note Preview is only available in table display mode.</p>

Customize a set of tiles

If you want a set of tiles to display only the information you need about the assets, you can change several aspects of the tiles.

Add fields to a set of tiles

In Collibra Data Governance Center, a set of tiles has a default view, displaying a default set of fields. You can add, [remove](#) and [rename](#) the fields that appear in the tiles.

Note You can also [show responsibilities](#) as a field.

Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.
3. Click **Select fields**.
 - » The **Select fields** dialog box appears.

4. Select one or more items in the list.

Tip You can use predefined filters and the search box to quickly find fields.

5. Click **Update**.
6. If required, do the following:
 - Change a field name.
 - Change the order of the fields.
7. Click **Save**.

Show responsibilities in a tile set

Tiles can show the **responsibilities** of a resource, these responsibilities are shown per role.

If you **enabled inherited responsibilities** in Collibra Console, you can show the **inherited responsibilities**. Inherited responsibilities have a gray background and direct responsibilities have a white background.

Example



Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.
3. Click **Select fields**.
 - » The **Select fields** dialog box appears.

4. Select one or more roles in the list.

Tip You can find all roles in the **Roles** tab page.

5. Click **Update**.

» The **Select fields** dialog box appears.

Tip If you enabled inherited responsibilities in Collibra Console, you can select **Show inherited responsibilities** to show inherited responsibilities.

6. Click **Save**.

Edit the order of the fields

You can edit the order in which the fields are arranged in a set of tiles.

Note The community-domain breadcrumb will always appear at the top of the tile, followed by the asset name, status and report image, if an image has been uploaded for the asset.

Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.
3. Click and drag a field up or down.
4. Click **Save**.

Edit a field name

You can edit the field names in a set of tiles.

Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.
3. In the **Display name** field, type a new name.
4. Click **Save**.

Remove fields from a set of tiles

You can remove fields from a set of tiles in two ways:

- Use the **Fields** dialog box.
Do this if you want to remove a single field.
- Use the **Select fields** dialog box.
Do this if you want to add or remove one or more fields in one go.

Remove fields using the **Fields** dialog box

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.
3. Click for the field you want to remove.
4. Click **Save**.

Remove fields using the **Select fields** dialog box

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Fields**.
 - » The **Fields** dialog box appears.

3. Click **Select fields**.
» The **Select fields** dialog box appears.
4. Clear the check box in front of one or more items in the list.

Tip You can use predefined filters and the search box to quickly find fields.

5. Click **Update**.
6. Click **Save**.

Edit the number of tiles per page

If a view contains a large amount of tiles, they will be split across multiple pages. You can change the number of tiles that are shown per page.

Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. In the content toolbar, click → **Rows per page** → <number>.

Select multiple tiles

When you select a single tile, all of the actions available to you appear above the tiles, in the **tiles action menu**. The same is true when you select multiple tiles. For all of the tiles you've selected, you can perform the same actions or start a workflow.

Note Only workflows that apply to all selected tiles are available.

Steps

To select multiple tiles, follow these steps:

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.

2. To select consecutive tiles, click the first tile, press and hold down the **Shift** key, and then select the last tile you want.
3. To select non-consecutive tiles:
 - If you're working with Windows OS, press and hold down the **Ctrl** key, and then click each tile you want.
 - If you're working with macOS, press and hold down the **Command** key, and then click each tile you want.

Sorting tiles

Sorting tiles helps you visualize your content and find the data you want. You can [sort a set of tiles](#) in ascending or descending order, by the field of your choice.

Tip In tile [display mode](#), you can only sort on one field at a time, whereas in table display mode, you can [sort on one or more columns](#) simultaneously. However, if you sort on more than one column in table display mode and then [switch to tiles display mode](#), the results of the multi-column sorting is carried over to the tiles. If you then change the sorting while in tile display mode, the sort will be based on the single field of your choice.

Sort a set of tiles

You can sort a set of tiles by the field of your choice.

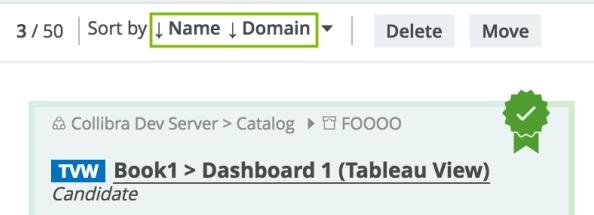
Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.» By default, the tiles are arranged in descending alphabetical order, by name.
2. Do one of the following:
 - On the left, click **Name**, or if sorting has been done by another field, click that field name.
 - If you or someone else sorted on more than one column in table display mode and you then switched to tile display mode (see the note below), click ▼.» A drop-down menu appears, with all the fields that are currently visible for the set

of tiles.

3. Select the field by which you want to sort the tiles.
 - » The tiles are sorted in descending order.
4. Optionally, click  to sort in ascending order.

Note If you or someone else sorted on more than one column in table display mode and then you switch to tile display mode, the multi-column sort is carried over to tiles. In the following example figure, the table was sorted by the **Name** and **Domain** columns before switching to tiles display mode.



Navigate between tiles pages

If a set of tiles contains more tiles than you are currently showing, they are split across multiple pages. You can navigate between these pages.

Tip You can [change](#) the number of tiles per page.

Steps

1. Do one of the following:
 - Open a view in tiles display mode.
 - Open an asset page with related assets shown in tiles display mode.
2. If the set of tiles contains more tiles than those displayed, the lower left corner shows the number of pages.
Do one of the following:

To navigate to...	click...
the previous page	◀
the next page	▶
the first page	the first page. Example: 1-10
one of the two previous or following pages	the desired page.
the last page	the last page. Example: 261-268
Example	
<input type="checkbox"/> New Data Sets  1 <i>Candidate</i> Asset Type Data Set Last Modified 11/24/17	<input type="checkbox"/> New Data Sets  10 <i>Candidate</i> Asset Type Data Set Last Modified 11/24/17
<input type="checkbox"/> New Data Sets  102 <i>Candidate</i> Asset Type Data Set Last Modified 11/24/17	<input type="checkbox"/> New Data Sets  103 <i>Candidate</i> Asset Type Data Set Last Modified 11/24/17
◀ 1-10 11-20 21-30 ... 261-268 ▶	

Filtering tiles

You can use advanced **Asset filters** to filter the tiles shown in tile display mode.

Asset filters

Asset filters enable you to quickly find the data in Collibra Data Governance Center by limiting the amount of assets shown in a table or a set of tiles. You can find the filter function on almost every page containing data.

In this section, you can learn how to work with filters.

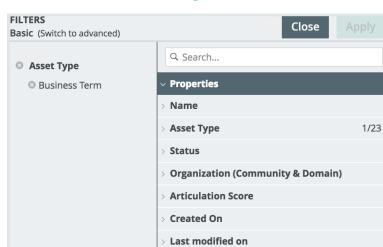
Basic and advanced filtering

Collibra Data Governance Center has two modes for filtering data:

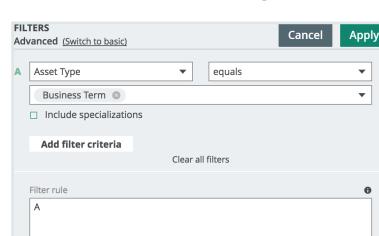
- **Basic:** Filter data by creating simple filter expressions that are always combined by the logical AND function.
- **Advanced:** Filter data by creating complex filter expressions. An advanced filter is a combination of filter expressions that can be combined by using the logical AND and OR functions.

In the filter pane, you can toggle between basic and advanced filtering:

Basic filtering:



Advanced filtering:



When you have applied a filter, you can save the view for later usage.

Basic filters

You can create basic filters by adding filter expressions. A filter expression is created by selecting a characteristic and assigning one or more values to it. In a basic filter, you can combine multiple expressions.

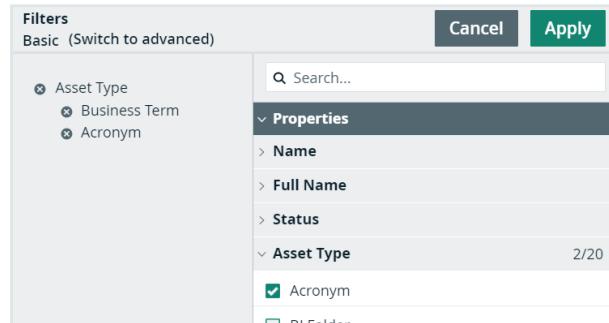
The characteristics are grouped in the following categories:

- **Properties:** All the asset properties in Collibra DGC such as name, asset type, tags and so on.
- **Attributes:** All the asset attributes in Collibra DGC, such as note, definition, quality and so on.
- **Relations:** All the relations in Collibra DGC.
- **Roles:** All the resource roles that are defined in Collibra DGC, such as Requester, Assignee, Reviewer and so on.

To add characteristics to the filter, consult [Create a basic filter](#).

Filter behavior

- Multiple values for one characteristic are treated as an OR clause.
 - Example:



The example filters the assets if the asset type is Acronym or Business Term.

- All the simple expressions in a basic filter are treated as an AND clause.
- You can remove a filter characteristic by clicking next to the filter characteristic that you want to delete, or you can remove a single value from a filter characteristic by clicking next to its value.

Other filter aspects

- If you use filters in hierarchy views (not available in tile display mode), Collibra DGC only applies the filter at the 'root' (start) level of the hierarchy. Child rows are not filtered.
- In the **Roles** category of the filter characteristics, you can select one or more specific users or user groups, or *current user* to filter on the signed-in user. This has the advantage that it is not necessary to create a filter for every single user.

- Example: Filter assets by "current user" with Reviewer responsibility: If user A is signed in, the table shows the assets for which User A has Reviewer responsibility. If user B is signed in, the table shows the assets for which User B has Reviewer responsibility.
- The **Roles** category of a basic filter does not take into account inherited responsibilities. If you want to include inherited responsibilities in the filter criteria, you can use an [advanced filter](#).

Create a basic filter

If you want to customize a view to make sure that you only see the assets that you really need, you can create a filter.

To create a basic filter, follow these steps:

1. Navigate to a table or set of tiles that contains the assets you want to see.
Example: Business Glossary
2. In the **Filters** pane, next to filters, click **Edit**.

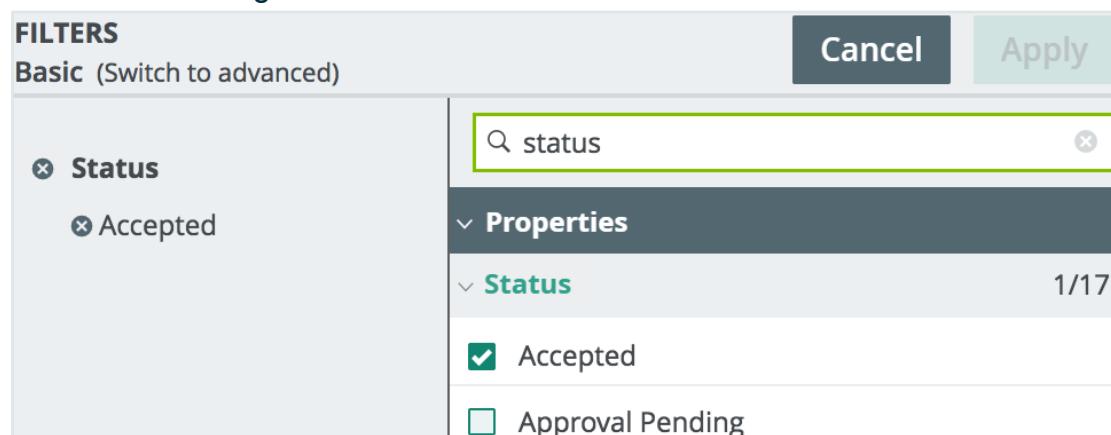
Verify that you are in basic filter mode. If you aren't, click **Switch to basic**.



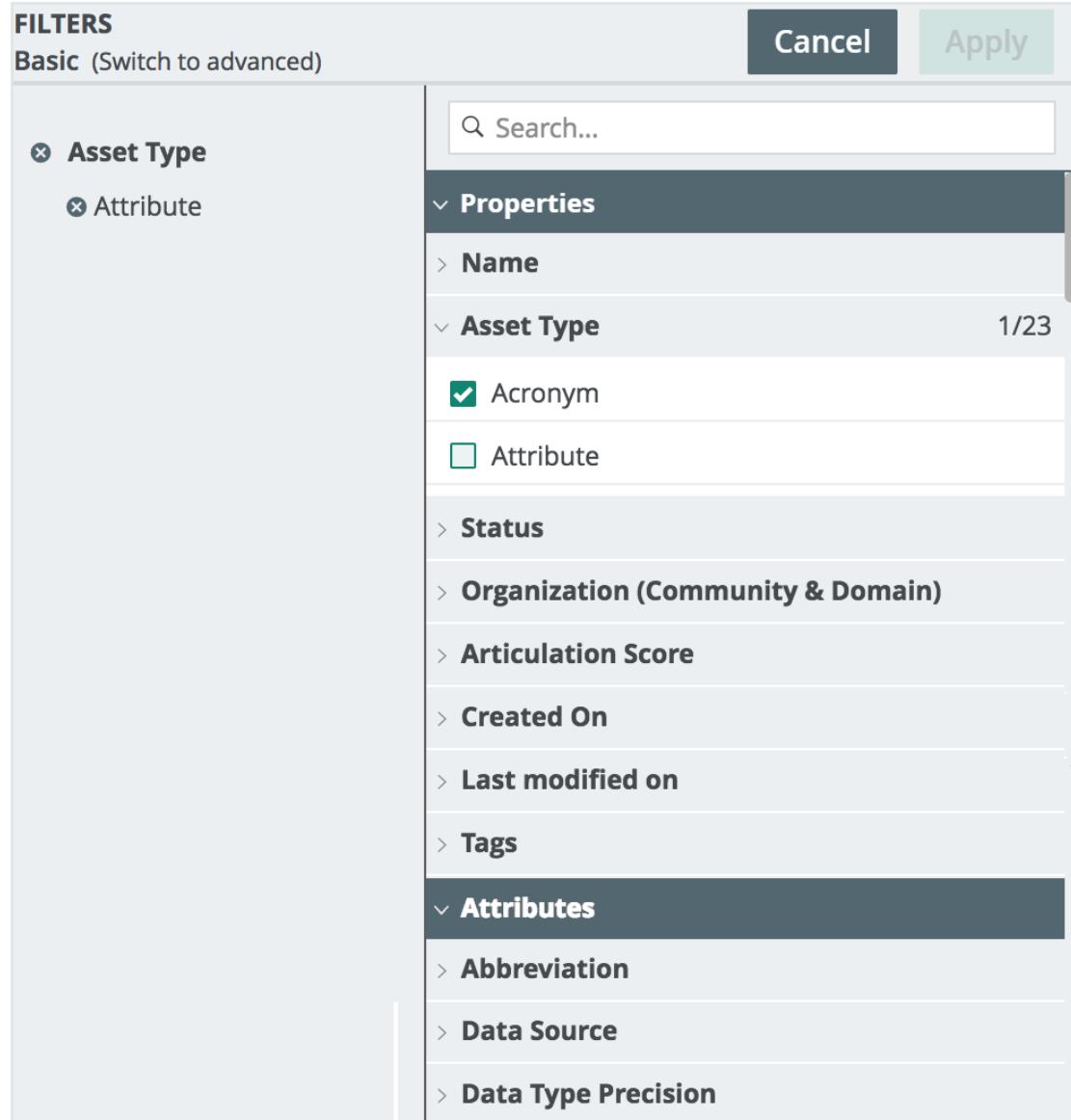
3. In the right column of the **Filters** pane, select the characteristics that you want to include in your filter.

You can do this in different ways:

- By typing the name of what you are looking for in the search field at the top, and then selecting the characteristic.



- By going through the list while expanding or collapsing characteristics to find what you are looking for, and then selecting the values.



Note

- For some characteristics, you have to select the values from a predefined list, for example *Type* or *Status*.
- For some characteristics, you have to type one or more values, for example *Name* or *Definition*.
- Multiple values for a characteristic are treated as an OR clause.
- All the simple expressions in a basic filter are treated as an AND clause.
- You can remove a filter characteristic by clicking ✖ next to the filter characteristic that you want to delete, or you can remove a single value from a filter characteristic by clicking ✖ next to its value.

4. Click **Apply** to activate the filter or click **Cancel** to close the filter characteristics pane.

Advanced filters

Advanced filters are like basic filters in that they consist of one or more filter clauses. Advanced filters, however, use advanced logical operators. In a basic filter clause, the logical operator is "equals". In advanced filter clauses, the operator depends on the property, characteristic or resource role that you select as the filter criterion.

The filter criteria are grouped as follows:

- **Properties:** All the asset properties in Collibra DGC, for example name, asset type and tags.
- **Attributes:** All the asset attributes in Collibra DGC, for example note, definition and quality.
- **Relations:** All the relations in Collibra DGC.
- **Roles:** All the resource roles that are defined in Collibra DGC, for example Business Steward, Requester and Assignee.

The following table shows some examples of operators, per filter criterion type:

Filter criterion type	Operators
Text, for example <i>Name</i>	<ul style="list-style-type: none"> • equals • does not equal • contains • does not contain • starts with • does not start with • ends with • does not end with • exists • does not exist
Boolean, for example <i>Certified</i>	<ul style="list-style-type: none"> • equals • does not equal
Numeric, for example <i>Articulation Score</i>	<ul style="list-style-type: none"> • equals • does not equal • exists • does not exist • less than • less than or equal • greater than • greater than or equal
Date, for example <i>Created On</i>	<ul style="list-style-type: none"> • equals • before • before or equal to • after • after or equal to • last (...) days • exists • does not exist

Filter criterion type	Operators
<p>Resource role, for example <i>Business Steward</i></p> <ul style="list-style-type: none"> • contains • does not contain • equals • does not equal • starts with • does not start with • ends with • does not end with • exists • does not exist <p>Note If you select the logical operator "equals", you can select the value Current User, to find all assets for which you have been assigned the specified resource role. This means that users might see different results in the same view, depending on their responsibilities.</p> <p>Filtering by resource role and a specific user is extended to user groups that include the specified user, for the selected resource role.</p> <p>Example John Fisher is included in a user group named The Dream Team. There are a number of assets for which The Dream Team user group has been assigned as the Business Steward. If you filter a view by Business Steward, and specify the user John Fisher, all such assets will pass the filter.</p>	

You can create a combination of clauses by using the AND and OR operators and brackets. The order of the clauses does not affect the results.

Depending on the logical operator, you can add multiple values. If you do so, the values are treated as an OR operator.

Example The filter below finds assets that meet these criteria: they have the asset type *Business Term* OR the assets have both the domain *Business Glossary* and one of these three statuses: *Accepted*, *Approval Pending* or *Candidate*.

The screenshot shows the 'Filters' dialog box in advanced mode. It contains three filter clauses labeled A, B, and C:

- A:** Asset Type equals Business Term. Includes an option to 'Include specializations'.
- B:** Domain equals New Business Terms.
- C:** Status equals Accepted, Approval Pending, Candidate.

Below the clauses is a button 'Add filter criteria'. At the bottom left is a 'Filter rule' section containing the expression: 'A OR (B AND C)'.

Create an advanced filter

If you want to customize a view to make sure that you only see the assets that you really need, you can create an advanced filter.

To create an advanced filter, follow these steps:

1. Navigate to a table or set of tiles that contains the assets you want to see.
Example: Glossary
2. In the **Filters** pane, next to filters, click **Edit**.
Ensure that you are in advanced filter mode. If you aren't, click **Switch to advanced**.

The screenshot shows the 'Filters' dialog box in basic mode. On the left is a list of characteristics: Asset Type, Business Term, and Acronym. To the right is a search bar with placeholder text 'Search...' and a 'Properties' button.

3. In the **Filters** pane, define the filter clauses.
 - a. Select a characteristic from the **Characteristic** list.
 - b. Select an operator.
 - c. Add one or more values. The content of the value field depends on the selected characteristic.

ted operator.

- d. Click **Add filter criteria** to add the next filter clause.
4. In the **Filter rule** field, define how the filter clauses must be interpreted. See [Filter rules](#).
5. Click **Apply** to activate the filter or **Cancel** to discard the changes.

Tip If you want to filter assets by relation type and use an exclusionary logic operator, such as **does not equal** or **does not contain**, you have to introduce two filter clauses, as shown in the following example screenshot.

Name	Status	Asset Type
1 Month Actual Sales	Business Term	
3 Month Actual Sales	Business Term	
3 Month Forecast	Business Term	
3 Month Forecast Price	Business Term	
6 Month Actual Sales	Business Term	
6 Month Forecast	Business Term	
9 Month Actual Sales	Business Term	
9 Month Forecast	Business Term	
Actuals	Business Term	

- A. This filter clause conveys that you only want to consider assets that have the relation type, for example, **Asset synonym of asset Asset**.
- B. This filter clause shows, of all assets that have the filter type that is specified in clause A, for example, **Asset synonym of asset Asset** relation, only the assets for which the acronym **does not equal** a specified value, in this example **CRT**.

Name	Status	Asset Type
Cathode Ray Tube	Candidate	Business Term
CRT	Candidate	Business Term
Universal processing code	Candidate	Business Term
UPC	Candidate	Business Term

Without the **exists** filter clause, the filter results will include assets that do not have the **Asset synonym of asset Asset** relation type, which is not helpful.

Filter rules

When you create an advanced filter, you can create complex filters by combining the filter clauses you created with [Create an advanced filter](#). By default, the filter clauses are combined with the AND (conjunction) operator. However, you can also combine the clauses by using brackets and the OR (disjunction) operator.

Operator	Explanation
AND	A result must fit all filter clauses. Example: A AND B AND C means that only a resource that fits all three filter clauses is added to the results.
OR	A result must fit one of the filter clauses. Example: A OR B OR C means that whenever a resource fits one of the three filter clauses, it is added to the results.

A filter uses the following operator precedence to filter the data:

1. Operations inside brackets.
2. AND operations.
3. OR operations.

Filter rule examples

- A OR B AND C:
 - First, check the AND operation. The result must fit clause B and C.
 - Second, combine it with clause A. The result must fit either A or the result of the AND operation.
- (A OR B) AND C:
 - First, check the operation between brackets. The result must fit either clause A or clause B.
 - Second, combine it with clause C. The result must fit clause C and the result of the operation between brackets.

Reset a filter

If you have applied a filter and you want to return to the original view, follow these steps:

1. Open a view and apply a filter.
2. Click **Revert to original**.



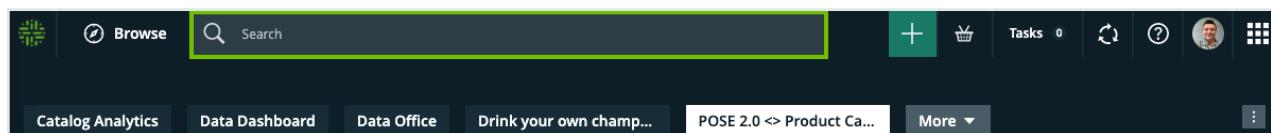
3. In the **Revert to original** dialog box, click **Revert**.
You return to the originally selected view.

Searching in Collibra DGC

You can use the **Search field** and the **Search widget** to quickly find any resource in Collibra Data Governance Center, including assets, communities, domains, users, user groups and more.

Both options take you to the **Search page**, where you can edit your search text and work with the search results.

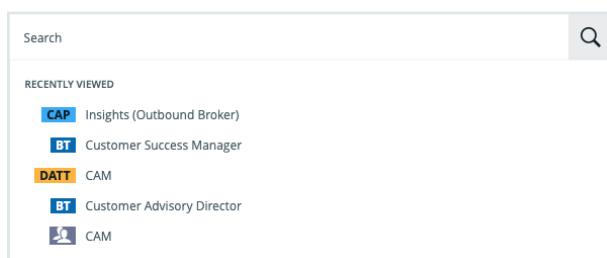
Search field



The search finds resources that contain a word that begins with your search text. For example, if you type *ca*, the search results could contain 'California' and 'Lewis Carroll', but not 'Meercat'.

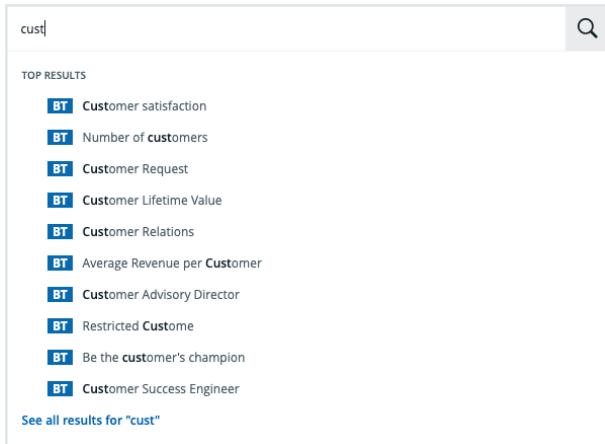
Recently viewed

When you click in the **Search field**, the five most recently viewed resources are shown in the quick search panel.



Top results

When you start typing in the **Search field**, the top 10 results are shown in the quick search panel.



Note

- In compiling the top results, the search engine searches for your text in the **Name** field only. As such, these results might not appear as the top results on the Search page, when you launch the search.
- The order of the top results takes **boosting** into account.

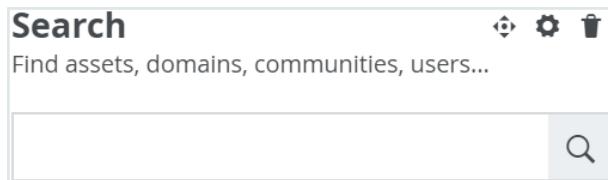
Actions

After typing something in the **Search** field, you can do any of the following:

- Press **Enter** to start the search.
 - » The [Search page](#), with results matching your search text is shown.
- Click on an asset name, to go to the asset page.
- Click on a filter name.
 - » The Search page, with results matching your search text and the filter you selected, is shown.

Search widget

The Search widget on the dashboard is similar to the **Search** field in the main menu. If you type something and press **Enter**, the same [search page](#) is shown as if you searched via the **Search** field, and the search results are the same. The difference is that the Search widget does not show the most recently viewed resources or, while you are typing, the top results, as does the **Search** field.



If the **Search** widget is not included on your dashboard, you can [add it](#).

Search page

The **Search** page consists of the following areas:

Original Name	Type
Customer/Partner	TRA Customer/Partner
customer_advocate_confirmed_c	customer_advocate_confirmed_c
customfield.13129_self	customfield_13129_self

No.	Part name	Description
1	Facet pane	<p>A dynamically generated collection of facets that allows you to:</p> <ul style="list-style-type: none"> • Add and remove search fields, to expand or reduce the scope of your search. • Navigate and refine the search results. <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note The Facet pane is only shown if your search yields results.</p> </div>
2	Search filters	<p>A drop-down list of all your saved search filters, with the name of the currently applied filter shown. By default, no search filter is applied.</p> <p>The buttons allow you to:</p> <ul style="list-style-type: none"> •  : Create a new search filter or save a copy of an existing filter. •  : Edit the name and description of a search filter. •  : Share a search filter •  : Delete a search filter.
3	Search input field	<p>Shows your search text. You can edit your search text here.</p> <p>Click  for examples of how wildcards and symbols work in your search text.</p>

No.	Part name	Description
4	Search results	<p>Shows:</p> <ul style="list-style-type: none"> The results that match your search. The total number of results. The applied sorting criterion and sorting order. By default, search results are sorted in order of descending relevance. The selected fields in which the search is performed. By default, all fields are searched. <p>Click  to:</p> <ul style="list-style-type: none"> Add or remove fields that are shown for each search result. Edit the number of results shown per page. <p>For any result that is an asset, click the three dots (⋮) to show the workflows that are available for the asset.</p> <p>Click the name of a search result to open its detailed page.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p>Tip In Collibra Console, you can influence the order of the search results by editing the boost factor of resources and attribute types. See also Relevance in search results.</p> </div>

Note It's possible that you or another user created a **search filter** that includes a field or facet that no longer exists in your Collibra Data Intelligence Cloud environment. In this case, the invalid field or facet is highlighted, as shown in the following image, so that you can easily identify them and delete them from the search filter. Invalid fields and facets are ignored during search queries.

The screenshot shows the search interface with the following details:

- SEARCH IN** section:
 - Organization** facet: Business Analysts Community (184863), Product, Operations and Engineering (POE) (4114), Collibra (2704), Data Governance Council (950), Collibra - GDPR (850).
 - Category** facet: Assets (194314), Users (144), Domains (131), Communities (23), User groups (9).
- REFINE** section:
 - Asset Type** facet:
 - Policy (125)
 - Tableau Data Attribute (82)
 - Invalid** (highlighted with a green border and a red arrow pointing to it)
 - Column (59)
 - Business Term (17)
 - Database (7)
- Search Bar**: Contains the letter 'a' and a 'My filter' dropdown.
- Search Results**:
 - Results: 194621 | Sort by Relevance | Search in All fields.
 - A message box highlights an error: **The search results might not be accurate**. It states: "Selected filter has invalid option (Facets)".
 - Definition** section: Describes the logomark loading animation.
 - Comments** section: Shows "Accepted" by FAP and "Definition approved by".
 - BT access key ID** section: Describes an access key ID for AWS Identity and Access Management.

Wildcards and symbols for searching

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

Wildcard	Description
?	Replaces any single character. Example: by typing ?ar, you can find Car, Bar, Tar, and so on.
*	Replaces any string of characters. Example: by typing C*r, you can find Car, Crosshair, and so on.

Wildcard	Description
~	Represents a fuzzy search, words with spelling similar to the search query. Example: by typing <i>~Owi</i> , you can find Ozi, Zowie, Bowie, and so on.
!	Excludes words. Example: by typing <i>!David Bowie</i> , you can find Lester Bowie, Joe Bowie, and so on.

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

Example: by typing *Tax Statement* you can find "Tax Statement 2017", but not "Tax" or "Statement".

Sort the search results

You can sort search results by the following criteria:

- Relevance
- The Name field
- The Last Modified field

Steps

1. Perform a search via the **Search field** or **Search widget**.
2. On the **Search page**, click ▾ next to the sort field.

Results: 459480 | Sort by ▾ Relevance ▾

3. Select the basis by which to sort the search results.
 - » By default, the results are sorted in descending order.
4. Optionally, click ▾ to sort in ascending order.

What's next?

- If you sorted the search results by an attribute type that is not shown in the tiles, you can **add** it to the tiles, so that you can see the values that determined the sort order.

- You can [create](#) a search filter or edit an existing search filter, to save your sort settings as part of the saved filter configuration.

Relevance in search results

By default, search results are sorted in order of descending relevance.

What is relevance in the context of search results?

Relevance is a calculation of the similarity, measured across several lines of comparison, between your search text and the content of the resources in your Collibra DGC environment.

In a set of search results, the relevance of each resource is represented by a positive number, or score. The higher the score, the more relevant the resource is to your search text.

How are relevance scores derived?

To derive relevance scores, the Collibra DGC search engine uses a combination of query clauses and boost factors.

Query clauses

When you perform a search, the Collibra DGC search engine queries the database, using various query clauses. Each query clause compares the similarity between your search text and your Collibra DGC resources, along a different line of comparison.

The following are example objectives of different query clauses:

- Calculate the similarity between the spelling of your search term and the term found in a field in the database.
- Calculate how frequently your search term appears in a field. The more often it appears, the greater the relevance. A field containing five occurrences of a given term is more likely to be relevant than a field containing one occurrence of the term.
- Calculate the occurrence percentage of a term among all words in a particular field. For example, if your search term occurs twice in the 10-word description of an asset,

that asset will have a higher relevance score than an asset for which your search term occurs twice in its 20-word description.

Boosting

Search boost factors allow you to influence the order of the [search](#) results. You can edit search boost factors to increase or decrease the importance of a resource type, field or asset type, in the search ranking.

For more information on boosting, see Boosting, in the Collibra DGC [Installation and Configuration Guide](#).

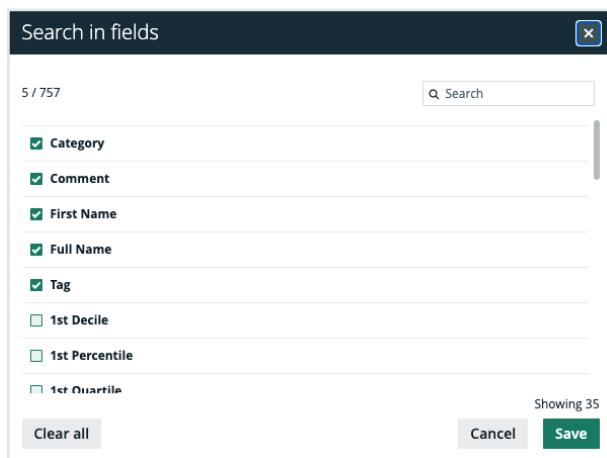
Searching in fields

When you perform a search, the search engine searches for your text in all fields, by default. On the [Search page](#), you can then select fields, to reduce the scope of the search to only the fields you've selected.

Conversely, if you apply a search filter for which certain fields have been selected, you can clear one or all of the selected fields, to expand the scope of your search.

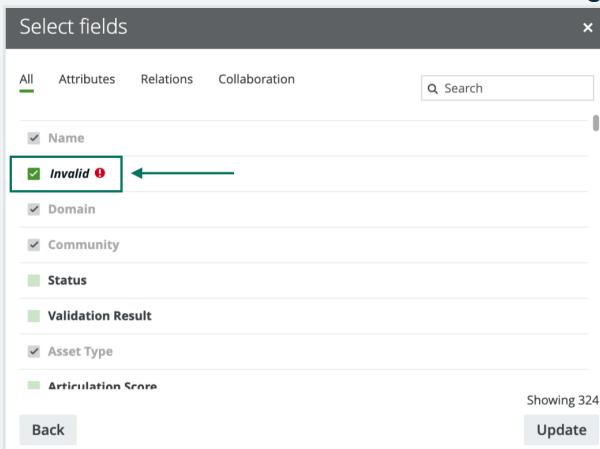
You select and deselect fields via the **Search in fields** dialog box.

In the following example image, six of 547 available fields have been selected. 37 fields have been loaded in the dialog box. If you scroll through the list of fields, more fields are loaded and the count is updated.



Tip When you scroll to show more fields, all attributes are shown first, in alphabetical order. Properties, such as Name, Comment and Tag appear at the very end of the list. Instead of scrolling through potentially hundreds of fields, you can use the search field in the dialog box to quickly find specific attributes and properties.

Note It's possible that you or another user created a [search filter](#) that includes a field or facet that no longer exists in your Collibra Data Intelligence Cloud environment. In this case, the invalid field or facet is highlighted, as shown in the following image, so that you can easily identify them and delete them from the search filter. Invalid fields and facets are ignored during search queries.



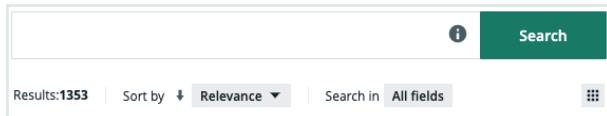
Select fields in which to search

The [Search in fields](#) option enables you to specify in which fields – meaning attributes, relation types and properties – you want to search for your text. By default, no fields are selected, meaning the search engine searches for your text in all fields.

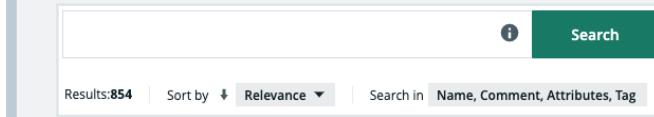
Note Adding relations to the search can significantly hinder search engine performance.

Steps

1. Perform a search via the **Search field** or **Search widget**.
2. On the **Search page**, click the **All fields** button.



Note If one or more fields have already been selected, they are shown instead of the All Fields button. In this case, click the selected fields.



3. Select the fields you want to search in. Click **Clear all** to deselect all fields.
4. Click **Save**.

Navigating and refining the search results

The Search page offers a variety of dynamically generated **facets** by which to navigate and refine your search results.

No.	Part name	Description						
1	"Search in" facets	<p>These facets enable you to navigate to resources via organizational path or resource category.</p> <table border="1"> <thead> <tr> <th>Facet</th><th>Use</th></tr> </thead> <tbody> <tr> <td>Organization</td><td> <p>Navigate to resources by drilling down at the organizational level and limiting the search results to a specific community, subcommunity or domain.</p> <p>If, for example, you click on a root-level community, the results will be refined to include only the resources (meaning subcommunities, domains and assets) in that community that match your search text.</p> </td></tr> <tr> <td>Category</td><td>Navigate to a specific category of resources, such as assets, communities, domains, users or user groups.</td></tr> </tbody> </table>	Facet	Use	Organization	<p>Navigate to resources by drilling down at the organizational level and limiting the search results to a specific community, subcommunity or domain.</p> <p>If, for example, you click on a root-level community, the results will be refined to include only the resources (meaning subcommunities, domains and assets) in that community that match your search text.</p>	Category	Navigate to a specific category of resources, such as assets, communities, domains, users or user groups.
Facet	Use							
Organization	<p>Navigate to resources by drilling down at the organizational level and limiting the search results to a specific community, subcommunity or domain.</p> <p>If, for example, you click on a root-level community, the results will be refined to include only the resources (meaning subcommunities, domains and assets) in that community that match your search text.</p>							
Category	Navigate to a specific category of resources, such as assets, communities, domains, users or user groups.							

No.	Part name	Description														
2	"Refine" facets	<p>These facets act as filters to refine the search results.</p> <p>The following table shows the packaged "refine" facets:</p> <table border="1"> <thead> <tr> <th>Filter criteria</th><th>Use this to show only those search results...</th></tr> </thead> <tbody> <tr> <td>Asset type</td><td> <p>That are of a specified asset type, such as Business Term, Acronym, Column or Table.</p> <p>This criterion is only applicable if you have selected the category Assets.</p> <p>In the following example image, the search engine searches for your text only in assets of asset type Standard, Column and Data Set.</p>  <p>The screenshot shows a dropdown menu titled "Asset Type" with three items checked: "Salesforce Picklist Value (52622)", "Column (28675)", and "Table (24606)". There are also four unchecked options: "Salesforce Field (7913)", "Tableau Data Attribute (3526)", and "Tableau Report Attribute (3365)", along with a "Show All" link.</p> </td></tr> <tr> <td>Status</td><td>That have a specified status, such as Candidate, Accepted, Deployed or Rejected.</td></tr> <tr> <td>Last modified</td><td>That were modified within the specified time frame; within the last 24 hours, week, month or year.</td></tr> <tr> <td>Created by</td><td>That were created by the specified users.</td></tr> <tr> <td>Created on</td><td>That were created within the specified time frame; within the last 24 hours, week, month or year.</td></tr> <tr> <td>Tags</td><td> <p>That have the specified tag(s).</p> <p>You can click the tag in any of the search results, to search for all domains and assets with that tag.</p> </td></tr> </tbody> </table>	Filter criteria	Use this to show only those search results...	Asset type	<p>That are of a specified asset type, such as Business Term, Acronym, Column or Table.</p> <p>This criterion is only applicable if you have selected the category Assets.</p> <p>In the following example image, the search engine searches for your text only in assets of asset type Standard, Column and Data Set.</p>  <p>The screenshot shows a dropdown menu titled "Asset Type" with three items checked: "Salesforce Picklist Value (52622)", "Column (28675)", and "Table (24606)". There are also four unchecked options: "Salesforce Field (7913)", "Tableau Data Attribute (3526)", and "Tableau Report Attribute (3365)", along with a "Show All" link.</p>	Status	That have a specified status, such as Candidate, Accepted, Deployed or Rejected.	Last modified	That were modified within the specified time frame; within the last 24 hours, week, month or year.	Created by	That were created by the specified users.	Created on	That were created within the specified time frame; within the last 24 hours, week, month or year.	Tags	<p>That have the specified tag(s).</p> <p>You can click the tag in any of the search results, to search for all domains and assets with that tag.</p>
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Tags	<p>That have the specified tag(s).</p> <p>You can click the tag in any of the search results, to search for all domains and assets with that tag.</p>															

Working with facets

Click **Clear**, to clear all selections for a specific facet type.

At the top of the page, click **Clear all**, to clear all facet type selections on the search page.

Click **Show all**, to show all the facets by which to refine the scope of your search for a particular facet type. As shown in the following example image, if there are more than 15 facets, the list will open in a dialog box.

The screenshot shows a search interface with a sidebar on the left containing facets like Asset Type, Status, and Last modified. A green box highlights the 'Asset Type' facet, which is expanded to show categories: Standard (421), Business Term (44), Data Set (38), Policy (29), and Data Domain (26). Below this is a 'Show All' button. To the right, a main content area displays a definition for 'Archived Employee Records' under 'GDPR - General Data Protection Regulation'. A green arrow points from the 'Show All' button to a modal dialog titled 'Asset Type'. This dialog lists various asset types with their counts: Salesforce Picklist Value (52622), Column (28671), Table (24606), Salesforce Field (7913), Tableau Data Attribute (3526), Tableau Report Attribute (3365), Business Term (1764), Data Attribute (840), and Tableau Worksheet (732). The dialog has a search bar at the top right and 'Cancel' and 'Save' buttons at the bottom right.

Note Adding and removing facets on the search page is not the same as:

- **Filtering** the search results.
- **Adding or removing** fields to a set of tiles.

Permissions

No particular **license** is needed to create and manage search filters; however, certain **global permissions** are needed.

Permission	With this permission, you can...
Manage and share anyone's Views, Dashboards, Search filters	Create and manage search filters for yourself and other users, and share with other users.
Manage your own Views, Dashboards, Search filters	Create and manage your own search filters.

Permission	With this permission, you can...
Share your own Views, Dashboards, Search filters	Share search filters that you created.

Note Users are not granted permissions directly, but through global roles and responsibilities.

What is a faceted search?

The Facet pane shows the relevant criteria by which to [navigate and refine](#) the search results. We refer to these criteria as facets, and the concept of using facets to navigate and refine search results as a "faceted search".

In introducing the concept of a faceted search, it may be helpful to draw the distinction between it and a more traditional filter-based search.

Filter-based search

Filters work by analyzing the search results and excluding resources (for example, assets, users and communities) that don't meet certain criteria.

In a filter-based search, the collection of filters that is available to you is constant. The relevance of the filters to the search results is not considered. As such, some of the filters available to you could either have no effect on the results, or reduce the results to a null set.

Faceted search

Facets are dynamically generated according to the resources that make up the search results. They allow you to narrow results by several different dimensions simultaneously.

In a faceted search, only facets that are relevant to the search results appear in the Facet pane on the [Search page](#). As you select facets, to navigate and refine the search results, the Facet pane is automatically updated, again showing only facets that are relevant to the refined set of results.

As shown in the following image, the facets in the Facet pane at any given moment include the number of resources that match both the search text and the value of the available facets. This gives you a view of the composition of the search results, and helps you avoid searches that yield no results.

Search filters

You can create a search filter from scratch. When you create a search filter, it exists only for you. However, with the correct global [permission](#), you can [share the filter](#) with other users.

By default, no search filter is applied.

Create a search filter

You can create a [search filter](#) from scratch.

Note When you create a search filter, the [sorting](#) and search fields are part of the saved configuration.

Create a search filter via the save icon

1. Perform a search via the [Search field](#) or [Search widget](#).
 - » The [Search page](#) appears.
2. Optionally:
 - a. [Navigate and refine](#) the search results by selecting from the available facets.
 - b. [Sort](#) the search results.
 - c. [Select](#) the fields in which to search.
3. When you've achieved the desired results, click .
4. Enter a name and description of the filter.
5. Select with whom you want to share the filter.
 - Select **Public**, to share the filter with all users.
 - Select **Private**, to share the filter with no one. This is the default setting.
 - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.

6. Click **Save**.
 - » The new filter is added to your list of filters.

Create a search filter via the "Add a new search filter" option

1. Perform a search via the **Search field** or **Search widget**.
 - » The **Search page** appears.
2. Click **No search filter ▾**, and then select **Add a new search filter**.
3. Enter a name and description of the filter.
4. Select with whom you want to share the filter.
 - Select **Public**, to share the filter with all users.
 - Select **Private**, to share the filter with no one. This is the default setting.
 - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.
5. Click **Save**.
 - » The new filter is added to your list of filters.

Save a copy of a search filter

You can save a copy of any **search filter**, and then **edit** it to suit your needs.

Steps

1. Perform a search via the **Search field** or **Search widget**.
2. On the **Search page**, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click , and then select **Save As**.
4. Enter a name and description of the filter.
5. Select with whom you want to share the filter.
 - Select **Public**, to share the filter with all users.
 - Select **Private**, to share the filter with no one. This is the default setting.
 - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.
6. Click **Save**.
 - » The new filter is added to your list of filters.

Note When you save a copy of the search filter, the [sorting](#) and search fields are part of the saved configuration, but the search text is not.

Edit a filter's name and description

You can edit the names and descriptions of the [search filters](#) you've created.

Steps

1. Perform a search via the [Search field](#) or [Search widget](#).
2. On the [Search page](#), click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click .
- » The **Edit name and description** dialog box appears.
4. Edit the name and/or the description.
5. Click **Save**.

Edit a search filter

You can edit an existing [search filter](#) to suit your needs.

Steps

1. Perform a search via the [Search field](#) or [Search widget](#).
2. On the [Search page](#), click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. In the Facet pane, reconfigure the available facets to achieve the desired filter results.
4. Click , and then select **Save**.

Share a search filter

Your [permissions](#) determine whether or not you can share [search filters](#), and if so, whether you can share only filters you've created or also the filters that others have created and shared with you.

Steps

1. Perform a search via the **Search field** or **Search widget**.
2. On the **Search page**, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click .
4. Select with whom you want to share the filter.
 - Select **Public**, to share the filter with all users.
 - Select **Private**, to share the filter with no one. This is the default setting.
 - Select **Share with specific global roles, groups and users**, and then enter the relevant roles or groups.
5. Click **Save**.

Delete a search filter

If you have the SysAdmin global role, you can delete your own **search filters** and those that other users have created and **shared** with you. If you don't have the SysAdmin global role, you can only delete search filters that you've created.

Steps

1. Perform a search via the **Search field** or **Search widget**.
2. On the **Search page**, click on the search filter label, to expand the search filter drop-down list, and then select the relevant filter.
3. Click .
4. Click **Delete filter** to confirm.

Example search queries and analysis

The following examples highlight common search text. We provide explanations for the results and explain how some configuration settings affect results.

Note This information is intended to:

- Help Collibra Data Governance Center administrators understand how the search configuration settings affect search results.
- Help other Collibra DGC users understand why some search queries might not provide the expected results.

For complete information on the search service and settings, such as boosting, stop words and the tokenizer, see the Collibra Data Governance Center [Installation and Configuration Guide](#).

Searching for assets that have stop words in their names

Prerequisites

- An asset named "On The Go" exists in your Collibra DGC environment.

Search text

Enter search text "On The Go".

Results

The asset "On The Go" is found.

In the following image, the word "Go" is shown in green text. This indicates that "Go" was the match that produced the result. The words "On The", which are shown in black text, did not produce a match.

The screenshot shows a search results page. At the top, there is a search bar containing the text "On The Go". Below the search bar, there are search parameters: "Results: 1", "Sort by Relevance", and "Search In All fields". Underneath these, there is a breadcrumb navigation: "Business Glossary > Business Terms". The main result is displayed in a card: "BA On The Go". The word "On" is in black, while "The Go" is in green, indicating it is the matched term.

Furthermore, if you enter search text "On The", the asset "On The Go" will not be found. Nor will any other asset. This is because "on" and "the" are stop words, which are filtered from indexing and searches.

Tip The best way to ensure thorough and intuitive search results is to name your assets, domains and communities as thoughtfully as possible.

Searching for assets that have more than one word in their names

Search text

Enter search text "marketing team summit".

The search engine handles the search text as: "marketing" OR "team" OR "summit*". Notice the wildcard (asterisk) at the end of the word "summit". This is determined by the default UI search appends wildcard setting, which adds the wildcard to the end of the search text.

Results

- An asset named "marketing_campaign_xyz" is not found.
- An asset named "team123" is not found.
- An asset named "summit_planning" is found.

To find the assets "marketing_campaign_xyz" and "team123", you have to add the wildcard after each word, for example: "marketing * team * summit". The search engine will handle this as: "marketing*" OR "team*" OR "summit*".

How boosting specified resource types affects search results

Prerequisites

- A resource, user or user group with the name "verylongname" exists in your Collibra DGC environment.
- Edit resource type boost factors, in Collibra Console, as follows:
 - Asset: 2
 - Community: 4

- Domain: 6
- User: 8
- User group: 10

Search text

Enter search text "verylongname".

Results

The results are ordered in accordance with the boost factor values of the respective resource types. Resource type user group, with a boost factor of 10, is the most relevant of the results. Asset, with a boost factor of 2, is the least relevant resource type.

A screenshot of a search results page. At the top, there is a search bar with the placeholder "No search filter" and a dropdown arrow. Below the search bar is a text input field containing the search term "verylongname". Underneath the search bar are three control buttons: "Results: 5", "Sort by Relevance", and "Search In All fields". The main content area displays five search results, each with a small icon and the text "verylongname":

- An icon of two people (members) followed by "verylongname members".
- An icon of a document with a gear (Business Analysts Community) followed by "verylongname".
- An icon of a person (User) followed by "verylongname".
- An icon of a globe (Data Governance Council) followed by "verylongname".
- An icon of a briefcase (New Processes) followed by "verylongname".

How boosting specified fields affects search results

Prerequisites

- The following assets exist in your Collibra DGC environment:
 - An asset named "superfeature".
 - An asset named "asset1", with a tag "superfeature".
 - An asset named "asset2", with a comment "superfeature"
- Edit property boost factors, in Collibra DGC Settings, as follows:
 - Name: 1
 - Comment: 5
 - Tag: 10

Search text

Enter search text "superfeature".

Results

The results are ordered in accordance with the boost factor values of the respective fields. The tag field, with a boost factor of 10, is the most relevant of the results. Name, with a boost factor of 1, is the least relevant field.

The screenshot shows the search results for the query "superfeature". At the top, there is a search bar containing "superfeature". Below it, the search interface includes "Results: 3", "Sort by Relevance", and "Search In All fields". The results are listed in three cards:

- someOtherAsset** (Tag: superfeature)
- someAsset1** (Comments: superfeature)
- superfeature**

Each result card displays the asset name, its type (e.g., someOtherAsset, someAsset1), and the specific field that triggered the search result (e.g., Tag or Comments). The results are ordered by relevance, with the tag field being the most prominent.

How boosting attributes affects search results

Prerequisites

- The following assets exist in your Collibra DGC environment:
 - An asset with the description "terminator".
 - An asset with the definition "terminator".
 - An asset with the note "definition".
- Edit attribute boost factors, in Collibra Console, as follows:
 - Description: 1
 - Definition: 2
 - Note: 3

Search text

Enter search text "terminator".

Results

The results are ordered in accordance with the boost factor values of the respective attributes. The note attribute, with a boost factor of 3, is the most relevant of the results. Description, with a boost factor of 1, is the least relevant attribute.

The screenshot shows the search results for the term "terminator". At the top, there is a search bar containing "terminator". Below it, the search interface includes "Results: 3", "Sort by Relevance", and "Search In All fields". The results are displayed in three separate card-like sections:

- BA differentAsset**
Note
terminator
- BA asset123**
Definition
terminator
- BA assetAbc**
Descriptive Example
terminator

Each result card includes a small navigation icon (triangle) and a "Data Governance Council" link.

How boosting asset types affects search results

Prerequisites

- The following assets exist in your Collibra DGC environment:
 - A Business Term asset with the name "Payment".
 - A Data Attribute asset with the name "Payment Type".
 - A Policy asset with the name "Payments".
- Edit attribute boost factors, in Collibra Console, as follows:
 - Business Term: 3
 - Data Attribute: 2
 - Policy: 1.5

Search text

Enter search text "payment".

Results

The results are ordered in accordance with the boost factor values of the respective asset types. The Business Term asset type, with a boost factor of 3, is the most relevant of the results. The Policy asset type, with a boost factor of 1.5, is the least relevant asset type of the three boosted asset types.

The screenshot shows the Collibra Console search interface with the query 'payment' entered. The results section displays 14 items, sorted by relevance. The results are categorized as follows:

- BT Payment Type**: Definition of payment.
- BT Payment**: Another definition of payment.
- DATT Payment Type**: A Data Attribute asset.
- Payments**: A Policy asset.
- payment_type**: An asset under Schemas.

Below these results, detailed information is provided for the 'payment_type' asset, including its original name ('dwh-stock_exchange-raw > dwh-stock_exchange-raw > stock_exchange_transaction_csv > payment_type') and full name ('dwh-stock_exchange-raw > dwh-stock_exchange-raw > stock_exchange_transaction_csv > payment_type').

How the exact match boost feature affects search results, regardless of boost factors

Prerequisites

- The following assets exist in your Collibra DGC environment:
 - A Schema asset with the name "Payment"
 - A Business Term asset with the name "Payment Type".
 - A Data Attribute asset with the name "Payment Type".
 - A Policy asset with the name "Payments".
 - Other assets, as shown in the following image.
- Edit asset type boost factors, in Collibra Console, as follows:
 - Business Term: 3
 - Data Attribute: 2
 - Policy: 1.5

Search text

Enter search text "payment".

Results

The resources that exactly match the search text in the Name attribute of the resource appear first. In this example, there is only one exact match, the Schema asset with the name "Payment".

After the exact matches, the search results are sorted in order of descending relevance.

The screenshot shows a search results page with the following details:

- Search Bar:** payment
- Search Buttons:** Search, Help
- Search Filters:** Results: 15, Sort by Relevance, Search in All fields
- Results List:**
 - Business Analysts Community > Schemas > default**
 - Payment** (highlighted in orange)
 - Business Analysts Community > Financial Services > Trading Glossary**
 - BT Payment Type** (highlighted in blue)
 - Definition:** the type of payment
 - Business Analysts Community > Supply Chain Performance Management > SCPM Glossary**
 - Price** (highlighted in blue)
 - Description:** The amount of money expected, required, or given in payment for a certain product
 - Business Analysts Community > Schemas > dwh-stock_exchange-refined**
 - payment_type** (highlighted in orange)
 - Original Name:** dwh-stock_exchange-refined > dwh-stock_exchange-refined > stock_exchange_refined > payment_type
 - Description:** type of the payment
 - Full Name:** dwh-stock_exchange-refined > dwh-stock_exchange-refined > stock_exchange_refined > payment_type
 - Business Analysts Community > Financial Services > Trading Logical Data Catalog**
 - DATT Payment Type** (highlighted in orange)

How term frequency contributes to relevance scores

Prerequisites

- Several assets, each with a variation of "jedi" in the name, exist in your Collibra DGC environment.
- Default boost factors for all resource types, properties and attributes.

Search text

Enter search text "jedi".

Results

The results are ranked as shown in the following image. A combination of total number of matches in a name and the percentage of matches per total words in a name affect relevance scoring of the results.

A screenshot of a search results page with the query 'jedi'. The results are sorted by relevance. Each result includes a snippet of text with the search term highlighted in green.

- Data Governance Council > Data Quality Dimensions**
BA jedi some jedi other jedi
- Data Governance Council > Data Quality Dimensions**
BA very jedi long jedi name jedi
- Data Governance Council > Data Quality Dimensions**
BA jedi asset
- Data Governance Council > Data Quality Dimensions**
BA very long jedi some name that can change score value

Using workflows

Start a global workflow

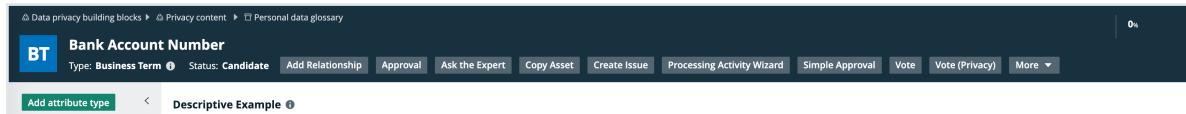
If you want to start a workflow that is not linked to an asset, follow these steps:

1. Go to a dashboard.
 - If the dashboard does not have the workflow widget and you have the right permissions, you can add it yourself, see [Add a widget to a dashboard](#).
 - If you are not logged in and the guest user access is enabled for the workflow, you have to provide some identification and click **Continue**.
2. In the workflow widget, click on the button of the workflow that you want to start.
3. Fill in the required information in the dialog box and click the button at the bottom to confirm.

Start an asset workflow from an asset page

If you are on an asset page and you want to start a workflow for that asset, follow these steps:

1. In the title bar, click the workflow that you want to start.



2. If necessary, fill in the form.
3. Click **Submit** at the bottom, to confirm.
If you do not see the **Submit** button, you have to scroll to the bottom in the dialog box.

Start an asset workflow from an asset table or set of tiles

You can start a workflow for one or more specific assets.

Steps

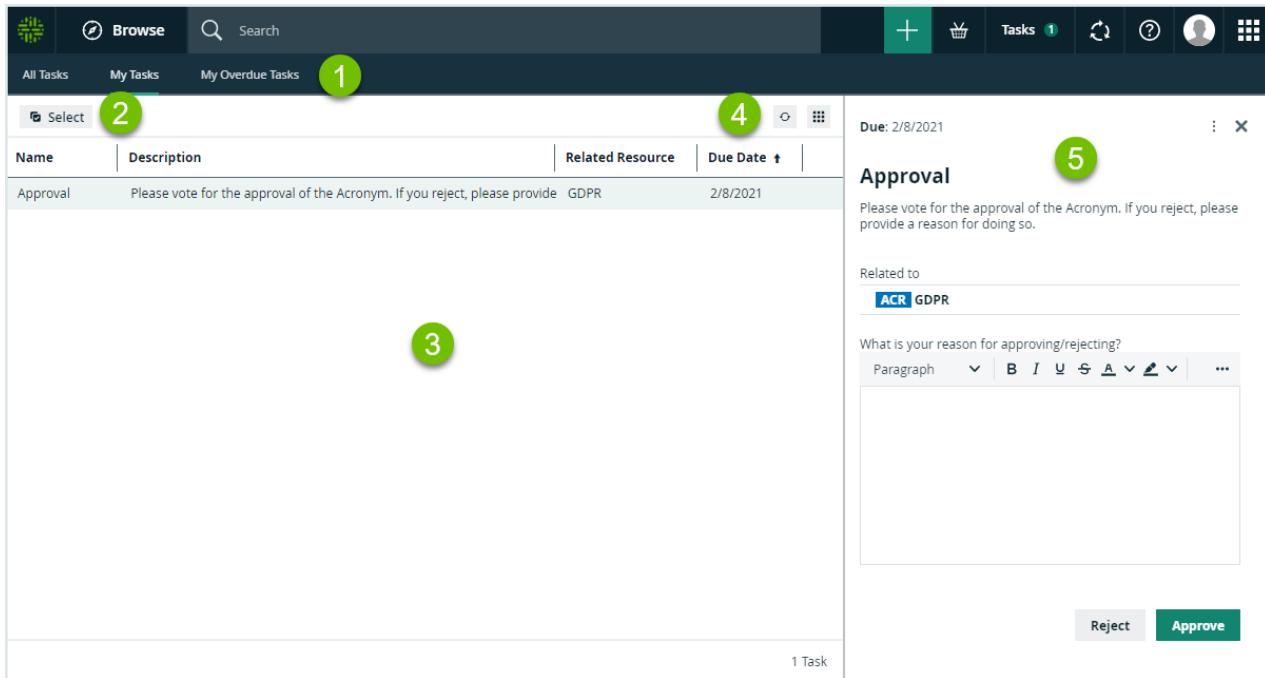
1. Navigate to a table or set of tiles.
2. If you are:
 - in table **display mode**, select the check boxes in front of the assets for which you want to start a workflow.
 - in tile display mode, select the tiles for which you want to start a workflow.
 More information: [Select multiple tiles](#).
3. In the menu above the selected assets, click the name of the workflow you want to start.
Only workflows that can be started for all selected assets at once are available.
If necessary, fill in the form that is displayed.
4. Click **Submit**.

Tip On the search page, you can also start an asset workflow by clicking : for the relevant asset.

The screenshot shows a search results page for 'bank account number'. The search bar contains 'bank account number' and the results count is 934. The results are sorted by relevance. A context menu is open over the first result, which includes options like 'Open in new tab', 'Add Relationship', 'Approval', 'Ask the Expert', 'Copy Asset', 'Create Issue', 'Processing Activity Wizard', and 'Simple Approval'. Red arrows point from the text 'On the search page, you can also start an asset workflow by clicking : for the relevant asset.' to the menu icon and the 'Approval' option in the context menu.

My Tasks page

The following image shows the different parts of the Tasks page:



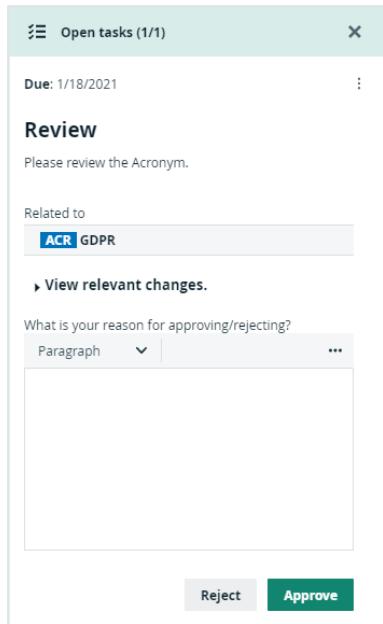
Element	Name	Description
1	Tasks submenu	Contains the following pages: <ul style="list-style-type: none"> All Tasks: Shows all the tasks for which you have permission to view. My Tasks: Shows all the tasks that have been assigned to you. My Overdue Tasks: Shows the tasks that have been assigned to you that are past their due date.
2	Select button	Allows you to select multiple tasks for bulk operations.
3	Tasks table	Shows a list of tasks.
4	Table menu	Contains refresh and display options for tasks table.
5	Sidebar	Contains all the elements that allow you to complete the task.

Viewing workflow tasks

Workflows create tasks that ask users to provide input or to perform certain actions. You can view the tasks that are currently assigned to you in different locations, in different contexts.

If a task is part of a workflow that has been started for a specific resource, you can consult the task on the resource page.

It is displayed in the sidebar:



You can also view all the tasks that have been assigned to you per resource. On the main menu bar, click the **Tasks** button.



A page with a list of your tasks is displayed by default. You can order the tasks alphabetically by clicking the column headers.

With the correct permission, you can do the following:

- Consult all other open tasks, on the **All Tasks** page. This view shows all your tasks and tasks for other users, for which you have permission to view.
- Cancel or reassign the tasks on the **All Tasks** page. When you cancel a task, you have to provide a reason in the dialog box that is displayed. After you have confirmed, the reason is shown as a comment on the corresponding asset page. You must not, in any way, complete tasks of other users.

An **Error** column displays an error message if the workflow task encountered an unexpected error.

Working with tasks

Each task asks you to perform some kind of action. This can be something external to the application, provide input or change something in the application directly. When a task requires input, you are presented with a form to fill in the required information. You can complete tasks on the asset page or on the tasks pages.

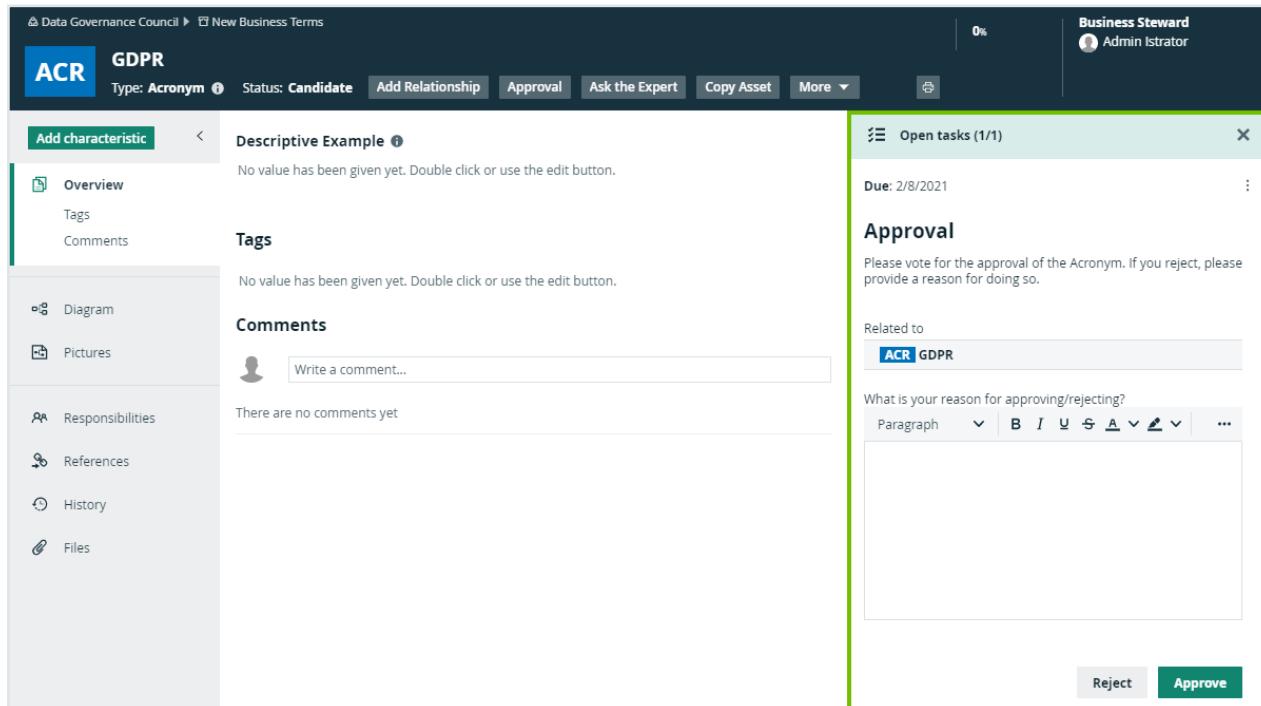
If you have more than one consecutive task assigned to you, each subsequent task is displayed immediately after the previous one is completed. This is especially useful in situations where a workflow is designed with multiple forms, one after the other, or a when you have more than one role for a resource.

An example of this behavior is shown in the asset page screenshots in this section, where the user is assigned to Subject Matter Expert, Stakeholder, and Steward.

For an example of a complete workflow, see [Tasks in the Issue Management workflow](#).

Completing a task on the asset page

On asset pages, all task-related data is shown in the sidebar. You can complete all tasks actions from the sidebar.



The screenshot shows the Asset Management application interface. At the top, there's a navigation bar with 'Data Governance Council' and 'New Business Terms'. Below it, the asset details are shown: 'ACR' (Acronym), 'GDPR' (Status: Candidate), and various buttons like 'Add Relationship', 'Approval', 'Ask the Expert', 'Copy Asset', and 'More'. On the right, the user is identified as 'Business Steward Admin Istrator'. The main content area has a sidebar with sections like 'Add characteristic', 'Overview' (selected), 'Tags', 'Comments', 'Diagram', 'Pictures', 'Responsibilities', 'References', 'History', and 'Files'. To the right of the sidebar, a 'Task' panel is open, titled 'Open tasks (1/1)'. It shows a single task: 'Approval' due on 2/8/2021. The task description says: 'Please vote for the approval of the Acronym. If you reject, please provide a reason for doing so.' There's a 'Related to' field with 'ACR GDPR' and a rich text editor for comments. At the bottom of the task panel are 'Reject' and 'Approve' buttons.

If the sidebar is not open, a task button indicates the number of active tasks.

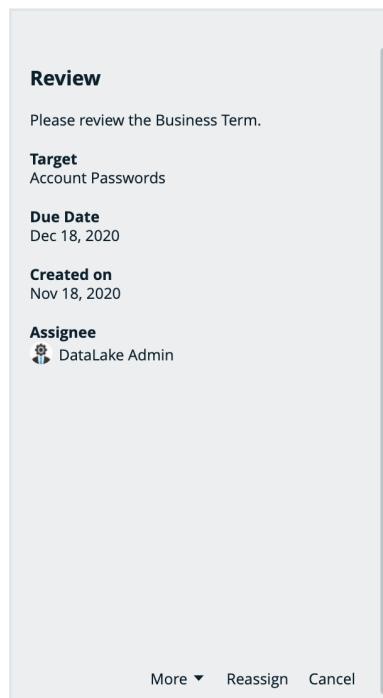
The screenshot shows a top navigation bar with 'Data Governance Council' and 'New Business Terms'. Below it is a header with 'GDPR' and 'ACR' (Type: Acronym). A progress bar shows '0%'. On the right, there's a 'Business Steward' section for 'Admin Istrator'. The main area has tabs like 'Add characteristic', 'Descriptive Example', and 'Overview'. A green arrow icon is visible on the right side of the screen.

Completing a task from My Tasks page

On the **My Tasks** page, all your tasks are listed in a table.

To complete tasks from here you can use one of the following options:

- In the preview pane on the right of a selected task, you get information about the task and the step in the workflow diagram. Click on one of the buttons to complete the task.

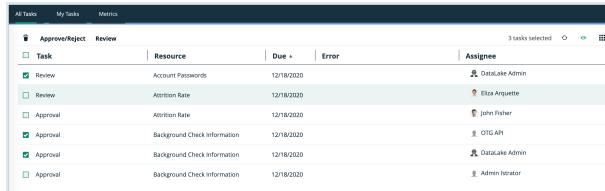


- When you select a check box in front of a task, the actions that are possible for that task are displayed above the table. Click on one of the buttons to complete the task.

The table lists tasks with the following columns: Task, Resource, Due, Error, and Assignee. The first column (Task) has a red border, indicating selected tasks. The table shows three rows of tasks, each with a checkbox in the first column.

Task	Resource	Due	Error	Assignee
Review	Account Passwords	12/18/2020		DataLake Admin
Review	Attrition Rate	12/18/2020		Ella Arquette
Approval	Attrition Rate	12/18/2020		John Fisher
Approval	Background Check Information	12/18/2020		CTG API
Approval	Background Check Information	12/18/2020		DataLake Admin
Approval	Background Check Information	12/18/2020		Admin Istrator

- When you select the check boxes of multiple tasks, the actions that are possible for that task are also displayed above the table. Click on one of the buttons to complete multiple tasks at once.



The screenshot shows a table with columns: Task, Resource, Due, Error, and Assignee. There are six rows, each with a checkbox in the first column. The 'Assignee' column shows icons for different users: Database Admin, Elsa Arquette, John Fisher, OTS API, Database Admin, and Admin Monitor. A tooltip '3 tasks selected' is visible above the table.

Task	Resource	Due	Error	Assignee
<input checked="" type="checkbox"/> Review	Account Passwords	12/18/2020		Database Admin
<input type="checkbox"/> Review	Attrition Rate	12/18/2020		Elsa Arquette
<input type="checkbox"/> Approval	Attrition Rate	12/18/2020		John Fisher
<input checked="" type="checkbox"/> Approval	Background Check Information	12/18/2020		OTS API
<input checked="" type="checkbox"/> Approval	Background Check Information	12/18/2020		Database Admin
<input type="checkbox"/> Approval	Background Check Information	12/18/2020		Admin Monitor

- If there is a form to fill in, it contains the names of all the assets for which you are completing a task.

Even when you select different types of tasks, all the different options to complete a task are displayed. However, only the tasks for which the action is possible are completed and you cannot complete all of the tasks at once.

Reassign a task

With the correct permissions, you can reassign a task. To do so, follow these steps:

- In the main menu, click **Tasks**.
- Click the row of task that you want to cancel. Do not click the task name or resource name as that will open respectively the task details or asset page.
 - The row is highlighted and the sidebar displays the task.
- In the sidebar, click the ellipses : → **Reassign**.
- Fill in the **Reassign task** values.
 - The workflow continues with the new set of users as candidates for the task. Note that if the task expects, for example, an attribute to be changed by one of the newly assigned users, that user needs the permission to do so.
- Click **Reassign task**.

Cancel a task

With the correct permissions, you can cancel a task.

- In the main menu, click **Tasks**.
- Click the row of task that you want to cancel. Do not click the task name or resource name as that will open respectively the task details or asset page.
 - The row is highlighted and the sidebar displays the task.

3. In the sidebar, click the ellipses : → **Cancel task**.
4. Fill in an optional reason to cancel the task and click **Cancel task**.

Note Canceling a task means that the entire workflow is canceled and an event is created. It is possible that other workflows are listening for this event and are started automatically when this event occurs.

View a workflow diagram

Each task is part of a workflow. With the correct permissions, you can open the full workflow diagram. This allows you to see in which stage of the workflow the task is located.

1. In the main menu, click **Tasks**.
 2. Click the row of task that you want to cancel. Do not click the task name or resource name as that will open respectively the task details or asset page.
 - » The row is highlighted and the sidebar displays the task.
 3. In the sidebar, click the ellipses : → **View in workflow diagram**.
- » A rendering of the current position of the task in the workflow is displayed.

Responsibilities

Responsibilities are used to assign a **resource role** to one or more **users** and/or **user groups**. Based on their responsibilities, users can act on the **permissions** conveyed to them via the resource role.

About responsibilities

A responsibility is the assignment of one or more **users** and/or **user groups** to a **resource role** for a resource.

Based on their responsibilities, users can act on the **permissions** conveyed to them via the resource role.

Child resources always inherit the responsibilities from their parent resources:

- If the resource is a community, the responsibilities are inherited by subcommunities, domains and assets in the community. For example, if you are a Business Steward for a certain community, you are a Business Steward for all the subcommunities, domains and assets inside that community.
- If the resource is a domain, the responsibilities are inherited by the assets in the domain.
- If the resource is an asset, the responsibilities only apply to the asset itself, because assets never have children.

Important For optimal performance and ease of use, we recommend that you create responsibilities mainly on domains and communities and not directly on assets. Creating responsibilities directly on large amounts of assets may lead to decreased performance.

Example

Suppose the following setup:

- Anita Morrison is assigned the Community Manager resource role for a community called "Enterprise".
- John Fisher is assigned the Business Steward resource role for a domain called "Critical Data Elements" in the "Enterprise" community.
- Joanna Zhou is assigned the Owner resource role for a domain called "Critical Data Elements" in the "Enterprise" community.
- William Parker is assigned the Owner resource role for an asset called "Customer Revenue" in the "Critical Data Elements" domain.

This leads to the following responsibilities:

Resource	Direct responsibilities	Inherited responsibilities
Enterprise community	<ul style="list-style-type: none"> • Anita Morrison as Community Manager 	<ul style="list-style-type: none"> • None
Critical Data Elements domain	<ul style="list-style-type: none"> • John Fisher as Business Steward • Joanna Zhou as Owner 	<ul style="list-style-type: none"> • Anita Morrison as Community Manager
Customer Revenue asset	<ul style="list-style-type: none"> • William Parker as Owner 	<ul style="list-style-type: none"> • Anita Morrison as Community Manager • John Fisher as Business Steward • Joanna Zhou as Owner

Note You can [view direct and inherited responsibilities](#) of a resource in different places.

View responsibilities for a resource

You can view the [responsibilities](#) for a resource in the following locations:

- In the **Responsibilities** tab of a resource.
- In any view that displays communities, domains or assets, in the specific column or field for that role.

- a. Open any view in table or tiles mode.
- b. Do one of the following:
 - In tile mode: [add](#) the required fields.
 - In table mode, [add](#) the required column.

Note

- Each role has its own field or column.
- Depending on the [settings](#) in Collibra Console, you may also see the inherited responsibilities.

- In the **Responsibilities** tab of a user's profile page.

Tip You can also view your own responsibilities.

- a. [Open](#) a profile page.
 - b. In the tab pane, click **Responsibilities**.
 - » The [Responsibilities](#) page appears.
- In the **Responsibilities** tab of a user group page.
 - a. Open a group page.
 - i. In the main menu, click , then **Settings**.
 - » The [System](#) tab page appears.
 - i. In the tab pane, click **Users → Groups**.
 - b. In the tab pane, click **Responsibilities**.
 - » The [Responsibilities](#) page appears.
 - In the **Preview** pane of an asset, for example on an asset page.

Note The preview pane only shows the direct responsibilities.

The Responsibilities page

The **Responsibilities** page shows the view permissions and the [responsibilities](#) of a resource.

The screenshot shows the SCPM Glossary interface. At the top, there are navigation links for Business Analysts Community, Supply Chain Performance Management, and a Business Steward named John Fisher. Below this is a toolbar with icons for Edit, Move, Delete, and Auto hyperlinks. The main area has a sidebar with links for Overview, Assets, Responsibilities (which is selected and highlighted in green), History, and Files. The main content area displays a table titled 'Responsibilities' with columns for Business Steward, Owner, and Stakeholder. It shows that the Business Steward is inherited from John Fisher, and the Owner is Luke O'Reilly, while the Stakeholder is Aarav Singh Chopra. There are 'Add' buttons for each column.

The background colors of the responsibilities show where the responsibility comes from.

Color	Description
Gray	The user or group inherited the role.
White	The user or group was directly assigned to this role for the resource.

If a user or group has a responsibility but not the required view permissions, a warning appears in the box. For example, a user was assigned the Steward role for a resource but does not have view permissions for it.

Create a responsibility

You can create a responsibility:

- By assigning a resource role to a user or user group on the responsibilities page of a resource.
- By adding a user in the table column of a role.
- By [editing](#) an existing responsibility.

Important For optimal performance and ease of use, we recommend that you create responsibilities mainly on domains and communities and not directly on assets. Creating responsibilities directly on large amounts of assets may lead to decreased performance.

Assign a resource role to a user or user group on the responsibilities page

1. Open a community, domain or asset page.
2. In the tab pane, click  **Responsibilities**.
 - » The **Responsibilities** page appears.
3. Above the table, to the right, click **Add a user or group**.
 - » The **Assign role** dialog box appears.
4. Enter the required information.

Option	Description
Role	Enter the role that you want to assign to a user or group for this resource.
People	Enter the users and user groups to which you want to assign a role for this resource.
Assign to	<p>Only available for communities and domains.</p> <p>Choose for which resources you want to assign the role to the users and/or groups.</p>
for assets	Select to apply the responsibility to the assets in the domain or community.
for domains	Select to apply the responsibility to the domains in the community.
for subcommunities	Select to apply the responsibility to the subcommunities of the current community.
for this community	Select to apply the responsibility to the current community only.

5. Click **Assign**.
 - » The users or groups with the assigned role are now displayed in the **Responsibilities** table.

Tip

- If you want to assign a user or user group a resource role that other users or groups already have for this resource, you can click  and add them in the **People** field in the **Assign role** box.
- If there are only inherited roles,  is not available.

Assign a role to a user or user group for a resource from a table

1. Open a table that displays communities, domains or assets.
2. If required, [add](#) the column of the role that you want to assign to the user.
3. Do one of the following:
 - Double-click a cell in the column of the role.
 - Hover your mouse pointer over a cell in the column and click .
4. Click in the field and enter the user or user group.
5. If required, select **Apply to visible rows**.

This will create the responsibilities for all visible users.

Tip You can [filter](#) the columns first, to assign a role to a user for specific resources in one go.

6. Click .

Edit a responsibility

You can edit a [responsibility](#):

- by [deleting](#) it and [creating](#) a new one.
- in an asset table.

Note You cannot edit inherited responsibilities.

Edit a responsibility in a table

1. Open a table that displays communities, domains or assets.
2. If required, [add](#) the column of the role that you want to edit.

Warning Depending on the [settings](#) in Collibra Console, you may also see the inherited responsibilities. You cannot edit these inherited responsibilities.

3. Do one of the following:
 - Double-click a cell in the column of the role.
 - Hover your mouse over a cell in the column and click .

4. Edit the responsibility:
 - Click in the field and enter a new user or user group.
 - Click  next to the user or user group to remove the user or user group.
 - If required, select **Apply to visible rows**.

This will edit the responsibilities of all visible users.

Tip You can [filter](#) the columns first to assign a user to specific resources in one go.

5. Click .

Delete a responsibility

You can delete a [responsibility](#):

- From the [responsibilities page](#) of a resource.
- From a table.

Note You cannot delete inherited assignments.

Delete a responsibility from the responsibilities page of a resource

1. Open a community, domain or asset page.
2. In the tab pane, click  **Responsibilities**.
 - » The [Responsibilities](#) page appears.

- In the Responsibilities table, click next to the name of the user or group that you want to remove.

- Click Delete to confirm.

Delete responsibilities for a resource from a table

- Open a table that displays communities, domains or assets.
- If required, add the column of the role that you want to edit.

Warning Depending on the [settings](#) in Collibra Console, you may also see the inherited responsibilities. You cannot delete these inherited responsibilities.

- Do one of the following:
 - Double-click a cell in the column of the role.
 - Hover your mouse over a cell in the column and click .
- In the cell editor, click next to the user or user group.
- If required, select **Apply to visible rows**.

This will delete the responsibilities from all visible users.

Tip You can [filter](#) the columns first to assign a user to specific resources in one go.

- Click .

View permissions

A view permission is the right to see a resource and its children. It determines which users can see and work with which resources. You assign a view permission to [users](#) or [user groups](#) on [domain](#) or [community](#) level. Consequently, only these users can see the resources and their children, including the assets.

Understanding view permissions

By default, all users can see all resources. You can tell that there are no view permissions if **Unrestricted view permissions** is in the View permissions section of the resource's [Responsibilities page](#).

The screenshot shows the SAP Fiori interface for managing a resource named "SCPM Glossary". The top navigation bar includes "Business Analysts Community" and "Supply Chain Performance Management". The main title is "SCPM Glossary" with a "Type: Glossary" label and buttons for "Edit", "Move", and "Delete". On the right, there is a "Business Steward" section for "John Fisher" and an "admins" group. The left sidebar has links for "Overview", "Assets", "Responsibilities", "History", and "Files". The "Responsibilities" section is currently selected. It shows two entries: "Business Steward" (John Fisher) and "Owner" (Luke O'Reilly). Below these, a note says "Inherited" and shows a box for "admins" with a note "Unrestricted view permissions.".

If you add users or user groups to the view permissions of a resource, only those users or groups can view the resource and its children.

All child resources inherit the view permissions from parent resources. Once you have added users or user groups to the view permissions of a resource, you cannot create view permissions for any of its child or parent resources.

You can recognize inherited view permissions by their gray background.

Note

- A user with the System Administration global permission, for example via the Sysadmin global role can see all views in Collibra DGC, even if they are not shared.
- A user with the Manage all views permission can see only views that are shared.

Impact of view permissions on responsibilities

View permissions affect **responsibilities**. If a user has a responsibility for a certain resource, but does not have view permission, that user cannot act upon that responsibility. The responsibility becomes inactive, due to the lacking view permission.

To activate the responsibility, you have to [create](#) the view permission for this resource or a parent resource.

Example

In the example below, Luke O'Reilly is the Owner of the SCPM Glossary domain, but he does not have the view permission to see the domain. As a consequence, he cannot see the assets or act on his responsibility. On the Responsibilities page, his responsibility shows an error message to clearly show that there is a problem. You can solve the problem in one of the following ways:

- [Create](#) a view permission for Luke.
- [Add](#) Luke to the user group that has a view permission.
- [Delete](#) all view permissions, so that everyone can see the assets.
- [Delete](#) Luke's responsibility as Owner and pick another person for that role.

The screenshot shows the SCPM Glossary details page. In the top right, under 'Business Steward', it lists 'John Fisher' with the role 'admins'. On the left, a sidebar menu includes 'Overview', 'Assets', 'Responsibilities' (which is selected), 'History', and 'Files'. The main content area shows 'View permissions' with 'Data Custodians' listed. Under 'Responsibilities', the 'Business Steward' section lists 'John Fisher'. The 'Owner' section lists 'Luke O'Reilly' with the note 'No view permission'. Below this, an 'Inherited' section shows 'admins' with 'No view permission'.

Create a view permission

You can create a [view permission](#) if you don't want all users to see certain resources.

Prerequisites

- You have a resource role with the Edit View Permissions [resource permission](#), for example Community Manager.
- None of the parent communities or children of the current resource have a view permission.

Steps

1. Open a community or domain page.
2. In the tab pane, click  **Responsibilities**.
 - » The **Responsibilities** page appears.
3. Above the table, to the right, click **Add**.
 - » The **Add view permissions** dialog box appears.
4. In the **Users or Groups** field, start typing the name of the user or user group.
5. Select a user or user group from the suggestions.
6. Click **Add**.

Delete a view permission

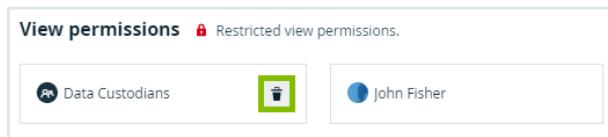
You can delete a **view permission** if you want to change which users are allowed to see certain resources.

Prerequisites

- You have a resource role with the **Edit View Permissions** **resource permission**, for example **Community Manager**.
- One or more users or user groups have a **view permission** on the resource.

Steps

1. Open a community or domain page.
2. In the tab pane, click  **Responsibilities**.
 - » The **Responsibilities** page appears.
3. In the **View Permissions** section, click  next to the name of the user or group that you want to remove.



- » A confirmation message appears.
4. Click **Delete**.
 - » One view permission is deleted, so only the remaining users or user groups can

see this resource and its children.

» If you deleted the last view permission, all users can now see this resource and its children.

Text editors

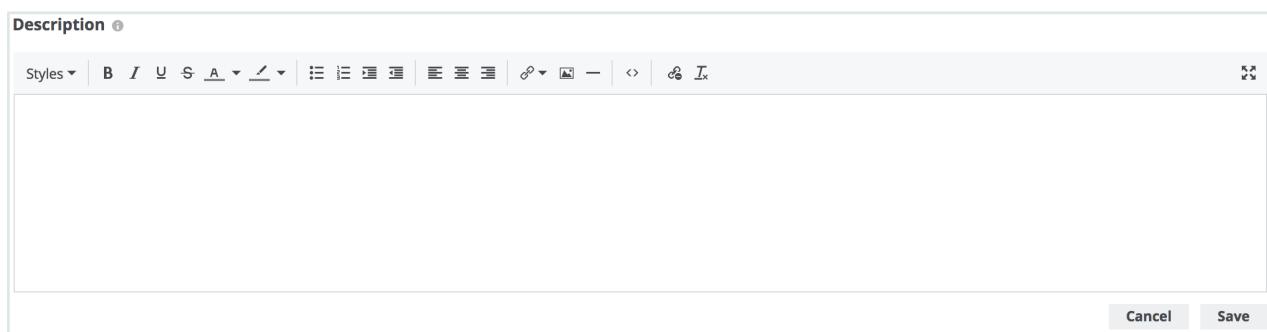
Text editors in Collibra Data Governance Center allow you to enter, format and edit text.

The following text editors are available throughout Collibra DGC:

- Standard text editor.
- Mini text editor.
- Table text editor.
- Plain text editor.

Standard text editor

The standard text editor is a rich text formatting editor. You use this editor on text widgets and asset pages to edit text attributes such as Definition and Note. It allows HTML formatting and styling. For advanced formatting, you can use the toolbar or enter HTML code after clicking `<>` in the toolbar.



Warning

The standard text editor supports most HTML elements, inline CSS styling and table (`< t >`) structures. However, this means an attacker could potentially execute an XSS attack by injecting malicious HTML. However, when you save, the following HTML elements are removed for security reasons:

- script (including JavaScript)
- svg
- frame
- frameset
- iframe
- any event handlers

Text attributes are always protected, but you can also enable this for [text widgets](#) in Collibra Console. For more information, see the [Troubleshooting section](#).

Mini text editor

You use the mini text editor typically for comments, ratings and so on. The toolbar offers basic formatting options.

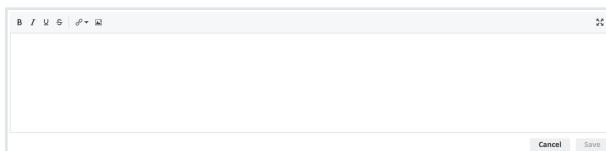
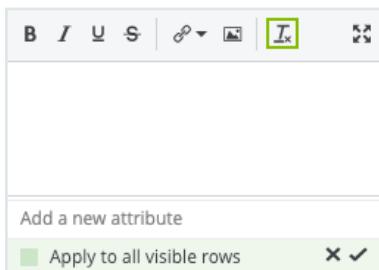


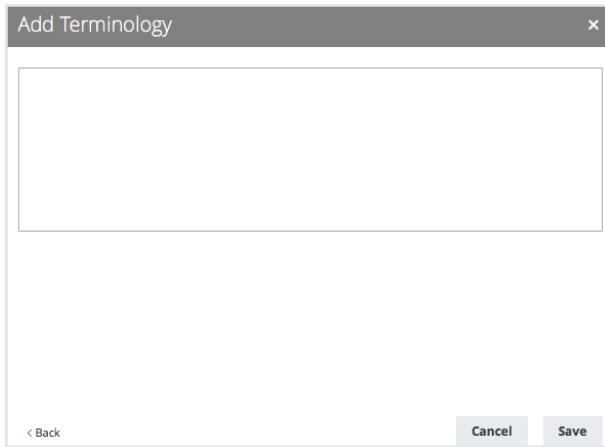
Table text editor

The table text editor allows you to edit and format text in asset [tables](#). The toolbar contains all the editing options of the mini text editor toolbar, plus a clear formatting option.



Plain text editor

The plain text editor allows you to enter text without formatting.



Use of text editors

The following table identifies where the various text editors and field are used.

Editor	Location of use
Standard text editor	<ul style="list-style-type: none"> Dashboard Text widget Community, domain and asset pages
Mini text editor	<ul style="list-style-type: none"> Comments Ratings
Table text editor	<ul style="list-style-type: none"> Table text fields
Plain text editor	<ul style="list-style-type: none"> Add characteristic option of an asset

Keyboard shortcuts

For the standard text editor, you can use the following keyboard shortcuts to edit or format your text:

Action	PC	Mac
Bold	Ctrl + B	Command + B
Italic	Ctrl + I	Command + I
Underline	Ctrl + U	Command + U

Action	PC	Mac
Select all	Ctrl + A	Command + A
Redo	Ctrl + Y / Ctrl + Shift + Z	Command + Y / Command + Shift + Z
Undo	Ctrl + Z	Command + Z
Header 1	Alt + Shift + 1	Control + Option + 1
Header 2	Alt + Shift + 2	Control + Option + 2
Header 3	Alt + Shift + 3	Control + Option + 3
Header 4	Alt + Shift + 4	Control + Option + 4
Header 5	Alt + Shift + 5	Control + Option + 5
Header 6	Alt + Shift + 6	Control + Option + 6
Paragraph	Alt + Shift + 7	Control + Option + 7
Keyboard focus to toolbar	Alt + F10	Option + F10
Toggle fullscreen	Alt + Shift + F	Command + Shift + F

Hyperlinking

In Collibra Data Governance Center, you can manually create hyperlinks in text attributes or enable automatic hyperlinking to easily navigate from asset to asset or from an asset to a website.

Automatic hyperlinking

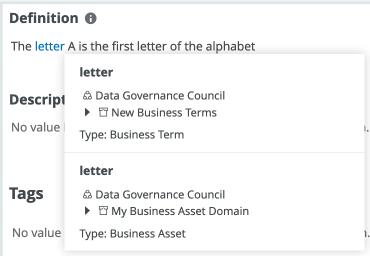
In Collibra DGC, every asset is a potential "target" of a hyperlink. If the name of an asset is mentioned somewhere in a text attribute of another asset, that mention automatically

gets a hyperlink to the corresponding asset. Collibra DGC keeps all hyperlinks up to date when you edit your data.

You can enable or disable automatic hyperlinking at the different levels:

- **Environment:** If automatic hyperlinking is disabled in Collibra Console, no automatic hyperlinks are created.
- **Domain:** If automatic hyperlinking is enabled in Collibra Console, you can enable or disable it on the domain level. Because every asset is a possible target, automatic hyperlinking can lead to an excessive amount of hyperlinks, which can negatively affect performance. Therefore, by default, automatic hyperlinking is disabled for all domains. However, you can enable it.
- **Individual assets:** An asset may have a common word as its name, for example, "is", "a", "or" or "and". When that happens, you don't want hyperlinks to this asset because it would lead to a lot of useless hyperlinks. Therefore, you can exclude such assets from automatic hyperlinking.

Note If there are assets with identical names, they are all shown in a pop-up when you click the link. Then, you can click one to open its asset page.



After importing data or after a backup has been restored, Collibra DGC triggers a rebuild of the automatic hyperlinks. You can also [rebuild the hyperlinks manually](#).

Tip By default, automatic hyperlinking is not case sensitive. For example, an asset 'Nato' will also be hyperlinked if it is mentioned as 'NATO', and vice versa. You can [configure](#) case-sensitivity for automatic hyperlinking in Collibra Console.

Manual hyperlinking

You can use manual hyperlink if you want a hyperlink to or from a specific asset. This is particularly useful if automatic hyperlinking is disabled, or if the link text does not match the name of the target asset.

Tip You can also manually [create](#) hyperlinks to web addresses.

Disable automatic hyperlinking to a specific asset

You can disable [automatic hyperlinking](#) at the [environment level](#), [domain level](#) and asset level.

An asset may have a common word as its name, for example, "is", "a", "or" or "and". When that happens, you don't want hyperlinks to this asset because it would lead to a lot of useless hyperlinks.

You can still [manually create hyperlinks](#) that target the asset.

Steps

1. Open an asset page.
2. In the toolbar, click, **Auto hyperlinks**.
» The **Auto hyperlinks** dialog box appears.
3. Enter the required information.

Field	Description
No Automatic Hyperlink	Collibra Data Governance Center will not create automatic hyperlinks to this asset.

4. Click **X** to close the dialog box.

What's next?

All automatic hyperlinks to the asset are removed and Collibra Data Governance Center no longer creates automatic hyperlinks to the asset.

If you enable automatic hyperlinking to the specific asset again, you have to rebuild the hyperlinks.

Enable automatic hyperlinking in a domain

Automatic hyperlinking is especially useful for linking to Business Term assets. But as every asset is a possible target, automatic hyperlinking can lead to an excessive amount of hyperlinks, which can negatively affect performance. Therefore, by default, automatic hyperlinking is disabled for all domains.

Nevertheless, you can enable automatic hyperlinking at the domain level.

Tip You can use the [Manage auto hyperlinks workflow](#) to enable or disable automatic hyperlinking in bulk.

Prerequisites

You have [enabled automatic hyperlinking](#) in Collibra Console.

Steps

1. Go to the domain page of the domain for which you want to enable automatic hyperlinking.
2. In the toolbar, click **Auto hyperlinks**.
 - » The **Auto hyperlinks** dialog box appears.
3. Enter the required information.

Field	Description
No Automatic Hyperlink	Collibra DGC will not create automatic hyperlinks to assets in this domain when its name occurs in a text attribute of another asset. You can use this option when the asset name is a common word like ‘and’, ‘or’, ‘it’, etc. You can still create manual hyperlinks to this asset.

4. Click **X** to close the dialog box.

What's next?

[Rebuild the hyperlinks](#) to automatically create the hyperlinks to all the assets in the domain.

Delete an automatic hyperlink

Collibra Data Governance Center can [automatically create hyperlinks](#) to assets. However, you can delete some or all of the hyperlinks without touching other potential automatic hyperlinks to the destination asset.

Steps

1. Open an asset page.
2. Click  in the text field with an automatic hyperlink.
3. Select the text.
4. In the **Edit** toolbar, click  (Remove autohyperlink).
 - » The hyperlink is removed.
5. Click **Save**, to save the content of the text field.

What's next?

The automatic hyperlink is removed, but if you edit the text field again and you add the same text, the automatic hyperlink will again be created. If [the hyperlink are rebuilt](#), for example after restoring a backup, the hyperlinks may reappear.

Tip To prevent an automatic hyperlink to a specific asset, you have to [disable automatic hyperlinking](#) for the target asset or the domain of the target asset.

Create a hyperlink to an asset

You can manually create [hyperlinks](#) to assets.

Tip Collibra Data Governance Center can also [create hyperlinks automatically](#).

Steps

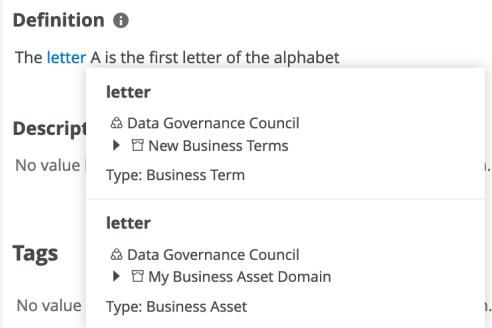
1. Open an asset page.
2. Double-click a text attribute, for example the definition, to edit the text.
3. Select the text to transform into a hyperlink.
4. On the **Edit** toolbar, click  (Insert/edit link) → **Link to asset**.
5. In the **Assets** field, start typing the name of the asset to which you want to link.

The assets are filtered as you type.

Tip To help you identify the correct asset, the domain of each asset is shown below the asset name.

6. Click the asset to which you want to link.

Note You can link to multiple assets, in which case, all links are shown when you click the link. You can then select which one to follow.



7. Click **Save**, to save the hyperlink.
8. Click **Save**, to save the content of the text field.

Create a hyperlink to a web address

In addition to creating hyperlinks to other assets in your environment, you can also create hyperlinks to web addresses. When you click the **hyperlink**, it will automatically open in a new tab.

Steps

1. Open an asset page.
2. Double-click a text attribute or click  to edit the text.
3. Select the text to transform into a hyperlink.
4. On the **Edit** toolbar, click  (Insert/edit link) → **Link to URL**.
5. Enter the required information.

Setting	Description
URL	<p>The target website of the hyperlink.</p> <p>If you don't start the URL with http:// or https://, the system will ask if it has to add http://. If you don't add either prefix, Collibra Data Governance Center will consider the URL content an asset.</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>Note You will only see this field if the hyperlink you edit is a link to a URL.</p> </div>
Text to display	The display text that will be visible in the attribute. By default, this is the text that you selected.

6. Click **Save**, to save the hyperlink.
7. Optionally, edit the source code so that the hyperlink automatically opens in a the current tab when you click it.
 - a. Click **Source code** ().
 - b. Type `target = "_blank"` after the `href` attribute.

Example Click `here` for more information.
- c. Click **Save**.
8. Click **Save**.

Edit a manually created hyperlink

After you have created a [hyperlink](#), you can always edit it afterwards.

Note Automatic hyperlinks cannot be edited.

Steps

1. Open an asset page.
2. Double-click a text attribute or click  in the text field that contains the hyperlink that you want to edit.
3. Click anywhere on the hyperlinked text and click **Edit**.
4. Update the link:
 - a. Enter the required information.

Field	Description
URL	<p>The target website of the hyperlink.</p> <p>If you don't start the URL with http:// or https://, the system will ask if it has to add http://. If you don't add either prefix, Collibra Data Governance Center will consider the URL content an asset.</p> <p>Note You will only see this field if the hyperlink you edit is a link to a URL.</p>
Assets	<p>The target assets of the hyperlink.</p> <p>The assets are filtered as you type. Click the asset to which you want to link.</p> <p>Note You will only see this field if the hyperlink edit is a link to an asset.</p>
Text to display	The display text that will be visible in the attribute. By default, this is the text that you selected.

- b. Click **Save**.
5. Click **Save**.

Remove a manually created hyperlink

You can remove [manually created hyperlinks](#) in text attributes.

Steps

1. Open an asset page.
2. Click  in the text field that contains the hyperlink that you want to remove.
3. Click anywhere on the hyperlinked text and click **Unlink**.
 - » The hyperlink is removed. If the hyperlink pointed to many assets, all links are removed.
4. Click **Save**, to save the content of the text field.

Activities

In the main menu of Collibra Data Governance Center, you can look up the most recent activities and their status by clicking .

If there are activities still running, the wheel is spinning.

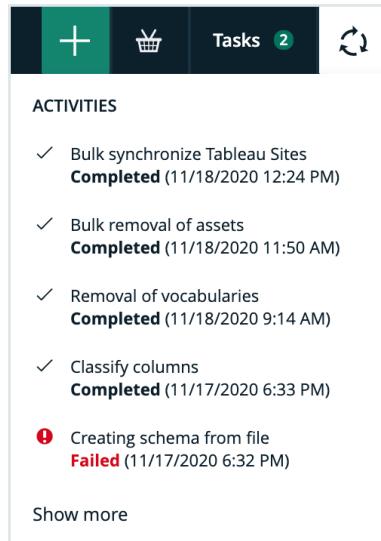
When you hover your pointer over a completed activity (success or failure), you can remove the activity from the list by clicking .

Click **Clear all** to clear the list of recent activities.

Opening the Activities list

You can open the Activities list in several ways:

- From the main menu:
 - a. In the main menu, click , then **Show more**.
 - » Your [profile page](#) opens on the **Activities** tab page.



- From your profile:
 - a. In the main menu, click your avatar → **Profile**.
 - b. In the tab pane, click **Activities**.
 - » The **Activities** tab page opens.

Profile page

The profile page of a user contains all relevant information about that user.

As a user, you can only open your own profile page. As an administrator, you can also open other users' profile page.

The view bar contains some basic information about the user, such as the name, license type, required license type and email address.

The profile page contains the following tab pages:

Tab page	Description
Overview	The overview page contains general information such as the user's account information, mail notification settings and contact information.
Groups	The groups page contains the user groups of which the user is a member, and allows you to add the user to or remove the user from groups.

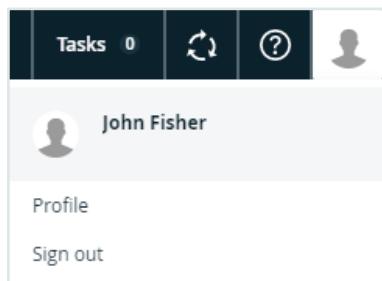
Tab page	Description
Responsibilities	The responsibilities page contains the responsibilities that are assigned to the user.
History	The history page contains the history of the user's actions.
Activities	The activities pages contains the list of your activities .
Mentions	The mentions page contains a list of all comments in which you are mentioned.

Open a profile page

As a regular user, you can open your own profile page. Administrators can open everybody's profile page.

Open your own profile page

1. Click your avatar, then **Profile**.
» Your [profile page](#) appears.



Open another user's profile page

1. In the main menu, click then **Settings**.
» The **System** tab page appears.
2. In the tab pane, click **Users**.
» The user table appears.
3. Click the username of the user whose profile you want to open.

Edit the user account settings

As a regular user, you can edit the settings of your own user account. As an administrator, you can also edit other users' settings.

Steps

1. Click your avatar, then **Profile**.
» Your [profile page](#) appears.
2. In the **Account** section, click .
3. Enter the required information.

Field	Description
Username	Enter the username. You need administrator permissions to edit the username.
Application Language	Choose the interface language . As an administrator, you can add or edit interface languages.

4. Click **Save**.

Edit the contact information

As a regular user, you can edit contact information of your own user account. As an administrator, you can also edit other users' contact information.

Note You can also add new contact information.

Edit contact information from a profile page

1. Click your avatar, then **Profile**.
» Your [profile page](#) appears.
2. Do one of the following:
 - In the **Contact** section, click .

Do this to edit the existing fields.

- In the **Contact** section, click **Add**.
Do this to add a new field, or edit the existing fields.
- 3. Edit the contact information.
- 4. Click **Save**.

Edit contact information from the user table

1. In the main menu, click , then  **Settings**.
» The **System** tab page appears.
2. In the tab pane, click **Users**.
» The user table appears.
3. Do one of the following:
 - Double-click a cell in the **E-mail** column.
 - Hover your mouse over a cell in the **E-mail** column and click .
4. Click in the field and type the new email address.
5. Click .

Edit the email notification settings

You can edit the email notification settings for your own user account. As an administrator, you can also edit other users' notification settings.

If you enable notifications, you will be notified via email whenever changes are made to assets for which you have been assigned a responsibility.

Steps

1. Click your avatar, then **Profile**.
» Your [profile page](#) appears.
2. In the **Notifications** section, click .

3. Select or clear the necessary check boxes.

Field	Explanation
Notify me of content updates	Specify whether or not you want to receive email notifications. If you select this option, email notifications will be sent to the email address shown in the Contact section of your Profile page, at the specified frequency.
Days of the week	Receive email notifications only on the days you specify.
Monthly	Receive a summary email once a month.

4. Click **Save**.

Edit user details

As an administrator, you can edit your own or other users' details.

Steps

1. Click your avatar, then **Profile**.
» Your [profile page](#) appears.
2. In the upper-right corner, click **Edit**.
» The **Edit** dialog box appears.
3. Enter the required information.

Field	Description
First name	Enter the first name of the user.
Last name	Enter the last name of the user.
Email	Enter the email address on which the user receives all communication from Collibra DGC, such as the registration mail and notifications.
License type	Choose the license type of the user.

4. Click **Save**.

Edit a user's license type

As an administrator, you can edit a user's license type.

Steps

1. Click your avatar, then **Profile**.
» Your [profile page](#) appears.
2. In the upper-right corner, click **Edit**.
» The **Edit** dialog box appears.
3. In the **License type** field, choose the license type of the user.
4. Click **Save**.

Metrics pages

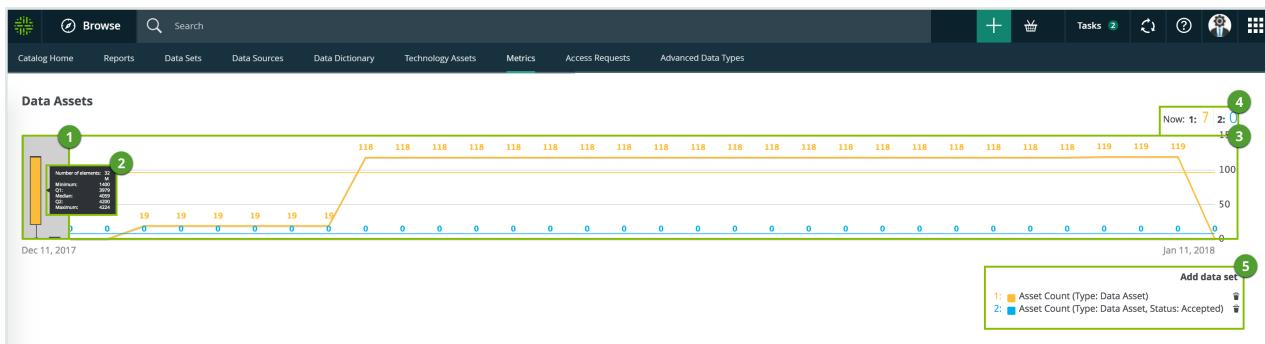
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

For each graph, you can edit the data set and the time range shown.

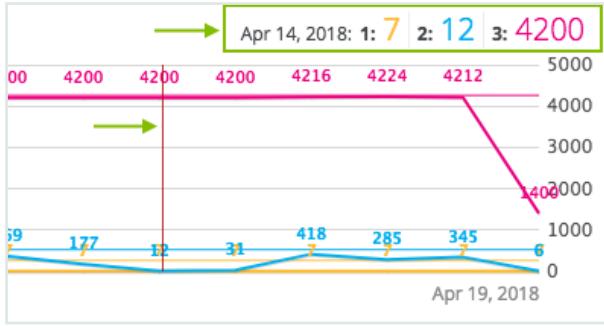
Note On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with [Data Catalog Data Sets](#) in the true context of CollibraData Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.

Components

The Metrics page consists of one or more graphs, their legend and some counters.



Number	Element	Description
1	Color-coded bars	The color-coded bars give a quick overview of the graph. The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values.
2	Data set details	More details about the graph. Hover your pointer over the color-coded bars to the left of each line of graph to view them.
	Number of elements	The amount of days in the time range.
	Minimum	The lowest count on any day in the data set.
	Q1	The first quartile, meaning the lowest 25% of the data set.
	Median	The median, meaning the middle value of the data set.
	Q3	The third quartile, meaning the lowest 75% of the data set.
	Maximum	The highest count on any day in the time range.
3	Graph	The actual graph. What it shows exactly, depends on the data set. For example, it can show the number of assets viewed over the last month, or the number of licenses used.
		Tip You can edit the time range of the graph.

Number	Element	Description																												
4	Counts by day	The counts for a specific day for each data set, by moving your mouse over the graph. The vertical red line identifies the day. The exact count for that day for each data set, is shown above the graph.  <table border="1"> <thead> <tr> <th>Date</th> <th>1</th> <th>2</th> <th>3</th> </tr> </thead> <tbody> <tr><td>Apr 14, 2018</td><td>7</td><td>12</td><td>4200</td></tr> <tr><td>Apr 15, 2018</td><td>177</td><td>12</td><td>31</td></tr> <tr><td>Apr 16, 2018</td><td>418</td><td>7</td><td>285</td></tr> <tr><td>Apr 17, 2018</td><td>345</td><td>7</td><td>6</td></tr> <tr><td>Apr 18, 2018</td><td>0</td><td>0</td><td>0</td></tr> <tr><td>Apr 19, 2018</td><td>0</td><td>0</td><td>0</td></tr> </tbody> </table>	Date	1	2	3	Apr 14, 2018	7	12	4200	Apr 15, 2018	177	12	31	Apr 16, 2018	418	7	285	Apr 17, 2018	345	7	6	Apr 18, 2018	0	0	0	Apr 19, 2018	0	0	0
Date	1	2	3																											
Apr 14, 2018	7	12	4200																											
Apr 15, 2018	177	12	31																											
Apr 16, 2018	418	7	285																											
Apr 17, 2018	345	7	6																											
Apr 18, 2018	0	0	0																											
Apr 19, 2018	0	0	0																											
5	Legend	The legend of the graph, which also allows you to add , edit and delete the data sets.																												

Add a data set to a metrics graph

You can add a data set to a graph on the [Metrics pages](#), for example if you want to compare the amount of new assets of different types.

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Under the relevant graph, to the right, click **Add data set**.

- » The filter settings appear.
4. Enter the required information:

Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Governance Center application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra DGC licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra DGC licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none">◦ License: Limit the results to active users with a specific license type.◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra DGC asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none">◦ Community: Limit the results to a specific community.◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

5. Click **Save data set**.

Remove a data set from a metrics graph

You can remove a data set that is shown in a graph on the [Metrics pages](#) if you don't want to see, for example, if you think there is too much information in a graph.

Note Each graph will always show at least one data set. If it only contains one data set and you want to remove it, you first have to [Add a data set to a metrics graph](#) another data set. You can then remove the other one.

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click on  next to the data set you want to delete.



- » The graph is updated.

Edit a data set of a metrics graph

You can edit the data set that is shown in a graph on the [Metrics pages](#).

Steps

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click the data set you want to edit.



Filter setting	Description
Filter Type	<p>The type of data that will be counted.</p> <p>Depending on the filter type that you select, different fields become available.</p>
Active Users	<p>A daily count of the active users to have viewed the relevant assets.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to active users with a specific license type. ◦ Community: Limit the results to a specific community. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Product: Limit the results to active users within a specific Colibra Data Governance Center application. ◦ Role: Limit the results to active users that have been assigned a specific role.

Filter setting	Description
Asset Count	<p>A daily count of the relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Domain: Limit the results to assets from a specific domain. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Status: Limit the results to assets with a specific status. ◦ Community: Limit the results to a specific community.
Changed Task Count	<p>A daily count of workflow tasks that have been changed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.

Filter setting	Description
Domain Count	<p>A daily count of the domains with relevant assets (either data or technology assets) that have been viewed.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Type: Limit the results to a specific type. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community.
License Available	<p>A daily count of Collibra DGC licenses that have been available to users.</p> <p>This is calculated by subtracting the licenses in use from the total licenses your organization has.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ License: Limit the results to a specific type. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.

Filter setting	Description
License Usage	<p>A daily count of Collibra DGC licenses in use by all users in your organization.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none">◦ License: Limit the results to active users with a specific license type.◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.
Page Hits	<p>A daily count of Collibra DGC asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none">◦ Community: Limit the results to a specific community.◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month.◦ Domain: Limit the results to assets from a specific domain.

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ Task: Limit the results to a specific task. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task Status: Limit the results to tasks that have a specific status (Completed, Deleted or Unfinished). ◦ User: Limit the results to a specific user.
Task Duration	<p>A daily count of workflow task duration.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> ◦ Workflow: Limit the results to a task in a specific workflow. ◦ Task Type: Limit the results to tasks of a specific type. ◦ User: Limit the results to a specific user. ◦ Count operation: Select the operation by which the results are shown in the template. For example, the sum of all values, the highest value or the lowest value each day over the last month. ◦ Community: Limit the results to a specific community. ◦ Task: Limit the results to a specific task.

5. Click **Save data set**.

» The updated data set is shown in the graph.

Edit the time range of a metrics graph

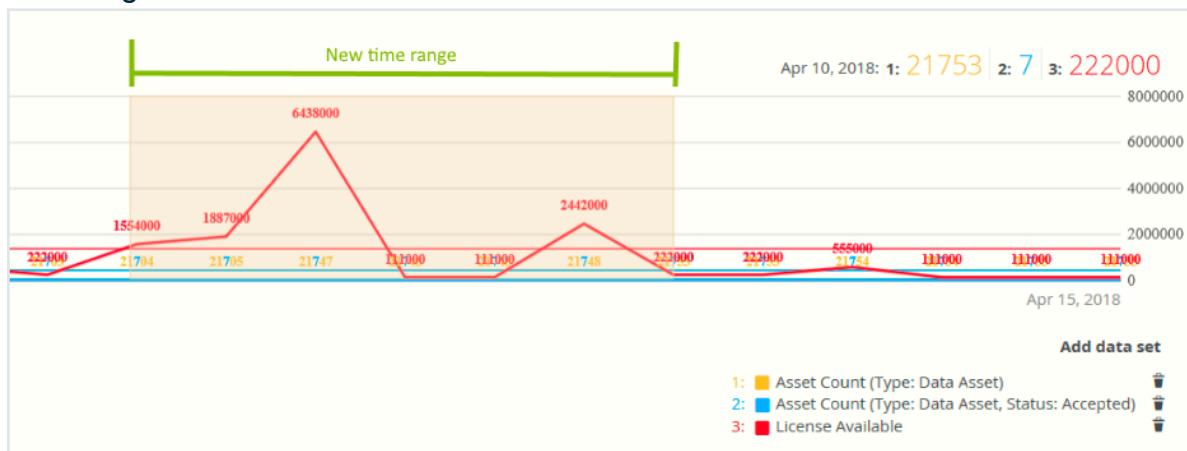
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

There are two ways to edit the time range:

- Click and drag in the graph.
- Select the dates for the graph.

Click and drag in the graph

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. In the relevant graph, click at (or near) the first date in your desired range, and drag to the right, toward the last date in your desired range.
 - » While you are dragging, the color changes in the graph, indicating the resulting time range.



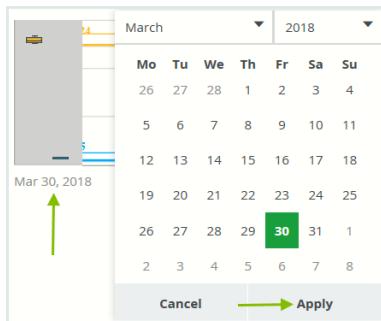
5. Release the mouse button.
 - » The graph is adjusted to the new time range.

Select the dates for the graph

1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
 - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.

4. On the left-hand side of the graph, click the date.

» A date picker appears.



5. Click the first day of your desired time range, and then click **Apply**.
» The graph is adjusted to the date you selected.
6. On the right-hand side of the graph, click on the date.
» A date picker appears.
7. Click the last day of your desired time range, and then click **Apply**.
» The graph is adjusted to the date you selected.

Asset functionalities

In this section, you find more information about the general functionalities on asset pages such as diagrams, relations and ratings.

In this chapter

Asset pages	253
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Asset pages

An asset page contains information about one asset. An asset is a resource that is stored and managed in Collibra Data Governance Center and owned or controlled by the customer. An asset is the capital building block by which to capture information (in terms of characteristics).

Asset page overview

The asset page provides an overview of information related to an asset, based on its asset type's [assignment](#). The assignment determines which and how many elements are by default added to the asset page.

The screenshot shows the SAP Asset Management interface for creating a new code value. The top navigation bar includes 'Browse' and 'Search' buttons. The breadcrumb path is 'Business Analysts Community > Country Codes'. The toolbar contains actions like 'Type: Code Value', 'Status: Candidate', 'Approval', 'Approve Asset', 'Simple Approval', 'Vote', 'Edit', 'Move', 'Delete', and 'Auto hyperlinks'. A progress bar indicates '80%' completion. On the right, there's a 'Business Steward' section for 'John Fisher'.

Section 1: Breadcrumbs (1)

Section 2: Asset type representation (2) - 'CODE AD'

Section 3: Asset name (3) - 'AD'

Section 4: Resource toolbar (4)

Section 5: Progress bar (5) - 80%

Section 6: Validation status (6) - 'valid'

Section 7: Business Steward (7) - John Fisher

Section 8: Left sidebar with 'Add characteristic' button (8)

Section 9: Description (10) - 'AD is the 2-digit country code for Andorra.'

Section 11: Is part of Code Set (11) - Shows 'ISO-2-digit' under 'Name' and 'Country Codes' under 'Domain'.

Section 12: Code Mapping (12) - Shows a crosswalk between 'CODE AD' (source) and 'CODE CC-AD' (target) via 'CWLK ISO-2-digit to CRM'.

Number	Section	Description
1	Breadcrumbs	The breadcrumbs of the current asset.
2	Asset type representation	The icon or abbreviation of the asset type . Tip You can edit how an asset type is represented.
3	Asset name	The name of the asset.
4	Resource toolbar	Additional actions, such as editing the asset and starting a workflow.

Number	Section	Description
5	Articulation score	<p>The articulation score of the asset.</p> <p>Note If there are no articulation score rules assigned to the asset, the asset page does not show an articulation score.</p>
6	Asset validation	<p>The validation result of the validation rules assigned to the asset.</p>
7	Stewards	<p>The stewards of the asset.</p> <p>You can see up to three stewards on the asset page. If there are more, click See all <number> to see them on the Responsibilities page.</p>
8	Tab pane	<p>A collapsible pane that allows you to navigate to other pages of the asset and add characteristics as specified in the assignment.</p>
9	Editor	<p>The currently selected page, in this case the Overview page, which contains all the attributes, relations and complex relations that have been defined for the asset and whose type was added to the relevant assignment.</p> <p>If a certain attribute type has been assigned as mandatory for this asset type, this attribute is shown in the asset's Overview tab, even if no attribute value has been defined yet.</p> <p>Tip If you want to copy and paste text from other sources into a text field, we recommend that you click  , and then paste the text into the Show source code field. This will remove any unwanted formatting or tagging of the text. For detailed information, see the knowledge base article on Collibra Support Portal.</p>

Number	Section	Description
10	Attribute	<p>An attribute is a characteristic of an asset containing information about the asset. This information can be in various formats, depending on the attribute kind:</p> <ul style="list-style-type: none"> • True/False: A binary choice. • Date: The format of the date depends on the user's locale settings. • Multiple selection: One or more values from a pre-defined list. • Number: If this is a fraction, the decimal separator shown in the UI is decided by the user's locale settings, usually a comma or a dot. • Selection: One value from of a predefined list. • Text: which may also include images and hyperlinks. <p>Note If a text attribute does not have any value, it shows the message No value has been given yet. If a text attribute has an empty value, it shows a message Empty value. Text attributes can have up to 100.000 bytes.</p>
11	Relation	<p>Relations of the same type are shown in a list. You can show the list in different display modes:</p> <ul style="list-style-type: none"> • Table: You can also choose the columns, or sort and filter their content. • Tiles: You can choose which fields to display and determine how many tiles to display.

Number	Section	Description
12	Complex relation	<p>Complex relations of the same type can be shown in different ways:</p> <ul style="list-style-type: none"> Table: You can show related assets in a table. This is the default way. You can edit this table in the same way you can any other table. Diagram: You can show complex relations as a diagram to visualize the underlying relations. You can scroll through the diagram and move nodes, but you cannot edit the diagram as extensively as you can via the diagram view. <p>Example</p>

Relation views

The asset page provides an overview of information related to an asset, based on its asset type's [assignment](#). This includes the [relations](#) and [complex relations](#).

Warning You only see complex relations if you have permission to view all assets of the complex relation.

Display modes

All relations and complex relations of the same type are displayed in a separate section with the relation type as section title. Each section can be shown in different display modes:

- Table:** By default, related assets are shown in a table. You can [edit](#) this table in the same way you can any other table.

Example

related to Business Asset			
Name ↗	Asset Type	Status	
Account Effective Date	Business Term	Candidate	⋮
Account Number	Business Term	Candidate	⋮
account reference number	Business Term	Candidate	⋮
account sequence number	Business Term	Candidate	⋮
Account Status Description	Business Term	Candidate	⋮
Account Type Code	Business Term	Candidate	⋮

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- **Tiles:** You can show the related assets as a set of tiles. You can edit this set of tiles in the same way you can any other set of tiles.

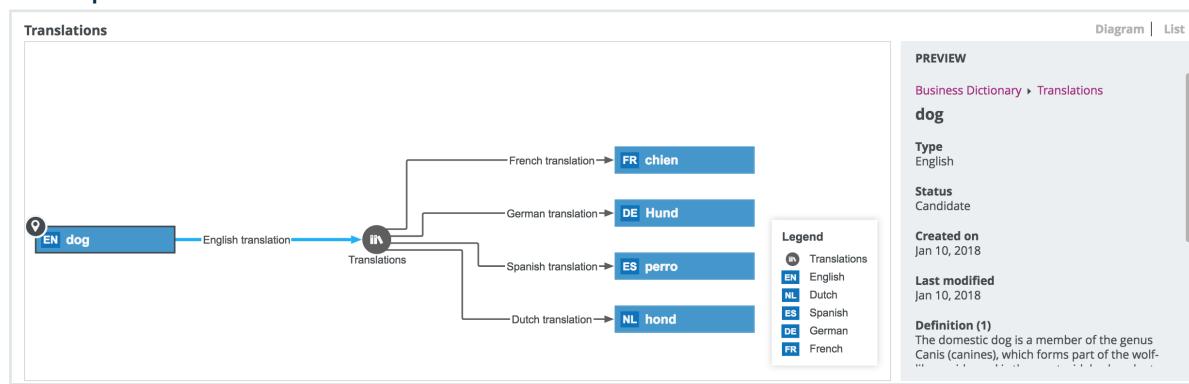
Example

related to Business Asset			
Sort by ↗ Name ↘ Add ⋮			
BT Account Effective Date Candidate	Asset Type Business Term	BT Account Number Candidate	Asset Type Business Term
BT account reference number Candidate	Asset Type Business Term	BT account reference number Candidate	Asset Type Business Term
BT account sequence number Candidate	Asset Type Business Term	BT Account Status Description Candidate	Asset Type Business Term
BT Account Type Code Candidate	Asset Type Business Term	BT Account Type Code Candidate	Asset Type Business Term

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- **Diagram:** You can show complex relations as a diagram to visualize the underlying relations. You can scroll through the diagram and move nodes, but you cannot edit the diagram as extensively as you can via the diagram view.

Example



Saving and sharing the layout of relation views

For each relation type and complex relation type, there is a default layout of the relation view. Similar to regular [views](#), you can change most elements of the layout:

- The fields.
- The display mode: table or tiles.
- The sorting and sort direction.
- The tiles or rows per page.
- If the assets are shown in table display mode, the width of each column.

If you make changes, Collibra DGC automatically saves the layout.

If you have the **Manage shared Views, Dashboard and Search Filter** global permission, you can also override the layout of this relation type or complex relation type for all users by clicking  → **Save for all users**. The previous layout of other users is lost. However, all users can still make fresh changes.

Print an asset page or save as a PDF file

You can print an [asset page](#) or save it as a PDF file to share information about an asset outside of Collibra Data Intelligence Cloud, for example for audit, reporting or security purposes.

Note

Not all information is printed:

- Relations are represented by a simple list, with the relation type as the header. Only the names of the related assets are printed in the list. The other fields of the related assets, for example their domains and asset types, are not printed. Additionally, only the related assets of the first page of the relation table are printed. The other related assets are not printed.
- Complex relations are not printed.
- Comments are not printed.
- Attachments are not printed.
- Attributes that were never given a value (except for tags) are not printed.

Steps

1. Open an asset page.
 2. In the resource toolbar, click .
- » The print preview and the **Print** dialog box appear.

3. If required, change the print settings, such as the printer or paper size.
4. Depending on your browser and print settings, click **Save** or **Print**.

Edit an asset

You can edit an asset to suit your needs.

Steps

1. Open an asset page.
2. In the resource toolbar, click **Edit**.

3. Enter the required information.

Field	Description
Name	<p>The name of the asset.</p> <p>If identical asset names per domain is disabled for this asset type, the name of an asset must be unique in its domain. If it is disabled and you type an existing name, an error message will appear below this field.</p>
Full name	<p>The full name of the asset. The full name of an asset must always be unique in its domain.</p> <p>This field is only available if identical asset names per domain is enabled for this asset type.</p> <p>Warning Do not edit the full name of assets needed to synchronize or refresh data sources. This may cause unexpected results and break the synchronization or refresh process.</p>
Type	<p>The asset type.</p> <p>Note You cannot change the asset type of Schema, S3 File System and Tableau Server assets.</p>
Status	The status of the asset.

4. Click **Save**.

Edit the name of an asset

You can edit the name of an asset in different ways:

- From the asset page.
- By **editing** the name cell in an asset view.

Tip If [Identical asset names per domain](#) is enabled for the relevant [asset type](#), you can also edit the asset's full name.

Edit the name of an asset from the asset page

1. Open an asset page.
2. In the resource toolbar, click **Edit**.
 - » The **Edit <asset name>** dialog box appears.
3. Enter the required information.

Field	Description
Name	<p>The name of the asset.</p> <p>If identical asset names per domain is disabled for this asset type, the name of an asset must be unique in its domain. If it is disabled and you type an existing name, an error message will appear below this field.</p>
Full name	<p>The full name of the asset. The full name of an asset must always be unique in its domain.</p> <p>This field is only available if identical asset names per domain is enabled for this asset type.</p> <div style="border-left: 3px solid red; padding-left: 10px; margin-top: 10px;"> Warning Do not edit the full name of assets needed to synchronize or refresh data sources. This may cause unexpected results and break the synchronization or refresh process. </div>

4. Click **Save**.

Identical asset names per domain

'Identical asset names per domain' is a feature that allows you to specify a regular **name** and a unique **full name** for an asset. If 'identical asset names per domain' is enabled for an [asset type](#), then multiple assets of that asset type can have an identical name in a domain.

Note All assets must have a unique full name per domain, regardless of whether or not ‘identical asset names per domain’ is enabled.

Technically, all assets have two names:

- A name: the regular name that is used by default in most places in the UI, such as the asset page title bar, preview panes, diagrams, search results, automatic hyperlinks and relation tables.
- A full name: the fully qualified name that must be unique within a domain. It is mainly used for technical operations (through the API) and when you edit an asset whose asset type allows identical names per domain.

By default, the name of an asset is the same as its full name. Collibra Data Governance Center automatically synchronizes them, so users don't notice the difference. However, for some asset types, it may be beneficial to allow users to edit the name and full name independently of one another, and have multiple assets with an identical name in one domain. This has the following benefits:

- You can use a shorter or simpler name for an asset that has a long or complex full name. This is particularly useful in Collibra Data Catalog.
- You can use the same name for multiple assets in one domain. Keep in mind that the full name still has to be unique for each asset in a domain.

Affected features

- The API is backward-compatible with regard to this feature, meaning the behavior of the API is not affected by whether or not ‘identical names per domain’ is enabled.
- Drop-down fields
 - In asset drop-down fields, you can search for an asset based on the name or the full name.

This also includes the drop-down menus to:

- Add manual hyperlinks to an asset in a text attribute.
- Add (complex) relations on an asset page and in assets table.
- Filter relations on an asset table.
- Add data to a data set.

- **Tables**

- The **Name** column contains the name. This column cannot be removed because it is used by [hierarchy](#).
- The **Full name** column is a regular column that is optional.
- The relation columns contain asset names.
- You can use both the name and full name as:
 - An advanced filter.
 - A sort option.
 - A column filter.
- The preview pane shows the asset's name.
- Editing cells:
 - If the asset type allows identical asset names per domain, you can edit both the name and full name of an asset, independently of one another.
 - If the asset type does not allow identical asset names per domain, editing either the name or full name changes both values.
 - Bulk editing the **Name** and **Full name** column is not possible.

- **Tiles**

- The name is used in tile header.
- **Full name** is a regular field. It can be moved, hidden and you can edit field name.
- Name and full name are both available as a sort option.

- **Diagrams**

- The default node name is the asset name. You can also use the full name (or any other property) as node name.
- You can use **Name** and **Full Name** as a node overlay.
- The [preview](#) shows the name of an asset.

- **Export**

- The name is always exported to the **Name** column.
- If you select **Add the characteristics needed for reimport**:
 - The full name is always exported (to uniquely identify each asset during re-import).
 - Relations are exported based on the full name: relation name [role/co-role asset type] → Full Name.
- If you do not select **Add the characteristics needed for reimport**:
 - If the **Full name** column is added to the view, it is exported to the **Full name** column.

- Relations are exported based on the name: relation name [role/co-role asset type] → Name.

- **Import**

- Full name has to be mapped, unless you map the 'ID' column (only available in special view 'All Characteristics').
- Full name will auto-map to the **Full name** column.
- When you import a file that was exported pre-5.4, you have to manually map the **Full name** column of the view to the **Name** column of the import file.
- Name will auto-map to the **Name** column.
- Name does not have to be mapped.
- Complex relations:
 - Relation asset full name auto-maps to **relation name [role/co-role asset type]** → **Full Name**.
 - When you import a file that was exported pre-5.4, you have to manually map the **Full name** column of the view to the **relation name [role/co-role asset type]** → **co-role/role asset type** column of the import file.
 - Relation asset display name should not be mapped.

- **Search**

- Basic search: searches for assets by name.
- Advanced search: searches for assets by name, when name is in the search criteria.
- Currently, you can not define a search filter for the 'full name' field.
- In the search results, the **Name** column shows the asset name.
- The preview shows the asset name.

- **Validation rules**

- To refer to the name in your validation rule scripts, use `displayName`.
- To refer to the full name in validation rule script, use `fullName`.
- Validation rules are backward compatible with regard to this feature, meaning a validation rule written prior to 5.4, will behave the same in 5.4.

Actions

- Administrators can **enable or disable** identical asset names per domain for an asset type.

Note If identical asset names per domain has been enabled for an asset type and there are multiple assets in the domain with identical names, the feature can still be disabled. Collibra DGC will simply show the full name of such assets, throughout the UI.

- You can [edit](#) the asset name and full name.
- You can add the **Full name** field to a [table](#) or [tile](#).

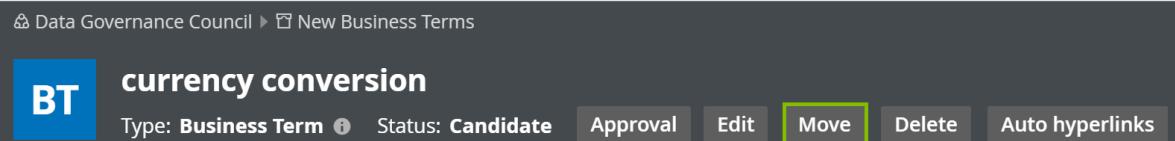
Move an asset to another domain

You can move a single asset to a different domain.

Tip You can also [move](#) multiple assets at once.

Steps

1. Open a table or set of tiles.
2. Click the name of the asset you want to move to another domain.
3. In the subheading, click **Move**.



4. In the **Move** dialog box, click the new domain.
5. Click **Save**.

Move multiple assets to another domain

You can move multiple assets to another domain in two ways.

Tip Either way you choose, you can select all the assets on the page at once by clicking the check box next to the **Name** column header.

Note You can only do this if you want to move all assets to the same domain.

Move multiple assets from a domain page

1. Open a domain page.
2. In the tab pane, click **Assets**.
3. Select the the assets you want to move.
4. In the action toolbar, click **Move**.
5. In the **Move selected assets** dialog box, select the new domain.
6. Click **Save**.

Move multiple assets from the global view

1. Open the [global view](#).
2. Select the check boxes in front of the assets you want to move.
3. In the action toolbar, click **Move**.
4. In the **Move selected assets** dialog box, click the new domain.
5. Click **Save**.

Delete an asset

This section describes how to delete an asset in table display mode and tile display mode.

Tip You can also [delete multiple assets at once](#).

Warning Deletion is permanent, you cannot undo it. If you delete a [configuration asset](#) of a data source, you also delete its configuration. Register your data source again to create a new configuration asset or contact support for more information.

Via an asset page

1. Open an asset page.
2. Do one of the following:
 - In the resource toolbar, click **Delete**.
 - In the resource toolbar, click **More > Delete**.
3. Click **Delete [asset type]**.

Tip If Data Catalog experience is enabled, the **Actions** menu replaces the **More** menu on Data Catalog's asset pages.

Delete an asset from a view

In table display mode

1. Open a view in table display mode.
2. If necessary, **filter** using a table filter or a column filter to easily find the asset.
3. Select the check box in front of the asset you want to delete.
4. In the action toolbar, click **Delete**.
 - » The **Delete Assets** dialog box appears.
5. Click **Yes**.

In tile display mode

1. Open a view in tile display mode.
2. If necessary, **filter** using a tile filter or a field filter to easily find the asset.
3. Select the tile you want to delete.
4. In the action toolbar, click **Delete**.
 - » The **Delete Assets** dialog box appears.
5. Click **Delete [asset type]**.

Delete multiple assets

This section describes how to delete multiple assets at once, in table display mode and tile display mode.

Note Deletion is permanent, you cannot undo it.

Delete multiple assets in table display mode

1. Open a table.
2. If necessary, [filter](#) the table using a table filter or a column filter.
3. Select the check boxes in front of the assets you want to delete.

Tip You can select all the visible assets at once by clicking the check box next to the **Name** column header.

4. In the action toolbar, click **Delete**.
 - » The **Delete Assets** dialog box appears.
5. Click **Yes**.

Delete multiple assets in tile display mode

1. Open a set of tiles.
2. If necessary, [filter](#) the tiles using a tile filter or a field filter.
3. [Select](#) the tiles you want to delete.
4. In the action toolbar, click **Delete**.
 - » The **Delete Assets** dialog box appears.
5. Click **Yes**.

Characteristics

Characteristics is a generic term for [attributes](#), [relations](#) and [complex relations](#).

Add characteristics to an asset

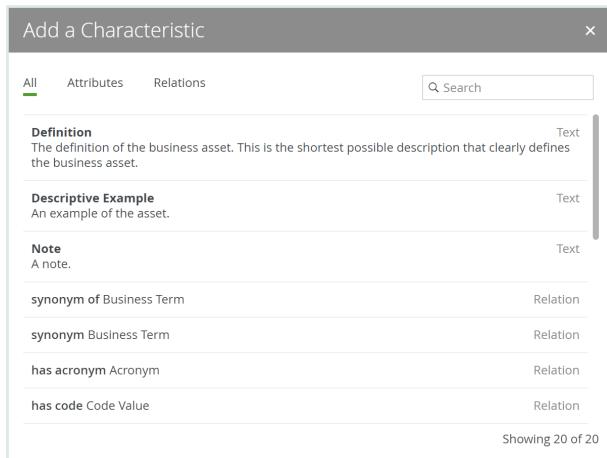
You can add a [characteristic](#) to an asset to add additional information about it.

Prerequisite

You have [assigned](#) the characteristic type to the relevant [assignment](#) of the asset's type.

Steps

1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
 - » The Add a characteristic dialog box appears.



3. In the Add a Characteristic dialog box, do one of the following:

If ...	then ...
You want to add an attribute :	Click Attributes .
You want to add a relation :	Click Relations .
You want to filter the characteristics:	<ol style="list-style-type: none"> a. Click All. b. Click in the Filter field. c. Start typing the name of the characteristic that you want to add.

Note If the characteristic type is not in the list, it is not in the [asset type's assignment](#).

4. Enter the required information.

Note The required information depends on the characteristic that you are adding.

5. Click **Save**.

Edit asset characteristics

You can edit characteristics of an asset. The procedure you should follow depends on the [type of characteristic](#) you want to edit.

If ...	then ...
you want to edit an attribute :	<ol style="list-style-type: none"> 1. Open an asset page. 2. Double-click the attribute or click . 3. Edit the attribute. 4. Click Save.
you want to edit a relation :	<ol style="list-style-type: none"> 1. Delete the existing relation. 2. Create a new relation.
you want to edit a complex relation :	<ol style="list-style-type: none"> 1. Open an asset page. 2. Go to the complex relation you want to edit. 3. Click  to change one or more relations. » The Edit Complex Relation dialog box is shown. 4. Edit the content of the complex relation, to meet your needs. <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note On the right, the minimum and maximum amount of items that are required are shown.</p> </div> <ol style="list-style-type: none"> 5. Click Next and then Finish.

Note If the characteristic type is not in the list, it is not in the [asset type's assignment](#).

Remove asset characteristics

You can remove an asset [characteristic](#) as long as the [minimum number of occurrences](#) in the [assignment](#) has not been reached.

1. Open an asset page.
2. At the end of the line, click  .
» A dialog box appears.
3. Click **Yes**.

Note These steps can be used to remove attributes, relations or complex relations

Attributes and attribute types

An **attribute** is a characteristic that describes an asset by means of an individual field. The attribute's type defines the class of information that the attribute contains.

About attributes and attribute types

An **attribute** is a characteristic that describes an asset by means of an individual field. The attribute's type defines the class of information that the attribute contains.

You can **add** an attribute to an asset if the attribute's type is in the relevant **assignment** of the **asset's type**.

Examples of attributes and attribute types

The following table contains attribute types and a description of the attribute that can be added to an asset.

Attribute type	Description of the attribute	Example of an attribute
Definition	The description with background information on the asset	Asset: Customer Definition: A person, company or organization that purchases a commodity or service.
Last Review Date	The date on which the asset was reviewed.	02/05/2020

Attribute type	Description of the attribute	Example of an attribute
Frequency	The rate at which an asset changes over a particular period of time.	Daily
Rows Failed	The number of rows that failed a rule.	15
Personally Identifiable Information	A boolean field to indicate whether an asset contains personally identifiable information.	True

Kinds of attribute types

Attribute types can contain different kinds of information, for example, free text, dates and numbers.

Field	Description
Date	<p>A date value. If you edit attributes of this type, you can pick a date using the date selector.</p> <p>Note The date format that is displayed in the UI, can be different depending on the language settings in your user profile. For example, dd/mm/yyyy or yyyy/mm/dd.</p>
Multiple Selection	A field that allows multiple values that you can select from a predefined list.
with values	The values from which you can select one or more.
Number	A number, or a number with a fraction.
Only integers. (...,-2, -1, 0, 1, 2, ...)	Checkbox to only allow integer numbers.

Field	Description
Metric	Checkbox to make this attribute type a metric. This allows you to assign this attribute type as a metric when you create a data quality rule.
Selection with values	A field that allows a single value that you can select from a predefined list. The values from which you can select one.
Text	Textual input which may contain formatting.
Plain Text	Checkbox to disable formatting.
True/False	A binary option that allows you to indicate whether something is true or false.
Metric	Checkbox to make this attribute type a metric. This allows you to assign this attribute type as a metric when you create a data quality rule.

Note An attribute can contain up to 100.000 bytes, which corresponds to roughly up to 100 000 characters in the source code of the attribute.

Add an attribute

You can add [attributes](#) to an asset to describe that asset.

Prerequisites

The attribute's type is in the relevant [assignment](#) of the asset's type.

Tip If the minimum cardinality of the relevant attribute type is greater than 0, or if an attribute of that type already exists, the asset page always contains an attribute field for the attribute type.

Add an attribute from an asset page

1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
 - » The **Add a characteristic** dialog box appears.
3. In the **Add a Characteristic** dialog box, click the **Attributes** tab.
 - » The **Add <attribute type>** dialog box appears.
4. Enter the value of the attribute.

Example If you want to add a Description attribute, enter the description that you want to add to the asset.

5. Click **Save**.

Add an attribute from a table

1. Open a view in table display mode.
2. If required, add the column of the attribute type to the table:
 - a. Above the table, to the right, click → **Fields**.
 - b. Click **Select fields** → **Attributes**.
 - c. Select the relevant attribute types.
 - d. Click **Update**.
 - e. Click **Save**.
3. Do one of the following:
 - Double-click a cell.
 - Hover your mouse over a cell and click .
 - » The cell editor appears.
4. Enter the required information.
5. Do one of the following:

If you want to change...	do...
the current row only:	a. Click .

If you want to change...	do...
all visible rows:	a. Click Apply to all visible rows . b. Click ✓.
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click ✓.

Edit an attribute

You can edit the value of an attribute.

Example You can edit the definition of an asset.

Edit an attribute from the asset page

1. Open an asset page.
2. Double-click the attribute or click .
3. Edit the attribute.
4. Click **Save**.

Edit an attribute from a table

1. Open a view in table display mode.
2. If required, add the column of the attribute type to the table:
 - a. Above the table, to the right, click  →  **Fields**.
 - b. Click **Select fields** → **Attributes**.
 - c. Select the relevant attribute types.
 - d. Click **Update**.
 - e. Click **Save**.
3. Do one of the following:
 - Double-click a cell.
 - Hover your mouse over a cell and click .
» The cell editor appears.

4. Enter the required information.
5. Do one of the following:

If you want to change...	do...
the current row only:	a. Click ✓.
all visible rows:	a. Click Apply to all visible rows . b. Click ✓.
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click ✓.

Delete an attribute

You can delete **attributes** as long as the **minimum number of occurrences** has not been reached.

Delete an attribute from an asset page

1. Open an asset page.
2. At the end of the line, click  .
» A dialog box appears.
3. Click **Yes**.

Delete an attribute from a table

1. Open a view in table display mode.
2. If you don't see the column of the attribute type, add it to the table:
 - a. Above the table, to the right, click  → **Fields**.
 - b. Click **Select fields** → **Attributes**.
 - c. Select the relevant attributes.
 - d. Click **Update**.
 - e. Click **Save**.

3. Click  .
 - » The **Delete attribute** dialog box appears.
4. Click **Yes**.
 - » The attribute field is now empty.

Relations and relation types

A relation is a characteristic that describes how two assets relate to each other. The relation's type defines the relation and determines which assets can be related.

About relations and relation types

A relation is a characteristic that describes how two assets relate to each other. The relation's type defines the relation and determines which assets can be related.

You can [add](#) a relation between assets if the relation's type is in the relevant [assignment](#) of the [asset's type](#).

Elements in a relation type

A relation type has four elements:

Element	Description
Head	Asset type of assets that can be the head of the relation.
Tail	Asset type of assets that can be the tail of the relation.
Role	The description of the relation type going from the head asset to the tail asset.
Co-role	The description of the relation type going from the tail asset to the head asset.

Note Relations are bidirectional. For example, in the relation type "Table is part of/contains Database", the Table asset is part of the Database asset, and the Database asset contains the Table asset.

Add a relation

You can add a [relation](#) to link two assets.

Prerequisites

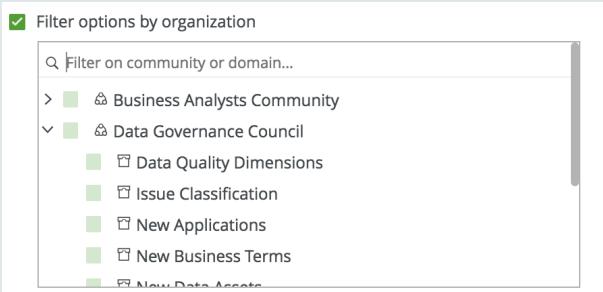
The relation's type is in the relevant [assignment](#) of the asset's type.

Tip If the minimum cardinality of the relevant relation type is greater than 0, or if a relation of that type already exists, the asset page always contains a relation table for the relation type.

Add a relation from the asset page

1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
 - » The **Add a characteristic** dialog box appears.
3. Click **Relations**.
4. Search for and click **<the relation type that you want to create>**.
 - » The **Add relation type <asset type>** dialog box appears.

5. Enter the required information.

Option	Description
Assets	The name of the related asset.
Filter suggested assets by organization	<p>Option to filter the suggestions based on selected communities and domains.</p> <p>If this option is selected, the organization tree appears. You can then filter and select domains and communities.</p>  <p>The screenshot shows a filtering interface with a checked checkbox labeled "Filter options by organization". Below it is a search bar with placeholder text "Filter on community or domain...". A list of items follows, each preceded by a small green square icon and a checkmark checkbox:</p> <ul style="list-style-type: none"> > <input checked="" type="checkbox"/> Business Analysts Community < <input checked="" type="checkbox"/> Data Governance Council <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Data Quality Dimensions <input checked="" type="checkbox"/> Issue Classification <input checked="" type="checkbox"/> New Applications <input checked="" type="checkbox"/> New Business Terms <input checked="" type="checkbox"/> New Data Assets
Start date	Optionally enter the date on which the relation between the assets becomes applicable.
End date	Optionally enter the date on which the relation between the assets is no longer applicable. Leave this field empty to create a permanent relation.

6. Click **Save**.

Add relations from a table

1. Open a view in table display mode.
2. If you don't see the column of the relation type, add it to the table:
 - a. Above the table, to the right, click → **Fields**.
 - b. Click **Select fields** → **Relations**.
 - c. Select the relevant relation types.
 - d. Click **Update**.
 - e. Click **Save**.
3. Do one of the following:
 - Double-click a cell.
 - Hover your mouse over a cell and click .

» The cell editor appears.
4. Enter one or more assets.
5. Do one of the following:

If you want to change...	do...
the current row only:	a. Click .
all visible rows:	a. Click Apply to all visible rows . b. Click .
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click .

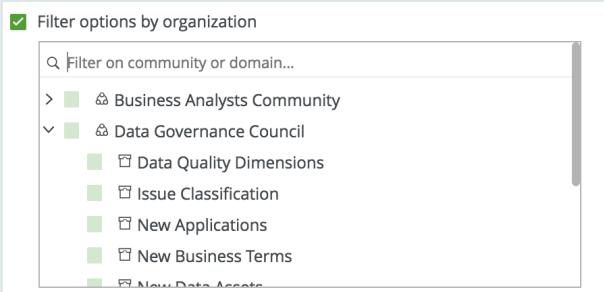
Edit a relation

You cannot edit a **relation**, but you can delete the existing relation and create a new one.

Edit a relation from an asset page

1. **Delete the existing relation.**
 - a. Open an asset page.
 - b. At the end of the line, click .
 - » A dialog box appears.
 - c. Click **Yes**.
2. **Add a new relation.**
 1. Open an asset page.
 2. In the tab pane, click **Add Characteristic**.
 - » The **Add a characteristic** dialog box appears.
 3. Click **Relations**.
 4. Search for and click **<the relation type that you want to create>**.
 - » The **Add relation type <asset type>** dialog box appears.

5. Enter the required information.

Option	Description
Assets	The name of the related asset.
Filter suggested assets by organization	<p>Option to filter the suggestions based on selected communities and domains.</p> <p>If this option is selected, the organization tree appears. You can then filter and select domains and communities.</p>  <p>The screenshot shows a filtering interface with a checked checkbox labeled "Filter options by organization". Below it is a search bar with the placeholder "Filter on community or domain...". A tree view follows, starting with "Business Analysts Community" (indicated by a plus sign) and "Data Governance Council" (indicated by a minus sign). Under "Data Governance Council", there are five items, each with a checkbox: "Data Quality Dimensions", "Issue Classification", "New Applications", "New Business Terms", and "New Data Assets".</p>
Start date	Optionally enter the date on which the relation between the assets becomes applicable.
End date	Optionally enter the date on which the relation between the assets is no longer applicable. Leave this field empty to create a permanent relation.

6. Click **Save**.

Edit a relation from a table

1. Open a view in table display mode.
2. If required, add the column of the relation type to the table:
 - a. Above the table, to the right, click → **Fields**.
 - b. Click **Select fields** → **Relations**.
 - c. Select the relevant relation types.
 - d. Click **Update**.
 - e. Click **Save**.
3. Do one of the following:
 - Double-click a cell.
 - Hover your mouse over a cell and click .

» The cell editor appears.
4. Remove or add one or more assets.
5. Do one of the following:

If you want to change...	do...
the current row only:	a. Click .
all visible rows:	a. Click Apply to all visible rows . b. Click .
selected rows:	a. Select one or more rows. b. Click Apply to all selected rows . c. Click .

Delete a relation

You can delete **relations** between two assets as long as the **minimum number of occurrences** in the **assignment** has not been reached.

Delete a relation from an asset page

1. Open an asset page.
2. At the end of the line, click  .
» A dialog box appears.
3. Click **Yes**.

Note If view your relation in tile display mode, the  is in the upper-right corner.

Delete a relation from a table

1. Open a view in table display mode.
2. If you don't see the column of the relation type, add it to the table:
 - a. In the content toolbar, click  →  **Fields**.
» The **Fields** dialog box appears.
 - b. Click **Select fields** → **Relations**.
 - c. Select the relevant relation types.
 - d. Click **Update**.
 - e. Click **Save**.
3. Do one of the following:
 - Double-click a cell.
 - Hover your mouse over a cell and click .
» The cell editor appears.
4. Remove one or more assets from the cell.
5. Do one of the following:

If you want to change...	do...
the current row only:	a. Click  .
all visible rows:	a. Click Apply to all visible rows . b. Click  .

If you want to change...	do...
selected rows:	<ol style="list-style-type: none"> a. Select one or more rows. b. Click Apply to all selected rows. c. Click ✓.

Complex relations and complex relation types

A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The complex relation's type defines the relations type and attributes the complex relation can have.

About complex relations and complex relation types

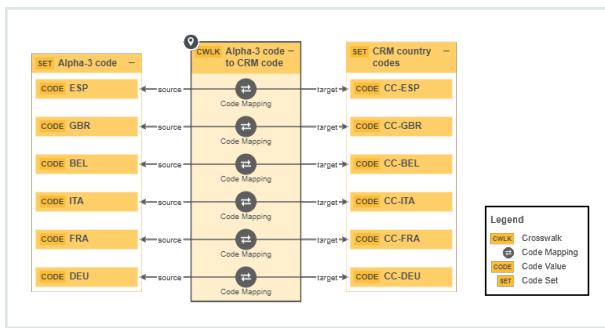
A complex relation is a characteristic that describes how two or more assets relate to each other. It can also have attributes of its own, for example, Description and Priority. Technically, they are objectified associations: simplified assets that cannot exist independently. The complex relation's type defines the relations type and attributes the complex relation can have.

You can [add](#) a complex relation between assets if the complex relation's type is in the relevant [assignment](#) of the [asset's type](#).

Note A complex relation cannot have more than 32 767 relations to assets.

Example

When you [add](#) a complex relation, you add one or more relations between the assets and the complex relation itself. The assets of those relations are always the head of the relation, while the complex relation is always the tail.



The following example creates a complex relation type called *Code Mapping*, with three relation types (*source*, *target* and *crosswalk*) and two attribute types (*Description* and *Transformation Logic*).

The screenshot shows the 'Create complex relation type' dialog box. It includes fields for Name (Code Mapping), Description (Complex mapping between two or more code values), Display options (Color hex value: #E6E6E6, Symbol icon: Network transmission), Relations (source, target, crosswalk), and Attributes (Description, Transformation Logic). Buttons for Cancel and Save are at the bottom.

The following example creates a complex relation of the type *Code Mapping*. For each relation type in the complex relation type, you can select head assets. Above the fields, you can see the minimum and maximum occurrences for each relation type. For each selected head asset, a relation of the relevant type is created between the head asset and the complex relation. In a next step, you can add attributes to the complex relation.

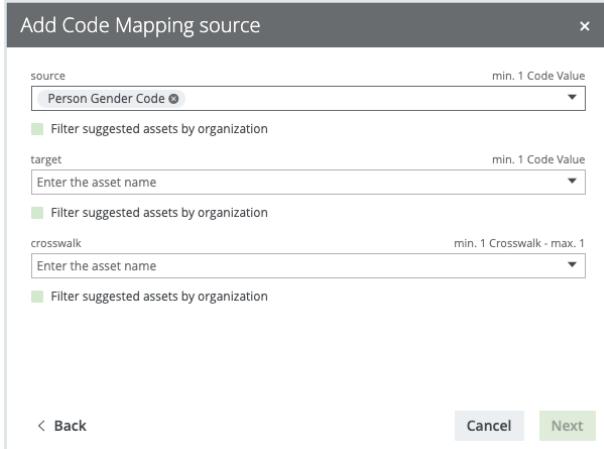
Add Code Mapping source

source min. 1 Code Value
Person Gender Code ⓘ
Filter suggested assets by organization

target min. 1 Code Value
Enter the asset name
Filter suggested assets by organization

crosswalk min. 1 Crosswalk - max. 1
Enter the asset name
Filter suggested assets by organization

< Back Cancel Next



Cardinality of relation types and attribute types in complex relation types

With complex relations, you can associate two or more assets in a relation and add attributes to the complex relation. When you [create a complex relation type](#), you set the cardinality of the relation types and attribute types to determine how many relations and attributes you can or must provide when you create a complex relation of that type.

Tip For every complex relation type, at least one relation type must have a minimum cardinality of 1 or greater.

Add a complex relation

You can add a [complex relation](#) to create a link between two or more assets and add attributes.

Tip If you want to add many complex relation, you can also [import](#) them.

Prerequisites

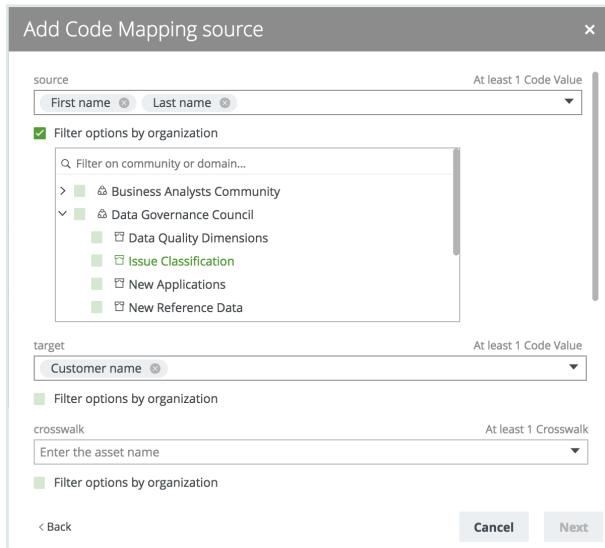
The complex relation's type is in the relevant [assignment](#) of the [asset's type](#).

Tip If the minimum cardinality of the relevant complex relation type is greater than 0, or if a complex relation of that type already exists, the asset page always contains a complex relation table for the complex relation type.

Steps

1. Open an asset page.
2. In the tab pane, click **Add Characteristic**.
 - » The **Add a characteristic** dialog box appears.
3. In the **Add a Characteristic** dialog box, click the **Relations** tab
4. Select a relation of the type **Complex Relation**, for example, *Field Mapping Target*.
 - » The **Add <complex relation type>** dialog box appears.
5. Enter the required information.

The required fields depend on the configuration of the complex relation type.



Tip The minimum and maximum amount of assets that you can add is displayed in the right upper corner of every relation field. If there is no maximum amount, the maximum amount of assets to add in the relation was not set.

6. Click **Next**.
7. Depending on the selected complex relation type, fill in the necessary information.
8. Click **Finish**.

Edit a complex relation

You can edit a [complex relation](#), for example if you want to edit its legs or attributes.

Steps

1. Open an asset page.
2. Find the complex relation you want to edit.
3. Click  to change one of more relations or attributes.
 - » The **Edit Complex Relation** dialog box appears.
4. Enter the required information.
The required fields depend on the [configuration](#) of the complex relation type.
5. Click **Next**.
6. Depending on the selected complex relation type, enter in the necessary information.
7. Click **Save**.

Delete a complex relation

You can delete a [complex relation](#) between two or more assets as long as the [minimum number of occurrences](#) in the [assignment](#) has not been reached.

Steps

1. Open an asset page.
2. At the end of the line, click .
 - » A dialog box appears.
3. Click **Yes**.
 - » The complex relation is deleted.

Diagrams

Diagrams allow you to show and interact with many assets and relations in an easy-to-read way. A diagram helps you to quickly see to which other assets a specific asset is

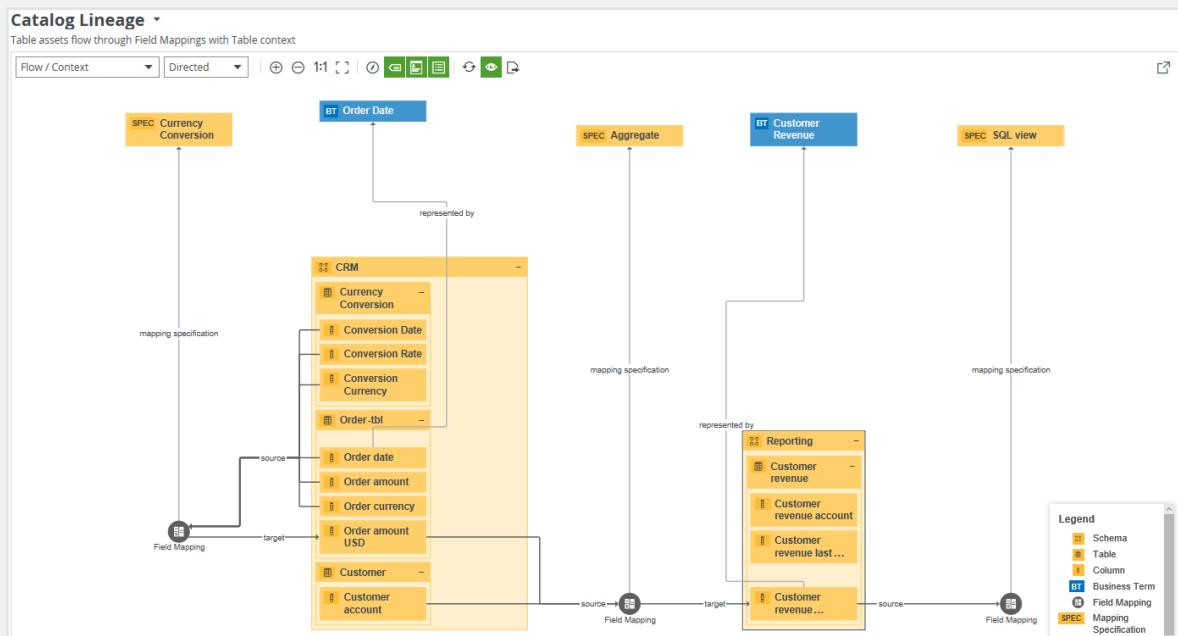
related. Two assets are related if you can navigate from one to the other by traversing one or more relations.

You can find a diagram in the tab pane of every asset page.

You can work with diagrams in the [diagram editor](#), to determine how a diagram is shown. Collibra Data Governance Center comes with several packaged [diagram views](#) for common use cases. You can also create and share your own diagram views.

Example

The image below shows a diagram with assets, relations and complex relations.



In this chapter

Diagram and diagram view terminology

To work with diagrams and diagram views, you have to understand the following concepts.

Concept	Description
Diagram	The diagram that results from applying a diagram view to a given asset. It sometimes also called "result diagram".
Diagram view	<p>A kind of query that determines which nodes and edges have to be shown in a diagram for a given asset.</p> <p>The diagram view also determines how the nodes and edges are shown.</p> <p>You can define multiple diagram views for the same asset type.</p>
Loop	<p>A diagram view that contains a path that revisits the same node. For example, [Business Asset] groups [Business Asset], or [Data Element] sources [Field Mapping], [Field Mapping] targets [Data Element].</p> <p>A diagram view with a loop can lead to a diagram that has very long paths.</p>
Node	<p>In a diagram, a node is an asset or a complex relation.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note</p> <ul style="list-style-type: none"> The node for an asset is depicted by a rectangle. The node for a complex relation is depicted by a circle or a rectangle with rounded corners. </div>
Boxed node	A node that is contained inside a boxing node. For example, a Column asset can be boxed by a Table asset.
Boxing node	<p>A node that contains one or more boxed nodes. If it is expanded, you can see the boxed nodes. If it is collapsed, you cannot see the boxed nodes.</p> <p>For example, a Table asset can box multiple Column assets.</p>
Locked node	A collapsed boxing node that cannot be expanded.

Concept	Description
Incoming relation	An incoming relation of a node is when the selected node is the tail side of the relation type, in other words, an edge for which this node is the 'to' node. For example, the relation [Business Term] has code / is code for [Code Value] is incoming for a Code Value.
Outgoing relation	An outgoing relation of a node is when the selected node is the head side of the relation type, in other words, an edge for which this node is the 'from' node. For example, the relation [Business Term] has code / is code for [Code Value] is outgoing for a Business Term.
Edge	In a diagram, an edge is a directed relation between two nodes. The word 'directed' indicates that the direction in which the relation is used is relevant for the diagram. An edge is normally depicted by an arrow between two nodes. The arrow points to the 'to' node. It can also be represented by means of boxing and boxed nodes, in which one node contains the other.
Flow	The entire course of nodes and edges from the start node to the end node.
Context	A collection of nodes that does not belong in the flow. The nodes have an incoming edge from a flow node. For example, nodes that represent a System asset can be context nodes.
Overlay	An overlay is a characteristic of a node that is shown in the diagram. Overlays are added in a diagram view and can be shown or hidden via the diagram toolbar .
Traversal strategy	The logic that describes which relations and assets are included in the diagram.

Nodes and edges

Nodes and edges are the fundamental building blocks of diagrams and diagram views:

- In diagrams, nodes are rectangles or circles that represent, respectively, assets or complex relations. Edges represent relations between assets or between assets and complex relations.
- In diagram views, nodes are rectangles or circles that represent, respectively, asset types or complex relation types. Edges represent relation types between asset types or between asset types and complex relation types.

Both nodes and edges can be represented in different ways in diagrams and diagram views.

Relations connect assets, or assets and complex relations. In diagrams, this is represented by edges that connect nodes. Each node can have incoming and outgoing edges:

- An edge of a node is incoming if that node is the 'to' node of the edge. This depends on the relation type and the direction of the edge:
 - The node is the tail side of the relation type, and the edge has the role direction.
 - The node is the head side of the relation type, and the edge has the co-role direction.
- An edge of a node is outgoing if that node is the 'from' node of the edge. This depends on the relation type and the direction of the edge:
 - The node is the head side of the relation type, and the edge has the role direction.
 - The node is the tail side of the relation type, and the edge has the co-role direction.

Example

Consider the diagram below:



- The red node represents a Tableau Data Source asset.
- The blue node represents a Tableau Workbook asset.
- The arrow edge between the nodes represents a relation of the type "Tableau Data Source is source of / is source for Tableau Workbook".
 - The edge is outgoing for the Tableau Data Source node.
 - The edge is incoming for the Tableau Workbook node.

Node and edge styles

Edges represent relations, which in turn describe a link between assets. To represent the meaning of those links in a diagram, edges can be represented in different ways.

Depending on the meaning of the relation, you can choose which edge style suits best.

- Arrow: The most basic way to represent an edge is by means of an arrow. This representation is ideal for visualizing flows and causal relations.

Example

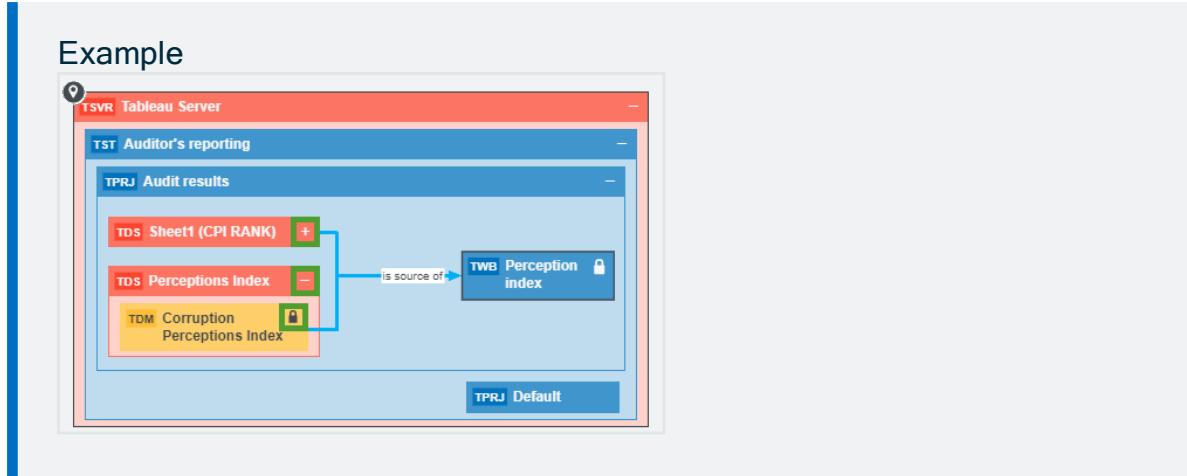


- Boxed and boxing: Many relation types are used to describe a part-whole relation, such as "Tableau Project groups / is grouped by Report". For that reason, you can also represent the relation between those assets as boxing nodes and boxed nodes.

A node that has an outgoing edge of the boxing style, becomes a boxing node. For the boxed node, the same edge is an incoming edge of the boxed style. Additionally, one boxing node could contain several boxed nodes, which have edges of their own.

Boxing nodes can be expanded or collapsed:

- An expanded boxing node shows its boxed nodes.
You can collapse them by clicking $-$ in the upper right corner of the node.
- A collapsed boxing node does not show its boxed nodes. As a consequence, if the hidden boxed nodes have arrow edges to nodes that are not contained by the boxing nodes, the diagram shows them as arrow edges of the boxing node.
You can expand them by clicking $+$ in the upper right corner of the node.
- A locked node is a collapsed node that cannot be expanded.
You can recognize locked boxing nodes by the 🔒 in the upper right corner.
You can still explore the nodes to see the edges.



Duplicate nodes

In some cases, the same asset might be represented by more than one node. In other words, there are two nodes representing the same asset, on the same diagram. This can be caused by several of reasons, but the most common reason is that an asset matches more than one node of the diagram view.

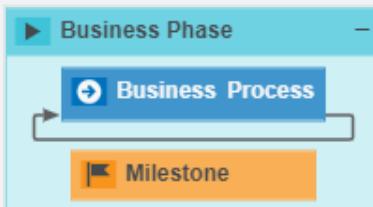
A node in a diagram view represents an asset type or a complex relation type. In the result diagram, this node represents an asset of that asset type or an asset of a child asset type. As a result, if a diagram view contains a node for an asset type and a node for its child asset types, the result diagram may contain an asset of the child asset type that matches both nodes of the diagram view. Therefore, the asset node is duplicated.

Example

Suppose the following situation:

- The Business Process asset type has two child asset types: Business Phase and Milestone.
- You have the following assets:
 - Business Process asset: Define Strategy
 - Business Phase asset: Plan
 - Milestone asset: Validate Strategy
- Your assets have the following relations:
 - Plan Business Phase has subprocess Define Strategy Business Process
 - Plan Business Phase has Milestone: Validate Strategy Milestone
 - Define Strategy Business Process Next: Validate Strategy Milestone
- The diagram view configuration is the following:
 - The Business Process node has a boxing edge: Business Process has subprocess Business Phase.
 - The Business Phase node has two boxing edges:
 - Business Phase has subprocess Business Process 2
 - Business Phase has Milestone
 - Business Process 2 node has an arrow edge: Business Process 2 Next Business Process 2.

This leads to the following diagram view:



Because the Business Process asset type has two child asset types that are also on the diagram view, the result diagram can have duplicate nodes. In the example below, the Validate Strategy asset, of the Milestone asset type, is represented by two separate nodes.

Because Milestone is a child asset type of Business Process, Milestone assets can match both Milestone nodes and Business Process nodes. Furthermore, the Validate Strategy Milestone asset has two separate incoming edges:

- The Plan Business Phase has Validate Strategy Milestone, with the boxing style.

- The Define Strategy Business Phase asset Next Validate Strategy, with the arrow style.

Therefore, the Validate Release Strategy Milestone node is duplicated:



Diagram layouts

Diagram layouts determine the location of nodes and edges in a [diagram](#), but do not change which nodes and edges are shown.

You can [select](#) a diagram layout in the [diagram toolbar](#).

Diagram layout	Description
Flow / Context	<p>Nodes and edges are shown in a flow and a context region.</p> <p>In the flow region, nodes are shown mostly from left to right.</p> <p>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.</p> <p>If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right.</p> <p>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</p>
Hierarchy left - right	Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout.

Diagram layout	Description
Hierarchy top - down	Nodes and edges are shown in a flow, from top to bottom.
Hierarchy bot-tom - up	Nodes and edges are shown in a flow, from bottom to top.
Circular	<p>Nodes and edges are arranged in a circular fashion.</p> <p>Boxing nodes are not supported in this layout, therefore:</p> <ul style="list-style-type: none"> The diagram is completely redrawn. The explored nodes are removed from the diagram. The nodes expand or collapse to their initial state. Returning to a layout that supports boxing nodes completely redraws the diagram.
Radial	<p>Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.</p> <p>Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.</p>
Smart Organic	Nodes and edges are distributed in a well-balanced manner, with few edge crossings.

Traversal strategies

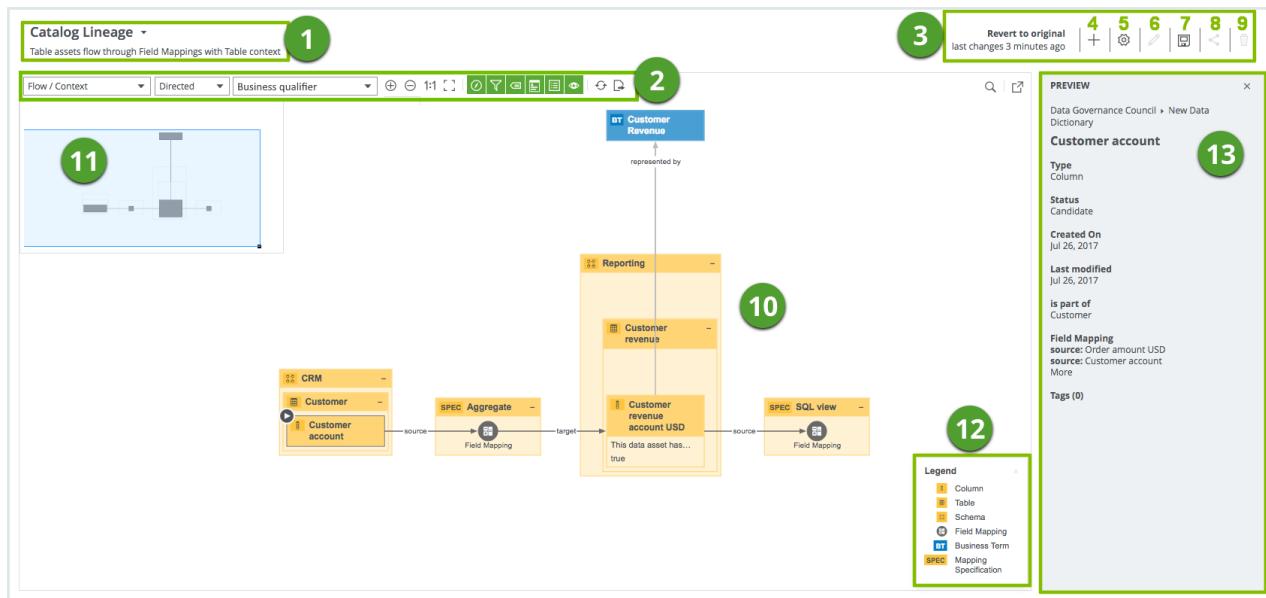
A traversal strategy determines which nodes and edges are traversed and displayed in a diagram.

The [diagram view](#) determines the initial traversal strategy, but you can [select](#) another one in the [diagram toolbar](#).

Traversal strategy	Description
End-to-end	<p>For the start node, Collibra Data Governance Center traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.</p> <p>For each encountered node, Collibra DGC traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra DGC looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.</p> <p>This is the default traversal strategy.</p>
Upstream	<p>For the start node, only the incoming edges are traversed and shown.</p> <p>For each node encountered, only the incoming edges are traversed.</p>
Downstream	<p>For the start node, only the outgoing edges are traversed and shown.</p> <p>For each node encountered, only the outgoing edges are traversed.</p>
Complete	<p>For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram.</p> <p>For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node.</p> <p>Warning This strategy can result in a very large diagram that can take a long time to load.</p>

Diagram editor

The diagram editor allows you to view and edit [diagrams](#).



No	Name	Description
1	View title	The name and description of the current diagram view . You can select a different view from a list of pinned and applicable views for an asset of this type. You can open the list of views when you click the view name and then Show all .
2	Diagram toolbar	The toolbar to work with the diagram.
3	View bar menu	The buttons to manage the diagram view.
4	+	The button to create a new diagram view, starting from the selected node.
5	⚙️	The button to edit the current diagram view.
6	📝	The button to edit the name and description of the current diagram view.
7	💾	The button to save the diagram view as a new view.
8	🔗	The button to share the diagram view.
9	🗑️	The button to delete the diagram view.

No	Name	Description
10	Diagram	This is the actual depiction of the traceability of the current asset, according to the selected diagram view .
11	Overview ()	The box to zoom and navigate a diagram that is too large to fit the screen. You can move it to anywhere in the diagram.
12	Legend	The legend explains the color codes and symbols of the items in the diagram. You can move it to anywhere in the diagram. For each asset type and complex relation type that is visible on the diagram, the legend shows the color and symbol, followed by the name of the type. If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend. Tip Click a row in the legend to select all occurrences of that type in the diagram. You can use this to expand or collapse all nodes of the same type.
13	Preview panel	The preview panel with information about the selected node.

Diagram toolbar

The toolbar of the [diagram editor](#) helps you to edit settings that apply to the entire diagram.



Button	Name	Description
Hierarchy left - right ▾	Layout	Select a layout . The layout determines the location of nodes and edges, but does not change which nodes and edges are shown.

Button	Name	Description
 End-to-end ▾	Traversal strategy	Select a traversal strategy to change which nodes and edges are shown in the diagram.
 Business qualifier ▾	Business qualifier	Filter a diagram to contain only assets that are qualified by a chosen business qualifier.
	Zoom in	Zoom in on the diagram.
	Zoom out	Zoom out of the diagram.
	Zoom to readable value	Zoom the diagram to a size that is readable.
	Shrink to fit	Zoom the diagram to a size that fits the screen.
	Overview	Show or hide the overview inset that enables you to zoom and navigate.
	Labels	Show or hide the labels of the edges and complex relations.
	Overlays	Show or hide overlays for all nodes in the diagram. If the view does not have any defined overlays, the button is grayed out.
	Export	Export the diagram as a PDF or SVG file to your default downloads folder.
	Redraw	Discard all the changes that you made to the diagram and restore it to the initial state.

Button	Name	Description
	Legend	<p>Show or hide the legend panel containing the explanation of the nodes.</p> <p>The legend explains the color codes and symbols of the items in the diagram. You can move it to anywhere in the diagram.</p> <p>For each asset type and complex relation type that is visible on the diagram, the legend shows the color and symbol, followed by the name of the type.</p> <p>If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend.</p> <p>Tip Click a row in the legend to select all occurrences of that type in the diagram. You can use this to expand or collapse all nodes of the same type.</p>
	Preview	Show or hide the preview panel on the right side of the screen. It contains information about the characteristics of the currently selected node (asset or complex relation).
	Filter	Enable or disable all filters in the diagram view. If the view does not have any defined filters, the button is grayed out.
	Picture	Create a picture based on the diagram.
	Find	Find a node in the diagram.
	Fullscreen	Show the current diagram in full-screen mode. The button changes to  to exit full-screen mode.

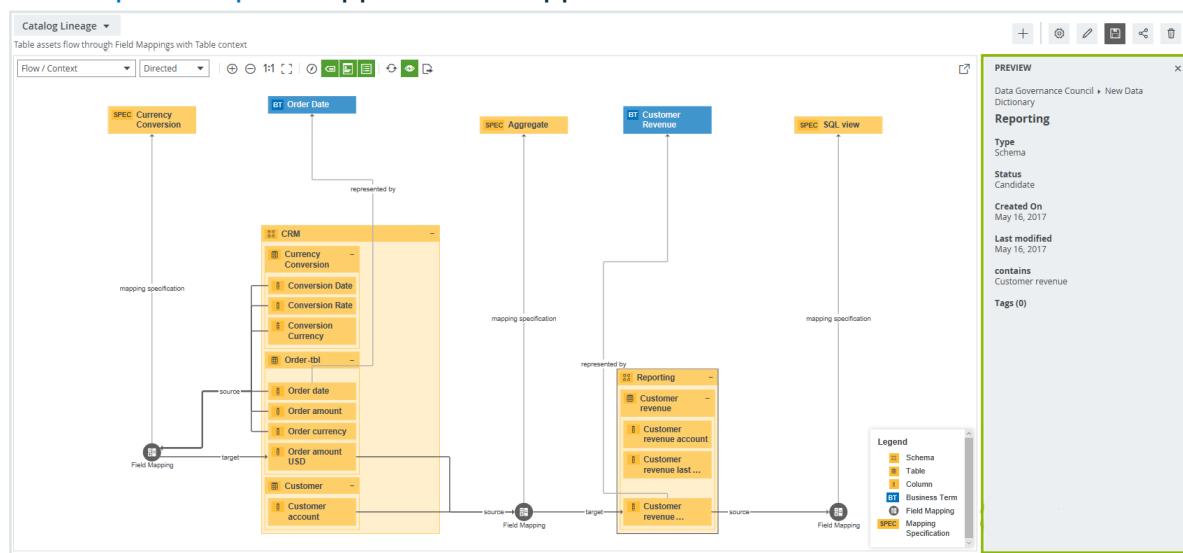
The diagram preview panel

The preview panel offers a quick overview of the node that you select in the diagram. The content of the preview panel depends on the type of node that you select in the diagram:

Assets	Complex relations
<ul style="list-style-type: none"> • Breadcrumbs • Name of the asset • Asset type • Status • Created on • Last modified • Notes • All assigned characteristics • Tags 	<ul style="list-style-type: none"> • All assigned characteristics • Last modified by (user), with date and time • Created by (user)

To open or close the diagram preview panel

1. Open a diagram.
2. On the diagram toolbar, click .
3. Optionally, click the node that you want to preview.
» The preview panel appears or disappears.



Working with diagrams

The diagram is a feature to show and interact with many assets and relations in an easy-to-read diagram. The diagram helps you to quickly see to which other assets a specific asset is related. Two assets are related if you can navigate from one asset to another by traversing one or more relations.

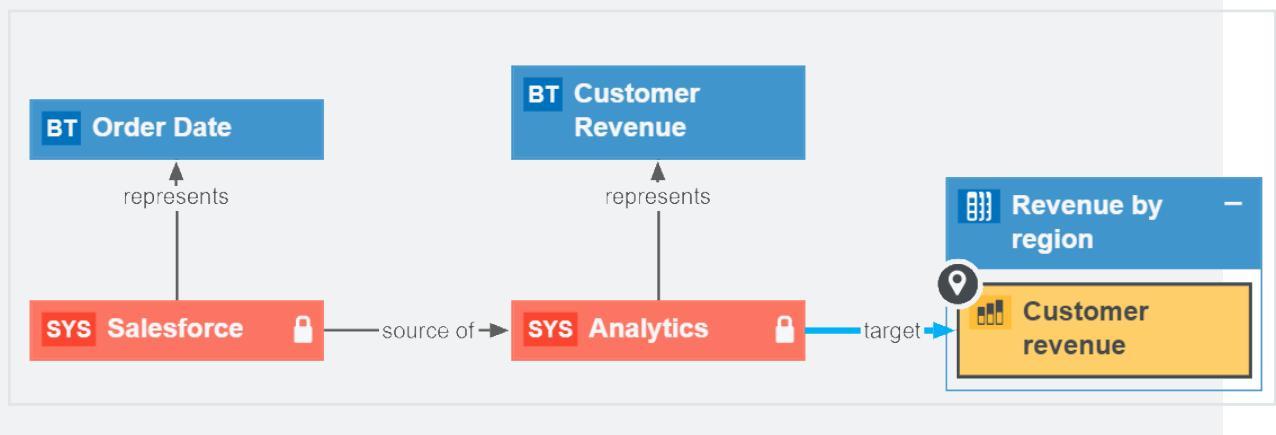
Summary diagrams

Depending on the diagram view, diagrams can contain a large number of **nodes** and **edges**. Opening a diagram with many nodes can take a long time. All nodes and edges are important to render the diagram correctly, but you don't always need to see every single node. Often, the diagram is only used to show the high-level outcome.

Summary diagrams contain high-level nodes that are locked. Locked nodes are boxing nodes that cannot be expanded. The low-level boxed nodes and their edges are taken into account to show the edges of the locked nodes, but the diagram requires less loading time.

Example

The following example shows a summary diagram that contains two locked nodes, representing System assets. These System assets can have a lot of relations. In a regular diagram this would take a lot of time to load. However, because these nodes are locked on this summary diagram, it loads faster.



Open a diagram

You can open a [diagram](#) of an asset to visualize its relations.

Steps

1. Open an asset page.
2. In the tab pane, click  **Diagram**.
 - » The diagram appears in the default [diagram view](#).
3. If necessary, [select](#) a different diagram view.

Tip If a diagram exceeds the size or time limit set by your administrator, an error notification is shown. In this case, you can try to edit the diagram view to reduce the number of nodes and edges or ask your administrator to increase the diagram limits.

Open another node's diagram

You can open a [diagram](#) for another node in the [diagram](#) you have currently open. This action also opens the asset page of the selected node.

Tip You can return to the initial diagram by using the back button of your browser.

Steps

1. [Open a diagram](#).
2. Select a node.
3. In the context menu, point to **Start here**.
 - » The available diagram views appear.
4. Click one of the diagram views.

Clicking **Start here** opens another node's diagram in the same diagram view.

» The diagram view of selected node's asset page appears.

Open a business qualifier diagram

You can open a [business qualifier diagram](#), meaning a diagram that contains only assets that are qualified by a chosen Business Qualifier asset.

Prerequisites

- The Diagrams Business Qualifier Filter is [enabled](#) in Collibra Console.
- A **Filtering by business qualifier** option (either Optional or Mandatory) is selected for at least one node in the selected diagram view.
- Either the start node is a Business Qualifier asset, or both of the following are true:
 - The start node matches a view node that has a **Filtering by business qualifier** option (either Optional or Mandatory) selected.
 - The start node has at least one Business Qualifier path.

Steps

1. Open the asset page of a Business Qualifier asset.
2. In the tab pane, click  **Diagram**.
 - » The diagram appears in the default [diagram view](#).
3. If necessary, [select](#) a different diagram view.
 - » The diagram view must be a [business qualifier view](#), meaning a view with at least one node for which a **Filtering by business qualifier** option is selected.
4. In the Diagram toolbar, click , to enable all filters in the diagram view.
5. In the Business Qualifier drop-down list, select the relevant Business Qualifier asset.
 - » The diagram is filtered to contain only the assets that are qualified by the selected Business Qualifier asset.

Open an asset page from a diagram

You can open an [asset page](#) while you are viewing a [diagram](#) without closing it.

Steps

1. [Open a diagram.](#)
2. Right-click the node of which you want to view the asset page.
3. In the context menu, click **Open in new tab**.
 - » The asset page opens on the diagram page.

Find node in a diagram

You can search a [diagram](#) for a specific node.

Steps

1. [Open a diagram.](#)
2. On the toolbar, click .
 - » The search box appears.
3. Start typing in the search box.
 - » The counter next to the search box indicates how many matches are found.
 - » The first match is selected in the diagram.

Tip You can use the arrows to navigate between the matches.

Export a diagram

You can export a [diagram](#) to a PDF or SVG file.

Steps

1. [Open a diagram.](#)
2. Make the necessary changes to the diagram.
 - a. [Select a view.](#)
 - b. [Select a layout.](#)
 - c. [Select a traversal strategy.](#)
 - d. [Zoom in or out.](#)

- e. [Explore nodes.](#)
 - f. [Expand or collapse nodes.](#)
 - g. [Trace a path between nodes.](#)
 - h. [Move nodes, enable or disable labels, the legend, and so on.](#)
3. On the toolbar, click  and select **PDF** or **SVG**.
 - » The resulting file is automatically downloaded to your default downloads folder.
 - » The default file name is **diagram.pdf** or **diagram.svg**.

Start a workflow for a node in the diagram

You can start a [workflow](#) from nodes in a [diagram](#), if the workflow is assigned to the relevant asset type.

Steps

1. [Open a diagram.](#)
2. Select a node.
3. In the context menu, point to **Actions**.
 - » A submenu appears with the available workflows.
4. Click the workflow that you want to start.

Note

- Workflows that have already been started are not listed.
- If there are no workflows available, **Actions** is grayed out.

Edit a diagram

You can edit a [diagram](#) to represent the nodes as clearly as possible.

Steps

1. [Open a diagram.](#)
2. Make the necessary changes to the diagram.
 - a. [Select a view.](#)
 - b. [Select a layout.](#)
 - c. [Select a traversal strategy.](#)

- d. [Zoom in or out.](#)
- e. [Explore nodes.](#)
- f. [Expand or collapse nodes.](#)
- g. [Trace a path between nodes.](#)
- h. [Move nodes, enable or disable labels, the legend, and so on.](#)

Select a diagram layout

You can select a [diagram layout](#) to change the way nodes are shown in a [diagram](#).

Steps

1. [Open a diagram.](#)
2. On the toolbar, click the layout box and select a layout.

Diagram layout	Description
Flow / Context	<p>Nodes and edges are shown in a flow and a context region.</p> <p>In the flow region, nodes are shown mostly from left to right.</p> <p>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.</p> <p>If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right.</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</p> </div>
Hierarchy left - right	Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout.

Diagram layout	Description
Hierarchy top - down	Nodes and edges are shown in a flow, from top to bottom.
Hierarchy bottom - up	Nodes and edges are shown in a flow, from bottom to top.
Circular	<p>Nodes and edges are arranged in a circular fashion.</p> <p>Boxing nodes are not supported in this layout, therefore:</p> <ul style="list-style-type: none"> ◦ The diagram is completely redrawn. ◦ The explored nodes are removed from the diagram. ◦ The nodes expand or collapse to their initial state. ◦ Returning to a layout that supports boxing nodes completely redraws the diagram.
Radial	<p>Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.</p> <p>Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.</p>
Smart Organic	Nodes and edges are distributed in a well-balanced manner, with few edge crossings.

Tip You can go back to the initial diagram by clicking  . Keep in mind that all your changes are discarded if you do this.

Select a traversal strategy

You can select a [traversal strategy](#) to determine which nodes and edges are traversed and displayed in a [diagram](#).

Note If you change the traversal strategy, the diagram is completely redrawn and explored nodes are removed.

Steps

1. [Open](#) a diagram.
2. On the diagram toolbar, click the traversal strategy box and select a traversal strategy.

Traversal strategy	Description
End-to-end	<p>For the start node, Collibra Data Governance Center traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.</p> <p>For each encountered node, Collibra DGC traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra DGC looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.</p> <p>This is the default traversal strategy.</p>
Upstream	<p>For the start node, only the incoming edges are traversed and shown.</p> <p>For each node encountered, only the incoming edges are traversed.</p>
Downstream	<p>For the start node, only the outgoing edges are traversed and shown.</p> <p>For each node encountered, only the outgoing edges are traversed.</p>

Traversal strategy	Description
Complete	<p>For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram.</p> <p>For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p>Warning This strategy can result in a very large diagram that can take a long time to load.</p> </div>

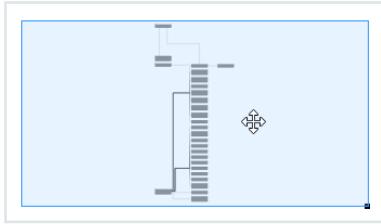
Working with the diagram overview inset

The overview inset of the [diagram editor](#) allows you to keep an overview of the complete [diagram](#), while the main screen is showing only a section of it.

Steps

1. [Open a diagram](#).
2. On the toolbar, click the  to show or hide the overview inset.
» The overview inset is shown over the diagram. You can still see the diagram underneath.
3. Do one of the following:

Action	Descriptions
Zoom in or out by scaling:	<ol style="list-style-type: none"> a. Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow. b. Click and hold, then drag the pointer to zoom in or out. 

Action	Descriptions
Navigate in the diagram:	<p>a. Move your mouse pointer over the blue square. The pointer turns into a four-way arrow.</p>  <p>b. Click and hold, then drag the pointer to move the square to what you want to see.</p>

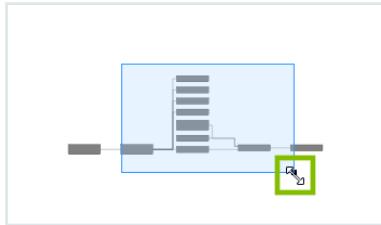
Zoom in or out in the diagram editor

When working with [diagrams](#), you can zoom in or out in different ways.

Steps

1. [Open a diagram](#).
2. Do one of the following:

Strategy	Description
Zoom in or out with buttons.	On the toolbar, click \oplus (Zoom in) or \ominus (Zoom out) as needed.
Zoom in or out by scrolling with your mouse.	Move your mouse pointer to anywhere on the diagram and use your mouse wheel to zoom. The zoom is centered at the mouse pointer.

Strategy	Description
Zoom in or out by scaling.	<p>a. On the toolbar, click the  button (Overview). An overview inset with a miniature version of the entire diagram is shown in the top right corner. The section of the diagram that is shown on the screen is visible as a blue rectangle on the overview.</p> <p>b. Move your mouse pointer over the lower right corner of the blue rectangle, until it turns into a sleek slanted arrow.</p>  <p>c. Click and hold, then drag the pointer to zoom in or out.</p>
Zoom to readable value.	On the toolbar, click  1:1.
Adapt the diagram to fit in the view.	On the toolbar, click  .

Explore nodes in a diagram

For each node in a [diagram](#), there might be relations that are not depicted in the diagram. This is the case if the type of relation is not in the [diagram view](#) or the relation is not traversed due to the selected [traversal strategy](#).

You can still add these relations and their nodes to the diagram, by 'exploring' the node.

Tip To remove the relations that you added to a node by using the explore mode, right-click the node and click **Remove explored**.

Steps

1. [Open](#) a diagram.
2. Select a node.
3. In the context menu, point to **Explore**.
 - » A submenu appears with the available relation types, and a count of how many relations exists for this type.
4. Click one of the relation types or group of relation types:

Mode	Description
All	<p>Explore all relation types of the selected node.</p> <p>Clicking Explore in the context menu has the same result.</p>
Incoming	<p>Explore all incoming relations of the selected node.</p> <p>A relation is considered incoming when the selected node is the tail side of the relation type.</p> <p>For example, the relation <i>[Business Term] has code / is code for [Code Value]</i> is incoming for a <i>Code Value</i>.</p>
Outgoing	<p>Explore all outgoing relations of the selected node.</p> <p>A relation is considered incoming when the selected node is the head side of the relation type.</p> <p>For example, the relation <i>[Business Term] has code / is code for [Code Value]</i> is outgoing for a <i>Business Term</i>.</p>
Any specific relation type	Explores the relations of the selected relation type.

Expand or collapse nodes

If a node has an outgoing edge with the boxing style, it becomes a boxing node. Your diagram view determines whether boxing nodes are expanded or collapsed by default. Your diagram view can also lock collapsed nodes, which means that you cannot expand the collapsed boxing node.

Tip Though you cannot expand locked nodes, you can explore them to see their boxed nodes.

Steps

1. [Open a diagram](#).
2. Do one of the following:
 - Select a node.
 - Select multiple nodes by holding down the select key and clicking nodes.

On a macOS system	On a Windows system
Click the first one and then hold down <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

- In the legend, click the asset type or complex relation type that you want to expand or collapse. You have now selected all nodes of this type.
3. Do one of the following:
 - In the node, click $+$ or $-$.
 - In the context menu of a node, click **Expand/Collapse selected**.

Trace all paths between nodes in the diagram

You can trace all paths between any number of nodes on the [diagram](#), which means you can show the relations between the nodes.

You can trace a path between nodes in the following ways:

- The highlight mode: Keep the whole diagram and highlight the nodes and edges on the path.
- The crop mode: Remove any node or edge that is not on the path.

Steps

1. [Open a diagram.](#)
2. Select one, two or more nodes in the diagram:

On a macOS system	On a Windows system
Click the first one and then hold down <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

3. Do one of the following:
 - To keep the whole diagram and highlight the path, right-click one of the selected nodes and click **Trace path → Highlight**.
 - To remove anything that is not part of the path between the two selected nodes, right-click one of the nodes and click **Trace path → Crop**.
 - » If you selected a single node, all relations are traced.
 - » If you selected multiple nodes, the path between the selected nodes is traced.
 - » If there is no path between the nodes, a message is displayed.

Move a node in the diagram

If you want a node to be in a different location in the diagram, you can easily move it around.

Steps

1. [Open a diagram.](#)
2. Click a node and hold down your mouse button. To select multiple nodes, do the same but select multiple nodes.

On a macOS system	On a Windows system
Click the first one and then hold down <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

3. Move the node to where you want it and release the mouse button.

Note You cannot save the these changes, but you can [create](#) a picture or [export](#) the diagram with these changes.

Diagram views

In this section, you can find more information about what you can do with diagram views.

Create a diagram view

You can create your own [diagram views](#):

- [From scratch](#).
- [From an existing view](#).

Create a diagram view from scratch

1. Open an asset page.
2. In the tab pane, click  **Diagram**.
 - » The diagram appears in the default diagram view.
3. Click **+** to add a new view.
4. [Edit](#) the diagram view.

Create a diagram view from an existing view

1. Open an asset page.
2. In the tab pane, click  **Diagram**.
 - » The diagram appears in the default diagram view.
3. If required, [select](#) another diagram view.
4. Click 
 - » The **Save view as** dialog box appears.

5. Enter the required information.

Field	Description
Name*	Type a name for the diagram view.
Description	Type a description for the diagram view.
Sharing options	This section determines who has access to this diagram view.
Public	Select to share this diagram view with all users.
Private	Select to share this diagram view with no one.
Share with specific roles, groups & users	Select to choose with whom to share the diagram view.
Roles	Select or type the roles whose users you want to give access.
Groups	Select or type the groups whose users you want to give access.
Users	Select or type the users to whom you want to give access.
Promote	
Default	Select to use this diagram view as the default view when you open the diagram editor.
Pin	Select to pin the diagram view. Pinned diagram views appear in the view selection drop-down list.

Fields marked with a * are mandatory.

6. [Edit](#) the diagram view.

Open diagram view

You can open a [diagram view](#) to view the [diagram](#) of an asset.

Steps

1. Open an asset page.
2. In the tab pane, click  **Diagram**.
 - » The diagram appears in the default diagram view.
3. If necessary, [select](#) a different diagram view.

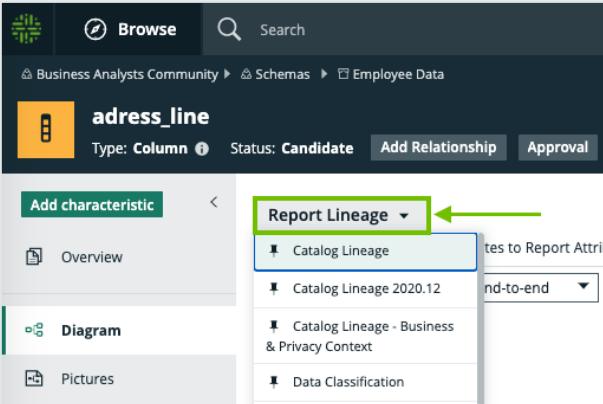
Tip If a diagram exceeds the size or time limit set by your administrator, an error notification is shown. In this case, you can try to edit the diagram view to reduce the number of nodes and edges or ask your administrator to increase the diagram limits.

Note If the diagram depth is limited by a specified maximum flow depth value, a notification informs you that the diagram is incomplete. For complete information, see [Maximum flow depth](#).

Select a diagram view

To select to a different [diagram view](#), follow these steps:

1. Open a diagram view.
2. Do one of the following:

<p>Select a pinned view:</p>	<p>Click the current view name and select a view from the list of pinned views.</p> <p>Show me where to click.</p> 
<p>Select an unpinned view:</p>	<p>a. Click the current view name and click Show all... at the bottom. b. Click on a view in the list of views that apply to an asset of this type.</p>

Edit the name and description of a diagram view

You can edit the name and the description of a [diagram view](#).

Steps

1. Open a diagram view.
 2. Click .
- » The **Edit name and description** dialog box appears.

3. Enter the required information.

Field	Description
Name	Type a name for the diagram view. The default name is the name of the diagram view and a date stamp.
Description	Type a description for the diagram view.

4. Click **Save**.

Edit a diagram view

You can edit a [diagram view](#).

Steps

1. [Open a diagram view](#).
2. Click .
- » The **General properties** form appears.
3. Edit the [general properties](#) as required.

Field	Description	
Layout	Select the layout of your diagram view.	
Diagram layout	Description	
Flow / Context	<p>Nodes and edges are shown in a flow and a context region.</p> <p>In the flow region, nodes are shown mostly from left to right.</p> <p>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.</p> <p>If there are no nodes in the context region, this layout produces the same result as Hierarchy left - > right.</p>	<p>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</p>
Hierarchy left - right	Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout.	
Hierarchy top - down	Nodes and edges are shown in a flow, from top to bottom.	
Hierarchy bottom - up	Nodes and edges are shown in a flow, from bottom to top.	

Field	Description	
	Diagram layout	Description
	Circular	<p>Nodes and edges are arranged in a circular fashion.</p> <p>Boxing nodes are not supported in this layout, therefore:</p> <ul style="list-style-type: none"> ◦ The diagrampicture is completely redrawn. ◦ The explored nodes are removed from the diagrampicture. ◦ The nodes expand or collapse to their initial state. ◦ Returning to a layout that supports boxing nodes completely redraws the diagrampicture.
	Radial	<p>Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.</p> <p>Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.</p>
	Smart Organic	<p>Nodes and edges are distributed in a well-balanced manner, with few edge crossings.</p>

Field	Description									
Traversal strategy	<p>Indicates which nodes and edges have to be traversed and displayed.</p> <table border="1"> <thead> <tr> <th>Traversal strategy</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>End-to-end</td><td> <p>For the start node, Collibra Data Governance Center traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.</p> <p>For each encountered node, Collibra DGC traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra DGC looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.</p> <p>This is the default traversal strategy.</p> </td></tr> <tr> <td>Upstream</td><td> <p>For the start node, only the incoming edges are traversed and shown.</p> <p>For each node encountered, only the incoming edges are traversed.</p> </td></tr> <tr> <td>Downstream</td><td> <p>For the start node, only the outgoing edges are traversed and shown.</p> <p>For each node encountered, only the outgoing edges are traversed.</p> </td></tr> </tbody> </table>		Traversal strategy	Description	End-to-end	<p>For the start node, Collibra Data Governance Center traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.</p> <p>For each encountered node, Collibra DGC traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra DGC looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.</p> <p>This is the default traversal strategy.</p>	Upstream	<p>For the start node, only the incoming edges are traversed and shown.</p> <p>For each node encountered, only the incoming edges are traversed.</p>	Downstream	<p>For the start node, only the outgoing edges are traversed and shown.</p> <p>For each node encountered, only the outgoing edges are traversed.</p>
Traversal strategy	Description									
End-to-end	<p>For the start node, Collibra Data Governance Center traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.</p> <p>For each encountered node, Collibra DGC traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra DGC looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.</p> <p>This is the default traversal strategy.</p>									
Upstream	<p>For the start node, only the incoming edges are traversed and shown.</p> <p>For each node encountered, only the incoming edges are traversed.</p>									
Downstream	<p>For the start node, only the outgoing edges are traversed and shown.</p> <p>For each node encountered, only the outgoing edges are traversed.</p>									

Field	Description	
	Traversal strategy	Description
	Complete	<p>For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram.</p> <p>For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Warning This strategy can result in a very large diagram that can take a long time to load. </div>
Overview	Select to show the overview inset in the initial diagram.	
Labels	Select to show the edge and node labels in the initial diagram.	
Legend	Select to show the legend in the initial diagram.	
Preview	Select to show the preview in the initial diagram.	
Max node label length	<p>Type the maximum number of characters for node labels. If a label is longer than this value, it is truncated.</p> <p>Type <i>0</i> if you always want to show the entire label.</p> <p>The default setting is <i>50</i>.</p>	
Max edge label length	<p>Type the maximum number of characters for edge labels. If a label is longer than this value, it is truncated.</p> <p>Type <i>0</i> if you always want to show the entire label.</p> <p>The default setting is <i>30</i>.</p>	

4. Select a node.
 - » The **Node properties** form appears.

5. Edit the [node properties](#) as required.

Field	Description
General	<p>This section allows you to edit the general properties of the selected node.</p> <p>Tip Click it to collapse and expand this section.</p>
Name	<p>Type a name for the selected node.</p> <p>Tip By default, this is the name of the asset type or complex relation type. For readability, it is recommended to use the name of the asset type or complex relation type.</p> <p>You can refer to this node by using its ID in the from and to fields of the edge properties form.</p> <p>This ID must be unique in the current diagram view.</p>
Type	<p>Choose an asset type.</p> <p>By default, this is the asset type of the selected node.</p>
Display name	<p>Choose the characteristic to use as the display name of the node in the diagram.</p> <p>If you leave this field empty, the node shows the name of the asset or the name of the complex relation. You can also choose a characteristic, for example, attribute or relation.</p> <p>The drop-down displays all the characteristics that apply.</p> <p>Tip You can filter the list by starting to type.</p>

Field	Description
Overlays	<p>Choose characteristics that you want to show on the node.</p> <p>The drop-down displays all the characteristics that apply.</p> <div style="border-left: 3px solid #99CC33; padding-left: 10px; margin-top: 10px;"> Tip You can filter the list by starting to type. </div>
Context	<p>Select to place the node in the context region of the diagram.</p> <p>If not selected, the node is placed in the flow region.</p> <div style="border-left: 3px solid #99CC33; padding-left: 10px; margin-top: 10px;"> Note This influences the traversal strategy: an edge from a flow node to a context node is always included in the diagram. This edge has to be outgoing from the flow node and incoming to the context node. This means that, when you switch a node from flow to context, you have to flip any edge that is outgoing from this context node and incoming to a flow node. For more information about the traversal strategy, see Which nodes and edges are included in a diagram?. </div>
Boxing nodes options	<p>The options to determine how you want to show boxed nodes by default.</p> <div style="border-left: 3px solid #99CC33; padding-left: 10px; margin-top: 10px;"> Tip The start node is always visible in the diagram, even when it is boxed inside of a collapsed or locked node. </div>
Expanded	Select to show boxing nodes and their boxed nodes.
Collapsed	Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, you can expand these boxing nodes.

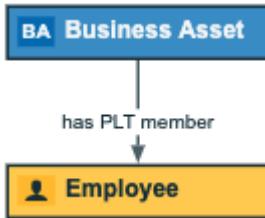
Field	Description
Collapsed (hide boxed nodes)	<p>Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, these nodes are locked, so you cannot expand them.</p> <div data-bbox="536 503 589 539" style="background-color: #92D050; width: 30px; height: 15px; margin-bottom: 5px;"></div> <p>Tip</p> <ul style="list-style-type: none"> ◦ Diagrams with locked nodes are also called summary diagrams. ◦ The boxed nodes of a locked node are not loaded when you open the diagram. As a consequence, opening the diagram may be a lot faster if some of the boxing nodes are locked. ◦ You can still explore locked nodes to see the boxed nodes.
Edges	<p>This section allows you to add, edit and delete the edges.</p> <div data-bbox="536 997 589 1033" style="background-color: #92D050; width: 30px; height: 15px; margin-bottom: 5px;"></div> <p>Tip Click it to collapse and expand this section.</p>
Outgoing	
<outgoing edges>	<p>The outgoing edges that currently exist.</p>
Add	<p>Click to add an outgoing edge.</p>
Incoming	
<incoming edges>	<p>The incoming edges that currently exist.</p>
Add	<p>Click to add an incoming edge.</p>
Filters	<p>This section allows you to work with filters.</p> <div data-bbox="536 1776 589 1812" style="background-color: #92D050; width: 30px; height: 15px; margin-bottom: 5px;"></div> <p>Tip Click it to collapse and expand this section.</p>

Field	Description
Filtering by business qualifier	Enable users to filter diagrams by a chosen Business Qualifier asset. This feature is only available if it is enabled in Collibra Console.
<existing filters>	The filter criteria that currently exist.
Add filter criteria	Click to create a filter.

6. Select an edge.
 - » The **Edge properties** form appears.
7. Edit the **edge properties** as required.

Field	Description
Relation type	Select a relation type to define the relation type of the currently selected edge. The drop-down list shows all available directed relation types.
Role direction	Indicates the direction in which instances of this relation type are traversed. <ul style="list-style-type: none"> ◦ Selected: The edge is traversed from head to tail. The edge label is the role of the relation type. ◦ Cleared: The edge is traversed from tail to head. The edge label is the co-role of the relation type.

Field	Description
from	<p>Select the node from which the edge starts.</p> <p>In the drop-down list of nodes, the nodes that match the current type of edge are shown first (under Matching types). Nodes that do not match the current type are shown after the matching types (under All types). It is also indicated if the node is already in the diagram (on diagram).</p> <p>A matching node is (a parent of) the head asset type of the current relation type (when Role direction is selected) or (a parent of) the tail asset type of the relation type (when Role direction is cleared).</p> <p>Selecting a node that is already in the diagram view adds this edge to that node.</p> <p>Selecting a node that is not yet in the diagram view adds this node to the view.</p>
to	<p>Select the node in which the edge ends.</p> <p>You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge.</p> <p>A matching node is (a parent of) the tail asset type of the current relation type (when Role direction is selected) or (a parent of) the head asset type of the relation type (when Role direction is cleared).</p> <p>Selecting a node that is already in the diagram view adds this edge to that node.</p> <p>Selecting a node that is not yet in the diagram view adds this node to the view.</p>

Field	Description
<p>Style</p> <ul style="list-style-type: none"> ◦ Arrow: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting. <p>Example</p> <p>Business Asset is the selected node.</p>  <pre> graph TD BA[BA Business Asset] -- "has PLT member" --> Employee[Employee] </pre> <ul style="list-style-type: none"> ◦ Boxed: The node on the outgoing side is enclosed by the node on the incoming side. <p>Example</p> <p>Business Asset is the selected node. It is boxed by Employee.</p>  <pre> graph TD Employee[Employee] --- BA[BA Business Asset] </pre> <ul style="list-style-type: none"> ◦ Boxing: The node on the outgoing side encloses the node on the incoming side. <p>Example</p> <p>Business Asset is the selected node. It is boxing Employee.</p>  <pre> graph TD BA[BA Business Asset] --- Employee[Employee] </pre>	

Field	Description
Label	Type a label for the edge. If you do not specify a label, either the role or co-role name of the relation type from the operating model is used in both the diagram view and the diagram. If the Role direction check box is selected, the label is the role of the relation. If it is cleared, it uses the co-role.

8. Click **Save**.

The General properties form

The **General properties** form is used to define the overall look and feel of your [diagram](#).

This pane appears when you edit a [diagram view](#) and you have not selected a node or edge.

Field	Description																
Layout	<p>Select the layout of your diagram view.</p> <table border="1"> <thead> <tr> <th data-bbox="430 372 620 473">Diagram layout</th><th data-bbox="620 372 1406 473">Description</th></tr> </thead> <tbody> <tr> <td data-bbox="430 473 620 698">Flow / Context</td><td data-bbox="620 473 1406 698"> <p>Nodes and edges are shown in a flow and a context region.</p> <p>In the flow region, nodes are shown mostly from left to right.</p> </td></tr> <tr> <td data-bbox="430 698 620 1012"></td><td data-bbox="620 698 1406 1012"> <p>The context region is shown above the flow region.</p> <p>The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.</p> </td></tr> <tr> <td data-bbox="430 1012 620 1147"></td><td data-bbox="620 1012 1406 1147"> <p>If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right.</p> </td></tr> <tr> <td data-bbox="430 1147 620 1338"></td><td data-bbox="620 1147 1406 1338"> <p>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</p> </td></tr> <tr> <td data-bbox="430 1338 620 1450">Hierarchy left - right</td><td data-bbox="620 1338 1406 1450"> <p>Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout.</p> </td></tr> <tr> <td data-bbox="430 1450 620 1563">Hierarchy top - down</td><td data-bbox="620 1450 1406 1563"> <p>Nodes and edges are shown in a flow, from top to bottom.</p> </td></tr> <tr> <td data-bbox="430 1563 620 1686">Hierarchy bottom - up</td><td data-bbox="620 1563 1406 1686"> <p>Nodes and edges are shown in a flow, from bottom to top.</p> </td></tr> </tbody> </table>	Diagram layout	Description	Flow / Context	<p>Nodes and edges are shown in a flow and a context region.</p> <p>In the flow region, nodes are shown mostly from left to right.</p>		<p>The context region is shown above the flow region.</p> <p>The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.</p>		<p>If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right.</p>		<p>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</p>	Hierarchy left - right	<p>Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout.</p>	Hierarchy top - down	<p>Nodes and edges are shown in a flow, from top to bottom.</p>	Hierarchy bottom - up	<p>Nodes and edges are shown in a flow, from bottom to top.</p>
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Hierarchy bottom - up	<p>Nodes and edges are shown in a flow, from bottom to top.</p>																

Field	Description	
	Diagram layout	Description
	Circular	<p>Nodes and edges are arranged in a circular fashion.</p> <p>Boxing nodes are not supported in this layout, therefore:</p> <ul style="list-style-type: none"> • The diagrampicture is completely redrawn. • The explored nodes are removed from the diagrampicture. • The nodes expand or collapse to their initial state. • Returning to a layout that supports boxing nodes completely redraws the diagrampicture.
	Radial	<p>Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.</p> <p>Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.</p>
	Smart Organic	<p>Nodes and edges are distributed in a well-balanced manner, with few edge crossings.</p>

Field	Description	
Traversal strategy	Traversal strategy	Description
	End-to-end	<p>For the start node, Collibra Data Governance Center traverses the relations of the types that occur in the diagram in all directions, incoming and outgoing, and adds all the nodes and edges that it encounters to the diagram.</p> <p>For each encountered node, Collibra DGC traverses the relations only in the same direction as that in which they were encountered. If a node was encountered while traversing an outgoing relation, Collibra DGC looks for outgoing relations of that node and vice versa. This behavior is like traversing a hierarchy.</p> <p>This is the default traversal strategy.</p>
	Upstream	<p>For the start node, only the incoming edges are traversed and shown.</p> <p>For each node encountered, only the incoming edges are traversed.</p>
	Downstream	<p>For the start node, only the outgoing edges are traversed and shown.</p> <p>For each node encountered, only the outgoing edges are traversed.</p>

Field	Description	
	Traversal strategy	Description
	Complete	<p>For the start node, the relations are traversed in both directions. All encountered nodes and edges are added to the diagram.</p> <p>For each encountered node, both incoming and outgoing edges are traversed. Essentially, this means that each encountered node is treated as a start node.</p> <p>Warning This strategy can result in a very large diagram that can take a long time to load.</p>
Overview	Select to show the overview inset in the initial diagram.	
Labels	Select to show the edge and node labels in the initial diagram.	
Legend	Select to show the legend in the initial diagram.	
Preview	Select to show the preview in the initial diagram.	
Max node label length	<p>Type the maximum number of characters for node labels. If a label is longer than this value, it is truncated.</p> <p>Type <i>0</i> if you always want to show the entire label.</p> <p>The default setting is <i>50</i>.</p>	
Max edge label length	<p>Type the maximum number of characters for edge labels. If a label is longer than this value, it is truncated.</p> <p>Type <i>0</i> if you always want to show the entire label.</p> <p>The default setting is <i>30</i>.</p>	

The Node properties form

The **Node properties** form is used to define a node in the [diagram view](#) and the edges that are connected to it.

This pane appears when you edit a diagram view and you have selected a node.

Field	Description
General	<p>This section allows you to edit the general properties of the selected node.</p> <p>Tip Click it to collapse and expand this section.</p>
Name	<p>Type a name for the selected node.</p> <p>Tip By default, this is the name of the asset type or complex relation type. For readability, it is recommended to use the name of the asset type or complex relation type.</p> <p>You can refer to this node by using its ID in the from and to fields of the edge properties form.</p> <p>This ID must be unique in the current diagram view.</p>
Type	<p>Choose an asset type.</p> <p>By default, this is the asset type of the selected node.</p>
Display name	<p>Choose the characteristic to use as the display name of the node in the diagram.</p> <p>If you leave this field empty, the node shows the name of the asset or the name of the complex relation. You can also choose a characteristic, for example, attribute or relation.</p> <p>The drop-down displays all the characteristics that apply.</p> <p>Tip You can filter the list by starting to type.</p>

Field	Description
Overlays	<p>Choose characteristics that you want to show on the node.</p> <p>The drop-down displays all the characteristics that apply.</p> <p>Tip You can filter the list by starting to type.</p>
Context	<p>Select to place the node in the context region of the diagram.</p> <p>If not selected, the node is placed in the flow region.</p> <p>Note This influences the traversal strategy: an edge from a flow node to a context node is always included in the diagram. This edge has to be outgoing from the flow node and incoming to the context node. This means that, when you switch a node from flow to context, you have to flip any edge that is outgoing from this context node and incoming to a flow node. For more information about the traversal strategy, see Which nodes and edges are included in a diagram?.</p>
Boxing nodes options	<p>The options to determine how you want to show boxed nodes by default.</p> <p>Tip The start node is always visible in the diagram, even when it is boxed inside of a collapsed or locked node.</p>
Expanded	Select to show boxing nodes and their boxed nodes.
Collapsed	Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, you can expand these boxing nodes.

Field	Description
Collapse d (hide boxed nodes)	<p>Select to show boxing nodes, but not their boxed nodes. In the resulting diagram, these nodes are locked, so you cannot expand them.</p> <p>Tip</p> <ul style="list-style-type: none"> Diagrams with locked nodes are also called summary diagrams. The boxed nodes of a locked node are not loaded when you open the diagram. As a consequence, opening the diagram may be a lot faster if some of the boxing nodes are locked. You can still explore locked nodes to see the boxed nodes.
Edges	<p>This section allows you to add, edit and delete the edges.</p> <p>Tip Click it to collapse and expand this section.</p>
Outgoing	
<outgoing edges>	The outgoing edges that currently exist.
Add	Click to add an outgoing edge.
Incoming	
<incoming edges>	The incoming edges that currently exist.
Add	Click to add an incoming edge.
Filters	<p>This section allows you to work with filters.</p> <p>Tip Click it to collapse and expand this section.</p>
Filtering by business qualifier	<p>Enable users to filter diagrams by a chosen Business Qualifier asset.</p> <p>This feature is only available if it is enabled in Collibra Console.</p>

Field	Description
<existing filters>	The filter criteria that currently exist.
Add filter criteria	Click to create a filter.

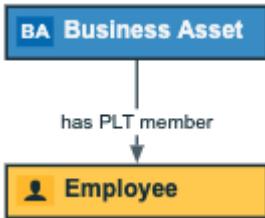
The Edge properties form

The **Edge properties** form is used to define edges in the [diagram view](#).

This pane appears when you edit a [diagram view](#) and select an [edge](#).

Field	Description
Relation type	Select a relation type to define the relation type of the currently selected edge. The drop-down list shows all available directed relation types.
Role direction	Indicates the direction in which instances of this relation type are traversed. <ul style="list-style-type: none"> • Selected: The edge is traversed from head to tail. The edge label is the role of the relation type. • Cleared: The edge is traversed from tail to head. The edge label is the co-role of the relation type.

Field	Description
from	<p>Select the node from which the edge starts.</p> <p>In the drop-down list of nodes, the nodes that match the current type of edge are shown first (under Matching types). Nodes that do not match the current type are shown after the matching types (under All types). It is also indicated if the node is already in the diagram (on diagram).</p> <p>A matching node is (a parent of) the head asset type of the current relation type (when Role direction is selected) or (a parent of) the tail asset type of the relation type (when Role direction is cleared).</p> <p>Selecting a node that is already in the diagram view adds this edge to that node.</p> <p>Selecting a node that is not yet in the diagram view adds this node to the view.</p>
to	<p>Select the node in which the edge ends.</p> <p>You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge.</p> <p>A matching node is (a parent of) the tail asset type of the current relation type (when Role direction is selected) or (a parent of) the head asset type of the relation type (when Role direction is cleared).</p> <p>Selecting a node that is already in the diagram view adds this edge to that node.</p> <p>Selecting a node that is not yet in the diagram view adds this node to the view.</p>

Field	Description
Style	<p>Select the style of the edge.</p> <ul style="list-style-type: none"> • Arrow: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting. <p>Example Business Asset is the selected node.</p>  <ul style="list-style-type: none"> • Boxed: The node on the outgoing side is enclosed by the node on the incoming side. <p>Example Business Asset is the selected node. It is boxed by Employee.</p>  <ul style="list-style-type: none"> • Boxing: The node on the outgoing side encloses the node on the incoming side. <p>Example Business Asset is the selected node. It is boxing Employee.</p> 

Field	Description
Label	<p>Type a label for the edge.</p> <p>If you do not specify a label, either the role or co-role name of the relation type from the operating model is used in both the diagram view and the diagram.</p> <p>If the Role direction check box is selected, the label is the role of the relation. If it is cleared, it uses the co-role.</p>

Edges

In a diagram, an edge is a directed relation between two nodes. The word 'directed' indicates that the direction in which the relation is used is relevant for the diagram.

An edge is normally depicted by an arrow between two nodes. The arrow points to the 'to' node. It can also be represented by means of boxing and boxed nodes, in which one node contains the other.

Actions

- [Add](#) an edge to a node.
- [Edit](#) an edge.
- [Remove](#) an edge of a node.

Add an edge in a diagram view

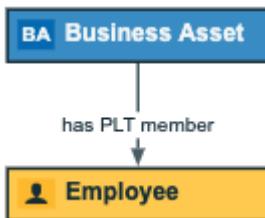
You can add an [edge](#) to a node in a [diagram view](#).

Steps

1. [Open](#) a diagram view.
2. Click .
- » The [General properties](#) form appears.
3. Select a node in the diagram.
- » The [Node properties](#) form appears.

4. In the **Node properties** form, go to the **Edges** section.
5. Do one of the following:
 - Under **Outgoing**, click **Add**.
This adds an edge starting from the selected node.
 - Under **Incoming**, click **Add**.
This adds an edge ending in the selected node.
6. Define the edge characteristics:

Edge characteristic	Description
Relation Type	Choose a relation type from the list of applicable types. Start typing to reduce the list.
Role direction	Choose in which direction to traverse a relation. For example, [Business asset] groups/is grouped by [Business Asset], if you select the Role direction option, you traverse in the role direction , meaning from parent to child. If you don't select this option, you traverse in the co-role direction, meaning from child to parent.
to	Choose the type of node (asset or complex relation) from the list of types. The dropdown first shows node types that match the relation type, but also allows you to choose a node whose type does not match the relation type. You can select a new node, or a node that already exists on the diagram.

Edge characteristic	Description
Style	<p>Select the style of the edge.</p> <ul style="list-style-type: none"> Arrow: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting. <p>Example Business Asset is the selected node.</p>  <ul style="list-style-type: none"> Boxed: The node on the outgoing side is enclosed by the node on the incoming side. <p>Example Business Asset is the selected node. It is boxed by Employee.</p>  <ul style="list-style-type: none"> Boxing: The node on the outgoing side encloses the node on the incoming side. <p>Example Business Asset is the selected node. It is boxing Employee.</p> 

7. Click Add.
8. Optionally, edit the edge.

Tip This allows you to edit the label of the edge.

9. Above the diagram, to the right, click **Save**.

Edit an edge in a diagram view

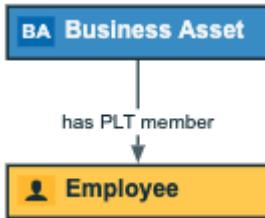
You can edit an [edge](#) of a node in a [diagram view](#).

Steps

1. [Open a diagram view](#).
2. Click .
- » The [General properties](#) form appears.
3. Do one of the following:
 - Select an edge in the diagram.
 - Select a node in the diagram and click  next to an incoming or outgoing edge in the edge section.
- » The [Edge properties](#) form appears.
4. Enter the required information.

Field	Description
Relation type	Select a relation type to define the relation type of the currently selected edge. The drop-down list shows all available directed relation types.
Role direction	Indicates the direction in which instances of this relation type are traversed. <ul style="list-style-type: none"> ◦ Selected: The edge is traversed from head to tail. The edge label is the role of the relation type. ◦ Cleared: The edge is traversed from tail to head. The edge label is the co-role of the relation type.

Field	Description
from	<p>Select the node from which the edge starts.</p> <p>In the drop-down list of nodes, the nodes that match the current type of edge are shown first (under Matching types). Nodes that do not match the current type are shown after the matching types (under All types). It is also indicated if the node is already in the diagram (on diagram).</p> <p>A matching node is (a parent of) the head asset type of the current relation type (when Role direction is selected) or (a parent of) the tail asset type of the relation type (when Role direction is cleared).</p> <p>Selecting a node that is already in the diagram view adds this edge to that node.</p> <p>Selecting a node that is not yet in the diagram view adds this node to the view.</p>
to	<p>Select the node in which the edge ends.</p> <p>You must select an ID from the drop-down list of nodes. The list contains nodes that match the current type of edge.</p> <p>A matching node is (a parent of) the tail asset type of the current relation type (when Role direction is selected) or (a parent of) the head asset type of the relation type (when Role direction is cleared).</p> <p>Selecting a node that is already in the diagram view adds this edge to that node.</p> <p>Selecting a node that is not yet in the diagram view adds this node to the view.</p>

Field	Description
<p>Style</p> <ul style="list-style-type: none"> ◦ Arrow: An arrow from the outgoing side to the incoming side. The pointer is on the incoming side of the arrow. This is the default setting. <p>Example</p> <p>Business Asset is the selected node.</p>  <pre> graph TD BA[BA Business Asset] -- "has PLT member" --> Employee[Employee] </pre> <ul style="list-style-type: none"> ◦ Boxed: The node on the outgoing side is enclosed by the node on the incoming side. <p>Example</p> <p>Business Asset is the selected node. It is boxed by Employee.</p>  <pre> graph TD Employee[Employee] --- BA[BA Business Asset] </pre> <ul style="list-style-type: none"> ◦ Boxing: The node on the outgoing side encloses the node on the incoming side. <p>Example</p> <p>Business Asset is the selected node. It is boxing Employee.</p>  <pre> graph TD BA[BA Business Asset] --- Employee[Employee] </pre>	

Field	Description
Label	<p>Type a label for the edge.</p> <p>If you do not specify a label, either the role or co-role name of the relation type from the operating model is used in both the diagram view and the diagram.</p> <p>If the Role direction check box is selected, the label is the role of the relation. If it is cleared, it uses the co-role.</p>

5. Above the diagram, to the right, click **Save**.

Remove an edge in a diagram view

You can remove an [edge](#) of a node in a [diagram view](#).

Steps

1. [Open](#) a diagram view.
2. Click .

 - » The **General properties** form appears.

3. Select a node in the diagram.

 - » The **Node properties** form appears.

4. Do one of the following:
 - Click  next to an incoming or outgoing edge in the edge section.
 - Select an edge in the diagram and click  in the upper right corner.
5. Above the diagram, to the right, click **Save**.

Maximum flow depth

Big diagrams can have very long paths, or chains of [edges](#). They can take a long time to build, and are canceled if they exceed specified time and size limits for fetching data.

To help you control the size of diagrams, you can specify the maximum flow depth, meaning the flow relation path length from the start flow node set to any other flow node.

This aims to improve readability and performance, and reduce the potential for diagrams that are too big to build.

Terminology and details

Terminology	Description
Flow node	<p>A diagram node that matches a diagram view node that is not marked as context.</p> <p>This means that the Context checkbox is not selected and, therefore, the node is situated in the flow region of the diagram.</p> <p>When the start node is a flow node, the start flow node set is only the start asset.</p>
Context node	<p>A diagram node that matches a diagram view node that is marked as context.</p> <p>This means that the Context checkbox is selected and, therefore, the node is situated in the context region of the diagram.</p> <p>When the start node is a context node, the start flow node set is all assets and complex relations that are reachable from the start node by traversing only flow-context and context-context edges.</p>
Start flow node set	<p>The merge of all start node sets of each diagram view node that it matches.</p> <p>When the start node matches multiple diagram view nodes, the start flow node set is the merge of all start node sets of each view node that it matches.</p>
Flow depth	The flow relation path length from the start flow node set to any other flow node.
Flow edge	An edge for which both nodes are flow nodes.

Note Maximum flow depth is ignored when traversing edges that are not flow edges. Flow-context edges and context-context edges are ignored in order to maximize context, which reduces diagram size and improves readability.

Specifying the maximum flow depth

You do not have to enable this feature. You can, however, [edit](#) the system-wide maximum flow depth in Collibra Console. This establishes a maximum flow depth for all results diagrams. The default value is 50.

You can also [specify](#) the maximum flow depth at the diagram view level. If you specify a value in a diagram view, that value supersedes the system-wide value in Collibra Console

Limitations

It bears mentioning that limiting flow depth does not prevent all diagrams from becoming too big to build. It can be that a single node has a large number of related assets, for example a Schema asset that contains 10,000 Table assets. In this case, the flow depth is only "1", but the diagram will "fan out" and might become too big to build.

Specify maximum flow depth

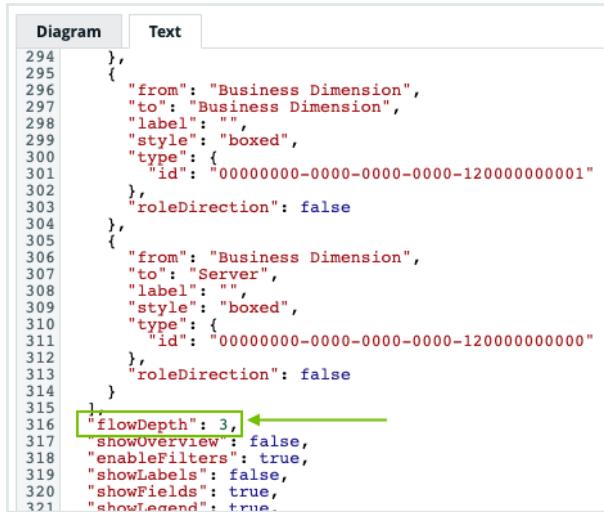
To help you control the size of business diagrams, you can specify the [maximum flow depth](#) in a diagram view.

Note

- Currently, you can only specify the maximum flow depth via the diagram view JSON [text editor](#).
- The value that you specify in the diagram view supersedes the value in Collibra Console. The default value in the Collibra Console configuration setting is 50.

Steps

1. Open a diagram view.
2. In the View bar menu, click .
- » The **General properties** form appears.
3. Click the **Text** tab, to switch to the diagram view text editor.
4. Scroll down and add "flowDepth": x, where "x" is the maximum flow depth.



```

Diagram Text
294 },
295 {
296   "from": "Business Dimension",
297   "to": "Business Dimension",
298   "label": "",
299   "style": "boxed",
300   "type": {
301     "id": "00000000-0000-0000-0000-120000000001"
302   },
303   "roleDirection": false
304 },
305 {
306   "from": "Business Dimension",
307   "to": "Server",
308   "label": "",
309   "style": "boxed",
310   "type": {
311     "id": "00000000-0000-0000-0000-120000000000"
312   },
313   "roleDirection": false
314 }
315 },
316 "flowDepth": 3, ←
317 "showOverview": false,
318 "enableFilters": true,
319 "showLabels": false,
320 "showFields": true,
321 "showLegend": true
322

```

5. Click **Save**.

Tip For more information on working with the diagram view text editor see:

- [JSON syntax: Nodes section](#)
- [Tips for creating correct diagram views with the JSON text editor](#)

Detailed description of JSON syntax for diagram views

A diagram view can be described by a file in a specific JavaScript Object Notation (JSON) format.

To design diagram views in JSON text format, it is important that you know the information in this section.

The examples of JSON code in the following sections are key-value pairs that you can use to [create a diagram view](#).

JSON syntax: Diagram section

These settings determine general display settings for the diagram.

JSON syntax	Description
<pre>"visitStrategy": "directed", "directedIncoming", "directedOutgoing", "completeGraph"</pre>	<ul style="list-style-type: none"> • Indicates which nodes and edges have to be traversed and displayed. • This setting is optional. • You can choose one of the following values: <ul style="list-style-type: none"> • "directed": For the start node, Collibra DGC traverses the relations in all directions and adds all the nodes that it finds. For the encountered nodes, Collibra DGC traverses relations only in the same direction as how they are encountered: if a node was encountered by traversing an outgoing relation, Collibra DGC looks for outgoing relations, and vice versa. This behavior is similar to traversing a hierarchy. <p>This is the default setting.</p> <p>For a refinement to this strategy, see also the setting for <code>layoutRegion</code>.</p> <ul style="list-style-type: none"> • "completeGraph": All nodes and edges related to the current asset are displayed, irrespective of the direction in which they were encountered. • "directedIncoming": For the start node, Collibra DGC only traverses the incoming relations and adds all the nodes that it encounters. For the encountered nodes, Collibra DGC traverses relations only in the same direction as how they are encountered: incoming relations only. • "directedOutgoing": For the start

JSON syntax	Description
	<p>node, Collibra DGC only traverses the outgoing relations and adds all the nodes that it encounters. For the encountered nodes, Collibra DGC traverses relations only in the same direction as how they are encountered: outgoing relations only.</p> <p>Be careful with using <code>completeGraph</code>, this setting can lead to very large diagrams.</p>

JSON syntax	Description
<pre>"resultNodeUnicityStrategy": "multipleNodesPerAssetId", "singleNodePerAssetId"</pre>	<ul style="list-style-type: none"> Indicates the number of times a node is displayed if it matches multiple nodes in the diagram view. This setting is optional. You can pick one of the following values: <ul style="list-style-type: none"> "multipleNodesPerAssetId": If an asset is encountered more than once for different nodes in the diagram view, it is represented by multiple nodes in the diagram, one per matching view node. This is the default setting. "singleNodePerAssetId": If an asset is encountered more than once for different nodes in the diagram view, it is represented by a single node in the diagram. <p>Note If one asset is encountered multiple times for the same node in the diagram view, it is always displayed only once in the diagram. In that situation, there is a loop for that node.</p>

JSON syntax	Description
<pre>"layout": "HierarchyLeftRight", "HierarchyTopBottom", "Hier- archyBottomTop", "Circular", "SmartOrganic", "Radial", "Flow/Context"</pre>	<ul style="list-style-type: none"> • Indicates the layout style of the diagram. • This setting is optional. • You can pick one of the following values: <ul style="list-style-type: none"> • "HierarchyLeftRight": Nodes and edges are displayed in a flow mostly from left to right. This is the default setting. • "HierarchyTopBottom": Nodes and edges are displayed in a flow mostly from top to bottom. • "HierarchyBottomTop": Nodes and edges are displayed in a flow mostly from bottom to top. • "Circular": Nodes and edges are arranged in a radial tree, where all nodes with the same number of edges to a given node are drawn in a circle. • "SmartOrganic": Nodes and edges are distributed in a well-balanced manner, there are minimal edge crossings. • "Radial": Nodes and edges are displayed with no overlaps, few edge crossings and few bends. • "Flow/Context": Layout style for diagrams with a flow and a context region. See also <code>layoutRegion</code> in the nodes section. Nodes and edges in the flow region are displayed mostly from left to right. The nodes and edges in the context region are displayed above the flow region. An

JSON syntax	Description
	edge that begins or ends with a context node, is shown with less emphasis (thinner and in light gray) than an edge between two flow nodes. If you specify this layout, keep in mind that for an edge between a flow node and a context node, the from node has to be in the flow region and the to node has to be in the context region.
"showOverview": false, true	<ul style="list-style-type: none"> • Indicates if the overview is displayed. • This setting is optional. • You can pick one of the following values: <ul style="list-style-type: none"> • <code>false</code>: The overview is not displayed. This is the default setting. • <code>true</code>: The overview is displayed.
"showLabels": false, true	<ul style="list-style-type: none"> • Indicates if the edge and node labels are displayed. • This setting is optional. • You can pick one of the following values: <ul style="list-style-type: none"> • <code>false</code>: The overlays are not displayed. This is the default setting. • <code>true</code>: The overlays are displayed.

JSON syntax	Description
'showLegend': false, true	<ul style="list-style-type: none"> Indicates if the diagram legend is displayed. The legend shows all asset types and complex relation types that occur in the diagram. This setting is optional. You can pick one of the following values: <ul style="list-style-type: none"> false: The legend is not displayed. true: The legend is displayed. This is the default setting.
'showPreview': false, true	<ul style="list-style-type: none"> Indicate if the preview pane is displayed by default. The preview pane shows information about the selected node or edge. This setting is optional. You can pick one of the following values: <ul style="list-style-type: none"> false: The legend is not displayed. true: The legend is displayed. This is the default setting.
'showFields': false, true	<ul style="list-style-type: none"> Indicates if the overlays are displayed. This setting is optional. You can pick one of the following values: <ul style="list-style-type: none"> false: The labels are not displayed. true: The labels are displayed. This is the default setting.

JSON syntax	Description
<pre>"maxNodeLabelLength": 0, <positive integer number></pre>	<ul style="list-style-type: none"> Indicates the maximum length of the node labels (whether they should be truncated when they are too long). This setting is optional. You can provide 0 or a positive integer number as the value: <ul style="list-style-type: none"> 0: Node labels are not truncated, they are displayed in full length. The default setting is 50.
<pre>"maxEdgeLabelLength": 0, <positive integer number></pre>	<ul style="list-style-type: none"> Indicates the maximum length of the edge labels. Edge labels are truncated when they are longer. This setting is optional. You can provide 0 or a positive integer number as the value: <ul style="list-style-type: none"> 0: Edge labels are not truncated, they are displayed in full length. The default value is 30.
<pre>"edgeBundling": false, true</pre>	<ul style="list-style-type: none"> Indicates whether edges of the same type are bundled to reduce clutter. This setting is optional. You can pick one of the following values: <ul style="list-style-type: none"> false: Edges are not bundled. true: Edges are bundled. This is the default setting.

JSON syntax	Description
"webworkersEnabled": false, true	<ul style="list-style-type: none">• Indicates whether the layout-related calculations can be moved to a separate DGC service thread. This is useful for larger diagrams, so that your browser does not freeze while rendering the diagram.• This setting is optional.• You can pick one of the following values:<ul style="list-style-type: none">◦ false: Layout-related calculations are not moved to a separate DGC thread of your processor.◦ true: For large diagrams, layout-related calculations are moved to a separate DGC thread of your processor. This is the default setting.

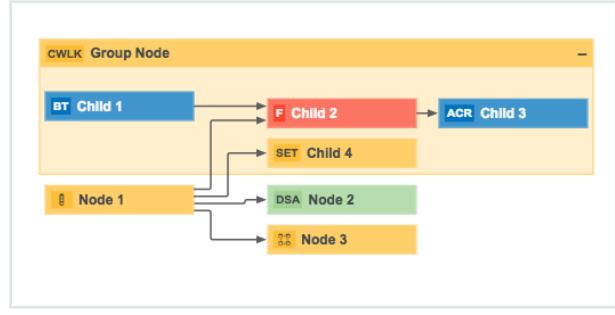
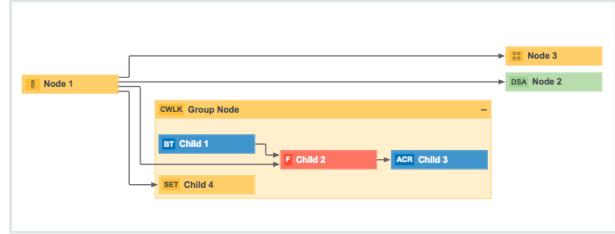
JSON syntax: Layout options

These options determine the layout of hierarchical diagrams.

- **Flow / Context**
- **Hierarchy left - right**
- **Hierarchy top - down**
- **Hierarchy bottom - up**

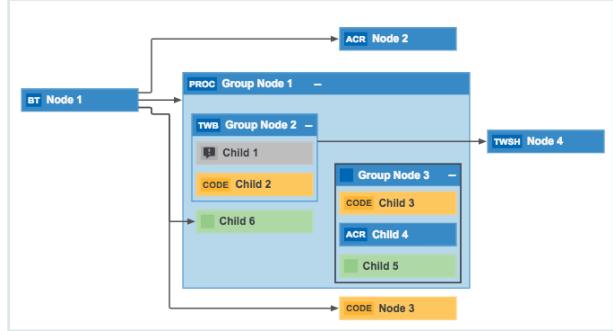
Example

```
"layoutOptions": {  
    "compactGroups": false,  
    "componentArrangementPolicy": "topmost",  
    "edgeBends": true,  
    "edgeBundling": true,  
    "edgeToEdgeDistance": 5,  
    "minimumLayerDistance": "auto",  
    "nodeToEdgeDistance": 5,  
    "orthogonalRouting": true,  
    "preciseNodeHeightCalculation": true,  
    "recursiveGroupLayering": true,  
    "separateLayers": true,  
    "webWorkers": true,  
    "nodePlacer": {  
        "barycenterMode": "auto",  
        "breakLongSegments": "auto",  
        "groupCompactionStrategy": "none",  
        "nodeCompaction": "auto",  
        "straightenEdges": "auto"  
    }  
}
```

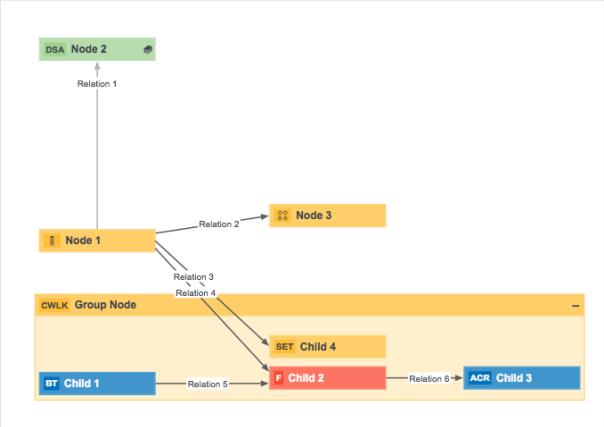
JSON syntax with all default values	Description
<pre>"compactGroups": true // false</pre>	<p>Group compaction reduces the number of node layers without reversing edge directions.</p> <p>The resulting layering tries to keep the layer span of a boxing node at a minimum, while minimizing the overall vertical space.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • true: The diagram view uses as few node layers as possible. The layers of a diagram are also used inside a boxing node. <p>Example</p>  <ul style="list-style-type: none"> • false: The diagram view does not try to reduce the number of node layers. This results in separate layers inside a boxing node. <p>Example</p> 

JSON syntax with all default values	Description
	<p>Note</p> <ul style="list-style-type: none">• This option is only applicable when <code>recursiveGroupLayering</code> is set to <code>true</code>.• This option is optional.• The default value is <code>false</code>.• This option does not affect the loading time of the diagram.

JSON syntax with all default values	Description
<pre>"componentArrangementPolicy": "topmost" // "compact"</pre>	<p>Choose how to arrange boxed nodes that are not connected by the arrow edge with other nodes.</p> <p>This is only applicable to boxed and boxing edges.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • "topmost": Vertically align the boxed nodes with their topmost boxed node inside the boxing node. • Example <ul style="list-style-type: none"> • "compact": Put the boxed nodes in different layers to reduce the size of the boxing node. This reduces the overall diagram size. If the diagram layout is Hierarchy left - right or Flow / Context, the height of the diagram will be minimized. If the diagram layout is Hierarchy bottom - up or Hierarchy top - down, the width will be minimized. • Example

JSON syntax with all default values	Description
	 <p data-bbox="781 691 1416 936">Note<ul style="list-style-type: none">• This option is optional.• The default value is <code>topmost</code>.• This option does not affect the loading time of the diagram.</p>

JSON syntax with all default values	Description
<pre>"edgeBends": true // false</pre>	<p>Choose whether edges can be curved and can contain bends.</p> <p>Warning When this option is false, the edgeBundling and orthogonalRouting options are automatically ignored.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • true: Enables edge bends. <p>Example</p> <ul style="list-style-type: none"> • false: Disables edge bends, edgeBundling and orthogonalRouting. Edges without bends go in a straight line from source node to target node, and may cross other nodes. They don't reserve space for edge labels. <p>Example</p>

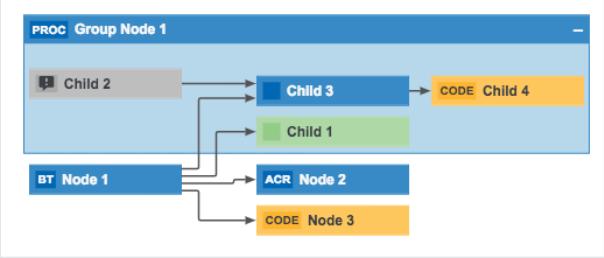
JSON syntax with all default values	Description
	 <p data-bbox="790 781 1394 1075">Note • This option is optional. • The default value is <code>true</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.</p>

JSON syntax with all default values	Description
<pre>"edgeBundling": true // false</pre>	<p>Choose whether arrow edges can be bundled at the source or target node when they represent the same incoming or outgoing relation.</p> <p>Note Only one edge label is displayed for a bundled edge.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • <code>true</code>: Enable edge bundling. <p>Example</p> <p>• false: Disable edge bundling.</p> <p>Example</p> <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>true</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre>"edgeToEdgeDistance": 5 // "auto"</pre>	<p>Set the minimum distance (in pixels) between two adjacent edges in one layer.</p> <p>This affects the horizontal distance if the diagram layout is:</p> <ul style="list-style-type: none"> • Hierarchy left - right • Flow / Context, but only for nodes in the flow <p>This affects the vertical distance if the diagram layout is:</p> <ul style="list-style-type: none"> • Hierarchy top - down • Hierarchy bottom - up • Flow / Context, but only for nodes in the context <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • [Any positive integer value]: Use this amount of pixels. • "auto": Let a layouting algorithm automatically set the value. <div data-bbox="743 1320 1421 1567" style="background-color: #f0f0f0; padding: 10px;"> <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is 5. • This option does not affect the loading time of the diagram. </div>

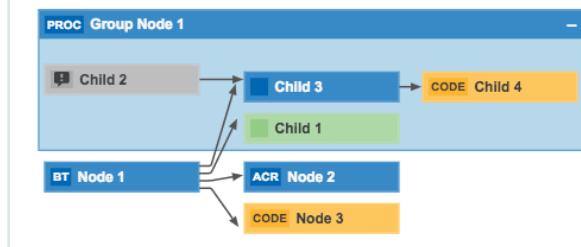
JSON syntax with all default values	Description
<pre>"minimumLayerDistance": 5 // "auto"</pre>	<p>Set the minimum distance (in pixels) between two adjacent layers.</p> <p>This affects the horizontal distance if the diagram layout is:</p> <ul style="list-style-type: none"> • Hierarchy left - right • Flow / Context, but only for nodes in the flow <p>This affects the vertical distance if the diagram layout is:</p> <ul style="list-style-type: none"> • Hierarchy top - down • Hierarchy bottom - up • Flow / Context, but only for nodes in the context <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • [Any positive integer value]: Use this amount of pixels. • "auto": Let a layouting algorithm automatically set the value. <div data-bbox="743 1327 1414 1581" style="background-color: #f0f0f0; padding: 10px;"> <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>auto</code>. • This option does not affect the loading time of the diagram. </div>

JSON syntax with all default values	Description
<pre>"nodeToEdgeDistance": 5 // "auto"</pre>	<p>Set the minimum distance (in pixels) between an edge and an adjacent node in the same layer.</p> <p>This affects the horizontal distance if the diagram layout is:</p> <ul style="list-style-type: none"> • Hierarchy left - right • Flow / Context, but only for nodes in the flow <p>This affects the vertical distance if the diagram layout is:</p> <ul style="list-style-type: none"> • Hierarchy top - down • Hierarchy bottom - up • Flow / Context, but only for nodes in the context <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • [Any positive integer value]: Use this amount of pixels. • "auto": Let a layouting algorithm automatically set the value. <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is 5. • This option does not affect the loading time of the diagram. </div>

JSON syntax with all default values	Description
<pre>"orthogonalRouting": true // false</pre>	<p>Choose whether or not edges can be routed orthogonally.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • <code>true</code>: All edge segments are horizontal or vertical. <p>Example</p> 

- `false`: Edge segments can be diagonal.

Example



Note

- This option is optional.
- The default value is `true`.
- This option does not affect the loading time of the diagram.

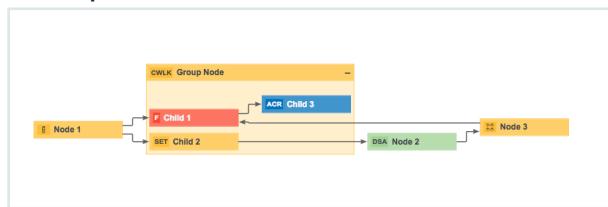
JSON syntax with all default values	Description
<pre>"preciseNodeHeightCalculation": true // false</pre>	<p>Determines the precision with which node heights are rendered to visually accommodate diagram text.</p> <ul style="list-style-type: none">• <code>true</code>: Each node is correctly sized to fit its label text. For extremely large diagrams, this can result in significantly longer loading times.• <code>false</code>: Loading times are vastly improved, but label text might not always fit in the nodes. When label text doesn't fit, the text is truncated by an ellipsis. For example: "ABC_Finance_Freq...". <p>Note</p> <ul style="list-style-type: none">• This option is optional.• The default value is <code>true</code>.• Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre>"recursiveGroupLayering": true // false</pre>	<p>Choose whether boxing edges are respected during layering.</p> <p>This option is ignored when the diagram does not contain boxing nodes.</p> <div style="border-left: 2px solid red; padding-left: 10px;"> <p>Warning Enabling this option may change the diagram flow. Some arrow edges may go in the opposite direction. Otherwise occupying only adjacent layers by boxing nodes wouldn't be possible in some cases.</p> </div>

You can choose one of the following values:

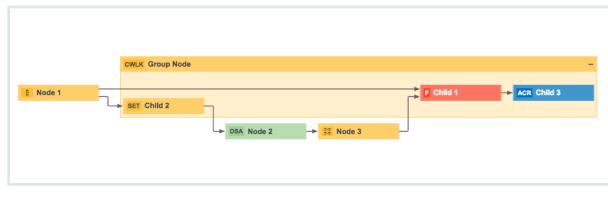
- **true:** Boxing nodes are layered recursively: Boxed nodes in the same boxing node always occupy adjacent layers.

Example



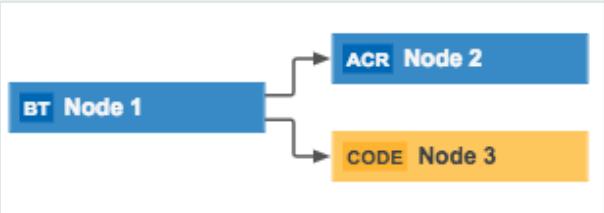
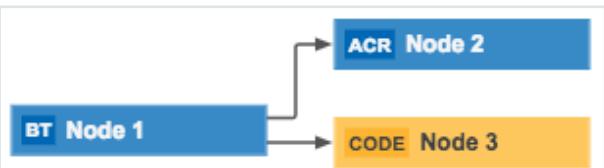
- **false:** Group information is ignored during the layering.

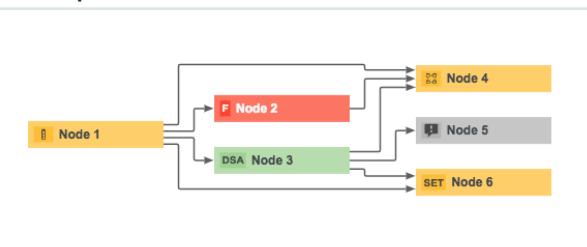
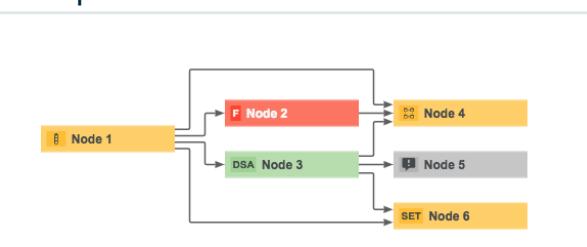
Example

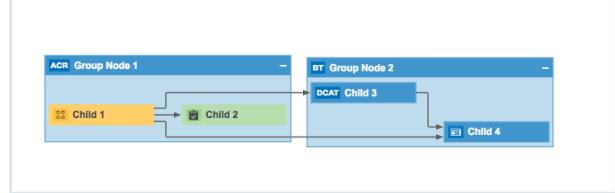
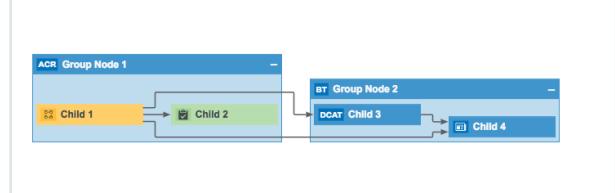


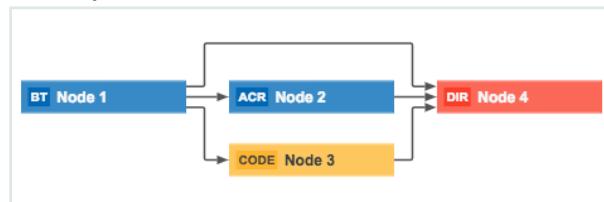
JSON syntax with all default values	Description
	<p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>true</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.
<pre>"separateLayers": true // false</pre>	<p>Strictly separate nodes of different layers. In other words, nodes are placed below each other. This prevents big nodes from extending into an adjacent layer.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • <code>true</code>: Layers are separated. <p>Example</p> <p>• false: Layers are not separated.</p> <p>Example</p> <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>true</code>. • This option does not affect the loading time of the diagram.

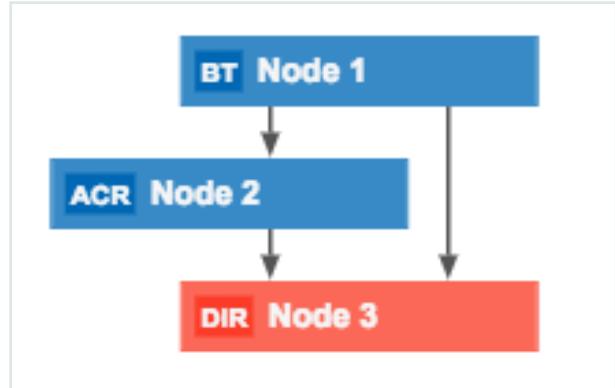
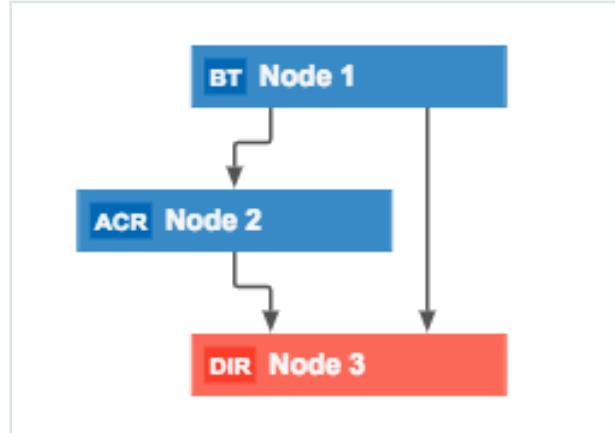
JSON syntax with all default values	Description
"webWorkers": true // false	<p>Choose whether big diagrams should be built in the background thread.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none">• <code>true</code>: Enables multi-thread support for diagram building. Note This makes layout processing faster and less likely to freeze the browser.• <code>false</code>: All diagrams are built in the main thread. Note<ul style="list-style-type: none">• This option is optional.• The default value is <code>true</code>.• Choosing <code>false</code> may lead to an increased loading time of the diagram.
"nodeplacer"	Use additional options for placing the nodes.

JSON syntax with all default values	Description
<pre data-bbox="282 316 687 399"> "barycenterMode": true // false // "auto" </pre>	<p>Choose whether the diagram should be as symmetric as possible. This may result in more edge bends.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • <code>true</code>: The diagram is more symmetric but may have more edge bends. <p>Example</p>  <ul style="list-style-type: none"> • <code>false</code>: The diagram is less symmetric but may have fewer edge bends. <p>Example</p>  <ul style="list-style-type: none"> • <code>"auto"</code>: The layouting algorithm decides whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data. <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>auto</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre data-bbox="282 316 700 399"> "breakLongSegments": true // false // "auto" </pre>	<p>Choose whether the diagram should break long arrow edges in favor of a more compact layout.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • <code>true</code>: Long edges are broken, for a more compact diagram. <p>Example</p>  <ul style="list-style-type: none"> • <code>false</code>: Long edges are not broken. <p>Example</p>  <ul style="list-style-type: none"> • <code>"auto"</code>: The layouting algorithm decides whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data. <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>auto</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre>"groupCompactionStrategy": "none" // "maximum"</pre>	<p>Choose the strategy for controlling the horizontal compactness of boxing nodes.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • "none": Do not use horizontal group compaction. The contents of a boxing node will occupy nearly the same horizontal positions as when not grouped at all. <p>Example</p>  <ul style="list-style-type: none"> • "maximum": Make boxing nodes as narrow as possible. <p>Example</p>  <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>none</code>. • Choosing <code>none</code> may lead to an increased loading time of the diagram.

JSON syntax with all default values	Description
<pre data-bbox="282 316 684 395"> "nodeCompaction": true // false // "auto" </pre>	<p>Choose whether to reduce the height of the diagram as much as possible. This places the nodes of a layer in a stacked style (horizontally interleaving), which reduces the width of the layer.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • <code>true</code>: Nodes are placed in a compact style. <div data-bbox="827 714 1372 792" style="background-color: #f0f0f0; padding: 10px;"> <p>Note This may result in an increased width.</p> </div> <p>Example</p>  <ul style="list-style-type: none"> • <code>false</code>: Nodes are not placed in a compact style. <p>Example</p>  <ul style="list-style-type: none"> • <code>"auto"</code>: The layouting algorithm decides whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data. <div data-bbox="787 1596 867 1632" style="background-color: #f0f0f0; padding: 10px;"> <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>auto</code>. • This option does not affect the loading time of the diagram. </div>

JSON syntax with all default values	Description
<pre data-bbox="282 316 700 393"> "straightenEdges": true // false // "auto" </pre>	<p>Apply a post-processing step to reduce edge bends.</p> <p>You can choose one of the following values:</p> <ul style="list-style-type: none"> • <code>true</code>: The post-processing step is applied to reduce edge bends. <p>Example</p>  <p>Warning This may violate some minimum distances specified by the user and the edge distribution may no longer be uniform.</p> <ul style="list-style-type: none"> • <code>false</code>: Post-processing step is not applied. <p>Example</p>  <ul style="list-style-type: none"> • <code>"auto"</code>: The layouting algorithm decides

JSON syntax with all default values	Description
	<p>whether this option is set to <code>true</code> or <code>false</code>, depending on the diagram data.</p> <div data-bbox="790 444 1408 709" style="background-color: #f0f0f0; padding: 10px;"> <p>Note</p> <ul style="list-style-type: none"> • This option is optional. • The default value is <code>auto</code>. • Choosing <code>true</code> may lead to an increased loading time of the diagram. </div>

JSON syntax: Nodes section

These settings determine the display settings for nodes. You must add a node for each asset type and complex relation type that you want to include in the diagram.

JSON syntax	Description
<pre data-bbox="163 1051 663 1486">"id": "Business Asset"</pre>	<ul style="list-style-type: none"> • Determines the name of the node. • This setting is mandatory. • You can type any string here, but it must be unique in this view. For readability, we recommend using the name of the asset type or complex relation type as the ID. • You can refer to this node by using its ID in the <code>"from"</code> and <code>"to"</code> key-value pairs of the edges section.

JSON syntax	Description
<pre>"type": {"id": "00000000-0000-0000-000000011001"}</pre>	<ul style="list-style-type: none"> Determines the resource ID of the asset type or the complex relation type. This setting is mandatory. You can have multiple nodes with the same Type in one diagram view. The value must be a valid resource ID of an asset type or complex relation type. See Find a resource ID of an asset type and Find the resource ID of a complex relation.
<pre>"layoutRegion": "flow", "context"</pre>	<ul style="list-style-type: none"> Determine if the node is treated as a flow node or a context node. This influences the traversal strategy. An edge from a flow node to a context node is always included in the diagram. An edge between two flow nodes FN1 and FN2 is only included in the diagram if the edge from FN1 to FN2 is traversed in the same direction as the edge that brought FN1 into the diagram. This setting is optional. You can choose one of the following values: <ul style="list-style-type: none"> "flow": The node is part of the flow. This is the default setting. "context": The node is part of the context. When you select the Flow/Context layout for a diagram, the edges between flow nodes are rendered horizontally, mostly from left to right (the from node is to the left of the to node). The edges from flow to context nodes are rendered vertically, from bottom to top.

JSON syntax	Description
"label": "Term"	<ul style="list-style-type: none"> Determines the name that is displayed on the node in the diagram design view. For a node that represents a complex relation type, the label is used in the diagram as well. This setting is optional. You can provide any string as the value. If you do not specify a label, the name of the asset type or the complex relation type is used.
"collapsed": false, true	<ul style="list-style-type: none"> Indicates if the selected node is collapsed in the initial diagram. This setting is optional. You can choose one of the following values: <ul style="list-style-type: none"> false: The selected node is a boxing node and the boxed nodes are displayed. true: The selected node is a boxing node and the boxed nodes are hidden.
"name":	<ul style="list-style-type: none"> Defines the name that has to be displayed on the node. By default, this is the asset's name, but you can specify any characteristic. Use the same syntax as for "fields".

JSON syntax	Description
<pre>"fields":</pre>	<ul style="list-style-type: none"> • Defines which characteristics are shown in the node's overlay. The order of the fields determines the order of the characteristics in the overlay. • This setting is optional. • You can pick one or more of the following values: <ul style="list-style-type: none"> ◦ "name": The asset's name, as defined in the "name": setting. ◦ "status": The asset's status value. ◦ "domain": The domain in which the asset is located. ◦ "community": The lowest-level community in which the asset is located. ◦ "assetType": The asset's type. <p style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">Note When filtering a diagram by asset type, keep in mind that all subtypes are included, meaning they pass the filter along with the specified asset type.</p> <ul style="list-style-type: none"> ◦ "tags": Any tags that were created for the asset. ◦ "responsibility_<ID>": The overlay is a resource role type with the ID that you type here. The diagram shows the avatars of users and user groups that have this role for this asset. ◦ "createdOn": The date when the asset was created. ◦ "createdBy": The name of the user who created the asset. ◦ "lastModifiedOn": The date and time when the asset was last modified. ◦ "lastModifiedBy": The name of the user who last modified the asset. ◦ "stringAttribute_<ID>": The overlay is a string

JSON syntax	Description
	<p>attribute type with the ID that you type here.</p> <p>Example: "stringAttribute_00000000-0000-0000-0000-000000000001"</p> <ul style="list-style-type: none"> ◦ "dateAttribute_<ID>": The overlay is a date attribute with the ID that you type here. ◦ "numericAttribute_<ID>": The overlay is a date attribute with the ID that you type here. ◦ "booleanAttribute_<ID>": The overlay is a boolean attribute with the ID that you type here. ◦ "singleValueListAttribute_<ID>": The overlay is a single-selection attribute with the ID that you type here. ◦ "multiValueListattribute_<ID>": The overlay is a multi-selection attribute with the ID that you type here. ◦ "dataQualityRule_<ID>": The overlay is the percentage score of a data quality metric group with the ID that you type here. The score overlay shows the percentage, the color (red/amber/green) and trend (up/down/flat). ◦ "sourceRelation_<ID>": The overlay is a relation type where the node is a tail asset and has the ID that you type here. ◦ "targetRelation_<ID>": The overlay is a relation type where the node is a head asset and has the ID that you type here. <p>Keep in mind that it is much easier to add and edit overlays through the graphical diagram view editor. See Edit a diagram view and The Node properties form.</p>

JSON syntax: Edges section

The edges settings determine which directed relations should be traversed, and how they should be depicted on the diagram. Each edge represents a relation type between two nodes (asset types or complex relation types) in the view.

You have to ensure that the diagram view is a connected graph: each node in the diagram view is reachable from any other node.

JSON syntax	Description
"from": "Business Asset"	<ul style="list-style-type: none"> Indicates which node is the head asset. This setting is mandatory. You must fill in a node ID ("id") from the nodes section.
"to": "Table Column1"	<ul style="list-style-type: none"> Indicates which node is the tail asset. This setting is mandatory. You must fill in a node ID ("id") from the nodes section.
"type": "00000000-0000-0000-000000007038"	<ul style="list-style-type: none"> Indicates the ID of the relation type. This setting is mandatory. You have to fill in the resource ID of the relevant relation type. You can copy and paste these resource IDs from the Settings UI: <ul style="list-style-type: none"> Attribute type. Relation type. Complex relation type.
"roleDirection": true, false	<ul style="list-style-type: none"> Determines the direction of the edge; is it the role or co-role. This setting is mandatory. You can pick one of the following values: <ul style="list-style-type: none"> <code>true</code>: The edge is traversed from head to tail. <code>false</code>: The edge is traversed from tail to head.

JSON syntax	Description
<pre>"style": "arrow", "boxed", "boxing"</pre>	<ul style="list-style-type: none"> • Determines how edges are displayed. • This setting is optional. • You can pick one of the following values: <ul style="list-style-type: none"> • "arrow": The edge is represented by an arrow. The arrow starts at the 'from' node and ends at the 'to' node. This is the default setting. • "boxing": The edge is represented as a 'from' asset that boxes one or more 'to' assets. In other words, a head asset contains one or more tail assets. • "boxed": The edge is represented as a 'from' asset that is boxed by a 'to' asset. In other words, a tail asset contains one or more head assets.
<pre>"label": "Groups"</pre>	<ul style="list-style-type: none"> • Determines the name that is displayed on edges in the diagram. • This setting is optional. • If you do not specify a label, the role or co-role of the relation type from the operating model is used, in both the diagram view and the diagram. If "roleDirection" is <i>true</i>, Collibra DGC uses the role, if it is <i>false</i>, it uses the co-role.

Tips for creating correct diagram views with the diagram view text editor

Although you can create and edit diagram views via the [text editor](#), we recommend that you use the graphical view editor when possible. However, if you want to configure advanced filter expressions for a diagram, you have to complete the configuration via the diagram view text editor.

Each change that you make via the graphical view editor is reflected in the text editor and vice versa.

Tips

- Collibra Data Governance Center checks the full syntax of your JavaScript Object Notation (JSON) as you type. If the JSON code is incorrect, Collibra DGC detects this immediately and the **Save** button remains inactive.

```

1 {
2   "nodes": [
3     {
4       "id": "Table Column",
5       "layoutRegion": "flow"
6       "type": "00000000-0000-0000-0000-000000031008"
7     }
8   }
9 }
10 {
11   "id": "Field Mapping",
12   "layoutRegion": "flow",
13   "type": "00000000-0000-0000-0000-00000007502"
14 }
15 }
16 }
17 {
18   "id": "Table",
19   "layoutRegion": "context",
20   "type": "00000000-0000-0000-0000-000000031007"
21 }
22 }
23 }
24 {
25   "id": "Business Term",
26   "layoutRegion": "context",
27   "type": "00000000-0000-0000-0000-000000011001"
28 }
29 }
30 }
31 {
32   "id": "Mapping Specification",
33   "layoutRegion": "context",
34   "type": "00000000-0000-0000-0000-000000031030"
35 }
36 }
37 }
38 }
39 }
40 }
41 }
42 }
43 }

```

Errors: 1
1. Invalid template syntax: Parse error on line 5: ...gion": "flow" "type": ("i^ Expecting EOF, ')', got 'STRING'.

For example:

- If you omit the required comma between two key-value pairs, Collibra DGC shows an error message, and highlights the offending line.
- If you make a typo in a value, Collibra DGC shows an error and displays the allowed values.
- JSON is a case-sensitive language. This means that you must use the exact key-value pairs as they are described in this guide.
- The code must contain a **nodes** section and an **edges** section. The order of the sections is irrelevant. Layout to improve readability (spaces, tabs, empty lines), is irrelevant.
- Collibra DGC checks if each resource ID (conceptTypeID, binaryFactTypeID, attributeTypeID) that you specified, exists in the operating model. If a resource ID does not exist, it is removed from the diagram view and a warning and an error are displayed. Collibra DGC does not save your view unless you correct the error.

The screenshot shows a software interface for managing diagram edges. At the top, there are tabs for 'Diagram' and 'Text'. Below the tabs is a code editor containing JSON code. The code defines several edges between nodes like 'Data Structure', 'Mapping Specification', and 'Business Assets'. A red box highlights the bottom section of the code editor, which contains error messages:

```

29 "edges": [
30   {
31     "from": "Data Structure",
32     "to": "Business Asset",
33     "roleDirection": false,
34     "type": {
35       "id": "00000000-0000-0000-0000-000000007038"
36     }
37   },
38   {
39     "from": "Data Structure",
40     "to": "Mapping Specification",
41     "roleDirection": true,
42     "type": {
43       "id": "00000000-0000-0000-0000-000000007028"
44     }
45   },
46   {
47     "from": "Mapping Specification",
48     "to": "Data Structure",
49     "roleDirection": false,
50     "type": {
51       "id": "00000000-0000-0000-0000-000000007029"
52     }
53   },
54   {
55     "from": "Business Assets",
56     "to": "Business Asset",
57     "roleDirection": true,
58     "type": {
59       "id": "00000000-0000-0000-0000-000000007001"
60     }
61   },
62   {
63     "from": "Business Assets",
64     "to": "Business Dimension",
65     "roleDirection": false,
66     "type": {
67       "id": "00000000-0000-0000-0000-000000007007"
68     },
69     "style": "boxed"
70   }
71 },
72 ]
    
```

Errors: 2

1. Edge with index 3 points to an unknown node with ID Business Assets.
2. Edge with index 4 points to an unknown node with ID Business Assets.

- Collibra DGC checks if the diagram view is a connected graph.

A diagram view is a connected graph when every node can be reached from any other node by traversing the edges. If the diagram is not connected, a warning is displayed. Collibra DGC does not save your view unless you correct the error.

- You can create key-value pairs with a key name that is not listed in this guide.

These key-value pairs are allowed in the code but are ignored. As such, typos in the key names do not trigger Collibra DGC to show a warning or error. You can use this to your advantage, for example, to add comments to the JSON view.

Pin a diagram view

You can pin a [diagram view](#) in the dropdown of the view selection field:

- While creating it.
- From the diagram editor.
- From the diagram view list.

Pin a view from the diagram editor

1. Open a diagram view.
2. Click .
- » The Share view dialog box appears.
3. Select the Pin check box.
4. Click Save.

Pin a view from the diagram view list.

1. Open a diagram view.
2. Click the current view name and click Show all... at the bottom.
» The available views appear.
3. Click  in front of the views you want to pin.

Unpin a diagram view

You can unpin a [diagram view](#) to remove it from the dropdown of the view selection field:

- In the diagram editor.
- In the diagram view list.

Unpin a view in the diagram editor

1. Open a diagram view.
2. Click .
- » The Share view dialog box appears.
3. Clear the Pin check box.
4. Click Save.

Unpin a view in the diagram view list.

1. Open a diagram view.
2. Click the current view name and click Show all... at the bottom.
» The available views appear.
3. Click  in front of the views you want to pin.

Set a diagram view as default

Setting a [diagram view](#) as default for an asset means that you indicate that this diagram view is the one to be used initially, when the users with whom you shared this diagram view display a diagram for an instance of this asset type and all its child asset types.

Steps

1. [Open](#) a diagram view.
2. Click .
- » The **Share view** dialog box appears.
3. Select the **Default** check box.
4. Click **Save**.

Share a diagram view

You can share a [diagram view](#) with other users or make it private.

Users with whom the diagram view is shared can only [edit](#) the diagram view if they also have the **Manage and share anyone's Views, Dashboards, Search filters** permission.

Note By default, diagram views are public.

Steps

1. [Open](#) a diagram view.
2. Click .
- » The **Share view** dialog box appears.

3. Enter the required information.

Field	Description
Sharing options	This section determines who has access to this diagram view.
Public	Select to share this diagram view with all users.
Private	Select to share this diagram view with no one.
Share with specific roles, groups & users	Select to choose with whom to share the diagram view.
Roles	Select or type the roles whose users you want to give access.
Groups	Select or type the groups whose users you want to give access.
Users	Select or type the users to whom you want to give access.
Promote	
Default	Select to use this diagram view as the default view when you open the diagram editor.
Pin	Select to pin the diagram view. Pinned diagram views appear in the view selection drop-down list.

4. Click **Save**.

Filtering by business qualifier

Filtering by business qualifier allows you to filter a diagram to contain only assets that are qualified by a chosen business qualifier. The difference from traditional filtering is that the filter value is not fixed in the diagram view; instead, the user can choose the business qualifier to filter by in the result diagram, without having to change the view. This is a form of dynamic filtering. We refer to such a diagram as a [business qualifier diagram](#).

Business qualifier diagrams are smaller and load faster than "unqualified" diagrams, and their focused qualifier makes them easier to understand.

The following is true of every asset in a business qualifier diagram:

- Every asset matches a node in the business qualifier view.
- Every asset can be reached from the start asset by selecting the view and applying the normal traversal strategy. In other words, the asset would be included in an ordinary diagram.
- Every asset has a business qualifier path to the selected business qualifier.

For descriptions of these terms, see [Terminology](#).

Key asset type and relation types

The various business qualifiers that can "qualify" assets in a business qualifier diagram are represented by Business Qualifier assets.

When filtering by business qualifier, the start node can be a Business Qualifier asset or a Column asset.

Business Qualifier assets

Business Qualifier assets relate to other assets by the following packaged relation type:

Head	Role	Co-role	Tail
Business Qualifier	qualifies	is qualified by	Asset

Column assets

Column assets relate to Business Attribute assets that are related to Business Qualifier assets. The packaged relation types are the following:

Head	Role	Co-role	Tail
Business Qualifier	qualifies	is qualified by	Data Attribute
Data Attribute	groups	is grouped by	Column

Enabling business qualifier diagrams

To view Business Qualifier diagrams, the feature has to be enabled in Collibra Console.

If enabled in Collibra Console, the **Filtering by business qualifier** option is shown in the **Filters** section of the [Node properties](#) form, when [editing](#) a diagram view. The filter icon appears on the nodes for which the option is selected, like on any other node for which a filter is applied.

Note To make the feature available to users, a **Filtering by business qualifier** option (either Optional or Mandatory) has to be selected for at least one view node.

Terminology

Term	Description
Business qualifier view	A diagram view with at least one node for which a Filtering by business qualifier option is selected .
Business qualifier diagram	A diagram for which all of the following conditions are met: <ul style="list-style-type: none"> The selected diagram view is a business qualifier view. Filters are enabled in the diagram toolbar. Either the start node is a Business Qualifier asset, or both of the following are true: <ul style="list-style-type: none"> The start node matches a view node that has a Filtering by business qualifier option (either Optional or Mandatory) selected. The start node has at least one Business Qualifier path.
Business qualifier path	An asset has a business qualifier path if either of the following is true: <ul style="list-style-type: none"> The asset has at least one relation asset qualified by a Business Qualifier asset. The asset is a Column, and both: <ul style="list-style-type: none"> The Column asset is grouped by a Data Attribute asset. That Data Attribute asset is qualified by a Business Qualifier asset.

Work with filters in a diagram view

When you create a diagram view, you can configure filters to only keep the nodes that you are interested in or to limit the number of nodes that are shown in a diagram.

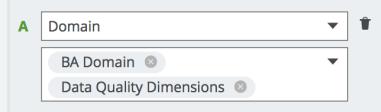
Note Users can enable or disable all filters in the [diagram toolbar](#).

Steps

1. [Open a diagram view](#).
2. Click .
- » The [General properties](#) form appears.
3. Select a node in the diagram.
- » The [Node properties](#) form appears.

4. In the **Node properties** form, go to the **Filters** section.
5. Do one of the following:

Action	Description	
Filter by business qualifier	Collibra version	Action
	2021.01	Select the Filtering by business qualifier checkbox to filter a diagram to contain only the assets that are qualified by the chosen business qualifier.
		<p>In the Filtering by business qualifier drop-down list , select one of the following settings:</p> <ul style="list-style-type: none"> ○ Mandatory: The diagram only contains assets matching this view node that are qualified by the chosen business qualifier. ○ Optional: The diagram includes: <ul style="list-style-type: none"> ■ Assets matching this view node that are qualified by the chosen business qualifier. ■ Assets matching this view node that are not qualified by any business qualifier.
<p>Note</p> <ul style="list-style-type: none"> ○ This feature is only available if it is enabled in Collibra Console. ○ You can only apply Filtering by Business Qualifier to view nodes that represent an asset type, not to nodes that represent a complex relation type. 		

Action	Description
Add a simple filter	<p>Select a characteristic and enter one or more values. Click Add filter criteria to add more filter criteria.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p>Tip</p> <ul style="list-style-type: none"> You can add multiple values for a characteristic. If you select multiple values, the filter clause uses the IN operator. In other words, any of the values is accepted. <p>Example:</p>  <p>reads <i>Domain IN (BA Domain, Data Quality Dimensions)</i></p> <ul style="list-style-type: none"> You cannot use wildcards in the value of a filter clause. If you use multiple filter clauses, they are always combined with the logical AND operator. In other words, all filter clauses have to be met. </div>
Configure advanced filter expressions	See Configure an advanced filter expression in a diagram view .
Edit a filter	Edit the filter criteria to match your needs.
Delete a filter	Click  to delete a filter criterion.

- Above the diagram, to the right, click **Save**.

Configure an advanced filter expression in a diagram view

To configure advanced filter expressions for diagrams, you have to complete the configuration via the diagram view JSON [text editor](#).

Steps

1. Add a simple filter, as described in [Work with filters in a diagram view](#).
2. Click the **Text** tab, to switch to the diagram view text editor.
3. Find the node on which you created the simple filter and change the **IN** operator to one of the following operators:

Operators for attributes kinds "text" and "plain text"

- IN
- NOT_IN
- CONTAINS
- NOT_CONTAINS
- STARTS_WITH
- NOT_STARTS_WITH
- ENDS_WITH
- NOT_ENDS_WITH

Note The operators EXISTS and NOT_EXISTS do not work in advanced filter expressions for diagrams.

Operators for attribute kinds "date" and "number"

- IN
- NOT_IN
- LESS
- LESS_OR_EQUALS
- GREATER
- GREATER_OR_EQUALS

4. Above the diagram, to the right, click **Save**.

Examples and additional information

Example of a node with a filter on the Report Attribute asset type

Filtering by asset type is particularly useful for diagrams. When filtering a diagram by asset type, keep in mind that all subtypes are included, meaning they pass the filter along with the specified asset type.

```
{  
  "layoutRegion": "flow",  
  "id": "Report Attribute",  
  "type": {  
    "id": "00000000-0000-0000-0000-000000031027"  
  },  
  "filters": [  
    {  
      "operator": "IN",  
      "values": [  
        "00000000-0000-0000-0000-000000031027"  
      ],  
      "field": "assetType"  
    }  
  ]  
},
```

Example of a node with a filter on a data attribute

You have to provide the value in Unix Epoch datetime, in milliseconds. This example is for a custom date attribute to be greater than 2020-okt-1.

```
{  
  "operator": "GREATER",  
  "values": [  
    "1601483854000"  
  ],  
  "field": "dateAttribute_7ff7f6af-33d3-4fdf-8ac5-bf918606315f"  
}
```

For more information on configuring advanced filter expressions in the diagram view text editor, see:

- [JSON syntax: Nodes section](#)
- [Tips for creating correct diagram views with the JSON text editor](#)

Delete a diagram view

You can delete a [diagram view](#).

Steps

1. Open an asset page.
2. In the tab pane, click **Diagrams**.
3. Select the diagram view that you want to delete.
4. In the view bar, click .
5. Click **Delete view**.

Diagram FAQ

Which nodes and edges are included in a diagram?

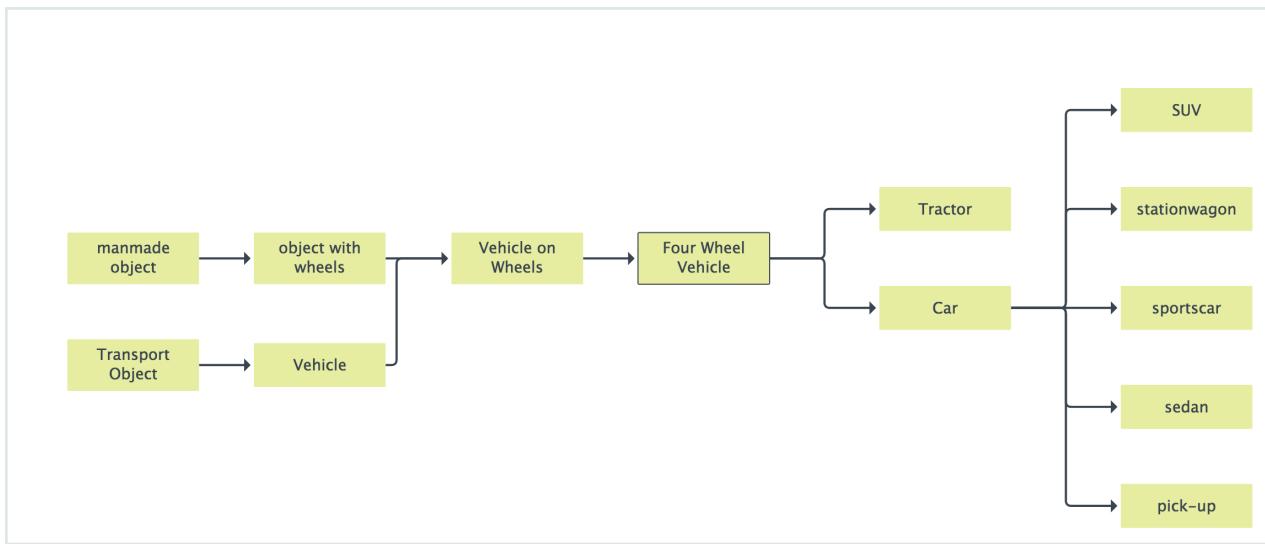
Collibra Data Governance Center only adds relevant relations and nodes to the diagram by using a specific traversal strategy. The traversal strategy is the logic that describes which relations and assets have to be included in the diagram. To understand the traversal strategy, it is important that you know the difference between incoming and outgoing edges and between flow and context nodes.

From a start node, Collibra DGC adds all the relations (both incoming and outgoing) and the relation's node whose relation type is mentioned in the view.

When traversing further downstream from a node that is downstream from the start node, Collibra DGC adds all the relations and nodes that are downstream, but not the ones that are upstream.

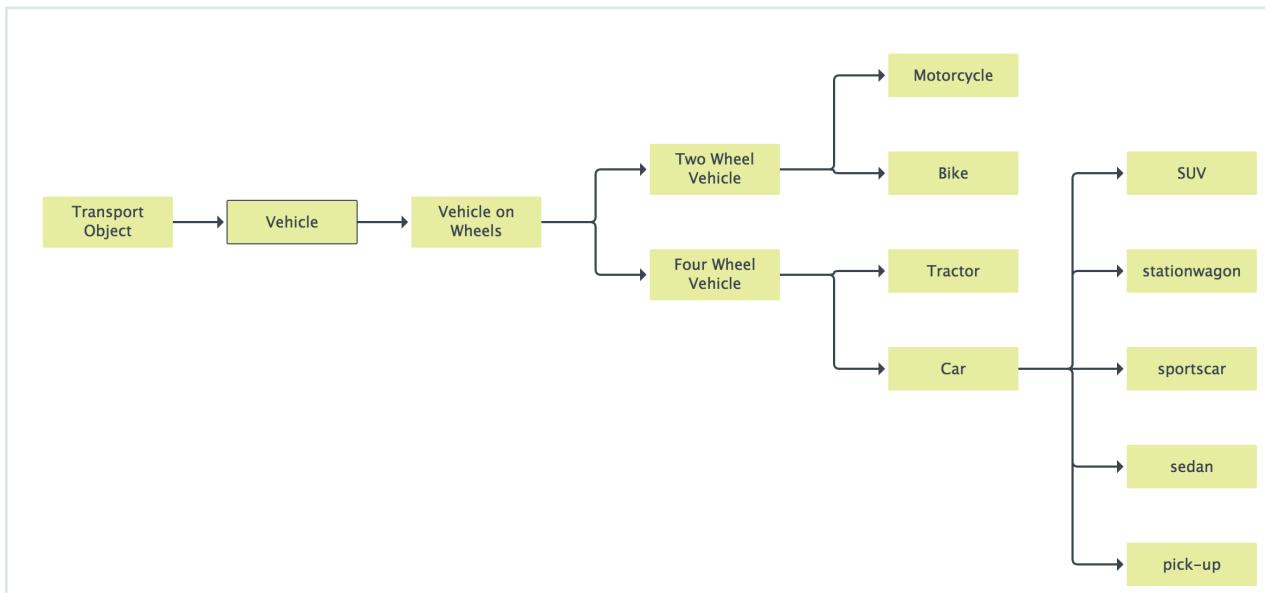
When traversing further upstream, Collibra DGC adds all relations and nodes that are upstream of that node, but not the ones that are downstream.

For the following example diagram, the view contains the **Groups** relation type and **Four Wheel Vehicle** is the start node.



Any downstream relation of an upstream node (**Vehicle**, **Vehicle on Wheels**, ...) is irrelevant for the diagram and thus not shown. The same traversal strategy is applied to any node that is on the upstream side of a node that is downstream of the start node.

If you jump to **Vehicle**, you see that the diagram has changed for the **Vehicle on Wheels** node. This node no longer has the upstream relation to **object with wheels**, but the relation to **Two Wheel Vehicle** is added.

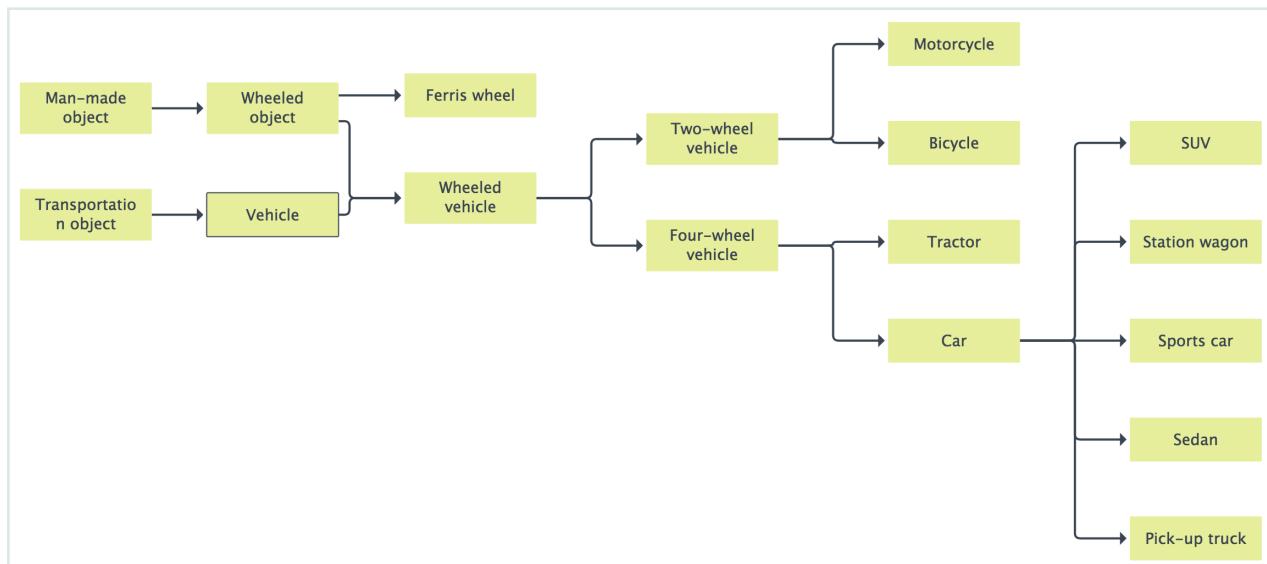


Can I set a different traversal strategy for my diagram view?

All examples in this chapter, unless mentioned otherwise, use the default traversal strategy. We call this the 'directed' traversal strategy. It can be paraphrased as 'keep on walking and don't look back'.

You can also switch the traversal strategy to complete graph, by always looking in all directions. Depending on your data, this could obviously lead to a much bigger diagram, with many more nodes and edges.

Going back to the example given in the FAQ [Which nodes and edges are included in a diagram?](#), and applying that strategy results in the following diagram:



Note the new upstream branch of **Wheeled vehicle**, which is downstream from the start node. An upstream node in that branch, **Wheeled object**, has a downstream branch: **Ferris wheel**.

You can switch the traversal strategy in the JSON form of the diagram view by adding the following key-value pair to the top-level diagram section

`"visitStrategy": "completeGraph"`.

For more information, see [Diagram views](#).

When editing a diagram view, I can assign each node to either the 'Flow' or 'Context' layout region. What does that do?

The default traversal strategy ('directed') gives the required results when you depict a set of assets that are related through some kind of (data) flow or dependency. For nodes in the flow section, and the edges between them, you can paraphrase the 'directed' traversal strategy as "keep on walking and don't look back". But when the relation represents a link to **context** rather than **flow**, the edge between two nodes should always be traversed, even if the related node is upstream of a downstream node, or vice versa. You can also regard an edge between a flow node and a context node as bidirectional: it should always be traversed.

This notion becomes clearer when you look at the following example.

When the flow depicts transformations of table columns, the tables that contain the columns, and the business terms that are related to them, provide context to the columns. The context nodes are always relevant, regardless of whether the column was encountered while going upstream or downstream. The context nodes are always added to the diagram.

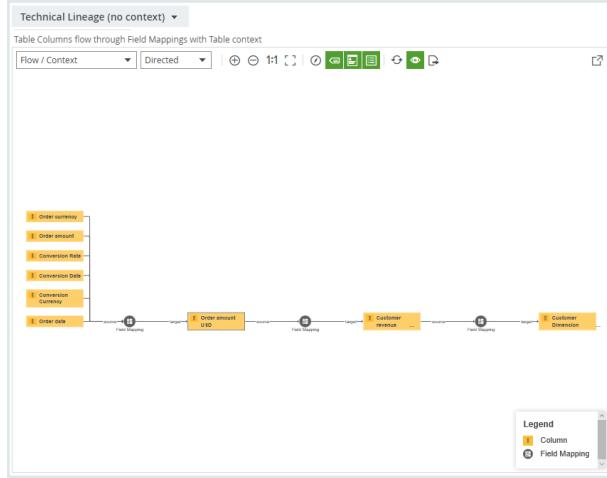
For this traversal strategy, you can assign a node in the diagram view to be a **context** node.

Consider the following example diagram view:



This view contains flow only.

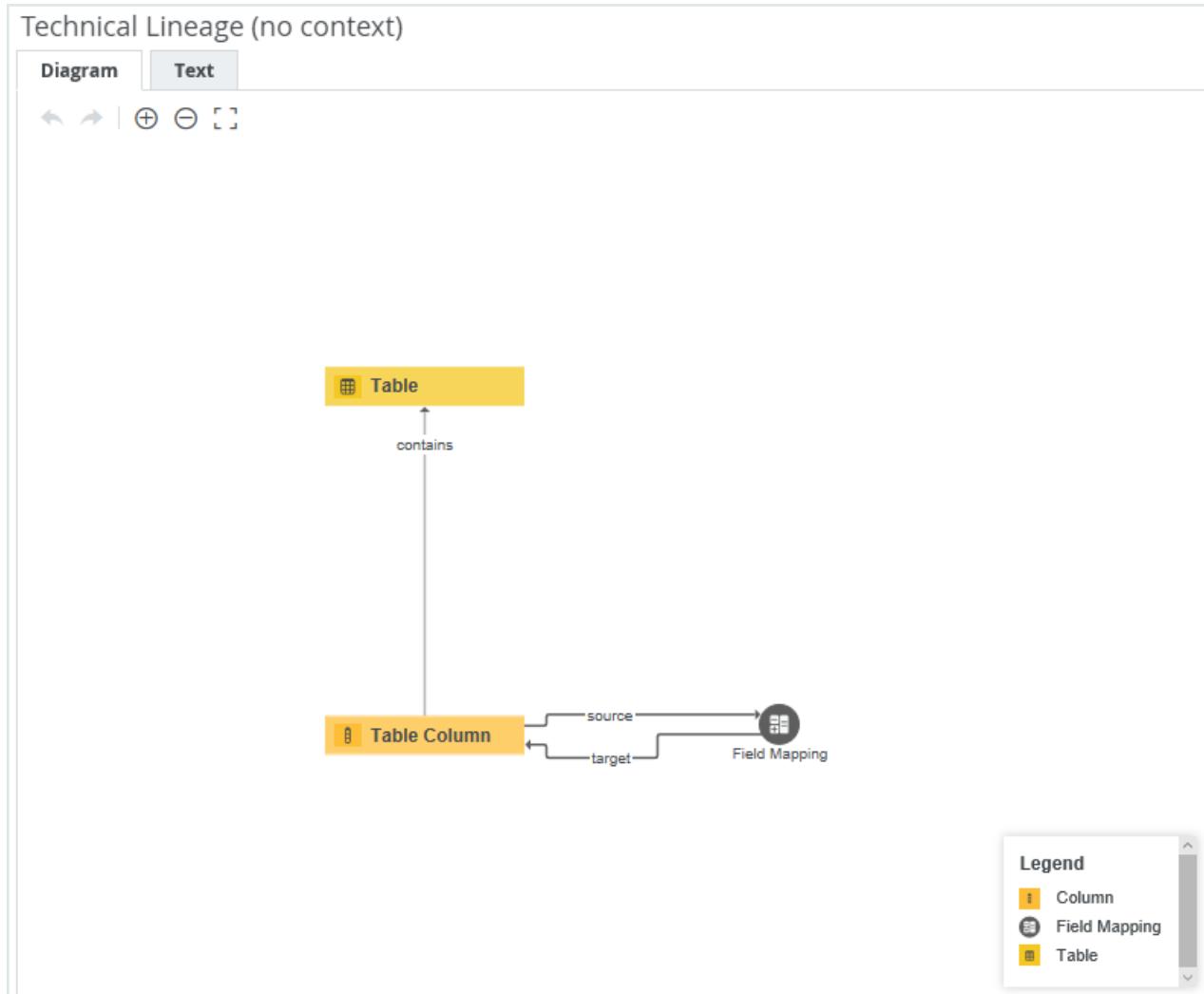
An example diagram for this view is below:



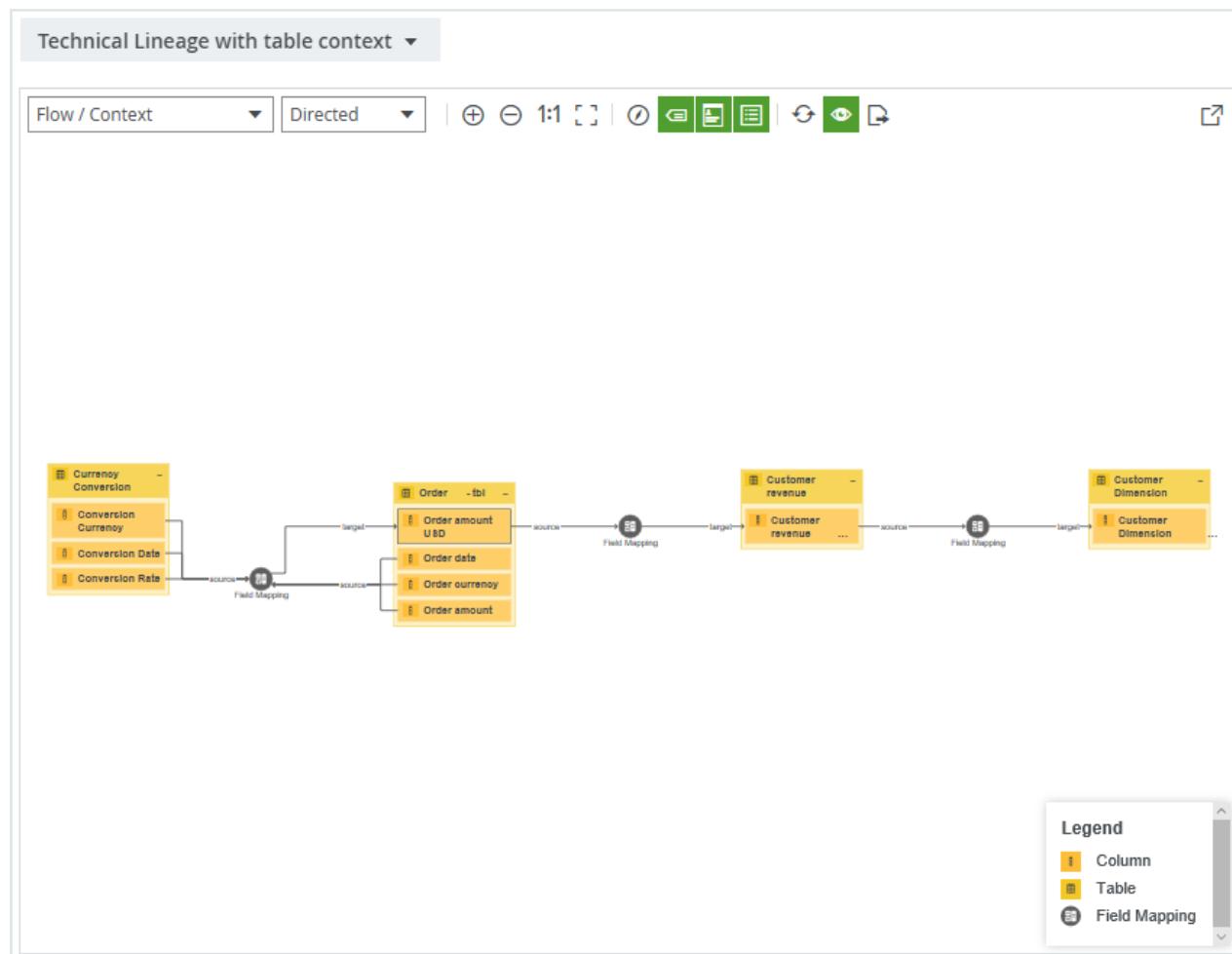
We started from the **Order amount USD** asset.

Now assume that you also want to see to which tables these columns belong.

You could add a relation from column to table to the view (in other words, a downstream edge), but this relation would only be considered on the downstream side, and if we add the column/table relation in the reverse direction, it would only be considered on the upstream side. To solve this problem, we designate the Table as a **context node**, so that the relation from **Column to Table** is always traversed, both for **Columns** that are upstream as well as downstream.



Resulting in the diagram below:



Both upstream and downstream **Columns** show the **Table** that contains them. The edge from **Column** to **Table** was always traversed.

What is special about the flow/context layout?

The **Flow/Context** layout is special because it has a specific behavior.

If you set the diagram layout to **Flow/Context**, the nodes that are in the **Flow** layout region, also known as flow nodes, are depicted as a left-to-right hierarchy in the lower half of the diagram. The context nodes are all in the top half of the diagram.

Note Flagging your nodes as flow or context nodes is always relevant, even when the diagram layout is not Flow/Context. For more information about how this is relevant, see [When editing a diagram view, I can assign each node to either the 'Flow' or 'Context' layout region. What does that do?](#) .

Can I change the node colors and symbols that are used for an asset type or complex relation type?

You can view and edit the color and symbol of each asset type and complex relation type in  **Settings**. However, you need a role that can access the  **Settings** and the permission to make changes to the operating model.

All assets and complex relations of the same type have the same color and symbol across all diagrams.

Pictures

A picture is a copy of a [diagram](#) that is stored separately from the original. You can edit the pictures in the same way you edit diagrams, but there are fewer options available.

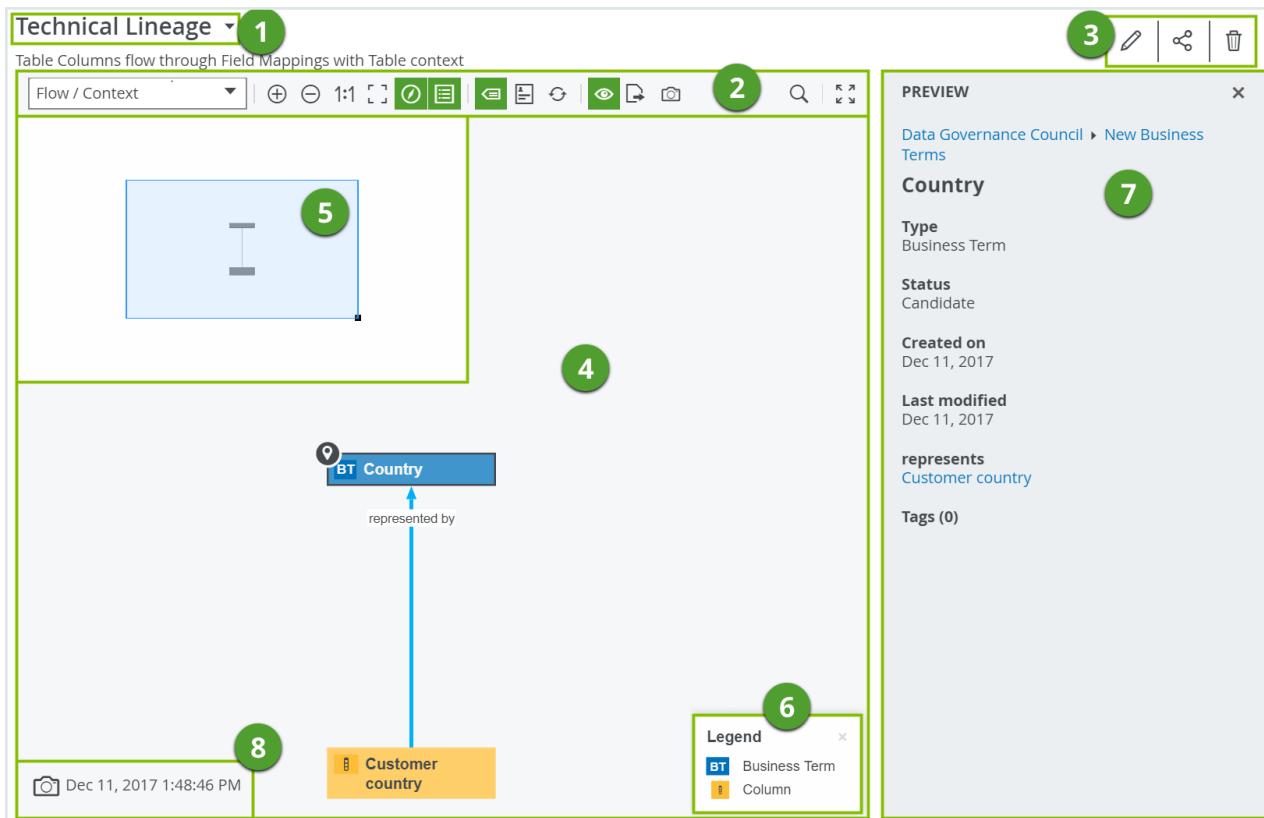
Pictures are an easy way to save a diagram after you configured it. You can then reuse it later.

Available actions

- [Create a picture.](#)
- [Open a picture.](#)
- [Edit a picture.](#)
 - a. [Select a layout.](#)
 - b. [Zoom in or out.](#)
 - c. [Expand or collapse nodes.](#)
 - d. [Trace a path between nodes.](#)
 - e. [Move nodes, enable or disable labels, the legend, and so on.](#)
- [Export a picture.](#)
- [Delete a picture.](#)

Picture editor

The picture editor allows you to view and edit [pictures](#).



No	Name	Description
1	Picture name	The name of the picture.
2	Picture toolbar	The toolbar to work in the picture.
3	View bar menu	The buttons to edit the picture's name, share it or delete it.
4	Picture	This is the actual depiction of the traceability of the current asset, according to the picture you opened .
5	Overview ()	Zoom and navigate a picture that is too large to fit the screen. You can move it to anywhere in the diagram.

No	Name	Description
6	Legend	<p>The legend explains the color codes and symbols of the items in the picture. You can move it to anywhere in the picture.</p> <p>For each asset type and complex relation type that is visible on the picture, the legend shows the color and symbol, followed by the name of the type.</p> <p>If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend.</p> <p>Tip Click a row in the legend to select all occurrences of that type in the picture. You can use this to expand or collapse all nodes of the same type.</p>
7	Preview panel	The preview panel with information about the selected node.
8	Time stamp	The date and time on which the picture was created .

Picture toolbar

The toolbar of the [picture editor](#) helps you to edit settings that apply to the entire [picture](#).



Button	Name	Description
Hierarchy left - right	Layout	Select a layout . The layout determines the location of nodes and edges, but does not change which nodes and edges are shown.
+	Zoom in	Zoom in on the picture.
-	Zoom out	Zoom out from the picture.

Button	Name	Description
1:1	Zoom to readable value	Zoom the picture to a size that is readable.
	Shrink to fit	Zoom the picture to a size that fits the screen.
	Overview	Show or hide the overview inset that enables you to zoom and navigate.
	Labels	Show or hide the labels of the edges and complex relations.
	Overlays	Show or hide overlays for all nodes in the picture . If the view does not have any defined overlays, the button is grayed out.
	Export	Export the picture as a PDF or SVG file to your default downloads folder.
	Redraw	Discard all the changes that you made to the picture and restore it to the initial state.

Button	Name	Description
:≡	Legend	<p>Show or hide the legend panel containing the explanation of the nodes.</p> <p>The legend explains the color codes and symbols of the items in the picture. You can move it to anywhere in the picture.</p> <p>For each asset type and complex relation type that is visible on the picture, the legend shows the color and symbol, followed by the name of the type.</p> <p>If all occurrences of a given type are boxed inside collapsed boxing nodes, that type is not visible and therefore, not shown in the legend.</p> <p>Tip Click a row in the legend to select all occurrences of that type in the picture. You can use this to expand or collapse all nodes of the same type.</p>
👁	Preview	Show or hide the preview panel on the right side of the screen. It contains information about the characteristics of the currently selected node (asset or complex relation).
📷	Picture	Create a picture based on the picture.
🔍	Find	Find a node in the picture.
Fullscreen	Fullscreen	Show the current picture in full-screen mode. The button changes to ✖, to exit full-screen mode.

Create a picture

You can create a [picture](#) based on a diagram.

Steps

1. Open a [diagram](#) or a [picture](#).
2. Make the necessary changes.
 - a. [Select a layout](#).
 - b. [Zoom in or out](#).
 - c. [Expand or collapse nodes](#).
 - d. [Trace a path between nodes](#).
 - e. [Move nodes, enable or disable labels, the legend, and so on](#).
3. On the toolbar, click .
- » The **Save diagram as picture** dialog box appears.
4. Enter the required information.

Field	Description
Name*	Type a name for the picture. The default name is the name of the diagram view and a date stamp.
Description	Type a description for the picture.
Sharing options	This section determines who has access to this picture.
Public	Select to share this picture with all users.
Private	Select to share this picture with no one.
Share with specific roles, groups & users	Select to choose with whom to share the picture.
Roles	Select or type the roles whose users you want to give access.
Groups	Select or type the groups whose users you want to give access.
Users	Select or type the users to whom you want to give access.
Promote	

Field	Description
Pin	Select to pin the picture. Pinned pictures appear in the view selection drop-down list.

Fields marked with a * are mandatory.

5. Click **Save**.
 - » The resulting picture appears in the **Pictures** section of the tab pane.

Pin a picture

You can pin a [picture](#) in the drop-down of the view selection field

- while [creating it](#).
- [from the picture editor](#).

Pin a view from the picture editor

1. [Open a picture](#).
2. Click .
- » The **Share picture** dialog box appears.
3. Select the **Pin** check box.
4. Click **Save**.

Unpin a picture

You can unpin a [picture](#) to remove it from the drop-down of the view selection field

Unpin a picture in the picture editor

1. [Open a diagram view](#).
2. Click .
- » The **Share view** dialog box appears.
3. Clear the **Pin** check box.
4. Click **Save**.

Share a picture

You can share a **picture** with other users or keep it private.

Steps

1. Open a picture.
2. Click <.
- » The Share picture dialog box appears.
3. Enter the required information.

Field	Description
Sharing options	This section determines who has access to this picture.
Public	Select to share this picture with all users.
Private	Select to share this picture with no one.
Share with specific roles, groups & users	Select to choose with whom to share the picture.
Roles	Select or type the roles whose users you want to give access.
Groups	Select or type the groups whose users you want to give access.
Users	Select or type the users to whom you want to give access.
Promote	
Pin	Select to pin the picture. Pinned pictures appear in the view selection drop-down list.

4. Click **Save**.

Open a picture

You can open a [picture](#) of a diagram of an asset to visualize its relations in the [picture editor](#).

Steps

1. Open an asset page.
2. In the tab pane, click **Pictures**.
 - » The picture list appears.
3. Click a picture in the list.
 - » The picture is opened in the picture editor.

What's next?

You can now [edit](#) or [export](#) the picture.

Find node in a picture

You can search a [picture](#) for a specific node.

Steps

1. [Open a picture](#).
2. On the toolbar, click  .
 - » The search box appears.
3. Start typing in the search box.
 - » The counter next to the search box indicates how many matches are found.
 - » The first match is selected in the picture.

Tip You can use the arrows to navigate between the matches.

Edit the name and description of a picture

You can edit the name and the description of a [picture](#).

Steps

1. [Open](#) a picture.
2. Click .
 - » The **Edit name and description** dialog box appears.
3. Enter the required information.

Field	Description
Name	Type a name for the picture. The default name is the name of the original diagram view and a date stamp.
Description	Type a description for the picture.

4. Click **Save**.

Edit a picture

You can edit a [picture](#) to represent the nodes as clearly as possible.

Steps

1. [Open](#) a picture.
2. Make the necessary changes to the picture.
 - a. [Select](#) a layout.
 - b. [Zoom](#) in or out.
 - c. [Expand or collapse](#) nodes.
 - d. [Trace](#) a path between nodes.
 - e. [Move](#) nodes, enable or disable labels, the legend, and so on.

Select a picture layout

You can select a [picture layout](#) to change the way nodes are shown in a [picture](#).

Steps

1. [Open a picture.](#)
2. On the toolbar, click the layout box and select a layout.

Diagram layout	Description
Flow / Context	<p>Nodes and edges are shown in a flow and a context region.</p> <p>In the flow region, nodes are shown mostly from left to right.</p> <p>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.</p> <p>If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right.</p> <p>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</p>
Hierarchy left - right	<p>Nodes and edges are shown in a flow, predominantly from left to right. This is the default layout.</p>
Hierarchy top - down	<p>Nodes and edges are shown in a flow, from top to bottom.</p>
Hierarchy bottom - up	<p>Nodes and edges are shown in a flow, from bottom to top.</p>

Diagram lay-out	Description
Circular	<p>Nodes and edges are arranged in a circular fashion.</p> <p>Boxing nodes are not supported in this layout, therefore:</p> <ul style="list-style-type: none"> ◦ The picture is completely redrawn. ◦ The explored nodes are removed from the picture. ◦ The nodes expand or collapse to their initial state. ◦ Returning to a layout that supports boxing nodes completely redraws the picture.
Radial	<p>Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.</p> <p>Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.</p>
Smart Organic	<p>Nodes and edges are distributed in a well-balanced manner, with few edge crossings.</p>

Picture layouts

Picture layouts determine the location of nodes and edges of a [picture](#), but do not change which nodes and edges are displayed.

You can [select](#) a picture layout in the [toolbar](#) of the [picture editor](#).

Diagram layout	Description
Flow / Context	<p>Nodes and edges are shown in a flow and a context region.</p> <p>In the flow region, nodes are shown mostly from left to right.</p> <p>The context region is shown above the flow region. The edges that begin or end with a node in the context region are shown with less emphasis (thinner and light gray). You can choose which nodes are in the context region by selecting the Context checkbox in the node properties form.</p> <p>If there are no nodes in the context region, this layout produces the same result as Hierarchy left -> right.</p> <div style="border-left: 3px solid #ccc; padding-left: 10px; margin-top: 10px;"> <p>Note For an edge between a flow node and a context node, the 'from' node must be in the flow region and the 'to' node in the context region.</p> </div>
Hierarchy left - right	<p>Nodes and edges are shown in a flow, predominantly from left to right.</p> <p>This is the default layout.</p>
Hierarchy top - down	<p>Nodes and edges are shown in a flow, from top to bottom.</p>
Hierarchy bottom - up	<p>Nodes and edges are shown in a flow, from bottom to top.</p>
Circular	<p>Nodes and edges are arranged in a circular fashion.</p> <p>Boxing nodes are not supported in this layout, therefore:</p> <ul style="list-style-type: none"> • The picture is completely redrawn. • The explored nodes are removed from the picture. • The nodes expand or collapse to their initial state. • Returning to a layout that supports boxing nodes completely redraws the picture.

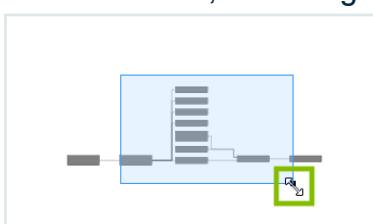
Diagram layout	Description
Radial	<p>Nodes and edges are shown in a radial fashion, with no overlaps, few edge crossings and few bends.</p> <p>Boxing nodes are not supported in this layout. This has the same consequences as described for the Circular layout.</p>
Smart Organic	Nodes and edges are distributed in a well-balanced manner, with few edge crossings.

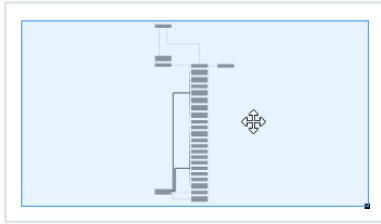
Working with the picture overview inset

The overview inset of the [picture editor](#) allows you to keep an overview of the complete [picture](#), while the main screen is showing only a section of it.

Steps

1. [Open a picture](#).
2. On the toolbar, click the  to show or hide the overview inset.
 - » The overview inset is shown over the picture. You can still see the picture underneath.
3. Do one of the following:

Action	Descriptions
Zoom in or out by scaling:	<p>a. Move your mouse pointer over the lower right corner of the blue square, until it turns into a sleek slanted arrow.</p> <p>b. Click and hold, then drag the pointer to zoom in or out.</p> 

Action	Descriptions
Navigate in the picture:	<p>a. Move your mouse pointer over the blue square. The pointer turns into a four-way arrow.</p>  <p>b. Click and hold, then drag the pointer to move the square to what you want to see.</p>

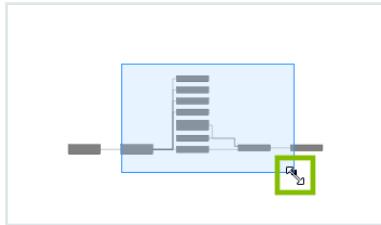
Zoom in or out in the picture editor

When working with [pictures](#), you can zoom in or out in different ways.

Steps

1. [Open](#) a picture.
2. Do one of the following:

Strategy	Description
Zoom in or out with buttons.	On the toolbar, click \oplus (Zoom in) or \ominus (Zoom out) as needed.
Zoom in or out by scrolling with your mouse.	Move your mouse pointer to anywhere on the picture and use your mouse wheel to zoom. The zoom is centered at the mouse pointer.

Strategy	Description
Zoom in or out by scaling.	<p>a. On the toolbar, click the  button (Overview). An overview inset with a miniature version of the entire picture is shown in the top right corner. The section of the picture that is shown on the screen is visible as a blue rectangle on the overview.</p> <p>b. Move your mouse pointer over the lower right corner of the blue rectangle, until it turns into a sleek slanted arrow.</p>  <p>c. Click and hold, then drag the pointer to zoom in or out.</p>
Zoom to readable value.	On the toolbar, click  1:1.
Adapt the diagram to fit in the view.	On the toolbar, click  .

Trace all paths between nodes in a picture

You can trace all paths between any number of nodes on the [picture](#), which means you can show the relations between the nodes.

You can trace a path between nodes in the following ways:

- The highlight mode: Keep the whole picture and highlight the nodes and edges on the path.
- The crop mode: Remove any node or edge that is not on the path.

Steps

1. [Open a picture.](#)
2. Select one, two or more nodes in the picture:

On a macOS system	On a Windows system
Click the first one and then hold down <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

3. Do one of the following:
 - To keep the whole picture and highlight the path, right-click one of the selected nodes and click **Trace path → Highlight**.
 - To remove anything that is not part of the path between the two selected nodes, right-click one of the nodes and click **Trace path → Crop**.
 - » If you selected a single node, all relations are traced.
 - » If you selected multiple nodes, the path between the selected nodes is traced.
 - » If there is no path between the nodes, a message is displayed.

Move a node in the picture

If you want a node to be in a different location in the picture, you can easily move it around.

Steps

1. [Open a picture.](#)
2. Click a node and hold down your mouse button. To select multiple nodes, do the same but select multiple nodes.

On a macOS system	On a Windows system
Click the first one and then hold down <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

3. Move the node to where you want it and release the mouse button.

Note You cannot save the these changes, but you can [create](#) a picture or [export](#) the picture with these changes.

Expand or collapse picture nodes

If a node has an outgoing edge with the boxing style, it becomes a boxing node. Your diagram view determines whether boxing nodes are expanded or collapsed by default. Your diagram view can also lock collapsed nodes, which means that you cannot expand the collapsed boxing node.

Steps

1. [Open a picture](#).
2. Do one of the following:
 - Select a node.
 - Select multiple nodes by holding down the select key and clicking nodes.

On a macOS system	On a Windows system
Click the first one and then hold down <code>cmd</code> while clicking on the next ones.	Click the first one and then hold down <code>ctrl</code> while clicking on the next ones.

3. Do one of the following:
 - In the legend, click the asset type or complex relation type that you want to expand or collapse. You have now selected all nodes of this type.
 - In the node, click `+` or `-`.
 - In the context menu of a node, click **Expand/Collapse selected**.

Export a picture

You can export a [picture](#) to a PDF or SVG file.

Steps

1. [Open a picture.](#)
2. Make the necessary changes to the picture.
 - a. [Select a layout.](#)
 - b. [Zoom in or out.](#)
 - c. [Expand or collapse nodes.](#)
 - d. [Trace a path between nodes.](#)
 - e. [Move nodes, enable or disable labels, the legend, and so on.](#)
3. On the toolbar, click  and select **PDF** or **SVG**.
 - » The resulting file is automatically downloaded to your default downloads folder.
 - » The default file name is **diagram.pdf** or **diagram.svg**.

Delete a picture

You can delete a [picture](#)

- [from the picture list.](#)
- [from the picture editor.](#)

Delete a picture from the picture list.

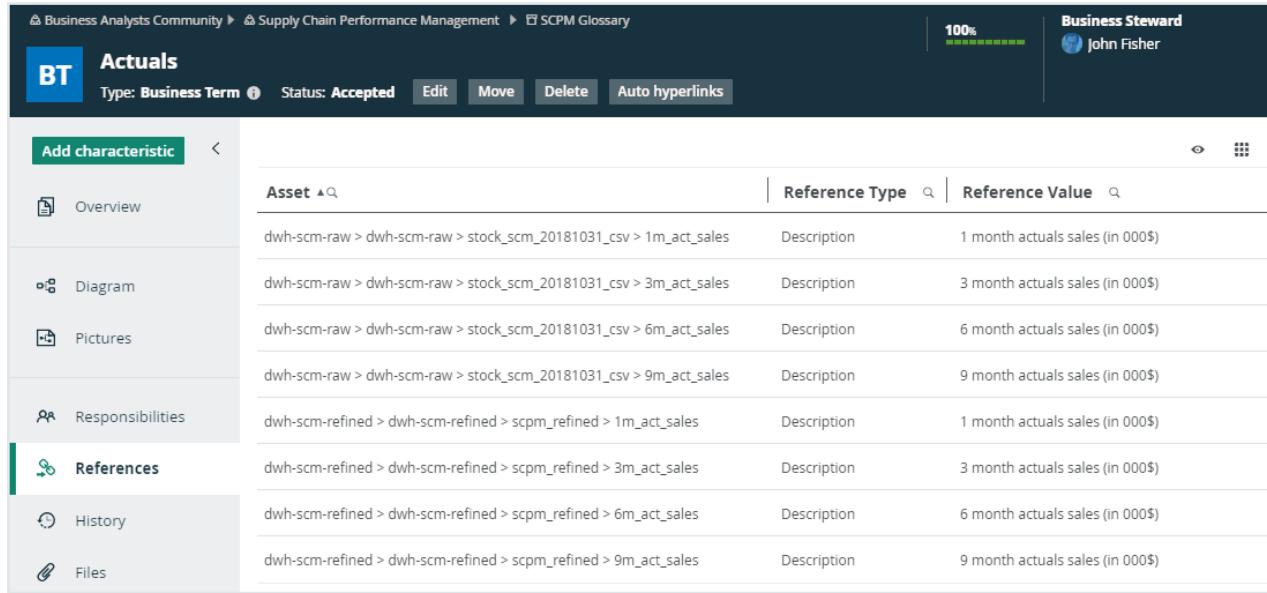
1. Open an asset page.
2. In the tab pane, click **Pictures**.
 - » The picture list appears.
3. At the end of a line, click .
4. Click **Delete picture**.

Delete a picture from the picture editor

1. [Open a picture.](#)
2. In the upper right corner, click .
3. Click **Delete picture**.

References page

The **References** tab page of an asset page contains a table with assets that have **automatic hyperlinks** pointing to the current asset.



The screenshot shows a user interface for managing assets. At the top, there's a navigation bar with links to 'Business Analysts Community', 'Supply Chain Performance Management', and 'SCPM Glossary'. On the right, it shows a progress bar at 100% and a 'Business Steward' section for 'John Fisher'. Below the navigation is a toolbar with buttons for 'BT', 'Actuals', 'Type: Business Term', 'Status: Accepted', 'Edit', 'Move', 'Delete', and 'Auto hyperlinks'. A sidebar on the left has links for 'Add characteristic', 'Overview', 'Diagram', 'Pictures', 'Responsibilities', 'References' (which is selected), 'History', and 'Files'. The main area is a table with columns for 'Asset', 'Reference Type', and 'Reference Value'. The table lists several entries related to sales data.

Asset	Reference Type	Reference Value
dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 1m_act_sales	Description	1 month actuals sales (in 000\$)
dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 3m_act_sales	Description	3 month actuals sales (in 000\$)
dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 6m_act_sales	Description	6 month actuals sales (in 000\$)
dwh-scm-raw > dwh-scm-raw > stock_scm_20181031_csv > 9m_act_sales	Description	9 month actuals sales (in 000\$)
dwh-scm-refined > dwh-scm-refined > scpm_refined > 1m_act_sales	Description	1 month actuals sales (in 000\$)
dwh-scm-refined > dwh-scm-refined > scpm_refined > 3m_act_sales	Description	3 month actuals sales (in 000\$)
dwh-scm-refined > dwh-scm-refined > scpm_refined > 6m_act_sales	Description	6 month actuals sales (in 000\$)
dwh-scm-refined > dwh-scm-refined > scpm_refined > 9m_act_sales	Description	9 month actuals sales (in 000\$)

By default, the table shows the **Asset**, the **Reference Type** and **Reference Value** columns. However, you can **add** more columns. The following table describes available columns:

Column	Description
Asset	The full name of the asset.
Reference Type	The type of the attribute that contains the automatic hyperlink.
Reference Value	The text of the attribute that contains the automatic hyperlink.
Status	The status of the asset.
Type	The asset type .

Ratings

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

Unlike objective parameters such as data quality, certifications and articulation scores, ratings are purely subjective assessments of data quality.

Enabling ratings

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

Permissions

No particular [license](#) is needed to rate assets or to edit or delete your own ratings; however, certain [resource permissions](#) are needed.

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

Note

- Users are not granted permissions directly, but through global roles and responsibilities.
- Guest users can see all ratings and reviews, but cannot provide ratings or reviews of their own.

Actions

- [View](#) ratings.
- [Enable or disable](#) ratings.
- [Rate](#) an asset.
- [Edit](#) your own ratings.
- [Delete](#) your own ratings.

- [Edit another user's ratings.](#)
- [Delete another user's ratings.](#)

Enable or disable ratings

You can enable and disable ratings via the asset type pages, in [⚙️ Settings](#).

Enabling ratings for a particular asset type is not inherited by children asset types. The feature has to be manually enabled for each child asset type.

By default, ratings are enabled for asset types **Data Set** and **Report** and their children asset types. Ratings are disabled, by default, for all other packaged asset types and any asset types you create.

Warning Ratings cannot be disabled for a specific asset type if user ratings exist for any assets of that asset type. In other words, all user ratings for all assets of a specific asset type must be manually [deleted](#) before ratings can be disabled for that asset type.

Prerequisites

You have a [global role](#) that has the System administration [global permission](#).

Steps

1. Open an asset type.
 - a. In the main menu, click , then [⚙️ Settings](#).
 - » The **System** tab page appears.
 - b. In the tab pane, click **Asset Types**.
 - » The asset type table appears.
 - c. In the overview of asset types, click an asset type.
 - » The **Asset type** editor opens.
2. In the upper-right corner, click **Edit**.
 - » The **Edit <asset type>** dialog box appears.

3. Enter the required information.

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

4. Click **Save**.

View ratings

If ratings are enabled for an asset type and one or more ratings has been provided for an asset of that type, the associated ratings activity appears in several places in the UI.

On an asset page

Ratings information appears on the asset page of any asset with one or more ratings.

Star Rating	Percentage
5★	22%
4★	25%
3★	19%
2★	17%
1★	16%

No.	Description
1	The average of all user ratings for that asset.
2	The total number of ratings.
3	A horizontal bar chart showing the distribution of ratings.
4	The percentage of total votes per number of stars.
5	Your rating and review.
6	Other users' ratings and reviews, ordered from newest to oldest.

In the History tab

User ratings and any edits to, or deletions of, ratings are shown in the [History tab](#) of the relevant:

- Asset pages.
- User profiles.
- Community pages.
- Domain pages.

History				
	Rating This data set is very complete and the data is up-to-date with latest information		Small and medium-sized...	William Parker 1/10/2018 10:56 PM
	Rating This data set is very complete		Small and medium-sized...	William Parker 1/10/2018 3:58 PM

In an asset table or set of tiles

There are two fields related to ratings that can be shown in an asset table or set of tiles:

- **Average rating:** The average of all user ratings for each asset.
- **Number of ratings:** The total number of ratings for each asset.

You can [sort](#) on these two fields and [filter](#) them.

All assets ▾					
	View for displaying all assets				
>	Delete	Move	Validate		
Filter	Name	Number of ratings	Average Rating	Status	Asset Type
	11 Data Set	40	★★★★★	Candidate	Data Set
	1 Data Set	40	★★★★★	Candidate	Data Set
	2 Data Set	1	★★★★★	Candidate	Data Set
	3 Data Set	1	★★★★★	Candidate	Data Set
	4 Data Set	200	★★★★★	Candidate	Data Set
	4 Data Set 2	1	★★★★★	Candidate	Data Set

Rate an asset

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

Ratings can only be given via asset pages.

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

Steps

1. Open an asset page.
2. In the **My rating** section, click the star that corresponds most closely to your opinion of the quality level of the asset.
The rating range is from one to five stars, with five representing the highest level of quality and one representing the lowest.
3. Optionally, enter a review of the asset in the text field.

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

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

Edit your ratings

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

Steps

1. Open an asset page.
2. In the **My rating** section, click .

 - Click the star that corresponds most closely to your opinion of the quality level of the asset.
 - Edit your review, if relevant.

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

Delete your ratings

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

Steps

1. Open an asset page.
2. In the **My rating** section, click .
3. Click **Delete**, to confirm.
 - » The average user rating is recalculated.

Editing and deleting other users' ratings

With the correct [resource permissions](#), you can [edit](#) or [delete](#) another user's ratings. This can be helpful if, for example:

- An asset that received a poor rating was improved and one or more previous ratings and reviews are no longer relevant.

- You want to disable ratings for a specific asset type, in which case all user ratings for all assets of that asset type must be manually deleted.

Note You cannot add a rating or review for another user.

If a rating is edited or deleted, the average user rating is recalculated.

Edit another user's rating

With the correct [resource permissions](#), you can edit other users' ratings.

Steps

1. Open an asset page.
2. In the **Ratings** section, click  next to the rating you want to edit.
 - Click the star that corresponds most closely to your opinion of the quality level of the asset.
 - Edit the review, if relevant.
3. Click **Save**.
 - » The average user rating is recalculated.

Delete another user's rating

With the correct [resource permissions](#), you can delete other users' ratings.

Steps

1. Open an asset page.
2. In the **Ratings** section, click  next to the rating you want to delete.
3. Click **Delete**, to confirm.
 - » The average user rating is recalculated.

Asset tags

To categorize assets, you do not only have strictly governed metadata, but you also have tags, which are labels of your own choice.

In this section, you learn more about tags and how you manage them.

Tags

A tag is a piece of metadata that is used to label an asset, to help categorize the asset. You can use the same tag for all the assets that belong to the same category of a business, for example, finance. Although the tags are stored in the Collibra Data Governance Center database, they are not strictly governed by Collibra DGC.

You can:

- Search for assets with a specific tag by clicking the tag on an [asset page](#) or on the [tags overview page](#).
- Select the Tag facet on the [Search page](#), to navigate search results.
- Use tags in filter clauses.
- Import and export tags.

Note You can only manage tags if you have the required permission. You can only add tags to assets, not to domains or communities.

Tag names

Tag names must meet the following requirements:

- Tag names are case sensitive.
For example, you can have the tag names *Car* and *car*. However, the tag suggestion is not case sensitive, for example, typing *car* suggests both "Car" and "car".
- Tag names cannot contain spaces.

- Underscore (_) is allowed.

Note If you upgrade to 5.6 or newer, spaces in tags are automatically replaced by underscores. Possible duplicate tags due to this renaming, will be merged.

- The maximum length of the tag name is 250 characters.

Permissions

The following table shows the permissions you need to manage tags:

- On asset pages.
- On the tags overview page.

Page	Permission	
Asset page	Resource	<p>Update: Add and remove tags.</p> <p>To grant this permission to a role, see Enable permission to use tags.</p> <p>Note The role to which you grant this permission needs at least view access to the corresponding asset type. See Responsibilities.</p>
Tags overview page	Global	<p>Manage tags: Edit, merge and delete tags.</p> <p>This permission allows admin and super users to manage all tags.</p> <p>View tags: View the tags overview page.</p>

Tags overview page

The tags overview page provides an overview of all the [tags](#) in Collibra Data Governance Center.

With the right [permissions](#), you can view, [delete](#), [edit](#), and [merge](#) tags.

Name	Assets Count	Created By	Created On	Last Modified	Last Modified By
Address	2	DataLake Admin	8/8/2019 9:46 AM	8/8/2019 9:46 AM	DataLake Admin
Analytics	2	DataLake Admin	8/22/2019 10:10 PM	8/22/2019 10:10 PM	DataLake Admin
City	2	DataLake Admin	9/11/2019 2:43 PM	9/11/2019 2:43 PM	DataLake Admin
CLV	6	DataLake Admin	11/6/2019 10:39 PM	11/6/2019 10:39 PM	DataLake Admin
Color	1	DataLake Admin	8/12/2019 3:50 PM	8/12/2019 3:50 PM	DataLake Admin
Country	1	DataLake Admin	9/11/2019 2:42 PM	9/11/2019 2:42 PM	DataLake Admin
Credit_card_number	1	DataLake Admin	8/23/2019 11:19 PM	8/23/2019 11:19 PM	DataLake Admin
CRM	1	DataLake Admin	8/22/2019 4:27 PM	8/22/2019 4:27 PM	DataLake Admin
Customer	1	DataLake Admin	9/16/2019 8:11 AM	9/16/2019 8:11 AM	DataLake Admin
CustomerLifetime	1	DataLake Admin	11/6/2019 10:39 PM	11/6/2019 10:39 PM	DataLake Admin

By default, the tags table shows the **Name** column and the **Created By** column. You can add more columns. The following table describes all available columns.

Column	Description
Assets Count	Total number of assets to which a specific tag has been applied.
Created By	The user who created the tag.
Created On	The date on which the tag was created.
Last Modified	The date and time when the tag was last modified.
Last Modified By	The user who last modified the tag.
Name	Name of the tag. Tag names cannot contain spaces and the maximum length is 250 characters. The underscore (_) character is allowed.

Search by tags

You can search for all assets for which a specific tag has been applied, by clicking the tag on an asset page or the tags overview page. The search results are shown on the [Search page](#).

Edit a tag on the tags overview page

You can edit an existing tag on the [tags overview page](#).

Steps

1. In the main menu, click  , then  **Stewardship**.
2. In the submenu, click **Tags**.
 - » The **Tags** overview page opens.
3. Hover your mouse over the name of a tag.
4. Click  to the right of the tag name.
5. Edit the name.
6. Click .

Merge tags on the tags overview page

You can merge tags on the [tags overview page](#). You merge tags by changing the name of a tag to that of another existing tag.

Steps

1. In the main menu, click  , then  **Stewardship**.
2. In the submenu, click **Tags**.
 - » The **Tags** overview page opens.
3. Hover your mouse over the name of a tag.
4. Click  to the right of the tag name.
5. Change the name of the tag to that of another existing tag.
6. Click  to the right of the tag.
 - » The **Merge tags confirmation** dialog box appears.
7. Click **Merge**.

Delete a tag from the tags overview page

You can delete one or more tags from the [tags overview page](#).

Steps

1. In the main menu, click  , then  **Stewardship**.
2. In the submenu, click **Tags**.
 - » The **Tags** overview page opens.
3. Select the checkboxes to the left of the tags you want to delete.
4. In the resource toolbar, click **Delete**.

Add a tag to an asset on an asset page

You can add a [tag](#) to an asset on an [asset page](#).

Steps

1. Open an asset page.
2. Double-click in the **Tags** section, or click  on the right-hand side of the section.
3. Type the text for your tag and press **Enter**.

Tip

- As you type, already existing tags that match what you are typing are suggested. If you want to use a suggested tag, you can click on it. Otherwise, you can ignore the suggestions.
- You can add as many tags as you want.

4. Click **Save**.

Add a tag to an asset in an asset table or set of tiles

You can add a [tag](#) to an asset in a table.

Steps

1. Open any set of assets in table [display mode](#).
 2. Double-click in the **Tags** column, or click  on the right-hand side of that column.
- If you do not see the **Tags** column, add it to the table. See [Customizing tables](#).

3. Type the text for your tag and press **Enter**.

Tip

- As you type, already existing tags that match what you are typing are suggested. If you want to use a suggested tag, you can click on it. Otherwise, you can ignore the suggestions.
- You can add as many tags as you want.

4. Click ✓.

Delete a tag from an asset on an asset page

You can delete a tag from an asset on an asset page.

Steps

1. Open an asset page.
2. Double-click in the **Tags** section, or click ✎ on the right-hand side of the section.
3. Click ✘ next to the tags that you want to delete.
4. Click **Save**.

Delete a tag from an asset in an asset table

You can delete a tag from an asset in an asset table.

Steps

1. Open any set of assets in table **display mode**.
2. Double-click in the **Tags** column, or click ✎ on the right-hand side of that column.
If you do not see the **Tags** column, add it to the table. See [Customizing tables](#).
3. Click ✘ next to the tags that you want to delete.
If you want to delete the tags from all assets that are visible on the page, select the **Apply to all visible rows** check box.
4. Click ✓.

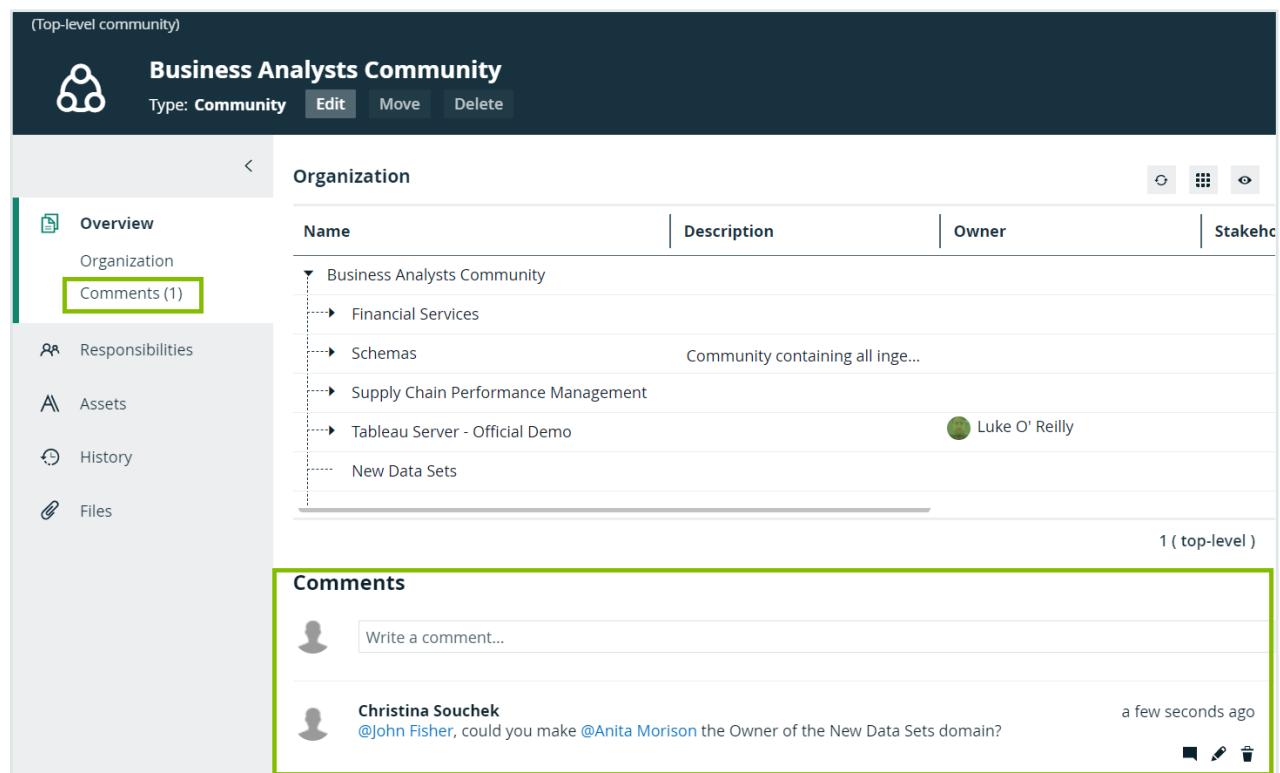
Comments and attachments

You can add comments and attachments to communities, domains and assets. Examples of attachments are reference materials or other documents that are related to the resource.

Comments

You can find comments under **community, asset or domain page** → **Overview** or **Details** tab → **Comments**.

Next to adding comments, you can also reply to other comments (Reply), edit your own comments (Edit) or delete comments (Delete) with the buttons that are displayed to the right of the comment.



The screenshot shows the 'Business Analysts Community' overview page. On the left, there's a sidebar with 'Overview' selected, followed by 'Responsibilities', 'Assets', 'History', and 'Files'. The main content area has a title 'Organization' and a table with columns for 'Name', 'Description', 'Owner', and 'Stakeholders'. Below the table, there's a list of items: 'Business Analysts Community' (with a dropdown menu showing 'Financial Services', 'Schemas', 'Supply Chain Performance Management', 'Tableau Server - Official Demo', and 'New Data Sets'), and 'Luke O'Reilly'. At the bottom, there's a 'Comments' section with a placeholder 'Write a comment...' and a comment from 'Christina Soucek' (@John Fisher) to @Anita Morison about making her the owner of the 'New Data Sets' domain, posted 'a few seconds ago'. There are three buttons to the right of the comment: Reply, Edit, and Delete.

Add comments

If you want to add a comment to a community, domain or asset, follow these steps:

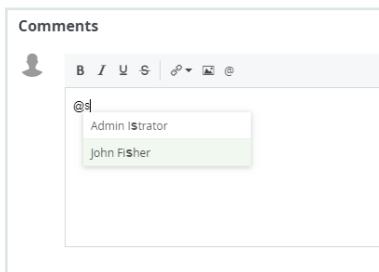
1. Open a community, domain or asset page.
2. Do one of the following:
 - o In the tab pane, click  Overview.
 - o In the tab pane, click Details → Comments.
3. Type your comment in the **Comments** field.
You can use the text editing tools to format your comment, to add links and images or to mention users.
4. Click **Save**.

User mentioning

User mentioning is a useful way to draw the user's attention to a page or comment. When you mention a user, they will receive an email which contains the content of the comment in which they are mentioned and a direct link to the asset page.

Mentioning users

To mention a user in a comment, you type the @ symbol followed by the user's first name, last name or username. Matching names appear as you start typing a name, even if the typed character is not the first character as shown in the following example.

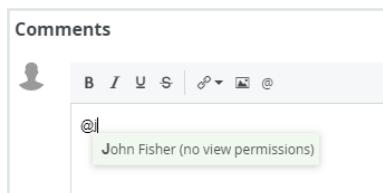


If the first name and or last name is available, these will be used to address the user, if those are not available, then the username will be used.

Note If a user is deleted, all the mentions are replaced by @Deleted User.

View permissions

If you mention a user who does not have the view permission on the asset, it will be indicated when you select the user.



As a mentioned user, if you open the link in a mail, you see a Not authorized message if you don't have the permission to view the asset.

List of user mentions

To see all the comments in which you are mentioned, go to your own profile page and select **Mentions** in the tab pane.

You cannot see somebody else's list of mentions.

 A screenshot of a user profile page for 'Mike Jones'. The top navigation bar shows the user's name, email (mike.jones@collibra.com), and links for 'Edit' and 'Reset password'. On the left, a sidebar has links for 'Overview', 'Groups', 'Responsibilities', 'History', 'Activities', and 'Mentions' (which is highlighted). The main content area shows two recent mentions.

- 1** Victoria Duarte Suárez mentioned you on 'Customer Lifetime Value':
@Mike Jones Great definition, the descriptive example is not clear though.
- 2** 3 minutes ago
- 3** John Fisher mentioned you on 'Customer Lifetime Value':
@Mike Jones please add a definition and descriptive example of this business ter
4 9 minutes ago
- 4** Go to comment >

Item	Description
1	The name of the user who has mentioned you. This can be the full name, first or last name or the username of that user, depending on which information is available.

Item	Description
2	The name of the asset to which a comment is added.
3	The time when the comment has been added.
4	The direct link to go to the comment on the asset page. The comment will be highlighted on the asset page.

Email content

When you **add** a comment to an asset page, you can also mention users. Users who are mentioned, will receive an email.

You were mentioned

The screenshot shows an email interface with the subject "You were mentioned". The body of the email contains a message from "John Fisher" mentioning the user on the asset "Customer Lifetime Value". Below the message, there is a reply box with the text "@Mike Jones please add a definition and descriptive example of this business term". At the bottom of the email are two buttons: "Open" and "See all mentions".

1	John Fisher mentioned you on the asset Customer Lifetime Value: 2
3	@Mike Jones please add a definition and descriptive example of this business term
4	Open
5	See all mentions

Item	Description
1	The user who mentioned you in a comment, this can be the first name/last name or username. If you click the name, you go to the user's page in Collibra DGC.
2	The asset name to which a comment has been added in which you are mentioned. If you click the name, you go to the asset page in Collibra DGC.

Item	Description
3	The full content of the comment in which you are mentioned. If you click your name, you go to your own user page in Collibra DGC.
4	The button to open the comment in your Collibra DGC environment.
5	The button to open the list of comments in which you are mentioned. You have to sign in with your own account to see this list.

Attachments

You can find attachments under **community, asset or domain page → Files**.

File Name	Type	Uploaded by	Uploaded on
All data (1).xlsx	Excel Sheet (xlsx)	Admin Istrator	6/9/17

Add attachments

If you want to add one or more files to a community, domain or asset, follow these steps:

1. Open a community, domain or asset page.
2. In the tab pane, click **Files**.
3. Upload a file in one of the following ways:
 - Drag and drop the file in the upload area.
 - Click **Upload a file**, browse to the location of the file and click **Open**.
 » The file is displayed in the table.

Asset data quality

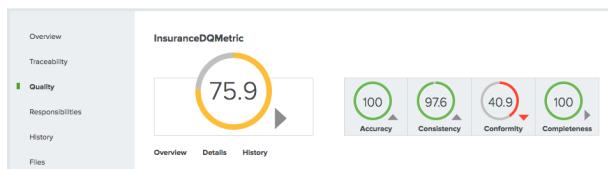
The **Quality** page of an asset makes data quality results of an asset available to the business stakeholders. The dashboard aggregates the following values:

- Collected over time on attributes.
- Aggregated from different assets along a number of predefined relations.

The assets for which these data quality dashboards are available and how the values are aggregated are defined in data quality rules, which can be edited on the **Data Quality Rule** tab on the  **Settings** page. For the following examples, a data quality rule exists on business terms, aggregating values from data quality rules related to these business terms.

Asset quality

The assets for which the quality dashboard is available have an extra option in their tab menu, namely **Quality**. The dashboard displays the aggregated passing fraction (quality score) for the asset in the form of ring charts.



Each ring chart shows the quality score in the form of:

- A quality score as a percentage.
- A color code indicating the quality of this passing fraction:
 - Red: 0-50%
 - Orange: 50-85%
 - Green: 85 - 100%
- An arrow indicating the trend of the score compared to the previous measurement.

The first ring chart shows the general score of the asset. The ring charts next to it show subscores for a specific dimension, such as **Accuracy**, **Conformity**, **Completeness** and **Consistency**. Only values that belong to that specific dimension are then taken into account. The dimensions to use are configured in the metric group. In this example, it is the relation: **Data Quality Rule** is Classified By **Data Quality Dimension**.

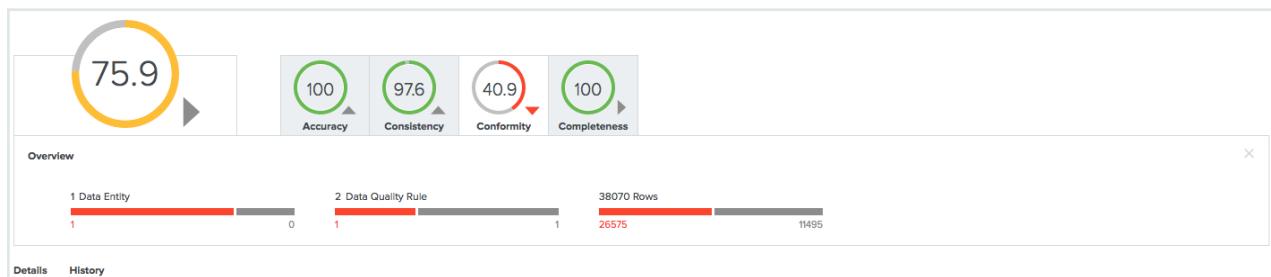
Underneath the top pane, three selection boxes are available. They display an extra overview, details and history pane, respectively.

To close a pane, click  in the upper-right corner of the pane.

Data quality overview pane

The **Overview** pane shows more information about each level in the aggregation path for the selected general score or dimension. For each level, it shows the number of involved assets of a certain type and what their results are: failing (red) or passing (gray). It also shows the total number of rows, the number of failing rows (red) and the number of passing rows (gray) that resulted in the given scores.

In the following example, the **Conformity** dimension consists of a total of 38 070 rows, 26 575 of which were failing. Two **Data Quality Rules** were involved, one of which was failing. And these **Data Quality Rules** were used by one **Data Entity**, which has an aggregated failing result.

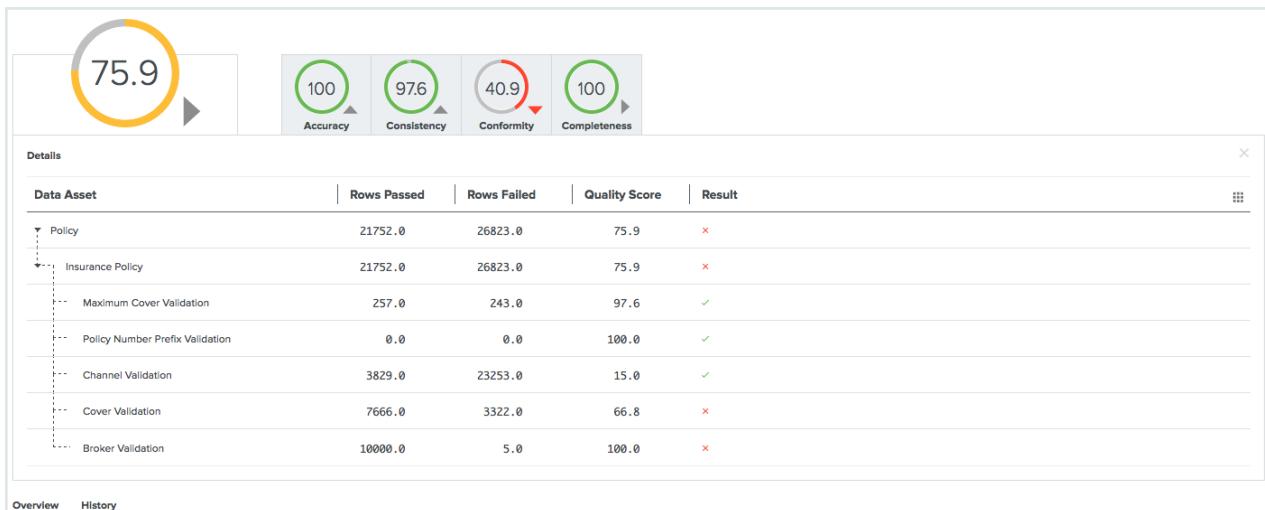


Asset quality details pane

The **Details** pane shows more information about all the assets involved in a table format.

For each asset, a row with the following default columns is shown:

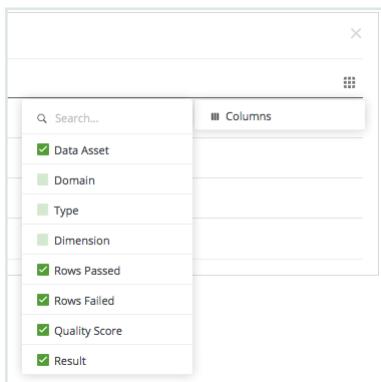
- **Data Asset:** The data asset signifier
- **Rows Passed:** The number of passing rows, aggregated as a sum of the passing rows of the underlying assets
- **Rows Failed:** The number of failing rows, aggregated as a sum of the failing rows of the underlying assets
- **Quality Score:** The score aggregated as an average of the quality scores of the underlying assets
- **Result (failing or passing):** The aggregated result as a logical conjunction of the results of the underlying assets.



Some extra columns can be displayed in this table by clicking → **Columns**.

These include:

- **Domain:** The domain to which the asset belongs.
- **Type:** The type of the asset.
- **Dimension:** The dimension that applies to these assets, if any. Dimensions are used to calculate the subscores, as mentioned earlier.

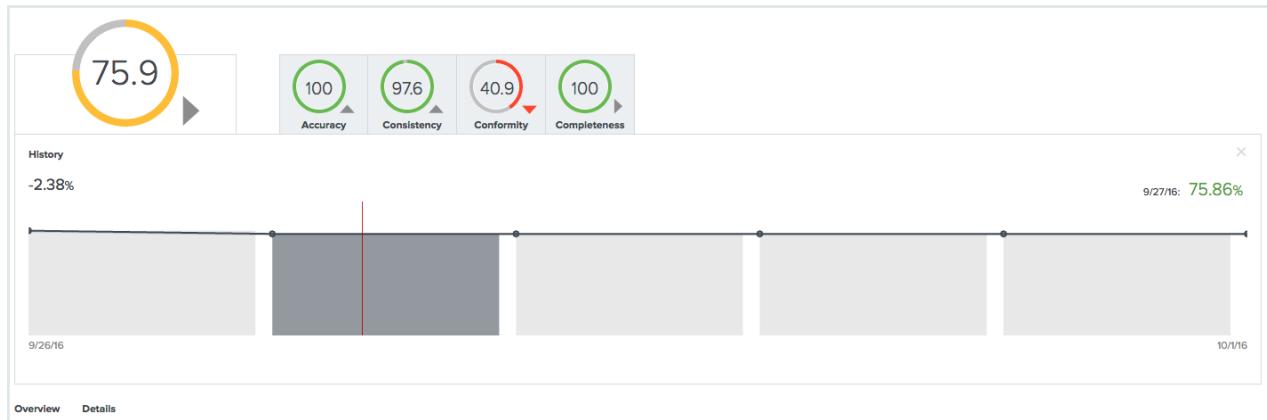


Asset quality history

The **History** pane shows the evolution of the quality score over time, for up to one month in the past.

You can display the date and the score for a specific period at the top right of the pane by hovering your pointer over that period.

When you select a period by clicking on it, the top left corner of the pane shows a trend of the score compared to the period before it.



Validation rules

Validation rules are special assets of the type **Validation Rule**. They allow you to verify whether assets meet certain criteria. They have a special attribute **Validation Script**, which contains a [validation script](#) that evaluates assets of the types to which the validation rule is assigned.

User actions

- [Validate assets](#).
- [View the validation result](#).
- [Revalidate an asset](#).

Executing validation rules

You can execute validation rules in many ways:

- [Validate assets](#)
Do this to manually validate assets.
- [Revalidate an asset](#)
Do this after editing an invalid asset.
- [Automatically](#).
You can configure a workflow to start a validation on given events. For example

when a asset is added or an attribute is edited.

To configure triggers on certain events, see [Getting started with workflows](#).

Validation logging

Collibra Data Governance Center can write extensive log messages from the execution of validation rules. These messages are written to the `dgc.log` file.

If the execution of a validation rule fails, analyzing the log is probably the most thorough approach.

For more information on how to configure validation logging, see [Logging](#).

Tip When contacting support regarding a problem with validation, attach the log file to the ticket.

Validate assets

Validating an asset executes all validation rules assigned to the asset type. If an asset does not meet all validation rules, the asset is invalid.

You can see the validation result on:

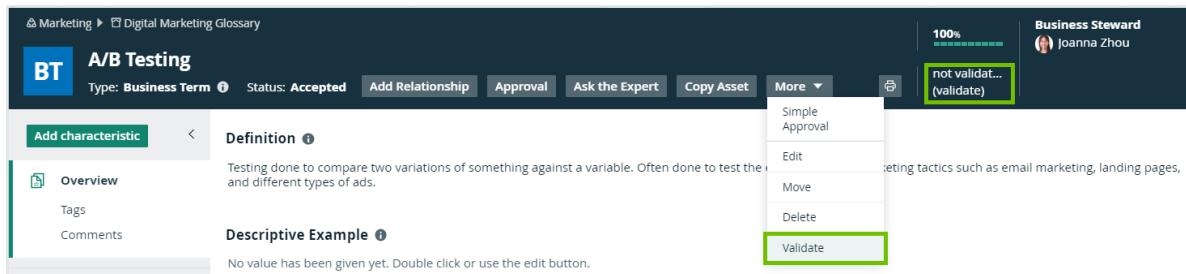
- An asset page's title bar.
- As a column, when viewing assets in table [display mode](#).
- As a field, when viewing assets in tiles display mode.
- As an overlay in a diagram.

After validation, the `dgc.log` file will also contain more extensive messages. For more information on how to configure validation logging, see [Logging](#).

Note By default, validation is not automatically triggered when an asset is edited, so you have to revalidate it after editing an asset. However, you can create a workflow for this. To configure validation on certain events, see [Getting started with workflows](#).

Validate an asset from the asset page

1. Open an asset page.
2. Do one of the following:
 - a. In the resource toolbar, click **(validate)**.
 - b. In the resource toolbar, click **More**, then **Validate**.



Validate one or more assets from an asset table

1. Open a set of assets in table display mode.
2. Select checkboxes in front of the assets you want to validate.
3. In the action toolbar, click **Validate**.

Validate one or more assets from a set of tiles

1. Open a set of assets in tile display mode.
2. Select the assets you want to validate.
3. In the action toolbar, click **Validate**.

Revalidate an asset

You can revalidate assets that were previously validated to see whether they meet the validation rules that are assigned to the asset type.

Validating an asset executes all validation rules that are assigned to the asset types. If an asset does not meet all validation rules, the asset is invalid.

You can see the validation result:

- An asset page's title bar.
- As a column, when viewing assets in table **display mode**.

- As a field, when viewing assets in tiles display mode.
- As an overlay in a diagram.

Note You can create a workflow to automatically revalidate assets. To configure validation on certain events, see [Getting started with workflows](#).

Prerequisites

1. You have a [global role](#) with the Reference Data Manager [global permission](#), for example ReferenceData.
2. You have a resource role with the Validation Execution [resource permission](#), for example Community Manager.

Revalidate an asset from the asset page

1. Open an asset.
2. In the upper right corner, click ✓ valid or ✗ invalid.
3. Click **Revalidate**.



Revalidate one or more assets from an asset table

1. Open an asset table.
2. Select checkboxes in front of one or more assets.
3. In the action toolbar, click **Validate**.

Revalidate an asset from an asset table

1. Open an asset table.
2. If you don't see the **Validation Result** column, add it to the table.
More info on adding columns to a table: [Customizing tables](#).
3. Click ✓ or ✗.
You can see the validation result of each validation rule.

4. Click Revalidate.

Name ↑	Definition	Validation Result
A/B Testing	Testing done to compare two variations of something ag...	X
AdWords	Google's advertising system in which...	Valid
Affiliate Marketing	When a publisher (website with a lo...	Valid
API	Application Programming Interfaces	Valid
Attribution	Identifying which part of a marketin...	X
Audience	The group of specific people a bran...	Valid

Invalid
Feb 1, 2021 1:57:25 PM Revalidate

X Has definition
A/B Testing in domain Digital Marketing Glossary must have at least one definition

1 rules

View the validation result

After validating or revalidating assets, you can view the result and make changes where necessary.

View the validation result from the activities list

1. Open the activities list.
» In the table, you see the validations.
2. In the results column, click **Result**.
» The **Validation results** dialog box appears.

Example

Validation results					
Rules executed					
Result	Asset	Rule	Message	Domain	
✓	Country	KDW VR1		New Business Terms	
✓	Currency Conversion	KDW VR1		New Business Terms	
✓	Customer	KDW VR1		New Business Terms	
✓	Customer Revenue	KDW VR1		New Business Terms	
✓	DDD	KDW VR1		New Business Terms	
✗	DW	KDW VR1	Name should have more than ...	New Business Terms	
✓	DWK	KDW VR1		New Business Terms	
✗	K	KDW VR1	Name should have more than ...	New Business Terms	
✓	KDW	KDW VR1		New Business Terms	
✓	Order	KDW VR1		New Business Terms	
✓	Order Date	KDW VR1		New Business Terms	
✗	W	KDW VR1	Name should have more than ...	New Business Terms	

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- The results column shows ✓ or ✗ to indicate whether they are respectively valid or invalid.

Tip If you want to fix invalid assets, you can open them by clicking them.

View the validation result on the asset page

- Open an asset page.
- In the upper right corner, you see ✓ valid or ✗ invalid.

View the validation result in an asset table

- Open an asset table.
- If you don't see the **Validation Result** column, add it to the table.
More info on adding columns to a table: [Customizing tables](#).
- Click ✓ or ✗.
» You can see the validation result of each validation rule.

Importing and exporting

The import and export functionality in Collibra Data Governance Center are useful to respectively quickly add or update content and to transfer data to an external file or system.

Importing

The import functionality allows you to create or edit data in bulk in Collibra Data Governance Center.

When you import, you create or edit assets or complex relations and their characteristics such as attributes, [relations](#) and tags from a [view](#).

Tip For easier bulk changes, you can perform the so-called export/import roundtrip. First [create](#) a view that contains all the characteristics, then [export](#) that view, edit the exported file, and [import](#) it back into the same view. Collibra DGC will automatically map the characteristics during the import.

For example, you can use the import functionality to do the following:

- Create assets in an existing domain.
- Create assets in a new domain.
- Add and edit characteristics of existing assets.
- Edit the display name of existing assets.
- Edit the full name of existing assets.
- Move assets to an existing domain.
- Move assets to a new domain.

Note After importing, it might take a short while before the affected assets appear correctly in the search results.

Import assets

You can import assets with the [import functionality](#). For example, this is useful if you have a list of business terms in Excel and you want to manage them in Collibra Data Governance Center.

Tip For easier bulk changes, you can perform the so-called export/import roundtrip. First [create](#) a view that contains all the characteristics, then [export](#) that view, edit the exported file, and [import](#) it back into the same view. Collibra DGC will automatically map the characteristics during the import.

Prerequisites

You have prepared an Excel or CSV file for upload:

- Only the essential sheets, columns and rows remain.
- Numbers that have to be interpreted as text are preceded by a single quotation mark.
- Dates are formatted as yyyy-mm-dd.

Note Importing data from a large Excel file can consume a lot of memory. We advise you to import from CSV instead of Excel, or to limit the Excel file to only contain the data you really need.

Steps

1. Open a view.
2. Above the table, to the right, click  → **Assets**.
» The Import dialog box appears.
3. Click **Select File** and choose the appropriate Excel or CSV file for upload.
4. Click **Next**.

5. If you chose a CSV File, do the following:

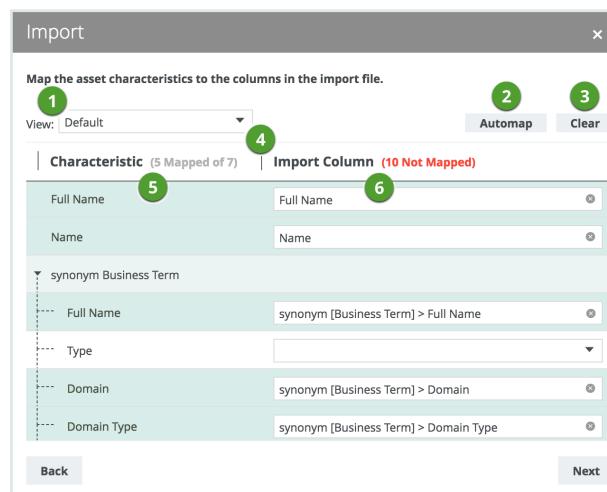
- Enter the required information.

Field	Description
Column Separator	The character used to delimit the columns in the CSV file.
Quote	The character before and after a string to capture the entire cell.
Escape Character	The character that is used to use the column separator or quote character as plain text.

- Click **Next**.

6. Manage the mapping of the columns of the import file and the view's fields.

- The **Import mapping** dialog box appears and Collibra DGC tries to map the fields of the view automatically to the columns in the import file, based on the names of the fields and columns.



Number	Field	Description
1	View selector	<p>The view selector allows you to choose a view whose characteristics will appear in the list.</p> <p>Tip You can also choose All characteristics to show all characteristics.</p>

Number	Field	Description
2	Automap	Button to let Collibra DGC automatically map all fields of the view to the columns in the import file, based on the names of the characteristics and columns.
3	Clear	Button to clear all mapped characteristics in the Import Column .
4	Mapping table	<p>This table enables you to map characteristics of the view to columns of the import file.</p> <p>Each row has a background color to indicate whether a characteristic is mapped or not.</p> <ul style="list-style-type: none"> ■ Dark green: The characteristic is mapped to a column in the import file. ■ Light green: The relation is mapped partially. This means not all underlying fields are mapped. ■ White: The characteristic is not mapped.
5	Characteristic	This column contains the available characteristics. Depending on the selection in the view selector, it contains either the characteristics of the selected view, or all characteristics. For relations, a hierarchy is displayed.
6	Import Column	This column should contain fields in which you can choose columns of the import file to map to a characteristic of the view.

- b. If required, choose another view in the view selector.

Tip Choose **All characteristics** to show all characteristics. In most cases, this makes it easier to map all characteristics.

- c. Click **Automap** to let Collibra DGC map all visible columns automatically.
d. If required, manually map columns to another characteristic.

7. Click **Next**.

» The **Import options** appear.

8. Enter the required information.

Setting	Result
Create new assets and domains if non-existent.	If assets or domains do not exist, Collibra DGC creates them. Collibra DGC creates a new domain and top-level community if the following conditions are met: <ul style="list-style-type: none"> ◦ You mapped columns of the import file to the domain, domain type and community characteristics of the view. ◦ The columns contain a domain and/or community name that doesn't exist yet.
How do you want to handle existing assets?	
Replace them with the new assets. (=> delete + create)	If assets exist, Collibra DGC deletes them first and creates them again based on the import file.
Update the name, properties and attributes.	If assets exist, Collibra DGC compares the attributes and updates them if necessary.
How do you want to handle mapped attributes?	
Replace them with new attributes. (=> delete + create)	If attributes exist, Collibra DGC deletes them and creates them again based on the import file. Select this option if you want to update existing, or add new attributes, such as a definition.

Setting	Result
Create as new attributes.	<p>If attributes exist, Collibra DGC creates another instance of the attributes based on the import file.</p> <p>Select this option if you do not want to edit the existing attributes, but always want to create new attributes. This could result in multiple instances of the same attributes, such as a definition.</p>
Delete existing assets from the domain that are not in the file.	Collibra DGC deletes the assets that are not in the import file.
Test Import	Collibra DGC first simulates an import without affecting the data to give you an overview of how the actual import would affect the data. After the overview, you can proceed with the import, go back to change the options or cancel the import.

9. Click the **Test Import** button.
» The test results appear.
10. If everything looks okay, click **Import**.
If it doesn't, close the dialog box to cancel the import or click **Back** to change the mapping or import options.
» The import results appear.
11. Click **Close**.

Import complex relations

You can import **complex relations** with the [import functionality](#). For example, this is useful if you want to create a lot of complex relations in one go.

Tip For easier bulk changes, you can perform the so-called export/import roundtrip. First [create](#) a view that contains all the characteristics, then [export](#) that view, edit the exported file, and [import](#) it back into the same view. Collibra DGC will automatically map the characteristics during the import.

Tip For importing complex relations using an Excel file, see the knowledge base on the [Collibra Support Portal](#).

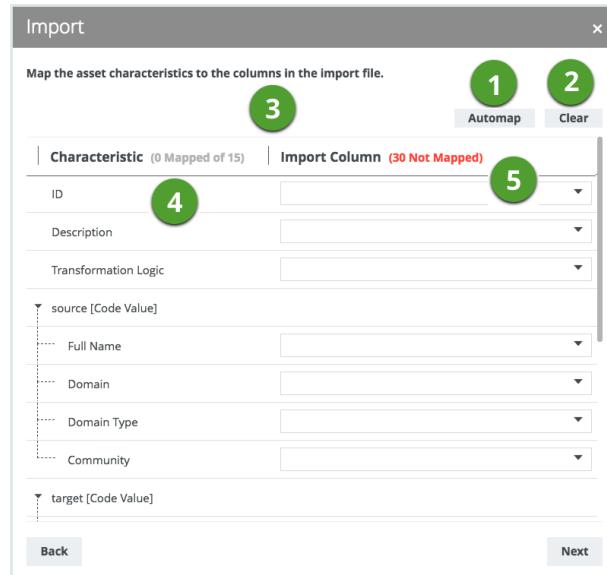
Prerequisites

You have prepared an Excel file for upload:

- Only the essential sheets, columns and rows remain.
- Numbers that have to be interpreted as text are preceded by a single quotation mark.
- Dates are formatted as yyyy-mm-dd.
- The related assets to connect for a single complex relation must be specified in a single cell.
- Your import file has the correct [structure](#) to import complex relations.

Steps

1. Open a view.
2. Above the table, to the right, click  → **Complex Relations**.
» The **Import** dialog box appears.
3. Click **Select File** and choose the appropriate Excel file for upload.
4. Click **Next**.
5. Select the complex relation type that you want to import.
6. Click **Next**.
7. Manage the mapping of the columns of the import file and the view's fields.
 - a. The **Import mapping** dialog box appears and Collibra DGC tries to map the fields of the view automatically to the columns in the import file, based on the names of the fields and columns.



Number	Field	Description
1	Automap	Button to let Collibra DGC automatically map all fields of the view to the columns in the import file, based on the names of the characteristics and columns.
2	Clear	Button to clear all mapped characteristics in the Import Column .
3	Mapping table	<p>This table enables you to map characteristics of the view to columns of the import file.</p> <p>Each row has a background color to indicate whether a characteristic is mapped or not.</p> <ul style="list-style-type: none"> ■ Dark green: The characteristic is mapped to a column in the import file. ■ Light green: The relation is mapped partially. This means not all underlying fields are mapped. ■ White: The characteristic is not mapped.

Number	Field	Description
4	Characteristic	This column contains the available characteristics. Depending on the selection in the view selector, it contains either the characteristics of the selected view, or all characteristics. For relations, a hierarchy is displayed.
5	Import Column	This column should contain fields in which you can choose columns of the import file to map to a characteristic of the view.

- b. If required, choose another view in the view selector.

Tip Choose **All characteristics** to show all characteristics. In most cases, this makes it easier to map all characteristics.

- c. Click **Automap** to let Collibra DGC map all visible columns automatically.
 - d. If required, manually map columns to another characteristic.
8. Click **Next**.
- » The **Import options** appear.
9. Enter the required information.

Setting	Result
Test Import	Collibra DGC first simulates an import without affecting the data to give you an overview of how the actual import would affect the data. After the overview, you can proceed with the import, go back to change the options or cancel the import.

10. Click the **Test Import** button.
- » The test results appear.
11. If everything looks okay, click **Import**.
If it doesn't, close the dialog box to cancel the import or click **Back** to change the mapping or import options.
- » The import results appear.
12. Click **Close**.

Import file structure of a complex relation

You can define multiple relations with the same role.

The different assets to relate to are formatted as a comma-separated list in a single cell.

This means that:

- For every role in the complex relation type, you have to specify the **Asset** column. Fill in a comma-separated list of the asset names to connect to the complex relation with that role. If there is an asset in the import file that does not exist, it is created automatically.
- If an asset name contains a comma, you can use double quotes around the asset names to ignore the comma as a separator.
For example, to refer to an asset named **last name, first name**, the name has to be written as "**last name, first name**".
- If your asset names have commas as well as double quotes, you can change the standard behavior of the double quote by using a backslash (\).
For example, to refer to an asset called **last name "," first name**, the name has to be written as "**last name \",\" first name**".
- If you specify the domain names for mapped assets, you also have to use a comma-separated list in the **Domain** column, even if the domain is the same for all the assets.
- If you have to specify the domain and community for the relation assets as well, it is important that the size and order of the comma-separated lists for all three aspects (asset name, domain, community) is the same.
- If the referred assets are not all in the current domain, you can specify one or more domains to search in, by mapping the **Domain** characteristic to a column containing a comma-separated list of domain names. If there is a domain in the import file that does not exist, it is created automatically.
- If the referred domains are not all in the current community, you can specify one or more communities to search in, by mapping the **Community** characteristic to a column containing a comma-separated list of community names.

Exporting

The export functionality makes it easy to transfer data from Collibra DGC to an external file or system.

You can export table data to a file. The exported file is very similar to the data you view in the table on the screen.

All relevant properties of a table are taken into account in an export:

- Filters: Determine which assets are exported.
- Columns: Determine which information about assets is exported.
- Sorting: Determine the order in which the assets are exported.

Export assets

You can export assets from a [view](#). For example, this is useful if you want to create an overview in Excel.

Steps

1. Navigate to the asset table that you want to export.
Example: Business Glossary
2. Above the table, to the right, click > Assets.
» The Export dialog box appears.
3. Enter the required information.

Field	Description
View	Choose the view that you want to export. By default, your current view is filled in as view to export.

Field	Description
Add the characteristic needed for reimport. (ID, Domain, Community, ...)	Select if you want to reimport the export file later. By default, the export file only contains the characteristics that are displayed in the view. If you select this field, the export file will contain additional columns that are needed for the reimport.
Remove text formatting.	Select this to remove any formatting of attributes in the import file. <p style="color: red;">Warning Removing text formatting may create problems while reimporting. During the reimport, column names are not automatically mapped to prevent overwriting of formatted text. You can manually map the columns, but then you lose formatting.</p>
File name	Type the name of the export file. By default, the name of the export file is set to the name of the view.
File type	Choose the file type of the export. By default, the exported file type is XLSX , but you can change it to CSV .
Sheet name	Type the name of the sheet in the export file.

4. Click **Export**.

- » A progress message is displayed. You can send this message to the background by closing it.
- » When the export is finished, the export file is downloaded according to the settings of your web browser.

5. Close the progress message.

Export complex relations

You can export **complex relations**. They have to be represented differently in a table structure than assets. For that reason, the export of complex relations is handled

differently.

Steps

1. Navigate to the asset table that you want to export.
Example: Business Glossary
2. Above the table, to the right, click  > **Complex Relations**.
» The **Export** dialog box appears.
3. Enter the required information.

Field	Description
Complex Relation Type	Choose the type of the complex relations that you want to export.
Add the characteristic needed for reimport. (ID, Domain, Community, ...)	Select if you want to reimport the export file later. By default, the export file only contains the characteristics that are displayed in the view. If you select this field, the export file will contain additional columns that are needed for the reimport.
Remove text formatting.	Select this to remove any formatting of attributes in the import file. <div style="background-color: #f0f0f0; padding: 10px;"> Warning Removing text formatting may create problems while reimporting. During the reimport, column names are not automatically mapped to prevent overwriting of formatted text. You can manually map the columns, but then you lose formatting. </div>
File name	Type the name of the export file. By default, the name of the export file is set to the name of the view.
File type	Choose the file type of the export. By default, the exported file type is XLSX , but you can change it to CSV .
Sheet name	Type the name of the sheet in the export file.

4. Click Export.

- » A progress message is displayed. You can send this message to the background by closing it.
- » When the export is finished, the export file is downloaded according to the settings of your web browser.

5. Close the progress message.

Export dialog box for complex relations

Field	Description
Complex Relation Type	The complex relation type that you want to export.
Add the characteristic needed for reimport. (ID, Domain, Community, ...)	By default, the export file only contains the characteristics that are displayed in the view. By selecting this check box, you can add a column for ID characteristics. These characteristics help to identify specific resources during an import.
Remove text formatting.	<p>By default, the export file contains the raw content of text attributes, including text markup. By selecting this check box, you can remove most of the text formatting from exported attributes.</p> <p>If you choose to remove text formatting, it is better not to import the unformatted text. To prevent the overwriting of formatted text, Collibra DGC ensures that the column names are not automatically mapped while you are importing a file that was exported without text formatting.</p>
File name	By default, the name of the export file is set to the name of the view. You can give the file any name you like, however.
File type	By default, the exported file type is .xls , but you can change it to .csv if you prefer.
Sheet name	Name of one of the sheets in an Excel or CSV file.

Update complex relations in bulk

If you want to make changes to multiple complex relations of the same type at once, follow these steps:

1. [Export complex relations.](#)
2. In the exported file, make the necessary changes.

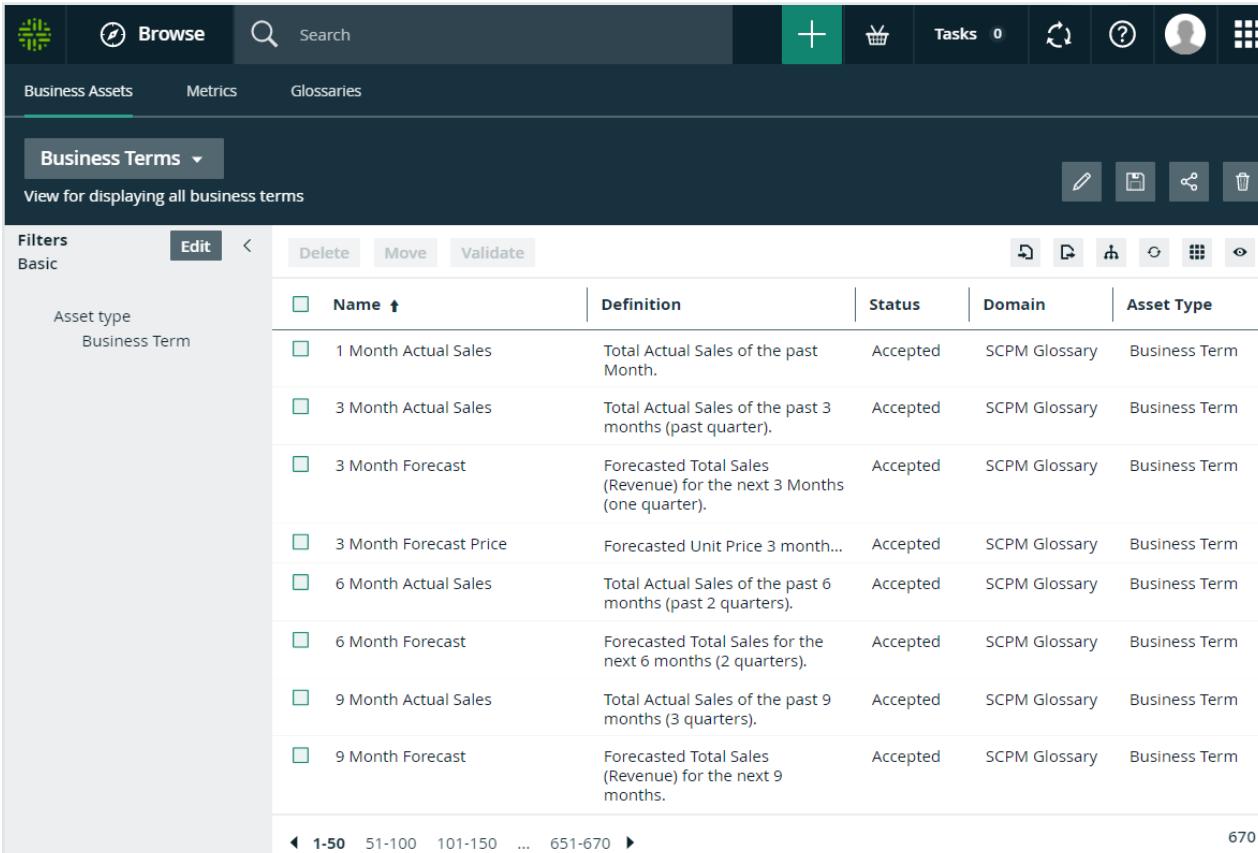
Warning Do not change the ID values.

3. Save and close the file.
4. [Import the complex relations.](#)

In the mapping step, also map the **ID** field to the **Business Term Mapping - id** column in your exported file.

Business Glossary

The Business Glossary application is your go-to system to govern your business terms. It contains a configurable range of asset types, their attributes, taxonomy and relations, as well as the status of their adoption. It is fully integrated with the technological assets as well as supported by Collibra DGC's core features: reporting, traceability, comments, workflows, and so on.



The screenshot shows the Collibra DGC interface for managing business terms. The top navigation bar includes 'Browse' (highlighted in green), a search bar, and various administrative icons like '+', 'Tasks 0', and user profiles. Below the navigation is a secondary header with tabs for 'Business Assets', 'Metrics', and 'Glossaries'. A dropdown menu for 'Business Terms' is open, showing a list of terms with columns for Name, Definition, Status, Domain, and Asset Type. The list includes entries such as '1 Month Actual Sales', '3 Month Actual Sales', '3 Month Forecast', etc., all categorized under 'Business Term' and assigned to the 'SCPM Glossary' domain. At the bottom of the table, there are navigation links for page numbers (1-50, 51-100, 101-150, etc.) and a total count of 670 items.

Asset type	Name ↑	Definition	Status	Domain	Asset Type
Business Term	1 Month Actual Sales	Total Actual Sales of the past Month.	Accepted	SCPM Glossary	Business Term
	3 Month Actual Sales	Total Actual Sales of the past 3 months (past quarter).	Accepted	SCPM Glossary	Business Term
	3 Month Forecast	Forecasted Total Sales (Revenue) for the next 3 Months (one quarter).	Accepted	SCPM Glossary	Business Term
	3 Month Forecast Price	Forecasted Unit Price 3 month...	Accepted	SCPM Glossary	Business Term
	6 Month Actual Sales	Total Actual Sales of the past 6 months (past 2 quarters).	Accepted	SCPM Glossary	Business Term
	6 Month Forecast	Forecasted Total Sales for the next 6 months (2 quarters).	Accepted	SCPM Glossary	Business Term
	9 Month Actual Sales	Total Actual Sales of the past 9 months (3 quarters).	Accepted	SCPM Glossary	Business Term
	9 Month Forecast	Forecasted Total Sales (Revenue) for the next 9 months.	Accepted	SCPM Glossary	Business Term

The Business Glossary is key for decision makers to understand their digital assets from a business perspective.

Business Glossary submenu pages

Page	Description
Business Assets	Contains a table with all the business assets in Collibra DGC.
Metrics	Contains a variety of statistics related to how the assets of the Business Glossary are used.
Glossaries	Contains a table with all the existing glossaries (domain type) in Collibra DGC

Reference data

Reference data is data that is used to structure and constrain other data. It is typically stable information with a known code set, which consists of code values that rarely change. As the name suggests, reference data is designed to be referenced by a wide variety of other data. This is done in order to create a standard vocabulary and structure across diverse systems and data sources.

Example

- country codes
- language codes
- product codes
- account identifiers
- ...

Reference Data application

The Collibra Reference Data application aims at a systematic approach to manage [reference data](#), including code sets and code values. For example, you can define relations between Code Set assets and Column assets for which they are the allowed values, or between Code Value assets and the Business Assets that they represent. Additionally, you can define complex mappings between them in order to enable crosswalks from one information system to another, taking into account differences in the code sets through time.

Name	is code for	Status	Domain	Asset Type
00-010	Cash	Candidate	3-Digit Chart of Accounts	Code Value
00-020	Petty cash	Candidate	3-Digit Chart of Accounts	Code Value
00-030	Accounts receivable	Candidate	3-Digit Chart of Accounts	Code Value
00-040	Reserve for bad debts	Candidate	3-Digit Chart of Accounts	Code Value
00-050	Marketable securities	Candidate	3-Digit Chart of Accounts	Code Value
00-060	Raw materials inventory	Candidate	3-Digit Chart of Accounts	Code Value

Subpages

Reference Data has the following items in its submenu:

Reference data sub-page	Description
Code Value/Sets	Contains a table with all Code Value and Code Set assets in Collibra DGC.

Reference data sub-page	Description
Metrics	Contains a variety of statistics related to how the assets of the Reference Data application are used.
Hierarchies	Contains a table with all Hierarchies domains in Collibra DGC

Reference data

Reference data is data that is used to structure and constrain other data. It is typically stable information with a known code set, which consists of code values that rarely change. As the name suggests, reference data is designed to be referenced by a wide variety of other data. This is done in order to create a standard vocabulary and structure across diverse systems and data sources.

Example

- country codes
- language codes
- product codes
- account identifiers
- ...

However, not all systems use the same versions of a code set for the same type of information. This leads to problems when these systems exchange information.

Example

The same organization could use the two-character country ISO codes for its Customer Relationship Management (CRM) system, but the three-character country ISO codes for its Enterprise Resource Planning (ERP) system.

Besides technical problems, business users may have the following questions:

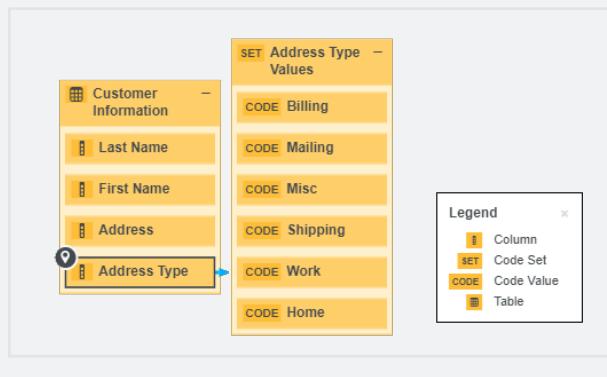
- What version of the ISO country codes is used in each database?
- What is the difference between the version of ISO country codes of last year as compared to the one currently operational internally?
- If I cannot find a code for a specific account or project, whom should I report it to?

Reference Data in Collibra DGC

The Collibra Reference Data application aims at a systematic approach to manage [reference data](#), including code sets and code values. For example, you can define relations between Code Set assets and Column assets for which they are the allowed values, or between Code Value assets and the Business Assets that they represent. Additionally, you can define complex mappings between them in order to enable crosswalks from one information system to another, taking into account differences in the code sets through time.

Example

In the following diagram, you can see that the Customer Information table contains the Address Type column, which can only contain code values from the Address Type Values code set.



Reference data lifecycle

[Reference data](#) is relatively easy to govern because it concerns predictable data. Very often, the code sets are related to assets in the [Business Glossary](#) application..

Typically, managing reference data in Collibra Data Governance Center consists of the following phases:

Phase	Description																							
1. Creation	<p>Gather all existing reference data content, analyze it and enter the relevant parts in Collibra Data Governance Center as Code Set and Code Value assets. We recommend that you use a specific Codelist domain for each code set.</p> <p>Tip You can create the assets manually, but usually it is easier to use the import functionality to enter thousands of assets in one go.</p>																							
<p>To fully describe the code set, you can create relations between the Code Set and Code Value assets on the one hand, and other relevant assets on the other:</p>																								
<table border="1"> <thead> <tr> <th>Relation type</th><th>Head assets</th><th>Tail assets</th><th>Description</th></tr> </thead> <tbody> <tr> <td>Code Value is part of / contains Code Set</td><td>Code Value assets</td><td>Code Set asset</td><td>Relations of this type link the Code Value assets to the corresponding Code Set asset.</td></tr> <tr> <td>Business Term has code / is code for Code Value</td><td>Business Term asset</td><td>Code Value asset</td><td>Relations of this type link Business Term assets to Code Value assets to provide more information about the meaning of the Code Value asset.</td></tr> <tr> <td>Data Element allowed value set / applies to Code Set</td><td>Column asset</td><td>Code Set asset</td><td>Relations of this type describe which code set is used to restrict the possible values of a column.</td></tr> <tr> <td>Data Element allowed value / allowed value for Code Value</td><td>Column asset</td><td>Code Value asset</td><td>Relations of this type describe the actual code values that are used in a column.</td></tr> </tbody> </table>					Relation type	Head assets	Tail assets	Description	Code Value is part of / contains Code Set	Code Value assets	Code Set asset	Relations of this type link the Code Value assets to the corresponding Code Set asset.	Business Term has code / is code for Code Value	Business Term asset	Code Value asset	Relations of this type link Business Term assets to Code Value assets to provide more information about the meaning of the Code Value asset.	Data Element allowed value set / applies to Code Set	Column asset	Code Set asset	Relations of this type describe which code set is used to restrict the possible values of a column.	Data Element allowed value / allowed value for Code Value	Column asset	Code Value asset	Relations of this type describe the actual code values that are used in a column.
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Data Element allowed value / allowed value for Code Value	Column asset	Code Value asset	Relations of this type describe the actual code values that are used in a column.																					

Phase	Description
	<p>The outcome consists of Code Set and Code Value assets, organized in different Codelist domains. The assets can have relations to other assets and still have the Candidate status.</p>
2. Completion	<p>Create responsibilities by assigning users or user groups to roles for the respective Codelist domains:</p> <ul style="list-style-type: none"> • The DataStewards improve the bulk import, and make it ready for review. They also have the final say in the approval process. • Subject Matter Experts review the correctness of the assets. • The Stakeholders comments on the assets and validate the correctness. <p>Use the Approval and Simple Approval workflows to update and approve the Code Set and Code Value assets.</p> <p>The outcome consists of Code Set and Code Value assets with the Approved status.</p>
3. Mapping	<p>The DataStewards map code values and crosswalks between corresponding Code Value assets. A Crosswalk asset may have additional attributes to describe the transformation logic. Often, this transformation logic is hidden or implicit.</p> <p>The Crosswalk assets originally also have the Candidate status, so they should also be reviewed and approved via the Approval and Simple Approval workflows.</p>

Phase	Description
4. Publication and traceability	<p>Once you have created the required assets and added the required relations, you can use diagrams to trace the lineage.</p> <p>The approved code values can also be provided to the business users in different ways:</p> <ul style="list-style-type: none"> • You can export them in XLSX or CSV format. • The Collibra API also offers ways to push approved assets to external applications. You can configure this to take place regularly via custom workflows. <p>To indicate that the code sets are published, you can create a new status, for example Published.</p>
5. Use and maintain	<p>Finally, the business users use the published code sets in their own applications, for example in reporting software.</p> <p>Typically, there will be inconsistencies or incompleteness in the code sets. These issues can be reported, which starts a workflow to fix the issue.</p>

Approaches to reference data management

There are several general approaches to reference data management:

1. Represent the code values as attributes of a Business Asset.
2. Use relations between Code Value assets and Business Terms.

Approach 1: Code values as attributes of Business Assets

Prerequisites

- You have [created a new asset type](#) to use as the reference point for information about the code value. This is typically a child asset type of Business Asset or

Business Term.

- You have **created or imported assets** of your new asset type for all code values.
- You have **created a custom attribute type** for each code set, for example ISO-2-digit, ISO-3-digit, and ISO Numeric.
- You have **assigned** the custom attribute types to the new asset type.

Approach

For each of the assets that represent a code value, enter the code values in the relevant attribute.

Example

BT Andorra

Type: Business Term Status: Accepted Add comment without form Edit Move Delete

Add characteristic < Country code
CC-AD
AND
AD

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

Comments
Write a comment...
There are no comments yet

Overview Tags Comments Diagram Pictures Responsibilities References History Files

Advantages

- This approach provides a simple overview of all code values on the asset page, which can suffice if the following conditions are met:
 - The code sets are very stable.
 - You will not add new code sets.

- The code values do not need to be traced to other assets.
- You don't want to reuse the codes for other assets.

Disadvantages and limitations

- This approach does not allow for traceability:
 - You cannot see that the 2-digit country code is a value from a code set, or a column in a database.
 - You cannot easily see for which other assets each 2-digit country code is used.
 - You cannot link the 2-digit country codes to 3-digit country codes. As a consequence, you also cannot represent transformation logic.
- Each code set requires a different attribute type.
- The code sets are hard to maintain, especially if the code values are updated, for example an existing value is changed or a new code value is added,

Approach 2: Code values as assets with a relation to Business Terms

Prerequisites

- You have created Business Term assets for all code values.
- You have imported all Code Value assets, for example the ISO-2-digit, ISO-3-digit, and ISO Numeric data.
- You have created a Code Set asset for each code set.
- You have created relations of the type "Code Value is part of / contains Code Set" between the Code Value assets and the Code Set assets.

Approach

For each of the Business Term assets, you can create a relation of the type "Business Term has code / is code for Code Value" to the equivalent Code Value assets.

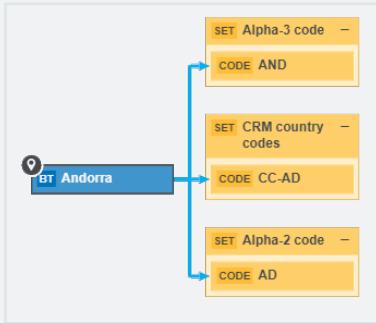
Example Asset Page:

The screenshot shows the Asset Page for a Business Term named "Andorra". The main content area displays a table of code values:

Name	Domain	Definition
AD	Alpha-2 code	Delete
AND	Alpha-3 code	Delete
CC-AD	CRM country codes	Delete

Below the table, there are sections for Tags, Comments, and History.

Traceability:



Advantages

- You don't have to make any changes to the asset types or attribute types.
- Each code value is an asset in itself, so you can manage it accordingly. For example, you can assign **responsibilities** and approve the Code Value assets with workflows.
- You can link each Code Value asset to multiple Business Assets.
- You can create new Code Values assets when required, without having to create or edit attribute types.

- You can use traceability diagrams to visualize the links between the Business Assets and the Code Value assets.

Disadvantages and limitations

- You need to create Business Assets for all code values.
- If you also need relations between the equivalent Code Value assets, you need a lot of relations.

Map code values and crosswalks

Different systems may use different [reference data](#) for the same type of information. This leads to problems when these systems exchange information.

Example

The same organization could use the two-character country ISO codes for its Customer Relationship Management (CRM) system, but the three-character country ISO codes for its Enterprise Resource Planning (ERP) system.

Besides technical problems, business users may have the following questions:

- What version of the ISO country codes is used in each database?
- What is the difference between the version of ISO country codes of last year as compared to the one currently operational internally?
- If I cannot find a code for a specific account or project, whom should I report it to?

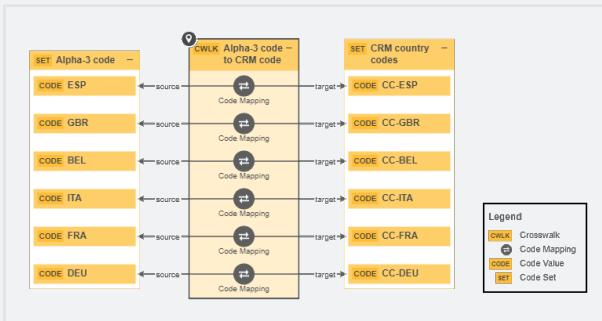
To resolve this challenge, you can map equivalent code values by means of complex relations between the corresponding Code Value assets and a Crosswalk asset, which can represent the transformation logic between the code values.

This has the following advantages:

- You can document the crosswalk between the code sets to which the code values belong.
- You can document exceptions and transformation logic between code values.

Example

A CRM system uses a modified version of the ISO 3-digit Code Set. In the CRM system, the developer added the prefix CC- to all the 3-digit ISO codes to show that they are country codes. For example, the code for Andorra is CC-AND. The mapping is always based on this Transformation Logic. This logic is important for users and should be described in Collibra Data Governance Center.



Prerequisites

- You have imported all Code Value assets, for example the ISO-3-digit, and the CRM country codes.

Steps

1. Create a Crosswalk asset to represent the mapping between the Code Set assets.
2. Create a relation of the type "Code Set source of / source Crosswalk" between the Code Set asset that contains the original code values and the Crosswalk asset.
3. Create a relation of the type "Code Set target of / target Crosswalk" between the Code Set asset that contains the resulting code values and the Crosswalk asset.
4. Create complex relations of the type "Code Mapping crosswalk" between all Code Value assets of the original code set and the corresponding Code Value assets of the resulting code set.
 - a. In the tab pane, click **Add Characteristic**.
 - b. Click **Code Mapping crosswalk**.

- c. Enter the required information.

Field	Description
source	The original Code Value asset.
target	The resulting Code Value asset.
crosswalk	The Crosswalk asset that represent the transformation.

- d. Click **Next**.
- e. If required, click **Add Characteristic > Transformation Logic** to describe the transformation.
- f. Click **Finish**.

Catalog

The Collibra Data Catalog application is a catalog of metadata that helps the business data analyst to discover, describe, assemble and govern data sets, in order to improve trust in analytics based on those data sets.

To access Collibra Data Catalog, you need a global role with the Catalog [global permission](#), for example Catalog Author.

To be able to assemble data sets, it is necessary for Collibra Data Governance Center to "register" metadata from data sources. This means that metadata is read from sources that are not yet governed in Collibra DGC itself, so registering a data source is not the same as importing data. These data sources can be databases as well as files.

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Catalog submenu pages

The following table describes each of the submenu items of the Data Catalog application.

Page	Description
Data Catalog Home	The landing page when you click the Data Catalog tab. This page is designed to help you quickly and easily find Data Catalog-related assets.
Reports	All report assets.
Data Sets	All data sets shown as a set of tiles or as a table, with their name, description and, if there are any, connections to existing assets in Collibra DGC.
Data Sources	Data sources that are used for data source registrations.

Page	Description
Data Dictionary	All data assets in Collibra DGC.
Technology Assets	All technology assets in Collibra DGC.
Metrics	Contains a variety of statistics related to how the assets of the Catalog are used.
Access Requests	The history of your access requests and their status.
Advanced Data Types	All advanced data types, which are used during a data source registration.

Register a data source

Registering a data source makes metadata from that source available in Collibra DGC to create data sets that can then be used for creating reports and analyzing data. Optionally, Collibra DGC can perform [data profiling](#) on the registered data and extract [sample data](#) from it.

Note If you are using a Collibra Data Intelligence Cloud environment with an on-premises Jobserver, both must have the same installer version. You can find the installer version of your Collibra Data Intelligence Cloud environment at the bottom of the sign-in window of its Collibra Console, for example 5.7.9-35

About registering a data source

By [registering](#) a data source, you connect a data source to Collibra DGC. With this, you can make metadata of the data source available in Collibra DGC.

Note During the data source registration process, you create a Schema asset. Via this asset, you can refresh the metadata of the data source.

Difference between registering a data source and importing data

When you register a data source, Data Catalog reads and processes metadata of data sources that are not governed in Collibra Data Governance Center. Collibra DGC will create assets of the relevant types, such as Database, Table and Column.

Example You register a data source that contains your financial data in a SAP HANA database. Afterwards, you can use the Collibra DGC to manage the data, for example manage access control through data sets and use traceability to see your data lineage.

When you [import](#) data, you create or edit assets or complex relations, with their characteristics, from a [view](#). Collibra DGC will create assets of the type specified in the imported XLSX or CSV file.

Example You import an XLSX file containing the most common business terms of your company. You can use Collibra DGC to approve the terms and link them to more technical assets.

Data source ingestion steps

The following table shows the steps required for data source ingestion.

Step	What?	Description
1	Register a data source	<p>Registering a data source creates a connection between your data source and Collibra DGC. It makes metadata of the data source available in Collibra DGC.</p> <p>Note You can register a data source using a Collibra-provided driver or your own driver.</p>

Step	What?	Description
2	Ingestion	<p>After registering a data source, Collibra DGC creates a Physical Data Dictionary domain and new assets of the type Schema, Table and Column, corresponding to the data in your data source.</p>
3	Refresh a data source	<p>Refreshing the schema of a registered data source updates the metadata of the data source in Collibra DGC. You typically do this when the data in a registered data source has been updated.</p> <p>Tip You can do this manually or automatically at fixed intervals.</p>

Profiling data options

When you register your data source, you can choose [profiling](#) options for the registered data.

Option	Description
Profile and classify data	<p>Option to profile and classify data via Edge.</p> <p>Option to profile and classify data via Edge.</p> <p>Important This option is only available if you selected a Jobserver for which profiling and classification via Edge is enabled.</p>
Store Data Profile	<p>Option to perform data profiling on the registered data via Jobserver.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>

Option	Description
Detect advanced data types	<p>Option to detect advanced data types in the data source.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Store Sample Data	<p>Option to extract sample data from the registered data.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>

After registering a data source

When the registration is complete:

- A message at the top right tells you that data source registration is complete. A domain and Schema asset are immediately created and an ingestion job is started.
- You can immediately add the registered data source to a [data set](#) by clicking the corresponding link in the confirmation message.
- The ingestion job creates assets that represent the metadata of the data source.

Note Table assets that are created after ingestion have an [attribute type](#) called Table Type that defines the type of table that is declared in the data source. For example, TABLE, VIEW,...

- A [workflow](#) to assign a technical steward to the new domain is started. This is a simple packaged workflow that you can edit to fit your organization's needs. When you have assigned a technical steward, that technical steward has to set the security classification and indicate whether the data elements contain personally identifiable information (PII).

Naming convention

When you register a data source, Collibra DGC follows a strict naming convention for the [names](#) of the new assets. Each asset has a display name and full name. You can freely edit the display name. However, you should never edit the full name, because Data Catalog may need it to refresh data sources. Editing the full name may cause unexpected results and break the synchronization process.

Warning Editing the full name of the Database and Schema assets may lead to errors during the refresh process.

Supported data sources for data source registration

Collibra Data Governance Center supports several databases to register as a data source. Depending on your data source, you can use Collibra-provided Catalog connector, or your own JDBC driver.

Collibra-provided Catalog connectors

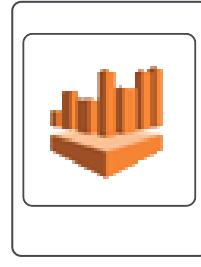
You can find certified Collibra provided Collibra Catalog Connectors on the [Collibra Marketplace](#).



Access



Adobe Analytics



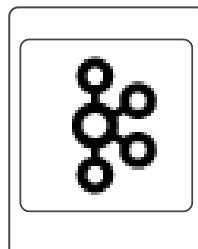
Amazon Athena



Apache HBase



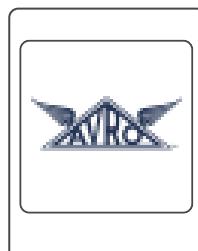
Apache Hive



Apache Kafka



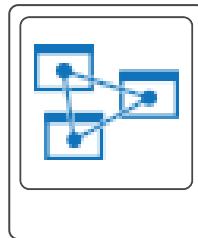
Apache Spark SQL



Avro



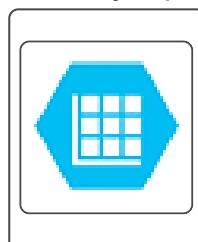
AWS Glue



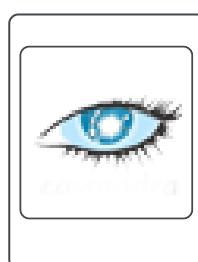
Azure Analysis Services



Azure Synapse



Azure Table Storage



Cassandra

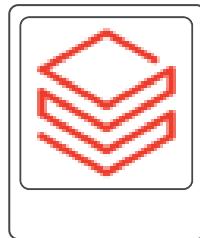


Cloudant



Cloudera Hive

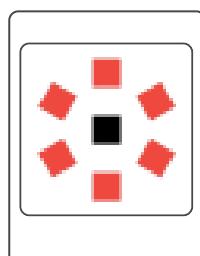




Databricks



DB2



denodo



Dynamics CRM



Elasticsearch



Exasol





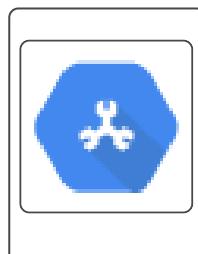
Excel Online



Google Analytics



Google BigQuery



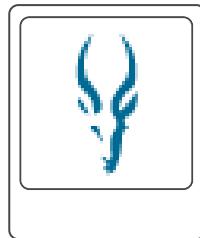
Google Spanner



Greenplum



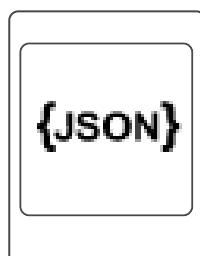
HP Vertica



Impala



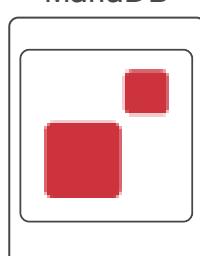
Jira Service Desk



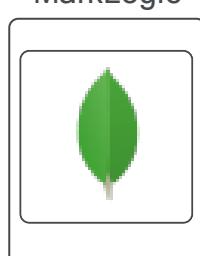
JSON



MariaDB



MarkLogic

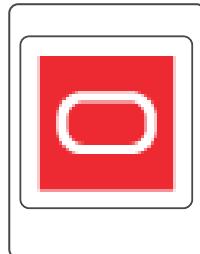


MongoDB





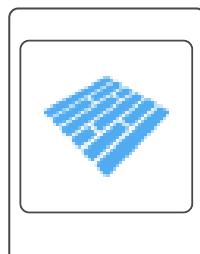
NetSuite



Oracle



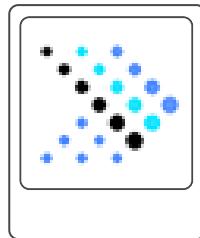
Oracle Sales Cloud



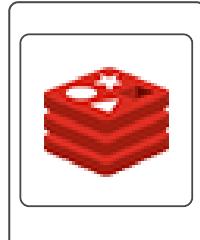
Parquet



PostgreSQL



Presto



Redis



Salesforce



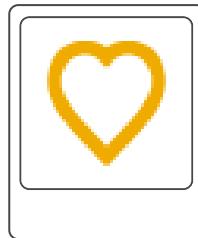
Salesforce Marketing Cloud



SAP ERP



SAP HANA



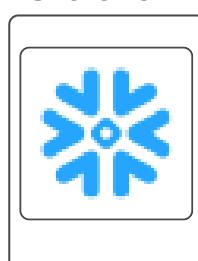
SAP SuccessFactors



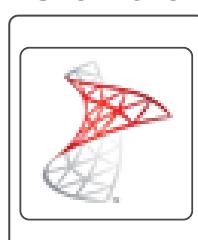
ServiceNow



SharePoint



Snowflake

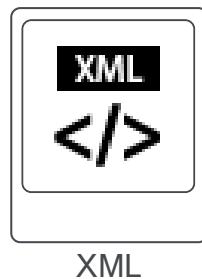


SQL Server



Sybase





XML

Your own JDBC drivers

For certain data sources, you can use your own JDBC driver. The following table contains the packaged data sources and versions that have been tested.

Data source	Tested versions	Support for profiling and sample data	JDBC driver version
Amazon Redshift	1.0	Yes	v. 1.1.13.1013
Cloudera Hive	5.10 - 5.14	No	Apache driver v. 1.2.1
Hortonworks Hive	2.5, 2.6	No	Apache driver v. 1.2.1
HP Vertica	7.0	Yes	v. 07.01.0200
IBM DB2	10.5	Yes	v. 4.9.78
MySQL	5.6, 5.7	Yes	v. 5.1.38
Oracle	11g, 12c	Yes	v. 12c
PostgreSQL	9.4, 9.5	Yes	v. 9.4.1207

Data source	Tested versions	Support for profiling and sample data	JDBC driver version
Microsoft SQL Server	2014, 2016	Yes	v. 5.1.38 Note Only Microsoft drivers and drivers available via Collibra Marketplace are supported.
Teradata	15.0, 16.20.07.01	Yes	No driver tested

Note We cannot guarantee that other data sources or driver versions work correctly. If you use a generic JDBC driver or an unsupported version, data ingestion, data profiling and sample data may not work as expected.

Authentication and permissions

Both ingestion and [profiling](#) (including [sampling](#) and [advanced data type detection](#)) rely on JDBC drivers to operate. Those drivers authenticate to the data sources as a user registered in that data source with specific permissions attached to the user profile in the data source.

To ingest a database without profiling, Data Catalog requires read access to the database metadata: description of schema, tables, columns, including some more complex properties such as the primary and foreign keys.

However, if you enable one or more profiling options, Data Catalog also requires the permission to read the full table. Which permissions are required exactly depends on the data source type, version and configuration. Additionally, they can also differ according to the provider and version of the JDBC driver. Most of the queries required to retrieve the information above are hidden by the driver. As a consequence, Collibra cannot give a exhaustive list.

Note Collibra DGC supports several [authentication methods](#), including credentials, NTLM, CyberArk and Kerberos. If you are using a certified Collibra provided driver on the [Collibra Marketplace](#), you can also authenticate using [Windows Authentication](#).

Tip If you need more detailed information, we recommend to contact your JDBC driver provider.

Register a data source using a Collibra-provided driver

1. In the main menu, click  , then  Catalog.
 - » The Catalog Home opens.
2. In the main menu, click the Create (+) button.
 - » The Create dialog box appears.
3. In the Create dialog box, click Register data source (use a Collibra provided driver).
4. If there is no JDBC driver available, add and configure the driver of your preference.
5. In the Register data source dialog box, enter the required information.

Field	Description
Process on	The jobserver used for ingesting.
Schema name	This name is used in Collibra DGC as schema asset and must therefore be unique.
Schema description	The description of the schema. This is used as description of the schema asset.
Data owner	The owner of the registered data in Collibra DGC.

6. Click Next.

7. Enter the database connection properties.

Option	Description
JDBC driver version	The JDBC driver to connect to your database.
Connect via	The jobserver used for ingesting.
<Configuration properties>	<p>The connection properties as defined in your JDBC driver.</p> <p>Note For more information on the connection details of supported data sources, see JDBC connection details.</p>
Store credentials	Select this option to store the credentials to access the database. With a schema refresh, you can clear this option again.
Username	<p>Username to access the database.</p> <p>Note This field is ignored if your data source uses Cyberark, Kerberos or NTLM.</p>
Password	<p>Corresponding password to access the database.</p> <p>Note This field is ignored if your data source uses Cyberark, Kerberos or NTLM.</p>
Schedule data refresh	Enable or disable a schedule to automatically refresh the data registration.
Cron pattern	<p>Schedule of the data refresh as a Cron pattern.</p> <p>If you create an invalid Cron pattern, Collibra Data Governance Center stops responding.</p>
Time zone	The time zone of the database.

Note If Collibra DGC cannot connect to the database, you cannot continue the data source registration wizard.

8. Click **Next**.
9. Select the data profiling options.

Option	Description
Profile and classify data	<p>Option to profile and classify data via Edge.</p> <p>Option to profile and classify data via Edge.</p> <p>Important This option is only available if you selected a Jobserver for which profiling and classification via Edge is enabled.</p>
Store Data Profile	<p>Option to perform data profiling on the registered data via Jobserver.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Detect advanced data types	<p>Option to detect advanced data types in the data source.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Store Sample Data	<p>Option to extract sample data from the registered data.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>

Option	Description
Tables excluded from registration	<p>Database tables that will not be ingested.</p> <p>Note</p> <ul style="list-style-type: none"> ◦ If required, you can exclude multiple tables. To do this, press <i>Enter</i> after typing a value and then type the next. ◦ You can use an asterisk (*) as wildcard to select multiple tables. For example, if you want to exclude the tables that all start with act_, you can enter <i>act_*</i>. ◦ The table names are case sensitive. ◦ You can add or remove tables from this list by refreshing the schema. ◦ The Table assets that are created after ingestion have an attribute type called Table Type that defines the type of table that is declared in the data source. For example, TABLE, VIEW,...

10. Click **Create**.

What's next?

The data source is registered and the data is automatically ingested. The ingestion of data is executed in a job. You can see this job in the list of [activities](#).



Overview	Clear all				
	Started	Name	Status	Finished	Results
Groups	12/12/2017 2:04 PM	Export to "Default.csv".	Completed	12/12/2017 2:04 PM	Result
Responsibilities	12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
History	12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
Activities	12/12/2017 1:27 PM	Creating schema from JDBC	Completed	12/12/2017 1:28 PM	Result
	12/12/2017 1:18 PM	Creating schema from file	Completed	12/12/2017 1:19 PM	Result

Click the **Result** button to open the [data profiling results](#).

Tip

- If the database contains foreign keys, they will be registered as new assets of the Foreign Key asset type. Assets of this type contain the complex relation, which is the link between all column assets that are part of the foreign key definition.
However, the complex relation is not created if a column is part of a table that is added to the list of **Tables excluded from registration**.
- If you exclude a table during the **schema refresh**, the corresponding table, column assets and foreign key mapping will be deleted.

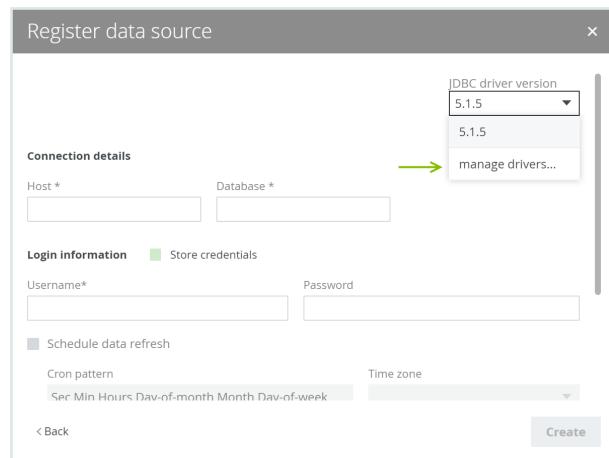
Manage Collibra-provided JDBC drivers

1. In the main menu, click , then Catalog.
» The Catalog Home opens.
2. In the main menu, click the **Create** (+) button.
» The **Create** dialog box appears.
3. In the **Create** dialog box, click **Register data source (use a Collibra provided driver)**.
4. If a JDBC driver is already installed for your data source, do the following:
 - a. Enter the schema properties.

Field	Description
Schema name	This name is used in Collibra DGC as schema asset and must therefore be unique.
Schema description	The description of the schema. This is used as description of the schema asset.
Data owner	The owner of the registered data in Collibra DGC.

- b. Click **Next**.

c. In the JDBC driver version field, click **manage drivers...**



5. Do one of the following:

- Click **Add JDBC Driver** if you want to create a new JDBC driver.
- Click  if you want to edit an existing JDBC driver.

6. Enter the required information.

Field	Description
JDBC Driver Version Name	The name of the JDBC driver.
Upload	<p>Button to upload the relevant files for the data source.</p> <p>Note If you downloaded the JDBC driver from Collibra Marketplace, make sure to unzip the downloaded ZIP file before uploading it to Collibra Data Governance Center.</p> <p>Note The JDBC driver has to be in JAR format.</p>
Driver files	<p>This table contains a list of uploaded files.</p> <p>You can remove a driver file by clicking .</p>

7. Click **Next**.

8. Configure the JDBC connection.

Note For more information on the connection details of supported data sources, see [JDBC connection details](#).

9. Click **Create**.

What's next?

You can now complete the [data source registration wizard](#) for Collibra-provided JDBC drivers.

Register a data source using your own driver

You can register a database as a data source using one of your own drivers.

Tip You can also do this with a Collibra-provided JDBC driver.

This operation should only be executed by your database administrator.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [set up the JDBC driver](#) of your source data, for example MySQL.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- If you are using a Collibra Data Intelligence Cloud environment with an on-premises Jobserver, both must have the same installer version. You can find the installer version of your Collibra Data Intelligence Cloud environment at the bottom of the sign-in window of its Collibra Console, for example 5.7.9-35
- You have a resource role with the following [resource permissions](#) on the **Schema** community:
 - Asset > add
 - Attribute > add

- Domain > add
- Attachment > add
- You have the permissions to retrieve the metadata of the following database components through the JDBC Driver Database Metadata methods:
 - Schemas
 - Tables
 - Columns
 - Primary keys
 - Foreign keys

Note

- For the list of supported databases and versions, consult the [Databases supported versions](#) section.
- For the JDBC connection details of the various databases, consult the [JDBC connection details](#) section.

Steps

1. In the main menu, click , then  Catalog.
» The Catalog Home opens.
2. In the main menu, click the Create (+) button.
» The Create dialog box appears.
3. In the Register data source dialog box, click the type of your data source.
4. If there is no JDBC driver available, [add and configure](#) the driver of your preference.
5. In the Register data source dialog box, enter the required information.

Field	Description
Process on	The jobserver used for ingesting.
Schema name	This name is used in Collibra DGC as schema asset and must therefore be unique.
Schema description	The description of the schema. This is used as description of the schema asset.
Data owner	The owner of the registered data in Collibra DGC.

6. Click **Next**.
7. Enter the database connection properties.

Option	Description
JDBC driver version	The JDBC driver to connect to your database.
Connect via	The jobserver used for ingesting.
Database	Name of the database. This field is not available for all data sources.
Host	Hostname to access the database.
Port	Port to access the database.

Option	Description												
<Configuration properties>	<p>The connection properties as defined in your JDBC driver.</p> <p>Note For more information on the connection details of supported data sources, see JDBC connection details.</p> <p>If you want to use Kerberos authentication, you also need the following connection properties.</p> <table border="1" data-bbox="790 848 1410 1612"> <thead> <tr> <th data-bbox="790 848 986 909">Label</th><th data-bbox="986 848 1410 909">Description</th></tr> </thead> <tbody> <tr> <td data-bbox="790 909 986 1012">Principal</td><td data-bbox="986 909 1410 1012">The Kerberos principal identity.</td></tr> <tr> <td data-bbox="790 1012 986 1138">Kerberos realm</td><td data-bbox="986 1012 1410 1138">The Kerberos realm name.</td></tr> <tr> <td data-bbox="790 1138 986 1286">Login context name</td><td data-bbox="986 1138 1410 1286">The login context name that is used as the index to the configuration.</td></tr> <tr> <td data-bbox="790 1286 986 1412">Jaas file name</td><td data-bbox="986 1286 1410 1412">The name of the Jaas file.</td></tr> <tr> <td data-bbox="790 1412 986 1612">Kerberos configuration file</td><td data-bbox="986 1412 1410 1612">The configuration file containing specific properties for Kerberos authentication.</td></tr> </tbody> </table> <p>If you want to use NTLM authentication, you also need the following connection properties.</p>	Label	Description	Principal	The Kerberos principal identity.	Kerberos realm	The Kerberos realm name.	Login context name	The login context name that is used as the index to the configuration.	Jaas file name	The name of the Jaas file.	Kerberos configuration file	The configuration file containing specific properties for Kerberos authentication.
Label	Description												
Principal	The Kerberos principal identity.												
Kerberos realm	The Kerberos realm name.												
Login context name	The login context name that is used as the index to the configuration.												
Jaas file name	The name of the Jaas file.												
Kerberos configuration file	The configuration file containing specific properties for Kerberos authentication.												

Option	Description	
	Label	Description
	Security	The security that enables the authentication
	Authentication scheme	The used authentication scheme, which is NTLM.
		If you want to use CyberArk authentication , you need the following connection properties.

Option	Description	
	Label	Description
	Keystore file	<p>The name of the keystore file. The keystore must contain the client key and client certificate or certificate chain.</p> <p>If <code>defaultTruststore</code> is set to <code>false</code>, the keystore has to contain the trusted CA certificate needed to validate the server certificate offered by CyberArk.</p> <p>The value must have the following format: <code>file://<keystore-file name.jks></code></p> <div style="background-color: #f0f0f0; padding: 10px;"> Example <code>file://cyberark-keystore.jks</code> </div>
	Keystore password	The password required to open the keystore.

Option	Description	
	Label	Description
	Default truststore	<p>The indication of the default truststore. The default value is set to False.</p> <ul style="list-style-type: none"> ◦ False: The certificate is validated through the keystoreFile property. ◦ True: The certificate is validated through the default truststore from the Java JRE. This is recommended when CyberArk is set up to offer a server certificate that can be validated by a public CA (certification authority).
	CyberArk address	<p>The host and port number through which the CyberArk server is accessible. The format of the address is hostname:port.</p> <div style="border-left: 3px solid #0070C0; padding-left: 10px; margin-top: 10px;"> Example my.cyberark.com:5 502 </div>

Option	Description	
	Label	Description
	CyberArk application ID	<p>The application ID as defined in CyberArk.</p> <p>This ID should be provided by your network or system administrator.</p>
	CyberArk query	<p>The CyberArk query.</p> <p>This query should be provided by your network or system administrator.</p>
Store credentials	Select this option to store the credentials to access the database. With a schema refresh , you can clear this option again.	
Username	<p>Username to access the database.</p> <p>Note This field is ignored if your data source uses any authentication method other than credentials.</p>	
Password	<p>Corresponding password to access the database.</p> <p>Note This field is ignored if your data source uses any authentication method other than credentials.</p>	
Schedule data refresh	Enable or disable a schedule to automatically refresh the data registration.	

Option	Description
Cron pattern	<p>Schedule of the data refresh as a Quartz Cron pattern.</p> <p>Warning If you create an invalid Cron pattern, Collibra Data Governance Center stops responding.</p>
Time zone	The time zone of the database.

Note If Collibra DGC cannot connect to the database, you cannot continue the data source registration wizard.

8. Click **Next**.
9. Select the data profiling options.

Option	Description
Profile and classify data	<p>Option to profile and classify data via Edge.</p> <p>Option to profile and classify data via Edge.</p> <p>Important This option is only available if you selected a Jobserver for which profiling and classification via Edge is enabled.</p>
Store Data Profile	<p>Option to perform data profiling on the registered data via Jobserver.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>

Option	Description
Detect advanced data types	<p>Option to detect advanced data types in the data source.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Store Sample Data	<p>Option to extract sample data from the registered data.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Tables excluded from registration	<p>Database tables that will not be ingested.</p> <p>Note</p> <ul style="list-style-type: none"> ◦ If required, you can exclude multiple tables. To do this, press <i>Enter</i> after typing a value and then type the next. ◦ You can use an asterisk (*) as wildcard to select multiple tables. For example, if you want to exclude the tables that all start with act_, you can enter act_*. ◦ The table names are case sensitive. ◦ You can add or remove tables from this list by refreshing the schema. ◦ The Table assets that are created after ingestion have an attribute type called Table Type that defines the type of table that is declared in the data source. For example, TABLE, VIEW,...

10. Click **Create**.

What's next?

The data source is registered and the data is automatically ingested. The ingestion of data is executed in a job. You can see this job in the list of [activities](#).

Started	Name	Status	Finished	Result
12/12/2017 2:04 PM	Export to "Default.csv"	Completed	12/12/2017 2:04 PM	Result
12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
12/12/2017 1:27 PM	Creating schema from JDBC	Completed	12/12/2017 1:28 PM	Result
12/12/2017 1:18 PM	Creating schema from file	Completed	12/12/2017 1:19 PM	Result

Click the **Result** button to open the data profiling results.

Tip

- If the database contains foreign keys, they will be registered as new assets of the **Foreign Key** asset type. Assets of this type contain the complex relation, which is the link between all column assets that are part of the foreign key definition.
However, the complex relation is not created if a column is part of a table that is added to the list of **Tables excluded from registration**.
- If you exclude a table during the [schema refresh](#), the corresponding table, column assets and foreign key mapping will be deleted.

Foreign key ingestion

In a relational database, a foreign key is a field in one table that refers to the primary key of another table. The primary key is a table column, or combination of columns, to uniquely identify table records.

The table with the primary key is also referred to as referenced table or parent table, the table with the foreign key as child table.

Ingesting foreign keys

In Data Catalog, a foreign key will be ingested as an asset of the foreign key type. The foreign key asset creates relations between columns of different tables.

The foreign key asset consists of foreign key mappings between the parent and child table. In the following example, you see an overview of the tables, columns and a foreign key:

	<ul style="list-style-type: none"> food: Schema that consists of two tables: <ul style="list-style-type: none"> food_types: Table with the columns <code>food_name</code>, <code>food_code</code> and <code>food_type</code>. fastfood: Table with the columns <code>main_food_code</code>, <code>company_name</code> and <code>main_food_type</code>. fastfood_fk: Foreign key asset consists of one or more foreign key mappings. <ul style="list-style-type: none"> mapping 1 (marked with blue arrows): <ul style="list-style-type: none"> Constrains the column <code>main_food_code</code> from the child table. References the column <code>food_code</code> from the parent table. mapping 2: <ul style="list-style-type: none"> Constrains the column <code>main_food_type</code> from the child table. References the column <code>food_type</code> from the parent table.
--	--

For more information about the foreign key in Collibra DGC, see the [Foreign Key asset page](#).

Foreign Key asset page

On a foreign key asset page, you can find the details of the foreign key and define what has to happen if there are changes to the foreign key.

Tip Do not change any of the ingested data of a foreign key as this can cause errors when you refresh the database.

Foreign Key Update Rule

The Foreign Key Update Rule defines what has to be done when you refresh a schema where the primary key is updated.

- Imported No Action
- Imported Key Cascade

- Imported Key Set Null
- Imported Key Set Default

Foreign Key Delete Rule

The Foreign Key Delete rule defines what has to be done when you refresh a schema where the primary key is deleted.

- Imported No Action
- Imported Key Cascade
- Imported Key Set Null
- Imported Key Set Default

Foreign Key Evaluation Deferrability

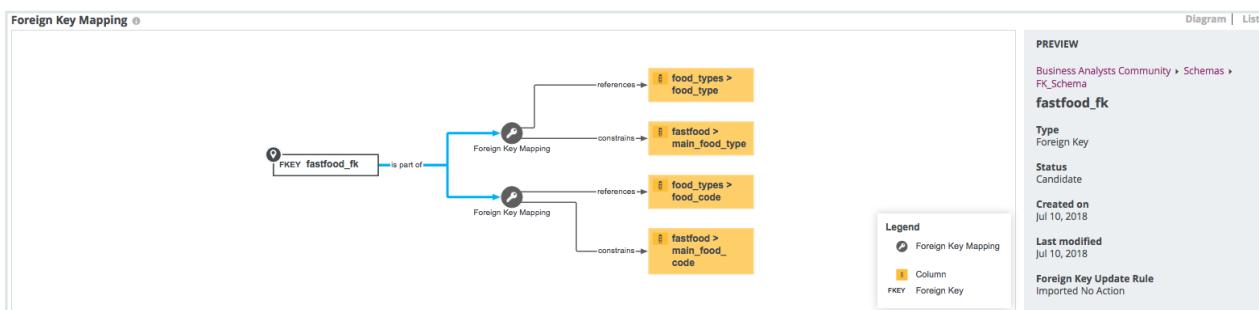
- Imported Key Initially Deferred
- Imported Key Initially Immediate
- Imported Key Not Deferrable

Foreign Key Mapping

The foreign key mapping defines the complex mapping between the primary key and the foreign key. For an example of a foreign key, see [Foreign Key ingestion](#).

The Foreign Key Mapping can be displayed in a table or in a diagram:

constraints	references	is part of	Key sequence	
fastfood > main_food_code	food_types > food_code	fastfood_fk	1	█
fastfood > main_food_type	food_types > food_type	fastfood_fk	2	█



Each foreign key mapping consists of the following information:

- constrains: The value is a column in a child table, its values are restricted by the values of the corresponding primary key.
- references: The value is the column of the parent table that is a primary key in the database.
- is part of: The value is the foreign key asset to which the mapping belongs.
- Key sequence: The value is the order of the constraints definitions.

Register an Excel file as data source

Note If you are using a Collibra Data Intelligence Cloud environment with an on-premises Jobserver, both must have the same installer version. You can find the installer version of your Collibra Data Intelligence Cloud environment at the bottom of the sign-in window of its Collibra Console, for example 5.7.9-35

Prerequisites

- You have downloaded an Excel file.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have a resource role with the following [resource permissions](#):
 - Asset > add
 - Attribute > add
 - Domain > add
 - Attachment > add

Steps

1. In the main menu, click  Catalog, then  Catalog.
 - » The Catalog Home opens.Or open any asset of the type Schema, Data Set, Table, Column or Tableau Server.
2. In the main menu, click the **Create** (+) button.
 - » The **Create** dialog box appears.

3. In the **Create** dialog box, click **Register data source (use your own driver)**.
» The **Register data source (use your own driver)** dialog box appears.
4. In the **Register data source** dialog box, click **Excel**.
5. Enter the data source configuration.

Field	Description
Process on	The jobserver used for ingesting.
Schema name	This name is used in Collibra DGC as schema asset and must therefore be unique.
Schema description	The description of the schema. This is used as description of the schema asset.
Data owner	The owner of the registered data in Collibra DGC.

6. Click **Next**.
7. Select the data profiling options.

Option	Description
Profile and classify data	<p>Option to profile and classify data via Edge.</p> <p>Option to profile and classify data via Edge.</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>Important This option is only available if you selected a Jobserver for which profiling and classification via Edge is enabled.</p> </div>
Store Data Profile	<p>Option to perform data profiling on the registered data via Jobserver.</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p> </div>

Option	Description
Detect advanced data types	<p>Option to detect advanced data types in the data source.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Store Sample Data	<p>Option to extract sample data from the registered data.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Tables excluded from registration	<p>Database tables that will not be ingested.</p> <p>Note</p> <ul style="list-style-type: none"> ◦ If required, you can exclude multiple tables. To do this, press <i>Enter</i> after typing a value and then type the next. ◦ You can use an asterisk (*) as wildcard to select multiple tables. For example, if you want to exclude the tables that all start with act_, you can enter act_*. ◦ The table names are case sensitive. ◦ You can add or remove tables from this list by refreshing the schema. ◦ The Table assets that are created after ingestion have an attribute type called Table Type that defines the type of table that is declared in the data source. For example, TABLE, VIEW,...

8. Click **Create**.

What's next?

The data source is registered and the data is automatically ingested. The ingestion of data is executed in a job. You can see this job in the list of [activities](#).

Overview	Clear all				
Groups	Started ▾	Name	Status	Finished	Results
Responsibilities	12/12/2017 2:04 PM	Export to "Default.csv".	Completed	12/12/2017 2:04 PM	Result
History	12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
Activities	12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
	12/12/2017 1:27 PM	Creating schema from JDBC	Completed	12/12/2017 1:28 PM	Result
	12/12/2017 1:18 PM	Creating schema from file	Completed	12/12/2017 1:19 PM	Result

Click the **Result** button to open the [data profiling results](#).

If you have selected the option to perform data profiling and/or extract sample data, you can go to the schema page to verify if this process has completed in the **Synchronization Status** field. Refresh the schema page until the **Synchronization Status** field has disappeared.

Note that there Collibra DGC may have resolved some small issues:

Use case	Behavior
Missing column name	If the file is missing a column name, a default name will be given, <code>_c + index</code> . The index is the column position in the file starting with 0. For example, <code>_c4</code> corresponds with the fifth column in the file.
Duplicate column name	If the file has duplicate column names, the column names will be appended with an index. The index is the column position in the file, starting with 0. For example, <code>mycol1</code> and <code>mycol3</code> are columns 2 and 4 in the file, each with the column name <code>mycol</code> .
Empty sheet	If the Excel file has empty sheets, they are not registered.

Register a CSV file as data source

Note If you are using a Collibra Data Intelligence Cloud environment with an on-premises Jobserver, both must have the same installer version. You can find the installer version of your Collibra Data Intelligence Cloud environment at the bottom of the sign-in window of its Collibra Console, for example 5.7.9-35

Prerequisites

- You have downloaded a CSV file.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have a resource role with the following [resource permissions](#):
 - Asset > add
 - Attribute > add
 - Domain > add
 - Attachment > add

Steps

1. In the main menu, click  Catalog, then  Catalog.
 - » The Catalog Home opens.Or open any asset of the type Schema, Data Set, Table, Column or Tableau Server.
2. In the main menu, click the **Create** (+) button.
 - » The Create dialog box appears.
3. In the Create dialog box, click **Register data source (use your own driver)**.
 - » The **Register data source (use your own driver)** dialog box appears.
4. In the **Register data source** dialog box, click **Csv**.
5. Enter the data source configuration.

Field	Description
Process on	The jobserver used for ingesting.

Field	Description
Schema name	This name is used in Collibra DGC as schema asset and must therefore be unique.
Schema description	The description of the schema. This is used as description of the schema asset.
Data owner	The owner of the registered data in Collibra DGC.

6. Click **Next**.
7. Select the data profiling options.

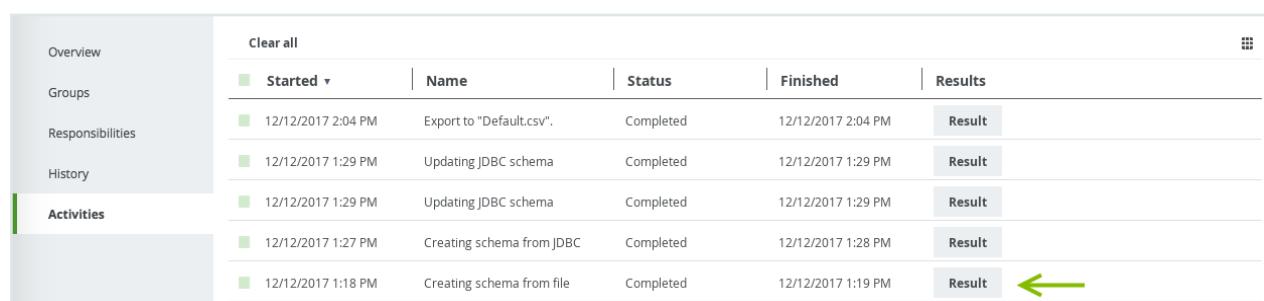
Option	Description
Profile and classify data	<p>Option to profile and classify data via Edge.</p> <p>Option to profile and classify data via Edge.</p> <p>Important This option is only available if you selected a Jobserver for which profiling and classification via Edge is enabled.</p>
Store Data Profile	<p>Option to perform data profiling on the registered data via Jobserver.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Detect advanced data types	<p>Option to detect advanced data types in the data source.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>

Option	Description
Store Sample Data	<p>Option to extract sample data from the registered data.</p> <p>Important This option is not available if you selected a Jobserver for which profiling and classification on Edge is enabled.</p>
Tables excluded from registration	<p>Database tables that will not be ingested.</p> <p>Note</p> <ul style="list-style-type: none"> ◦ If required, you can exclude multiple tables. To do this, press <i>Enter</i> after typing a value and then type the next. ◦ You can use an asterisk (*) as wildcard to select multiple tables. For example, if you want to exclude the tables that all start with act_, you can enter act_*. ◦ The table names are case sensitive. ◦ You can add or remove tables from this list by refreshing the schema. ◦ The Table assets that are created after ingestion have an attribute type called Table Type that defines the type of table that is declared in the data source. For example, TABLE, VIEW,...

8. Click Create.

What's next?

The data source is registered and the data is automatically ingested. The ingestion of data is executed in a job. You can see this job in the list of [Activities](#).



Overview	Clear all				
Groups	Started	Name	Status	Finished	Results
Responsibilities	12/12/2017 2:04 PM	Export to "Default.csv".	Completed	12/12/2017 2:04 PM	Result
History	12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
Activities	12/12/2017 1:29 PM	Updating JDBC schema	Completed	12/12/2017 1:29 PM	Result
	12/12/2017 1:27 PM	Creating schema from JDBC	Completed	12/12/2017 1:28 PM	Result
	12/12/2017 1:18 PM	Creating schema from file	Completed	12/12/2017 1:19 PM	Result

Click the **Result** button to open the [data profiling results](#).

Note

- Empty rows in the CSV file are ignored. As a consequence, they do not count towards the row count or missing value count.
- You can define the format of empty values by [configuring](#) the data profiling behavior in Collibra Console. However, if a field is empty in the CSV file, it will be considered empty even if it does not match the format defined in Collibra Console.

If you selected the option to perform data profiling and/or extract sample data, you can verify that the process was completed in the Synchronization Status field on the schema asset page. Refresh the schema page until the **Synchronization Status** field disappears.

Note that there Collibra DGC may have resolved some small issues:

Use case	Behavior
Missing column name	If the file is missing a column name, a default name will be given, <code>_c + index</code> . The index is the column position in the file starting with 0. For example, <code>_c4</code> corresponds with the fifth column in the file.
Duplicate column name	If the file has duplicate column names, the column names will be appended with an index. The index is the column position in the file, starting with 0. For example, <code>mycol1</code> and <code>mycol3</code> are columns 2 and 4 in the file, each with the column name <code>mycol</code> .
Empty sheet	If the Excel file has empty sheets, they are not registered.

Manage your own JDBC drivers

To [register a database as a data source](#) you need a JDBC driver. You can use one of your own JDBC drivers.

For more information, see [Supported data sources for data source registration](#).

This allows you to do the following:

- Edit an existing JDBC driver.
- Install a new JDBC driver for a data source type that has an existing JDBC driver, for example Oracle12c.
- Install a new JDBC driver for a data source type that doesn't have a JDBC driver yet, for example Amazon EMR.

Tip You can also do this with a Collibra-provided JDBC driver that you download from Collibra Marketplace.

This operation should only be executed by your database administrator.

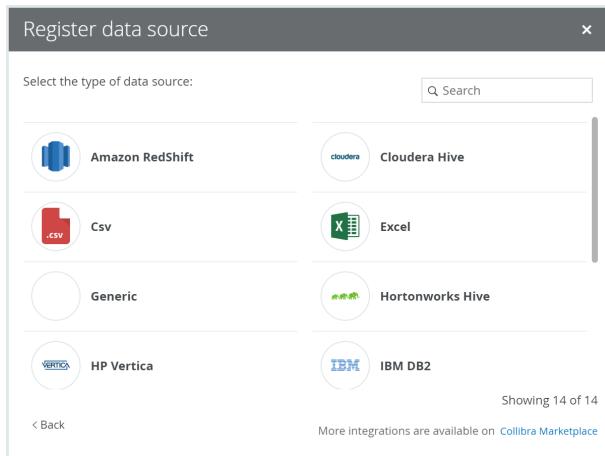
Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have downloaded the JDBC driver of your choice as an archive file (for example, ZIP or JAR).
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have a resource role with the following [resource permissions](#) on the **Schema** community:
 - Asset > add
 - Attribute > add
 - Domain > add
 - Attachment > add

Steps

1. In the main menu, click , then  **Catalog**.
» The Catalog Home opens.
2. In the main menu, click the **Create** (+) button.
» The Create dialog box appears.
3. In the Create dialog box, click **Register data source (use your own driver)**.

4. In the **Register data source** dialog box, click the type of your data source.



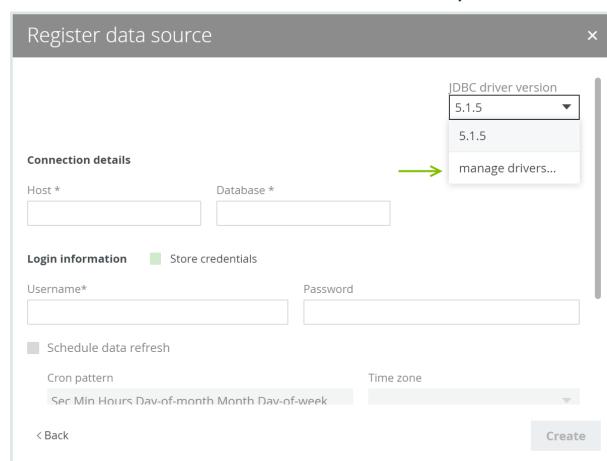
5. If a JDBC driver is already installed for your data source:

- a. Enter the schema properties.

Field	Description
Schema name	This name is used in Collibra DGC as schema asset and must therefore be unique.
Schema description	The description of the schema. This is used as description of the schema asset.
Data owner	The owner of the registered data in Collibra DGC.

- b. Click **Next**.

- c. In the **JDBC driver version** field, click **manage drivers...**



6. Do one of the following:
 - Click **Add JDBC Driver** if you want to create a new JDBC driver.
 - Click  if you want to edit an existing JDBC driver.

7. Enter the required information.

Field	Description
JDBC Driver Version Name	The name of the JDBC driver.
Upload	<p>Button to upload the relevant files for the data source.</p> <p>The JDBC driver should be in JAR or ZIP format with a valid Java archive structure.</p> <p>For authentication with CyberArk, you also need to upload a keystore file in JKS format.</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p>Note When you click the button, an Open dialog box appears. By default, the dialog box filters on JAR, ZIP and CONF files. However, you can change the filter to show all files.</p> </div> <p>For Hortonworks Hive with Kerberos authentication, you need two files: jaas.conf and krb5.conf.</p>
Driver files	<p>This table contains a list of uploaded files.</p> <p>You can remove a driver file by clicking .</p>

8. Click **Next**.
9. Configure the JDBC connection.

Note For more information on the connection details of supported data sources, see [JDBC connection details of your own drivers](#).

10. Click **Create**.

What's next?

You can now complete the [data source registration wizard](#).

JDBC connection details of your own drivers

In this section, you will see the connection details needed to [register a data source](#) or [manage your own JDBC driver](#).

Note About the Connection properties table:

- The **Label** column is the value that will appear in the connection details dialog box of the **Data Source Registration** wizard.
- The **Property** column contains the parameters in which the user input will be saved.

Amazon Redshift

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes
Database	database	Yes
Schema	schema	Yes

Cloudera Hive

Label	Property	Mandatory
URL (hostname:port)	host	Yes
Principal	principal	Yes
Schema	schema	Yes

Hortonworks Hive

Label	Property	Mandatory
URL (hostname:port)	host	Yes
Schema	schema	Yes

HP Vertica

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes
Database	database	Yes
Schema	schema	Yes

IBM DB2

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes
Database	database	Yes
Schema	schema	Yes

MapR Hive

Label	Property	Mandatory
URL (hostname:port)	host	Yes
Schema	schema	Yes

Microsoft SQL Server

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes
Database	databaseName	Yes
Schema	schema	Yes

MySQL

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes
Database	database	Yes

Oracle DB

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes
SID	sid	Yes
Schema	schema	Yes

PostgreSQL

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes

Label	Property	Mandatory
Database	database	Yes
Schema	schema	Yes

Teradata

Label	Property	Mandatory
Hostname	host	Yes
Port	port	Yes
Database	database	Yes
Schema	schema	Yes

Authentication methods

Certain authentication methods require additional connection properties.

NTLM

If you want to use NTLM authentication, you also need the following connection properties.

Label	Property	Mandatory
Security	<i>integratedSecurity</i> must be value <code>True</code> .	Yes
Authentication scheme	<i>authenticationScheme</i> must be value <code>NTLM</code> .	Yes

Kerberos

If you want to use [Kerberos authentication](#), you also need the following connection properties.

Label	Property	Mandatory
Principal	principal	Yes
Kerberos realm	realm	Yes
Login context name	loginContextName You can find the value for this property in the jaas.conf file.	Yes
Jaas file name	com.collibra.jobserver.dto.catalog.JdbcConnection.jaasConfig	Yes
Kerberos configuration file	com.collibra.jobserver.dto.catalog.JdbcConnection.krbConfig	Yes

Cyberark

If you want to use [CyberArk authentication](#), you need the following connection properties. If you use one of the CyberArk connection properties, Data Catalog automatically uses CyberArk authentication.

Label	Property	Mandatory
Keystore file	keystoreFile	Yes
Keystore password	keystorePass	Yes
Default truststore	defaultTruststore	No
CyberArk address	cyberarkAddress	Yes
CyberArk application ID	cyberarkAppId	Yes
CyberArk query	cyberarkQuery	Yes

Authentication

If you [register a database as data source](#) or [manage a JDBC driver](#), you can use various authentication methods to access your data source.

CyberArk authentication

CyberArk is middleware to manage authentication and is used to provide access to various data sources. You can use CyberArk to let Data Catalog access and ingest data sources with username and password authentication.

Note You can only authenticate to data sources using username and password authentication.

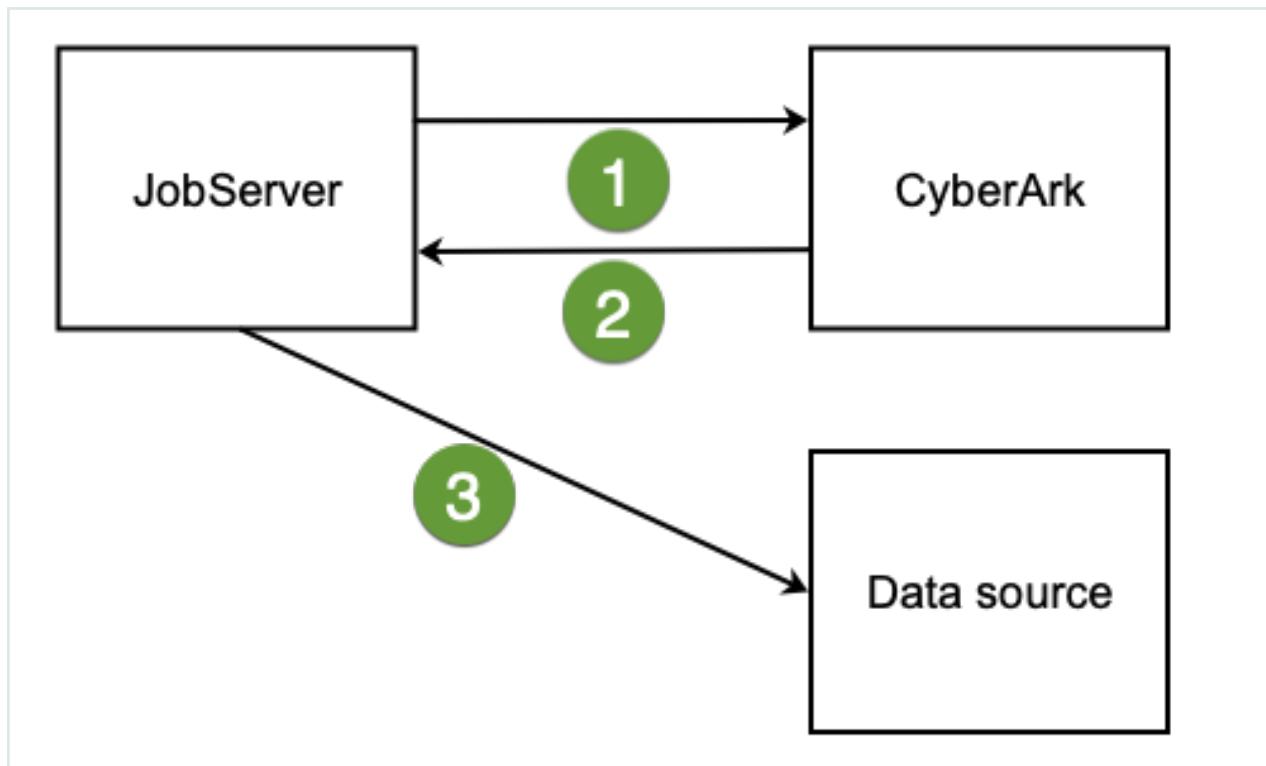
Setting up CyberArk authentication

You set up CyberArk authentication when you [register your data source](#) or [manage your JDBC driver](#). When you register your data source or manage your JDBC driver, you only provide the username, the password you need to authenticate to the data source is stored in CyberArk and is retrieved by the Jobserver. When you ingest a data source using CyberArk authentication, the Jobserver uses certificate-based mutual authentication to authenticate to CyberArk.

Note The connection to CyberArk is only supported over HTTPS.

To authenticate via CyberArk, you have to [enable CCP WebService](#) in CyberArk and keep the default name AIMWebService unchanged. You also have to provide your own CyberArk certificates via a JKS keystore that you upload to Collibra DGC when you register your data source or manage your JDBC driver. The JKS keystore contains the CyberArk client certificates, the private key and, if required, a server certificate.

Authentication workflow



Step	Action
1	The Jobserver requests credentials from CyberArk through a certificate-based mutual authentication.
2	CyberArk provides the Jobserver with a username and password.
3	The Jobserver uses these credentials to authenticate to a data source.

Configuration

If you want to use [CyberArk authentication](#), you need the following connection properties. If you use one of the CyberArk connection properties, Data Catalog automatically uses CyberArk authentication.

Label	Property	Description	Mandatory
Keystore file	keystoreFile	<p>The name of the keystore file. The keystore must contain the client key and client certificate or certificate chain.</p> <p>If <code>defaultTruststore</code> is set to <code>false</code>, the keystore has to contain the trusted CA certificate needed to validate the server certificate offered by CyberArk.</p> <p>The value must have the following format: <code>file://<keystore-file name.jks></code>.</p> <div style="background-color: #f0f0f0; padding: 10px;"> Example <code>file:///cyberark-keystore.jks</code> </div>	Yes
Keystore password	keystorePass	The password required to open the keystore.	Yes
Default truststore	defaultTruststore	<p>The indication of the default truststore. The default value is set to <code>False</code>.</p> <ul style="list-style-type: none"> <code>False</code>: The certificate is validated through the <code>keystoreFile</code> property. <code>True</code>: The certificate is validated through the default truststore from the Java JRE. This is recommended when CyberArk is set up to offer a server certificate that can be validated by a public CA (certification authority). 	No

Label	Property	Description	Mandatory
CyberArk address	cyberarkAddress	The host and port number through which the CyberArk server is accessible. The format of the address is hostname:port. Example my.cyberark.com:5502	Yes
CyberArk application ID	cyberarkAppld	The application ID as defined in CyberArk. This ID should be provided by your network or system administrator.	Yes
CyberArk query	cyberarkQuery	The CyberArk query. This query should be provided by your network or system administrator.	Yes

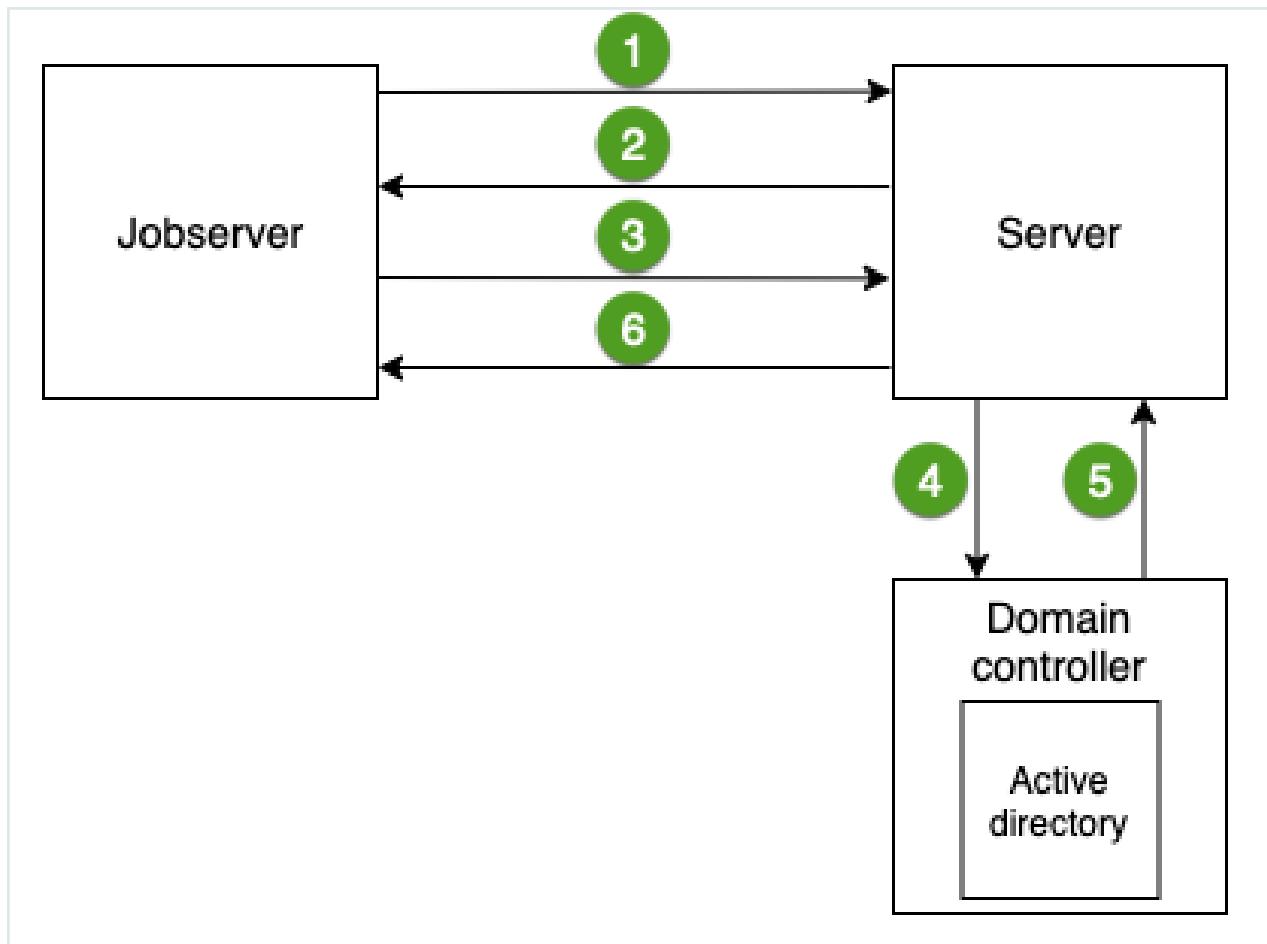
NTLM authentication

NTLM is an authentication protocol used on networks that include systems running the Windows operating system and on stand-alone systems. It uses a challenge-response authentication to connect to the Microsoft SQL Server data source. For more information, see the [Microsoft NTLM user guide](#).

If you have a Microsoft SQL Server data source that uses NTLM authentication, you have to set up specific connection properties when you [register the data source](#) or [manage the JDBC driver](#).

Authentication workflow

When you ingest a Microsoft SQL Server data source using NTLM authentication, the Jobserver connects to the server to request access. The server then sends a challenge for the Jobserver to encrypt and send back. The domain controller validates that response and gives the Jobserver access to the data source.



Step	Action
1	The Jobserver requests access to the Microsoft SQL Server data source.
2	The server sends a challenge message to the Jobserver to identify the Jobserver.
3	The Jobserver sends a response back to the server.
4	The server sends the challenge and response message to the domain controller.
5	The active directory on the domain controller validates the challenge and response message and sends the result to the server.
6	The server gives the Jobserver permission to access the data source.

Configuration

If you want to use NTLM authentication, you also need the following connection properties.

Label	Property	Description	Mandatory
Security	<i>integratedSecurity</i> must be value <code>True</code> .	The security that enables the authentication	Yes
Authentication scheme	<i>authenticationScheme</i> must be value <code>NTLM</code> .	The used authentication scheme, which is NTLM.	Yes

Kerberos authentication

You can use Kerberos authentication for registering a Hive data source, for example Cloudera Hive, Hortonworks Hive or MapR Hive.

Authentication type

We only support Kerberos username and password authentication, not keytab. Ensure that you configure this in the `jaas.conf` file by setting the `useKeyTab` option to `false`.

In the following `jaas.conf` example, `Client` is the value of the `loginContextName` field when you configure the [Kerberos connection configuration](#).

Example

```
Client {
    com.sun.security.auth.module.Krb5LoginModule required
    useKeyTab=false
    useTicketCache=true;
};
```

If there are multiple entries in this configuration file, ask the database administrator or network administrator which one to use. For more information about the Jaas login configuration file, see the [Java documentation](#).

Example krb5.conf

The following is an example configuration file of Kerberos.

```
[libdefaults]
    renew_lifetime = 7d
    forwardable = true
    default_realm = MY.REALM
    ticket_lifetime = 24h
    dns_lookup_realm = false
    dns_lookup_kdc = false
    default_ccache_name = /tmp/krb5cc_{uid}

[logging]
    default = FILE:/var/log/krb5kdc.log
    admin_server = FILE:/var/log/kadmind.log
    kdc = FILE:/var/log/krb5kdc.log

[realms]
    MY.REALM = {
        kdc = <kdc.my.realm>
        admin_server = <kadmin.my.realm>
    }
```

Enable debug for Kerberos authentication issues

If an error occurs during the Kerberos authentication, you can enable debugging to track the root cause of the error.

To enable debugging for the Kerberos authentication:

1. On the server that hosts the Jobserver service, open the file `context_jvm.conf` in `<drive>/collibra/spark-jobserver/conf` for editing.
2. Is the following parameter present in the file: `-Dsun.security.krb5.debug`
 - Yes: Set its value to `true`.
 - No: Add the following line to the file: `-Dsun.security.krb5.debug=true`
3. Save and close the file.
4. **Restart** the Jobserver service.

The default log file in which to look for Kerberos authentication issues is `<drive>/collibra_data/logs/context_<context-name>/spark-job-server.log`.

In general, you list the `context_<context-name>` directories and pick the most recent one.

Tip After resolving the authentication issues, set the parameter to *false*.

Cancel a data ingestion job

If you are the one that started the data ingestion job, you can cancel it while the data ingestion job is still running.

Prerequisites

- You have [registered](#) a data source.
- You have started the ingestion job.

Steps

1. In the main menu, click  , then **Show more**.
» Your [profile page](#) opens on the **Activities** tab page.
2. Click  next to the ingestion job to cancel it.

Note When the job is finished, the  icon changes into a  icon. You can't cancel the ingestion job anymore.

» The data ingestion job is canceled.

Configuration assets

When you register a database or system as a data source, you enter connection properties and other options. To store the configuration and connection properties, Data Catalog creates a special kind of asset, often called the configuration asset. Some of these assets show parts of the configuration on a dedicated Configuration tab page.

This list contains the most widely used configuration assets:

- [Schema assets](#)
- [S3 File System assets](#)
- [Tableau Server assets](#)

Working with configuration assets

Even though you can import or export configuration assets with the [import functionality](#) or create them via the [global create button](#), they would not contain any configuration. This means that, if you create a configuration asset in that way, you must also create the configuration and add it to the configuration asset. However, this is not possible for all configuration assets. For example, you cannot configure a [Schema asset](#) after creation. The only way to configure a Schema asset is by [ingesting a data source](#). We highly recommend that you do not create configuration assets by importing them or via the global create button. Instead, use the appropriate procedure, such as ingesting a data source or registering a system.

Warning If you [delete a configuration asset](#), you also delete its configuration. Register your data source again to create a new configuration asset or contact support for more information.

About refreshing a schema

Refreshing a schema is the process of updating the metadata of a registered data source in Collibra Data Governance Center.

You can refresh a schema [manually](#) or [automatically](#) at fixed intervals. This is particularly useful if the content of the data source changes regularly.

In this section, you can find the relevant actions to successfully refresh a schema.

Refresh the schema of a registered data source

You can refresh the schema of registered data to update the data and hence the profiling. It can also be useful to do this to change data types to force the profiling to use the correct type.

Tip You can also refresh the schema automatically by means of a [schedule](#).

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [set up the JDBC driver](#) of your source data, for example MySQL.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- If you are using a Collibra Data Intelligence Cloud environment with an on-premises Jobserver, both must have the same installer version. You can find the installer version of your Collibra Data Intelligence Cloud environment at the bottom of the sign-in window of its Collibra Console, for example 5.7.9-35
- You have a resource role with the following [resource permissions](#) on the **Schema** community:
 - Asset > add
 - Attribute > add
 - Domain > add
 - Attachment > add
- You have the permissions to retrieve the metadata of the following database components through the JDBC Driver Database Metadata methods:
 - Schemas
 - Tables
 - Columns
 - Primary keys
 - Foreign keys

Note

- For the list of supported databases and versions, consult the [Databases supported versions](#) section.
- For the JDBC connection details of the various databases, consult the JDBC connection details section.

Steps

1. Open the Schema asset.
 - a. In the main menu, click  Catalog.
 - » The Catalog Home opens.
 - b. In the submenu, click Data Dictionary and select the All Schemas view.
 - c. Click the schema that you want to refresh.

Tip You can also use the Collibra Data Governance Center search function to look up your schema.

2. In the view bar, to the right, click Actions → Refresh.

» The Refresh Schema dialog box appears.

Tip If Data Catalog experience is disabled, the More menu is shown instead of Actions.

3. Enter the required information.

This dialog box varies with the data source:

- Relational database

Note

- If you exclude a table during the schema refresh, you will delete the corresponding table, column assets and the foreign key mapping (complex relation).
- If you clear the Store credentials option, the credentials are no longer stored.

- CSV file
- Excel file

This step may take some time.

4. Click Save & Refresh.

» The refresh of the schema starts, you can follow the refresh job in the list of activities.

What's next?

- The representation of the schema is updated: Data Catalog creates, edits and deletes assets as needed.
 - This can lead to refresh conflicts. See the [Resolve schema refresh conflicts](#) section.
 - If you had deleted assets manually, Data Catalog usually doesn't create them again if you refresh the schema. However, if the assets are required to represent the schema structure, Data Catalog can create them again.

Example

You ingested a schema that contains a table and three columns. In Data Catalog, this is represented by a Schema asset, a Table asset and three Column assets.

Additionally, the following relations are created between the relevant assets:

- Schema contains/is part of Table
- Table contains/is part of Column

In the actual data source, the columns are physically inside the table. However, in Data Catalog, they are separate assets linked by relations. As a consequence, you can delete the Table asset without deleting the Column assets. If you did that, Data Catalog creates the Table asset again if you refresh the schema, because the Table asset is needed for the relations to the Column assets.

- If the data source has new values, new sample data is generated and all profiling information updated.
- Data types or categorical attributes that you [changed manually](#) are not updated when you refresh the schema.

Note If you change the data type back to the original value assigned by the profiler, Data Catalog can update it if you refresh the schema

- If you use this schema of the data source for [Tableau stitching](#), you have to [restitch](#) after each schema refresh to make sure that all relations are up to date.

Schedule a schema refresh

You can [refresh](#) a schema manually, but you can also create a schedule to refresh a schema on a regular basis.

You can only create a refresh schedule for schemas of databases that are registered as a data source, not from CSV or Excel files.

Tip You can schedule the refresh during the [data source registration](#) process or afterwards via the [Schema asset](#).

Note

- To enable a scheduled schema refresh, you have to save the credentials in the configuration of a data source registration.
- The refresh schedule uses [Quartz Cron](#) expressions.
- If you use the schema for [Tableau stitching](#), you have to [restitch](#) after each schema refresh to make sure that all relations are up-to-date.

Prerequisites

- You have registered a data source.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a role with the following [resource permissions](#) on the Schema community:
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add

Note These permissions are always necessary when [registering a data source](#).

Schedule the refresh during the data source registration process

You can create the refresh schedule when you register a data source.

Example

When you register a Snowflake data source in Collibra Data Governance Center, you can create a refresh schedule by selecting **Schedule data refresh**. You can then enter the CRON pattern *0 0 12?*WED* to refresh every Wednesday at 12:00:00 PM.

The screenshot shows the 'Register data source' dialog. At the top, fields for 'Account name*', 'Database*', and 'Schema*' are filled with 'MY_ACCOUNTNAME', 'MY_DATABASE', and 'MY_SCHEMA' respectively. Below these are fields for 'Warehouse' ('MY_WAREHOUSE') and 'Login information' (Username 'MY_USERNAME' and Password '*****'). A checkbox labeled 'Schedule data refresh' is checked. This checkbox is highlighted with a green rectangular border. Below it, the 'Cron pattern' field contains '0 0 12?*WED' and the 'Time zone' dropdown is set to '(GMT+01:00)'. At the bottom of the dialog are 'Back' and 'Next' buttons.

Schedule the refresh via the Schema asset

You can create the refresh schedule when you **refresh** the schema of a registered data source via the Schema asset.

1. Open the Schema asset.
 - a. In the main menu, click Catalog, then Catalog.
 - » The Catalog Home opens.
 - b. In the submenu, click **Data Dictionary** and select the **All Schemas** view.
 - c. Click the schema that you want to refresh.

Tip You can also use the Collibra Data Governance Center search function to look up your schema.

2. In the view bar, to the right, click **Actions** → **Refresh**.
 - » The Refresh Schema dialog box appears.

Tip If **Data Catalog experience** is disabled, the **More** menu is shown instead of **Actions**.

3. In the **Login information** section, check **Store credentials** and enter the username and password you use to access your data source.
» Your credentials are used to automatically connect to your data source and refresh the metadata in Collibra Data Governance Center.
4. Select **Schedule data refresh**.
5. Enter the required information.

Option	Description
Cron pattern	<p>Schedule of the data refresh as a Quartz Cron pattern.</p> <div style="background-color: #f0f0f0; padding: 10px; border-left: 2px solid red; margin-left: 10px;"> Warning If you create an invalid Cron pattern, Collibra Data Governance Center stops responding. </div>
Time zone	The time zone of the database.

6. Click **Save**.

Example

When you refresh a schema of a registered data source, you can create a refresh schedule by selecting **Schedule data refresh**. You can then enter the CRON pattern **0 0 12?*WED** to refresh every Wednesday at 12:00:00 PM.

The screenshot shows the 'Refresh Schema' dialog box. The 'Schedule data refresh' section is highlighted with a green border. Inside this section, the 'Cron pattern' field contains '0 0 12?*WED' and the 'Time zone' dropdown is set to '(GMT+01:00)'.

Setting	Value
Cron pattern*	0 0 12?*WED
Time zone*	(GMT+01:00)

Quartz Cron syntax

Cron is a software utility that specifies commands to run on a given schedule. This schedule is defined by a Cron pattern, which has a specific syntax that will be described in this section.

For example, you can refresh the [schema](#) of a data source or synchronize [Tableau](#) or [Amazon S3](#) metadata outside office hours to reduce the impact of these actions on the performance of your environment.

Note By default, you use [Spring Cron expressions](#) to schedule Collibra Console back-ups.

Warning If you create an invalid Cron pattern, Collibra Data Governance Center stops responding.

The Cron pattern consists of six or seven space-separated fields:

```
<second> <minute> <hour> <day of the month> <month> <day of the week>
<year>
```

Position	Field	Description	Mandatory
1	second	This field determines the second of the schedule: <ul style="list-style-type: none"> <second>: at the entered second. The value must be between 0 and 59, included. */<second>: every <second> seconds. For example, */10 corresponds to every 10 seconds. 	Yes

Position	Field	Description	Mandatory
2	minute	<p>This field determines the minute of the schedule:</p> <ul style="list-style-type: none"> • minute: at the entered minute. The value must be between 0 and 59, included. • minute/minute: on the given minutes, values included. For example, 15/45 corresponds to every hour at 15 and 45 minutes past the hour. • */minute: every <minute> minutes. For example, */15 corresponds to every 15 minutes. 	Yes
3	hour	<p>This field determines the hour of the schedule:</p> <ul style="list-style-type: none"> • hour: at the entered hour. The value must be between 0 and 23 included. • hour-hour: range of hours, values included. For example, 8-10 means at 8,9 and 10 o'clock. • hour, hour: at the given hours. For example, 6,18 means at 6 AM and at 6 PM. 	Yes

Position	Field	Description	Mandatory
4	day of the month	<p>This field determines the day of the schedule:</p> <ul style="list-style-type: none"> • <code>day</code>: at the entered day of the month. The value must be between 1 and 31 included. • <code>day-day</code>: range of days of the month, values included. For example, <code>1-4</code> corresponds to every first four days of the month. • <code>day,day</code>: at the given days of the month. For example, <code>1,15</code> corresponds to the first day of the month and the 15th day of the month. • <code>L</code>: at the last day of the month. • <code>dayW</code>: at the nearest weekday (Monday to Friday). For example, the 15th day is a Saturday, then value <code>15W</code> corresponds to the 14th day of the month, which is a Friday. If the 15th day is a Sunday, then value <code>15W</code> corresponds to the 16th day, which is a Monday. If the 15th day is a Monday, Tuesday, Wednesday, Thursday or Friday, then value <code>15W</code> corresponds to the 15th day. <p>Note If the 1st day of the month is a Saturday, then <code>1W</code> corresponds to the 3rd day of the month, since the month is specified in the 5th value of the Cron expression.</p> <ul style="list-style-type: none"> • <code>LW</code>: at the last weekday of the month. 	Yes

Position	Field	Description	Mandatory
5	month	<p>This field determines the month of the schedule:</p> <ul style="list-style-type: none"> • month: at the entered month of the year. The value must be between 1 and 12, included. You can also use the first three characters of the English names, JAN, FEB, MAR and so on. • month-month: range of months, values included. For example, 1-3 corresponds to every first three months of the year. • month,month: at the given months of the year. For example, APR,AUG,DEC corresponds to every April, August and December of the year. 	Yes

Position	Field	Description	Mandatory
6	day of the week	<p>This field determines the day of the week of the schedule:</p> <ul style="list-style-type: none"> • day of the week: at the entered day of the week. The value must be between 1 and 7, included, respectively corresponding to Sunday and Saturday. You can also use the first three characters of the English names, MON, TUE, WED and so on. • day of the week-day of the week: range of days of the week, values included. For example, 2-6 corresponds to Monday to Friday. • day of the week,day of the week: on the given days of the week. For example, MON,WED,FR/ corresponds to every Monday, Wednesday and Friday. • L: on Saturday, the 7th day of the week. • L-day of the week: at the given day before the end of the week. For example, L-3 corresponds to the third to last day of the month. • day of the weekL: at the last given day of the month. For example, 2L corresponds to the last Monday of the month. • day of the week#nr of day of the month: at the given day of the month. For example, 6#3 corresponds to the 3rd Friday of the month. 	Yes

Position	Field	Description	Mandatory
7	year	<p>This field determines the year of the schedule:</p> <ul style="list-style-type: none"> • <empty>: if your schedule doesn't require a year, you can leave this value empty. • year: at the entered year. The value must be between 1970 and 2099. For example, 2020 corresponds to the year 2020. • year-year: range of years, values included. For example, 2020-2025 corresponds with the years 2020, 2021, 2022, 2023, 2024 and 2025. • year, year: on the given years. For example, 2020,2022,2025 corresponds to the years 2020, 2022 and 2025. 	No

Non-standard characters

- asterisk (*): Used to select all values within a field. For example, "*" in the minute field corresponds with every minute.
- question mark (?): Used to specify something in one of the two fields in which the character is allowed, but not the other, mainly used for days of the week. For example, if you want your trigger to fire on a particular day of the month, for example the 10th, but don't care what day of the week that happens to be, you could put "10" in the day-of-month field, and "?" in the day of the week field.

Example

- `0 0 * ? * *` = the top of every hour of every day.
- `*/10 * * * ?` = every ten seconds.
- `0 0 8-10 * * ? 2020` = 8, 9 and 10 o'clock of every day during the year 2020.
- `0 0 6,19 ? * *` = 6:00 AM and 7:00 PM every day.
- `0 0/30 8-10 ? * *` = 8:00, 8:30, 9:00, 9:30, 10:00 and 10:30 every day.
- `0 0 9-17 * * MON-FRI` = on the hour nine-to-five weekdays.
- `0 0 0 25 12 ?` = every Christmas Day at midnight, no matter what day of the week it is.
- `0 15 10 ? * 6L 2022-2025` = 10:15 AM on every Friday of every month during the years 2022, 2023, 2024 and 2025.
- `0 30 11 ? * 6#2` = 11:30 AM on the second Friday of every month.

Warning Quartz Cron only supports a value in either the 4th or the 6th position, but not in both. At the same time, both positions cannot be empty.

Sample data

Sample data is a data set that consists of representative, random data collected from a registered data source. The sample data is also used for data [classification](#).

You can create sample data by:

- [registering a data source](#) and choosing to create sample data.
- [registering a data source](#) and adding the [push down sampling connection](#) property.
- importing sample data via the profiling API.

You can find the sample data by looking up the registered table and then clicking **Sample data** in the tab pane.

Sample data							
color	director_name	num_critic_for_reviews	duration	director_facebook_likes	actor_3_facebook_likes	actor_2_name	actor_1_facebook_likes
Color	Sofia Coppola	265	101	0	11	Bill Murray	19000
Color	Rand Ravich	107	109	7	1000	Charlize Theron	40000
Color	William Friedkin	138	104	607	109	Fernando Rey	813
Color	Jaco Booyens		90	37	0	Sebastian Aguilar	210
Color	Jaume Balagueró	252	78	57	7	Pablo Rosso	120
Color		8	22		344	Amy Sedaris	459
Color	Panos Cosmatos	97	110	22	48	Marilyn Norry	434
Color	Andrew Steggall	29	109	0	30	Alex Lawther	202
Color	Johnny Remo	2	112	74	891	Randy Wayne	260000

Data profiling

Data profiling creates a summary of a data source that is registered with Data Catalog. The summary mainly contains statistics and graphics to give the user an idea what the registered data is about.

About data profiling

Data profiling creates a summary of a data source that is registered with Data Catalog. The summary mainly contains statistics and graphics to give the user an idea what the registered data is about.

You can create profiling data by:

- Registering a data source and choosing to create profiling data.
- Importing profiling data via the profiling API.

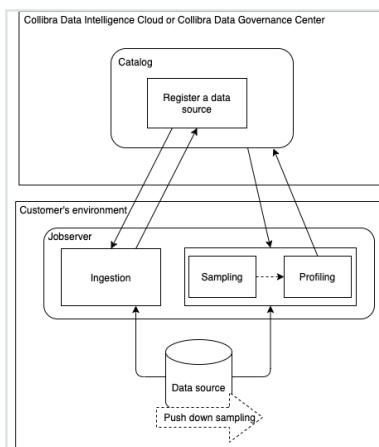
You can find the [profiling information](#) on the [asset page](#) of a table or a column, by clicking **Data Profiling** in the tab pane.

Profiling process

Profiling via Jobserver

When you register a data source, Data Catalog triggers the ingestion process via Jobserver. By default, the complete data set is transferred to the Jobserver, which then creates a sample based on your data source. Jobserver profiles the sample and sends the result to Data Catalog.

If you [enable](#) the **Anonymize data** option in Collibra Console, profiling information that can be considered [sensitive](#) is hashed or removed,



Profiling sample

To create a data profile, Data Catalog uses a representative **sample** of the data. This profiling sample is created when you register your data source.

Standard profiling sample creation process via Jobserver

If you use the Jobserver to register a data source without push down sampling, the complete data set is transferred to the Jobserver, which then creates a sample based on your data source. Jobserver uses the entire data set to ensure that the sample is representative.

The sample size is determined by the Table profiling data size setting in [Collibra Console](#). By default, the size is 10 GB.

Push down sample creation process

Push down sampling means that the task of creating the data sample is delegated to the data source itself. This can be done using dynamic SQL query, if the data source supports data sampling.

The data source creates the sample from randomly selected data and transfers it to the Jobserver or the Edge site in one fetching process. If the cache storage is reached nonetheless, the fetching process can be stopped. Because the data source already created the sample randomly, the omitted data can be ignored without lowering the representativeness of the sample.

Warning Push down sampling is only available for [specific data sources](#).

Profiling and classification via Edge

When you [register a data source](#), the Jobserver ingests data into Data Catalog. After that, an Edge site initiates the profiling and classification process and sends the results to Collibra Data Governance Center.

Prerequisites

- You have created a support ticket in Zendesk to request access to Edge.
- You have created and installed an [Edge site](#).
- You have an Edge site role with the following [global permissions](#):
 - Data Catalog
 - Register Profiling Information
- You have a role with the following [resource permissions](#) on the Schema community:
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add

Note These permissions are always necessary when [registering a data source](#).

Steps

1. [Enable Profiling and Classification](#)[Enable Profiling and Classification on Edge in Collibra Console](#).
2. Register a data source and do the following:
 - a. Optionally, enable [push down sampling](#).
 - b. In the [Profiling options](#), click **Profile and classify data**.
 - » Collibra Data Governance Center first ingests metadata via Jobserver and then profiles and classifies the data via the profiling capability of an Edge site.

Tip Collibra Data Governance Center only has access to ingested metadata, anonymized profiling results and classification suggestions, but not actual data from your data source.

Configurations in Collibra Console

If you use profiling and classification via Edge, some configurations in [Collibra Console](#) are no longer relevant:

Section	Setting	Description
Data profiling	Anonymize data	This setting is no longer relevant. Profiling data is automatically anonymized on an Edge site before it reaches Collibra Data Governance Center.
Cloud Classification configuration	Enable data classification	If the Enable data classification is set to <code>True</code> , profiling and classification on Edge is disabled. As a result, you can classify data via the Data Classification platform, by clicking the Classify button on Column and Table asset pages instead of automatically via Edge.

Push down sampling

Push down sampling means that the task of creating the data sample is delegated to the data source itself. This can be done using dynamic SQL query, if the data source supports data sampling.

The data source creates the sample from randomly selected data and transfers it to the Jobserver in one fetching process. If the cache storage is reached nonetheless, the fetching process can be stopped. Because the data source already created the sample randomly, the omitted data can be ignored without lowering the representativeness of the sample.

Push down sampling drastically increases the performance of sampling.

Enabling push down sampling

Push down sampling is not used by default. In order to use push down sampling, do the following:

Step	When	Description
1	Manage the driver	Add the pushDownSampling connection property.
2	Register your data source	<ol style="list-style-type: none"> Enter a value for the pushDownSampling connection property. <div style="border-left: 2px solid #ccc; padding-left: 10px;"> Note <ul style="list-style-type: none"> The value must be between 100 and 1 000 000. Your data source creates the sample of that amount of rows. If the size of the amount of rows exceeds the limit of the cache storage (Collibra recommends 10 to 20 GB), the amount of rows is reduced. If you typed a value that is bigger than the amount of rows in the data source, the entire data source is used as a sample. </div> Select the following Profiling options: <ul style="list-style-type: none"> Store Data Profile and, optionally, Store Sample Data to profile via Jobserver. Profile and classify data to profile and classify via Edge.

Supported data sources

Not all data sources support push down sampling. Currently, you can use push down sampling for the following data sources:

- [Amazon Redshift](#)
- [Databricks](#)
- [Exasol](#)
- [Oracle](#)
- [PostgreSQL](#)
- [Snowflake](#)

- [SQL server](#)
- [Teradata](#)

Push down sampling currently is a beta feature for the following data sources:

- [Apache Hive](#)
- [Google BigQuery](#)

Data anonymization via Jobserver

To ensure that sensitive data is not stored in the cloud, you can [enable](#) the Anonymize data option in Collibra Console.

With this option enabled, Collibra anonymizes the content of [columns](#) with data of the type Text and Geo immediately at the end of the profiling process. As a result, data samples and the values that are shown in the data distribution charts are replaced by a random hash value for columns that contain these data types. Attributes that could contain sensitive data, like attributes of the type Mode or Percentiles, are no longer calculated for columns with data type Text or Geo.

Identical values in a column get the same hash value so that you can still recognize the values as identical.

Collibra detects the data type of a column during profiling and only anonymizes the data if the data type attribute is Text or Geo. However, if Collibra detects a data type that does not correctly correspond with the actual data type, some data may not have been anonymized or has been wrongfully anonymized. To solve this, you can manually [modify](#) the column's data type and profile again.

Example You enabled the Anonymize data option in Collibra Console and profiled a column that has data type Text. If you go to the **Summary** or **Data Profiling** tab, all textual and geographical data has been removed or replaced by hashed values:

The screenshot shows the Collibra Data Profiling interface for the 'last_name' column. The left sidebar lists various tabs: Add characteristic, Summary, Details, Data Profiling (selected), Diagram, Pictures, Responsibilities, References, History, and Files. The main panel displays the following information:

- Metadata:** Original Name: 1VjmBb+oPjwXj94w6l92rB8uh55eDLrrrGzR1...; Data Type: Text; Categorical Data: X.
- Sample data:** A list of hashed strings, e.g., 1lyi/Df1YxHdqtqcdwrlLu2fEPj/8aBm1Np..., FGrlzO/V2k+GAEURsWjGX+X5iZK24sFA74Q..., zu/WCn9TQjh4bRcsxvuKUOfd1yoIDbx0t8V..., etc.
- Basic Statistics:** Minimum Text Length: 3.00; Maximum Text Length: 10.00.
- Counts:** Row Count: 500; Empty Values Count: 0 (0.00%); Number of distinct values: 220.

Note Collibra does not automatically anonymize your data. To ensure that your sensitive data is not stored in the cloud, you must [enable](#) the Anonymize data option in Collibra Console. This option is by default disabled.

Warning Currently, if you enable the data anonymization process you can no longer use [automatic data classification via the Data Classification platform](#). However, you can still classify and anonymize profiling results if you use Edge.

Data profiling of a table

The **Data Profiling** section of a registered table displays the properties of each registered column.

The following list contains the default displayed columns in this table:

- Name
- Data Type
- Row Count
- Empty Values Count
- Number of distinct values
- Chart

For more information about these columns and columns that you can add, see [Data profiling information](#).

You can customize the table by clicking on the Display options icon (⋮). For example, to add more columns, click ⋮ → **Fields** and then click **Select fields**.

Data profiling of a column

In the **Data Profiling** tab of a Column asset, you can see the details of the column.

The details are grouped in some fixed sections:

Section	Content
Metadata	Contains the metadata of the column, such as data type, column name and so on.
Counts	Contains basic content information, such as number of rows and number of distinct values.
Basic Statistics	Contains the basic statistics of the data, such as minimum and maximum value.

Depending on the column's data type, you can find extra sections:

Section	Content
Quantiles	Contains the descriptive statistics of the data. This section is only available if the data type is numerical.

Section	Content
Categorical Data	<p>Contains the values of the different categories.</p> <p>If there are too many values, only the first 50 and last 50 values are displayed.</p>
Chart	<p>Displays the statistics in a graphical way. The chart type varies per data type:</p> <ul style="list-style-type: none"> • bar chart: textual data • data distribution: numerical data and date and time data <p>See also Data profiling charts.</p>

Note If you [enable](#) the Anonymize data option in Collibra Console, Collibra [anonymizes](#) data in Column assets that have data type Text and Geo.

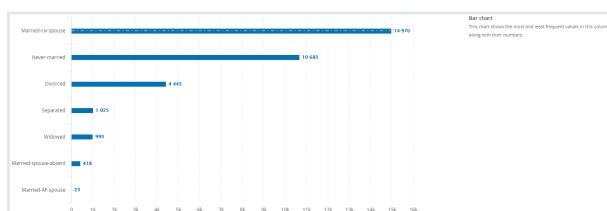
Data profiling charts

The [data profiling](#) process provides a view on the registered data by means of bar charts, distribution data and histograms.

Tip In each chart, you can zoom in by selecting the area of your preference. Click the **Reset zoom** button to return to the original chart view.

Bar chart

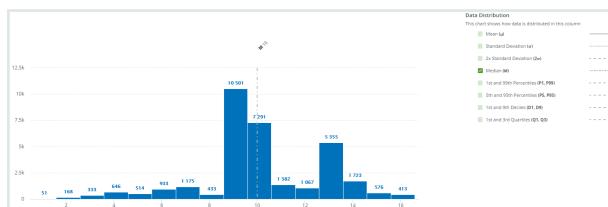
A bar chart is created when the data type is text. It displays the most and least frequent values of a column along with their number of occurrences.



Data distribution

The data distribution chart is created when the data type is numerical. It displays how the data is distributed.

In this chart, you can add extra information such as the mean, standard deviation and so on, by selecting the option at the right of the graph.



Data profiling information

If you want to create a [data profile](#) of registered data, data profiling information is generated.

The shown information depends on the profile options that you selected when you registered the data source and the profiling method, either via Jobserver or via Edge, that you used.

Column	Profiling option (Jobserver)	Description
Original Name	No	Column name of the registered table.

Column	Profiling option (Job-server)	Description
Data Type	Store Data Profile If you want to have Advanced Data Type detected, select Detect advanced data types	<p>Data type of the column. This type is detected by the profiling process. This can differ from the Technical Data Type value.</p> <p>For example, if a database has a column with text as data type, and the column contains only integer values, the profiling process will set the <i>Whole Number</i> data type instead of text.</p> <p>If you enable the Anonymize data option in Collibra Console, Collibra anonymizes data in Column assets that have data type Text and Geo.</p> <p>If the profiling process has detected a wrong data type, you can update it afterwards.</p>
Row Count	Store Data Profile	The number of rows in the source.
Empty Values Count	Store Data Profile	The number of rows that are empty.
Number of distinct values	Store Data Profile	The number of unique values in the column.
Chart	Store Data Profile	<p>This column displays whether a chart was generated () or not (no icon available). If you hover over the icon, you see a preview of the chart.</p> <p>The chart type varies per data type. There are three charts available:</p> <ul style="list-style-type: none"> • Frequency chart • Histogram that shows distribution • Probability distribution curve
Frequency	Store Data Profile	A bar chart showing frequency data.

Column	Profiling option (Job-server)	Description
Distribution - Histogram	Store Data Profile	A histogram showing the representation of the distribution of numerical data.
Distribution - Probability distribution curve	Store Data Profile	A curve showing the representation of the probability distribution of numerical data.
Technical Data Type	No	Data type of the column as defined in the source. This value can differ from the Data Type value.
Descriptive statistics (decile, percentile, quartiles)	Store Data Profile	The value of the calculated statistic of the registered data.
Categorical Data	Store Data Profile	Indication whether the data in the column is categorical or not. For example, if 100 000 rows are registered and there are only five distinct values, then the data is considered to be categorical.
Categories	Store Data Profile	List of detected categories. This column has only values if the data is categorical.
Char octet Length	No	Maximum number of bytes in a character type's column.
Column Position	No	The index of the column in the source table.
Is Auto Incremented	No	Indication whether the data in the column is auto-incremented or not.
Is Generated	No	Indication whether the data in the column is generated or not.
Is Nullable	No	Indication whether the column can store NULL values or not.

Column	Profiling option (Job-server)	Description
Is Primary Key	No	Indication whether the column is a primary key or not.
Maximum Text Length	Store Data Profile	The length of the longest text value in the column, including white spaces.
Maximum Value	Store Data Profile	The maximum value in the column.
Mean	Store Data Profile	The mean of all the values in the column, excluding empty rows.
Median	Store Data Profile	The median value of the column.
Minimum Text Length	Store Data Profile	The length of the shortest text value in the column.
Minimum Value	Store Data Profile	The minimum value in the column.
Mode	Store Data Profile	The value with the highest frequency for categorical data.
Number Of Fractional Digits	No	The number of fractional digits.
Original Column Name	No	The column name as defined in the source.
Primary Key Name	No	The name of the primary key composed by the column.
Size	No	The size of the column in the table.
Standard Deviation	Store Data Profile	The statistical standard deviation of numeric values.
Variance	Store Data Profile	The statistical variance of numeric values.

Column	Profiling option (Job-server)	Description
Sample	Store Sample Data	A random sample of the data set that represents the entire data set.

Data profiling results

If you click the **Result** button of a data source registration activity, you open the **Data Profiling Results** dialog box. A data source registration activity can be:

- Creating schema from JDBC
- Creating schema from file
- Updating JDBC schema
- Updating Excel schema
- Updating CSV schema

The **Data Profiling Results** dialog box contains the following information:

Item	Description
Schema	Name of the schema as added to Collibra Data Governance Center.
Status	Status of the data source registration job.
Start time	Date and time when the data source registration job has started.
End time	Date and time when the data source registration job has completed.
Duration	Elapsed time of the data source registration job.
Ingestion Details	Summary of the job, including error messages and the list of tables and columns that have been ingested.
Profiling Details	The number of tables that have been correctly profiled.

Modify the column data type of registered data

When Collibra Data Governance Center creates a data profile of registered data, it detects the data type of each column. It's possible that Collibra detects a data type that does not correctly correspond with the actual data type, for example the Text data type is detected for a column, but the actual data in the column are dates.

For more information about the data type detection, see [Data type detection](#).

You can update the data type of each column to ensure that the data is properly managed in Collibra DGC.

Note If you have [enabled](#) the Anonymize data option in Collibra Console, Collibra detects the data type of a column during profiling and only [anonymizes](#) the data if the data type attribute is Text or Geo. Other data types are not anonymized.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a [resource role](#) with the Attribute > Update [resource permission](#).

Steps

There are two ways to modify a column's data type:

- In the data sources table.
- On the Column's [asset page](#).

In the data sources table

1. In the main menu, click , then  Catalog.
 - » The Catalog Home opens.
2. In the submenu, click **Data Sources**.
3. [Add](#) the **Data Type** column to the table.
4. Expand the schema and table to see the columns.

5. Double-click in the **Data Type** column and choose the correct data type.
6. Click ✓ to apply the change.

On the Column asset page

1. Look up the column via the **Search** function.

Tip If you don't know the exact name of the column name, you can find it via **Data Catalog → Data Dictionary** and select the **All Schemas** view. Then click the schema that contains the column and click the column whose data type you want to update.

2. In the tab pane, click **Data Profiling**.
3. In the **Metadata** section, double-click the value of the **Data Type** parameter.
4. Select the correct type from the list.
5. Click **Save**.

When you [refresh](#) the schema, this change is not overridden.

Automatic Data Classification

When you [register](#) a data source in Collibra Data Governance Center, the process doesn't stop at ingestion. In order to unlock the full potential of Collibra DGC, the data needs to be contextualized: it needs to be classified and connected to other nodes in the Data Intelligence knowledge graph. Automatic Data Classification adds context to your data.

In the following sections, you will learn more about Collibra's Automatic Data Classification feature.

About automatic data classification

In Collibra Data Governance Center, automatic data classification is a feature that analyzes and predicts the content of registered data sources based on a subset of the data itself, helping you to easily gain insights on what kinds of data you have and where it

resides. In other words, data classification automatically (with no human input) assigns “class” values to individual columns of data to identify what kind of data is contained in that column. Examples of different data classes are “name”, “address”, “phone number” and “web browser”.

Why automatic data classification?

When you have ingested data in Data Catalog, the data classification process automatically identifies data structures within the data. As such, it takes less time to learn what kind of data you have ingested.

You can provide feedback by accepting or rejecting the proposed data classes. As a self-learning platform, the Data Classification Platform learns from the feedback, to improve the quality of future predictions.

Automatic data classification via the Data Classification platform

When you [register a data source](#), you have the option to store a data profile and sample data. These options are required if you want to classify columns in the data set.

The Data Classification platform predicts the data classes of selected columns and sends them back to Collibra Data Governance Center, where you confirm or reject the suggested data classes. The Data Classification Platform uses your feedback to retrain the platform and improve future data classifications.

Warning If you want to use the Data Classification platform, you have to request access to it by creating a support ticket via Zendesk.

Limitations

- Automatic data classification via the Data Classification platform is a cloud service, but if your on-premises environment can reach the cloud service, you can use data classification.

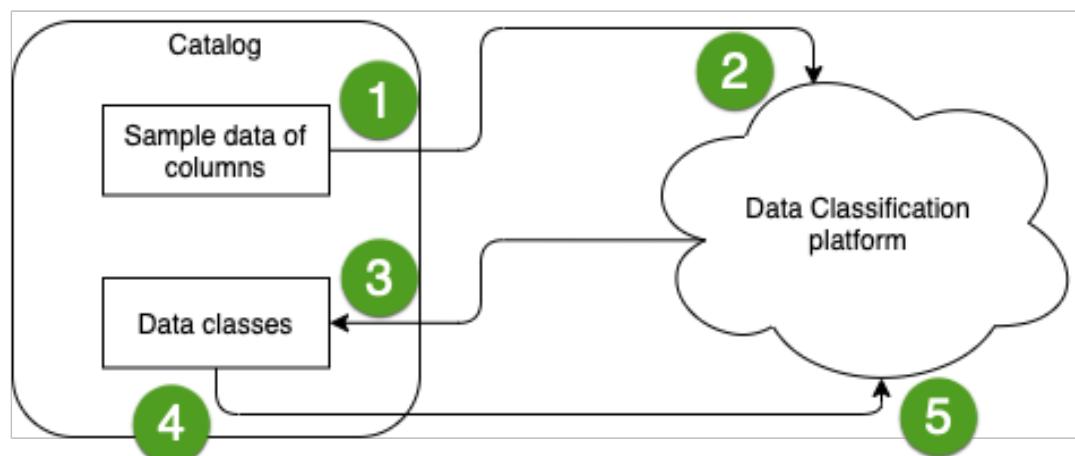
- Out of the box, automatic data classification can predict a limited set of data classes. However, you can create user-defined data classes to increase its prediction quality.
- The only supported language for data classes is English.
- Automatic data classification needs [sample data](#) and [profiling data](#) to be able to predict the data classes.

Note You can create sample data and profiling data by [registering a data source](#) and choosing to create sample data and profiling data or by importing the data via an import API.

- Automatic data classification only works for columns of data sources that are [registered](#) in Data Catalog with sample data and profiling data.

Automatic data classification flow

In the following schema, you can see the different steps of an automatic data classification flow.



Step	Description
1	You select the columns that you want to classify and send their sample data to the Data Classification platform.

Step	Description
2	The Data Classification platform predicts the data classes of the columns.
3	The Data Classification platform sends the data classes to Collibra DGC.
4	<p>You accept or reject the predicted data class of each column or add your own new classes.</p> <p>The Data Classification platform might predict multiple data classes for a column. In this case, if the prediction is accurate, you can accept multiple data classes for the column.</p>
5	<p>Your selections are sent to the Data Classification platform.</p> <p>The Data Classification platform stores your selections, along with the associated sample data, to retrain the Classification Model and improve future classification predictions.</p>

Data Classification Platform set-up

If you want to start using the Data Classification Platform, request it via your Collibra contact or create a support ticket.

Requirements

You can only use automatic data classification if you comply with the following requirements.

- [Data Catalog experience](#) is enabled in the DGC service configuration.
 - » This will give you access to the [improved Schema asset page](#).
- You are using [profiling data](#) within Data Catalog.

Note Be aware that after you accept the predicted data classes, all [sample data](#) and [profiling data](#) is stored on the Data Classification platform.

Location

We highly recommend to use a Data Classification platform running in the same region as your Collibra DGC environment.

Currently, Collibra can provide Collibra Data Governance Center environments in Amazon AWS® regions in the following locations:

- United States
- European Union
- United Kingdom
- Canada
- Australia

Data class calculation

There are four components for calculating data classes:

Component	Purpose
Neural network	A machine learning tool that is continuously trained to identify linguistic patterns. Training data has been collected to have an initial set of patterns.
Regex matcher	A wide range of regular expressions to identify matching patterns. When the matched types in a column exceeds a certain threshold, the result is used in the final calculation of the data class.
Dictionary search	The classification is based on a dictionary attack. Multiple data classes only have a limited number of possible values, for example countries, country codes, currencies and days of week. These are all stored in a dictionary. The sample data is matched against these dictionaries.
Aggregator	The aggregator gathers the responses from the neural network, regex matcher and dictionary search and creates a final response based on underlying algorithms.

The calculations are all based on the data samples received by the [Data Classification platform](#). Every time you accept a predicted data class, the sample data used to calculate that data class is added to the Data Classification platform, to improve future data class predictions.

Example

Assume you have a single column, C, containing sample data [a,b,c,d]. You classify this column, and the classification algorithm returns class x with confidence 70%. If you accept this class, then future columns containing the values [a,b,c,d] will be slightly more likely to be classified as x. In the future, a column with the same sample data may be classified as x with confidence 71%. The same can be said for a rejection of the above classification, with future results returning a confidence of, for example, 65%.

Note In reality, changes will be more discrete and take longer than one accepted or rejected data class to become effective.

Best practices for data class feedback

Each time the Data Classification platform predicts data classes for a column, Collibra Data Governance Center gives you the opportunity to send feedback by accepting or rejecting the data class. To improve future predictions, it is really important to send this feedback.

Sending feedback

Sending feedback is the act of accepting or rejecting the data classes that are predicted by the Data Classification platform.

- Reject data class: The data class is removed from the column and the Data Classification platform no longer uses the sample data.
- Accept data class: The data class is added to the column and the sample data is permanently added to the Data Classification platform to improve future data class predictions.

For the Data Classification platform, accepting a data class is more valuable than rejecting, but in general, we recommend that you always send feedback for every prediction. Without your feedback, the Data Classification platform cannot be trained.

User-defined classifications

When columns cannot be classified, you can create your own data classes. The Data Classification platform uses this new information to train the platform and improve the predictions in the future.

Some general recommendations:

- Avoid duplications. Always check the list of proposed classes before creating a new data class.
- Avoid vague data classes.
- Avoid mixed data classes and accept the best applicable one.

Required permissions for Automatic Data Classification

The following table shows the required roles and permissions to use the Automatic Data Classification feature.

Action	Global Role	Global Permission	Resource Permission (*)
Classify column	Catalog	Catalog	<p>Column asset type's attributes (Asset > Attribute):</p> <ul style="list-style-type: none"> • Add • Remove • Update <p>Column asset type's data (Asset > Data):</p> <ul style="list-style-type: none"> • View Samples

Action	Global Role	Global Permission	Resource Permission (*)
Classify table	Catalog	Catalog	<p>Table asset type's attributes (Asset > Attribute):</p> <ul style="list-style-type: none"> • Add • Remove • Update <p>And the resource permissions to classify a column.</p>
Accept or reject a classification	Catalog	Catalog	<p>Column asset type's attributes (Asset > Attribute):</p> <ul style="list-style-type: none"> • Update <p>Column asset type's data (Asset > Data):</p> <ul style="list-style-type: none"> • View Samples
Add a user-defined classification	Catalog	Catalog > Advanced Data Type: • Add	Column asset type's attributes (Asset > Attribute):

(*) As a user, you need a role that has the resource permission.

Classify columns in a table

By classifying columns in a table, Collibra's [Automatic Data Classification](#) platform predicts their data structures, after which, you can accept or reject the prediction.

There are three methods to classify columns:

- Via a [Database asset page](#)
- Via a [Schema asset page](#)
- Via a [Table asset page](#)

Tip You can also use the [physical data connector](#) to manually select a data class for individual columns.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have created a support ticket via Zendesk to access to the Automatic Data Classification platform.
- You have [configured](#) Automatic Data Classification for the DGC service.
- You have the [correct permissions](#) to classify tables and columns.
- You have [registered](#) a data source, including these options:
 - Store Data Profile
 - Store Sample Data
- [Data Catalog experience](#) is enabled in the DGC service configuration.
 - » This will give you access to the [improved Schema asset page](#).

Via the Database asset page

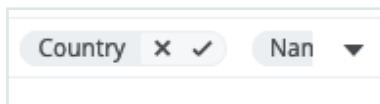
1. Open the Database asset that contains the tables and columns in the schema you want to classify.
 - a. In the main menu, click  , then  **Catalog**.
 - » The Catalog Home opens.
 - b. In the subpages, click **Technology Assets**.
 - c. Filter on the Database asset type.
2. Open the relevant database, and then click **Actions → Classify**.
 - » You can follow the status of the classification in Activities.
3. Open the database asset with the classified columns.

4. Add the Data Classification column to the table.

» In the **Data Classification** column, you find the suggested data classes.

#	Name	Is Primary Key	Data Type	Data Classification	represented by	Empty Values Count
1	age		Whole Number			0
16	birthday		Text			0
11	capital_gain		Whole Number			0
12	capital_loss		Whole Number			0
14	country		Text	Country 75% Name		583
4	education		Text	Last name 6%		0
5	education_num		Whole Number			0
3	fnlwgt		Whole Number			0
13	hr_per_week		Whole Number			0
15	income		Text	Weekday 49% US State 19%		0
6	marital		Text	Last name 6% City		1843
7	occupation		Text	Last name 50% Race or		0
9	race		Text	Last name 30%		0
8	relationship		Text	Gender 99% Name		0
10	sex		Text	Web browser 18%		1836
2	type_employer		Text			

5. Hover over the classification percentages and accept (✓) or reject (✗) the suggested data class.



- Accepting the classification leaves the classification in the list.
- Rejecting the classification removes the result from the data classification list.

Via the Schema asset page

1. Open the Schema asset that contains the tables and columns that you want to classify.
 - a. In the main menu, click Catalog, then Catalog.
 - » The Catalog Home opens.
 - b. In the subpages, click **Data Sources**.
 - c. Click the relevant schema.
2. Click the Tables tab.
3. Select one or more tables from the schema.
4. To classify all columns in the table, click **Actions → Classify**.

Tip To classify one or more specific columns, select the columns, then click **Actions → Classify**.

» You can follow the status of the classification job in Activities.

5. Open the Table asset with the classified columns.
6. **Add** the Data Classification column to the table.
» In the Data Classification column, you find the suggested data classes.

#	Name ↗	Is Primary Key	Data Type	Data Classification	represented by	Empty Values Count
1	age		Whole Number			0
16	birthday		Text			0
11	capital_gain		Whole Number			0
12	capital_loss		Whole Number			0
14	country		Text	Country 75% Name		583
4	education		Text	Last name 6%		0
5	education_num		Whole Number			0
3	fnlwgt		Whole Number			0
13	hr_per_week		Whole Number			0
15	income		Text	Weekday 49% US State 19%		0
6	marital		Text	Last name 6% City		1843
7	occupation		Text	Last name 50% Race or ethnicity 30%		0
9	race		Text	Gender 99% Name		0
8	relationship		Text	Web browser 18%		1836
10	sex		Text			0
2	type_employer		Text			0

7. Hover over the classification percentages and accept (✓) or reject (✗) the suggested data class.

Via the Table asset page

1. Open a Table asset that has columns you want to classify.
2. On the Table asset page, do one of the following:
 - a. To classify all columns in the table, click **Actions** → **Classify** in the upper right corner.
 - b. To classify specific columns in the table, select the columns and click **Actions** → **Classify** in the upper right corner.
» You can follow the status of the classification job in Activities.

3. Open the relevant table, and then **add** the Data Classification column to the table.
 » In the **Data Classification** column, you find the suggested data classes.

#	Name	Is Primary Key	Data Type	Data Classification	represented by	Empty Values Count
1	age		Whole Number			0
16	birthday		Text			0
11	capital_gain		Whole Number			0
12	capital_loss		Whole Number			0
14	country		Text	Country 75% Name	583	
4	education		Text	Last name 6%	0	
5	education_num		Whole Number			0
3	fnlwgt		Whole Number			0
13	hr_per_week		Whole Number			0
15	income		Text	Weekday 49% US State 19%	0	
6	marital		Text	Last name 6% City	1843	
7	occupation		Text	Last name 50% Race or	0	
9	race		Text	Last name 30%	0	
8	relationship		Text	Gender 99% Name	0	
10	sex		Text	Web browser 18%	1836	
2	type_employer		Text			

4. Hover over the classification percentages and accept (✓) or reject (✗) the suggested data class.

Create a user-defined data class

If the Data Classification platform cannot detect a data class in a column, you can classify the column yourself. Your data class will then be sent to the Data Classification platform to improve its future predictive capabilities.

Prerequisites

- You have **configured** Automatic Data Classification for the DGC service.
- You have the **correct permissions** to classify tables and columns.
- You have **registered** a data source, including these options:
 - Store **Data Profile**.
 - Store **Sample Data**, the more sample data (Data profiling section), the better the data class prediction.

Note In order to improve Automatic Data Classification all Sample data and Profiling data is stored in the cloud.

- Data Catalog experience** is enabled in the DGC service configuration.
 » This will give you access to the **improved Schema asset page**.

Classify a column via the Table asset page

1. Find the table that contains the columns to classify.
2. At the bottom of the **Columns** section, click **See all**.
3. If not yet done, [add](#) the Data Classification column to the table.
4. In the row of the column that you want to classify, double-click in the **Data Classification** column.
5. Click in the **Select** field.
The list with existing data classes appear.
6. In the **Select** field, enter a new data class name and press **Enter**.

Note

- Data classes are case-sensitive.
- You can add more data classes if applicable but avoid it as much as possible.

7. Press **Escape** and click ✓.
 - » The new data class is automatically accepted and sent to the Data Classification Platform.

Classify a column via the Column asset page

1. Find the column you want to classify.
2. In the tab pane, click **Data Profiling**.
3. In the **Data classification** section, click .
4. Enter a new data class name and press **Enter**.
You can add more data classes if applicable.
5. Click **Save**.
 - » The new data class is automatically accepted and sent to the Data Classification Platform.

Packaged data classes

The following table shows the data classes that can be detected for columns. The **Data class** column is the data class that is shown in Collibra Data Governance Center.

Note This list can evolve over time. When you create a user-defined data class and the number of data samples exceeds a certain threshold, we will add this data class to our system.

Data class	Content	Examples
City	Cities	<ul style="list-style-type: none"> • New York • Los Angeles • Chicago • Houston
Country	Countries	<ul style="list-style-type: none"> • Belgium • Lesotho • Dominica • Nigeria
Country code	Countries (short/code)	<ul style="list-style-type: none"> • USA • ws • CAF • GIN
Credit card number	Credit card number	<ul style="list-style-type: none"> • 5602223068893246 • 1234-1234-1234-1234 • 3711-123456-12345 • 4123 5123 6123 7123
Currency code	Currency code	<ul style="list-style-type: none"> • zar • ARS • GBP • kes
Date	Date (only)	<ul style="list-style-type: none"> • 24 January 2004 • 11/21/1974 • 07-Nov-1982 • 11-08-22
Date time	Datetime	<ul style="list-style-type: none"> • 2018-08-29 20:25:25.0 • 2018-02-05 11:27:10.562 • 2017-10-10 05:34:16.216 • 2017-07-20 09:03:24.0

Data class	Content	Examples
Education level	Education (level)	<ul style="list-style-type: none"> • Doctorate • post-secondary • Doctoral • Upper Secondary School
Email	Email	<ul style="list-style-type: none"> • pdawidas@storify.com • bmcentagartcf@china.com.cn • vgooms6x@barnesandnoble.com • dclatworthy9e@prweb.com
Employment status	Employment status	<ul style="list-style-type: none"> • Freelance • employed part time • office holder • Homemaker
Ethnicity	Race	<ul style="list-style-type: none"> • Hispanic • Latino • White • Asian
Filepath	Filepath	<ul style="list-style-type: none"> • E:\x9xOL\VB2ER_2E\ • F:L\r_dWjux_\ • /u_2/tlk4q2/TwaYgn08A/GU/d-fp/z2vHk5iOW/Ael/M_ • wUmxr/ • BaG_8xxK_m/o1dq4luQ7A/z/kCQXGu.bin
First name	First Name	<ul style="list-style-type: none"> • Natasha • Manan • Rob • Wojciech
Full name	Full name (name + last name)	<ul style="list-style-type: none"> • lukas yang • Lukas, Yang • Amelia, Dalton • Dickens, Charles

Data class	Content	Examples
Gender	Gender	<ul style="list-style-type: none"> • M • Male • woman • F
IBAN	IBAN - International Bank Account Number	<ul style="list-style-type: none"> • FO07 4910 6564 9863 03 • FR29 5218 3745 58B7 GH7N FYGZ Q50 • PS74 TSHR P22C D1DE 5OEB CRUG JRFW W • MK66 115I FYVV SOVS Y00
Internet domain	Web/internet domain	<ul style="list-style-type: none"> • slashdot.org • usa.gov • time.com • illinois.edu
IP address	IP address	<ul style="list-style-type: none"> • 80.206.17.108 • 3a6c:bb28:701a:5aaa:825c:4112:51ea:fadf • 255.139.66.168 • 241.65.195.63
ISBN	ISBN - International Standard Book Number (numeric commercial book identifier)	<ul style="list-style-type: none"> • 717393709-4 • 106115687-7 • 740540459-6 • 839089904-3
Language	Language	<ul style="list-style-type: none"> • Deccan • Kazakh • Zulu • Greek
Language code	Language code	<ul style="list-style-type: none"> • yor • HAU • CE • PS

Data class	Content	Examples
Last name	Surnames / last name	<ul style="list-style-type: none"> Burke Lenaghan Balmori Balog
MAC Address	MAC address	<ul style="list-style-type: none"> 4E-A0-23-78-53-50 DE:D3:44:A7:7E:13 a4-53-08-93-70-a4 83:4f-ca:43:93:32
Marital status	Marital status	<ul style="list-style-type: none"> unmarried Married not-in-family other-relative
Month	Month	<ul style="list-style-type: none"> Mar September January December
NDC Code	FDA NDC code - Food and Drug Administration's National Drug Code	<ul style="list-style-type: none"> 55154-5876 68927-3491 58118-0623 55154-3939
Occupation	Occupation	<ul style="list-style-type: none"> proofer transit coach operator forging machine tender sports worker
Personal Email	Email	<ul style="list-style-type: none"> f0ETKExihcHK@comcast.fr, Ffz0Asl0To@comcast.com.br jVgNF9v.ranlu@msn.com u.L79@verizon.net

Data class	Content	Examples
Phone number	Phone number	<ul style="list-style-type: none"> • 532-555-0185 • +1 212 555 3000 • 829-394-8017 • 973-491-8723
Religion	Religion	<ul style="list-style-type: none"> • Buddhist • Confucian • Protestant Anabaptist • Protestant Adventist
Routing Number (ABA)	Routing Number	<ul style="list-style-type: none"> • 058327451 • 675702815 • 805759224 • 305532637
SSN	SSN - Social security number	<ul style="list-style-type: none"> • 559-03-4491 • 284-34-1408 • 499-81-8467 • 576-17-9443
Street address	Address (first line) Street + number	<ul style="list-style-type: none"> • 4 Orinda Way • 61 Broadway
Time	Time	<ul style="list-style-type: none"> • 8:52 AM • 7:36 PM • 06:52 • 17:08:15
Title	Honorific	<ul style="list-style-type: none"> • Honorable • Rev. • Mr • Ms
UK Drivers License Number	Drivers License	<ul style="list-style-type: none"> • ENArq262033Xj32333 • ABzPt058106IA18871 • wkIrS604032zb31785 • smeel761300Rc02703

Data class	Content	Examples
UK National Health Service (NHS) Number	Health Service	<ul style="list-style-type: none"> • 375 251 3810 • 537 649 5407 • 784 382 2399 • 534 293 9797
URL	URL	<ul style="list-style-type: none"> • www.sohu.com • http://www.googleweblight.com • https://twitter.com • ftp://mydomena.org/folder1 • http://www.goolgle.com/search?query=my+query
US Adoption Taxpayer Identification Number (ATIN)	Tax Identifier	<ul style="list-style-type: none"> • 944-93-7219 • 930-93-3562 • 942-93-6471 • 932-93-3182
US Drivers License Number	Drivers License	<ul style="list-style-type: none"> • QP080580F • W5060999229 • Xm939887D • 70kQF62641
US Employer ID	Employer	<ul style="list-style-type: none"> • 41-0506939 • 91-0675223 • 43-2942382 • 77-4827140
US Individual Taxpayer Identification Number (ITIN)	Tax Identifier	<ul style="list-style-type: none"> • 915-78-5757 • 937-83-1696 • 929-75-9337 • 966-88-3886
US License Plate Number	License Plate	<ul style="list-style-type: none"> • 0HB8609 • 0qM6428 • 0VS0864 • 0lq7470

Data class	Content	Examples
US State	US States	<ul style="list-style-type: none"> Illinois Indiana Iowa Kansas
US State code	US state code	<ul style="list-style-type: none"> il WI ut MT
UUID	GUID/UUID	<ul style="list-style-type: none"> 0ee585a5-6bd3-4fde-9383-827095ed08f3 00000000-0000-0000-0000-000000031108 0a4281c9-0b6c-4095-b1b6-d8b417cfa952 ffe27556-7c0d-4007-95c4-306633af3f14
Vehicle Identification Number (VIN)	Vehicle	<ul style="list-style-type: none"> 4JGDF7DE1EA269698 WDAPF3CC1B9465179 WDBAB33A8EA076439
Web browser	Web browser	<ul style="list-style-type: none"> Mozilla Netscape Chrome
Weekday	Weekday	<ul style="list-style-type: none"> Wednesday Fri Wed Tue

Classification Dashboard

The Classification Dashboard shows the list of data classes assigned to the data in your environment.

You can use the Classification Dashboard to:

- See performance metrics.
- Manually classify columns.

About the Data Classification dashboard

The Classification Dashboard shows the list of data class values assigned to [registered data](#) in your Collibra DGC environment.

You access the dashboard via the Data Classification subpage on the [Stewardship](#) tab.

The screenshot shows the Data Classification dashboard interface. At the top, there's a navigation bar with tabs for Organization, Business Dimensions, Tags, Physical Data Connector, Metrics, and Data Classification. Below the navigation bar is a toolbar with various icons: a magnifying glass for search, a plus sign for adding, a delete bin for deleting, a refresh arrow, a question mark for help, a user profile icon, and a grid icon for column management. The main area is a table with the following columns: Data Classification, Columns Count, Data Concept, Data Attribute, and Created By. The table lists various data classes such as ABA Routing number, Address, ATIN, City, Country, Country code, Credit Activity, Credit card number, Credit Rating, Currency code, Date, Date time, Education level, Email, Employment status, Ethnicity, FDA NDC code, Filepath, and First name, along with their respective counts, concepts, attributes, and creators. At the bottom of the table, there are navigation links for page numbers (1-50, 51-58) and a total count of 58.

Data Classification	Columns Count	Data Concept	Data Attribute	Created By
ABA Routing number	0	Street	System User	
Address	0	First Name, Gender, J...	System User	
ATIN	0		System User	
City	0		System User	
Country	2		System User	
Country code	3		System User	
Credit Activity	1		DataLake Admin	
Credit card number	0		System User	
Credit Rating	1		DataLake Admin	
Currency code	0		System User	
Date	3		System User	
Date time	8		System User	
Education level	0		System User	
Email	4		System User	
Employment status	0		System User	
Ethnicity	0		System User	
FDA NDC code	0		System User	
Filepath	1		System User	
First name	3		System User	

No.	Name	Description
1	Merge button	A button to merge multiple data classes.
2	Delete button	A button to delete one or more data classes.
3	Add button	A button to manually add a new data class.
4	Table menu	The table menu contains buttons for actions you can perform on the table.
	⋮	A button to manage the columns shown.

No.	Name	Description
5	Table with packaged and manually created data classes	A table that shows all the data classes that exist in your environment.
	Data Classification	The data class name. You can manually add, edit or remove the data class of a Column asset.
	Column Count	The number of columns classified as the associated data class.
	Data Concept	The name of the associated Data Concept assets . You can manually connect a data class to a Data Concept asset .
	Data Attribute	The name of the associated Data Attribute assets . You can manually connect a data class to a Data Attribute asset .
	Created By	The name of the user who created the class. If the data class is a packaged data class , the user is the <i>System User</i> .
	Created On	The date the data class was created.
	Last Modified By	The name of the user who made the last change.
	Last Modified On	The date the data class was last changed.
	User Defined	Indicates if the data class was automatically or manually created.

Connect data classes to data layers

You can use the [Classification Dashboard](#) to connect data classes to the [logical](#) and [conceptual](#) data layers.

Prerequisites

- You have [configured](#) Automatic Data Classification for the Data Governance Center service.
- You have the [necessary permissions](#) to classify tables and columns.
- You have [registered](#) a data source.
- [Data Catalog experience](#) is enabled in the DGC service configuration.

Steps

1. In the main menu, click  , then  [Stewardship](#).
2. In the submenu, click **Data Classification**.
3. In the **Data Concept** or **Data Attribute** column, click .
4. Click in the **Select** field.
 - » The list with existing Data Concept or Data Attribute assets is shown.
5. Click .
- » The Classification Dashboard creates a relation between the data class and the logical and conceptual data layers. Column assets that have this data class, will automatically be connected to these data layers.

Guided Stewardship

Guided Stewardship is a set of features designed to help Data Stewards simplify the process of creating connections between [physical](#) data assets and their associated [logical](#) and [conceptual](#) assets. By establishing reliable and fully-connected data structures within your Collibra environment, you can trace relationships across all layers of representation and understand your data in a more complete way.

Guided Data Stewardship operating model

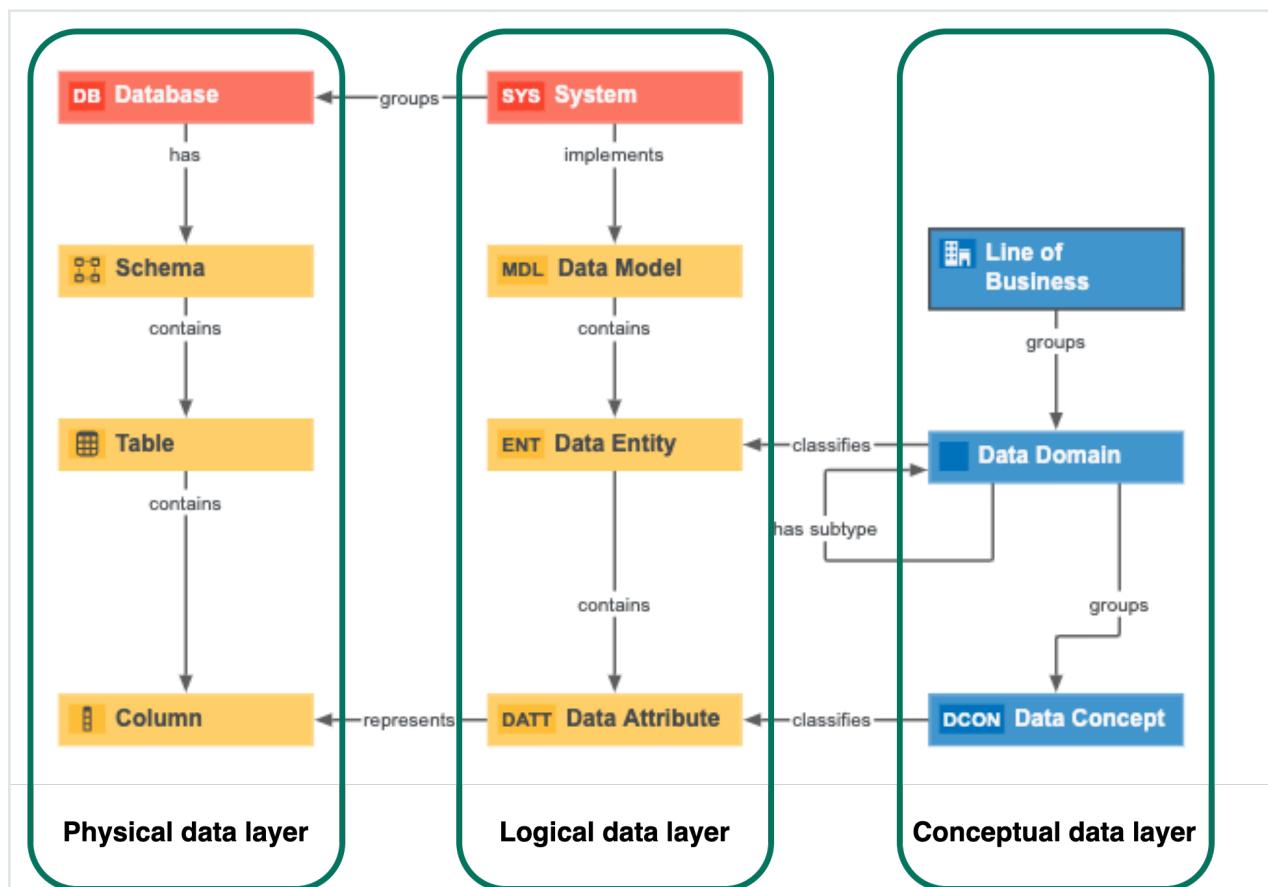
The Guided Data Stewardship operating model defines the structure of the information in Catalog. For this reason, the Guided Data Stewardship operating model is sometimes also referred to as the Data Catalog operating model.

Three data layers

The operating model consists of three data layers, representing the three different structural data layers that exist in typical organizations:

- The [conceptual data layer](#) represents the overarching structure of objects and elements in your data landscape.
- The [logical data layer](#) represents the context-dependent data structures in your organization.
- The [physical data layer](#) represents the actual data in your data environment.

The following image shows a complete view of the operating model. It identifies all of the relevant asset types, per data layer, and the relationships that bind them together in Collibra.



Note Database and System assets are [Technology assets](#) that represent the highest level over physical data and logical data organization.

Conceptual data layer

The conceptual data layer is the highest level of organization in the Data Catalog operating model. It represents the overarching structure of objects and elements within an organization's data landscape. It is where you define concepts, such as Customer and Product and their component fields, without direct reference to system-specific implementations.

Organization of the conceptual data layer is based on many-to-many relationships, which makes the conceptual data layer more concise and flexible than tree-like arrangements that rely strictly on one-to-one and one-to-many relationships.

The conceptual data layer consists of the following asset types:

- [Line of Business](#)
- [Data Domain](#)
- [Data Concept](#)

Line of Business asset type

The Line of Business asset type is the highest level of abstraction in the [conceptual data layer](#). Also known as business unit or business area, it represents a specific area of business in an organization.

Example Finance, Sales, Retail, Investment Management

Key relation type

Line of Business assets are:

Related to...	Via the relation type...	Description
Data Domain assets	Line of Business groups / is grouped by Data Domain	<p>Many-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Line of Business asset can group many Data Domain assets. • A Data Domain asset can be grouped by many Line of Business assets.

Data Domain asset type

Data domains, also known as data categories or subject areas, are high-level, theoretical representations of your data. They represent the structure of concepts in data environments and contain all the different nuances of corresponding business terms.

Example Customer, Employee, User, Order, Product

Key relation types

Data Domain assets are:

Related to...	Via the relation type...	Description
Line of Business assets	Business Asset groups / is grouped by Business Asset	<p>Many-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Line of Business asset can group many Data Domain assets. • A Data Domain asset can be grouped by many Line of Business assets.

Related to...	Via the relation type...	Description
Data Concept assets	Business Asset groups / is grouped by Business Asset	<p>Many-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Data Domain asset can group many Data Concept assets. • A Data Concept asset can be grouped by many Data Domain assets.
Other Data Domain assets	Data Domain has subtype / is subtype of Data Domain	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Data Domain asset can have many subtype Data Domain assets. • A Data Domain asset can be the subtype of only one Data Domain asset.

Data Concept asset type

A Data Concept asset is a high-level theoretical representation of your data and describes one aspect of one or more [Data Domains](#). These assets represent the most common concepts that are used to organize database content. They allow users to define a context-independent representation of the structure of an organization's data.

They are the most granular level of context-independent structure users can establish within the [conceptual data layer](#), and are comparable to [Columns](#) in the [physical data layer](#).

Example Address, Name, ID number, Phone number, Price, Year

Key relation types

Data Concept assets are:

Related to...	Via the relation type...	Description
Data Domain assets	Business Asset groups / grouped by Business Asset	<p>Many-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Data Concept asset can be grouped by many Data Domain assets. • A Data Domain asset can group many Data Concept assets.
Other Data Concept assets	Business Asset groups / grouped by Business Asset	<p>Many-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Data Concept asset can group, or be grouped by, many Data Concept assets.
Data Attribute assets	Business Dimension classifies / is classified by Asset	<p>Many-to-one relation, whereby:</p> <ul style="list-style-type: none"> • A Data Concept asset can classify many Data Attribute assets. • A Data Attribute asset can be classified by only one Data Concept asset.

Organization based on many-to-many relations

The conceptual data layer is organized such that the relationships between **Lines of Business** and **Data Domain** assets, and between **Data Domain** and **Data Concept** assets, are many-to-many relationships.

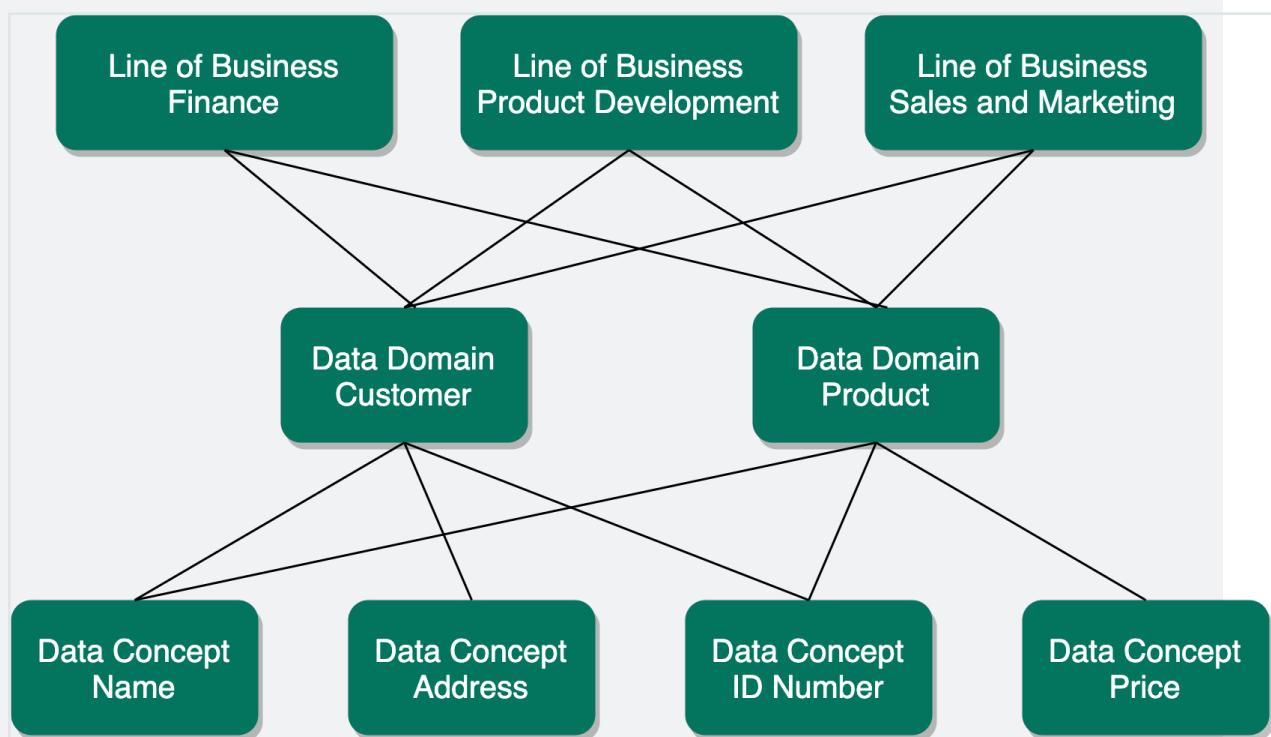
This graph-based approach, based on many-to-many relationships, makes the conceptual data layer more concise and flexible.

Example

In this example, we've identified three lines of business, each of which groups both the Customer data domain and Product data domain. In turn, each data domain groups several data concepts, some of which are grouped by both data domains.

Both data domains group the Name and ID Number data concepts. This is conceivable because Name and ID Number, as Data Concept assets, are abstract representations of these two concepts, rather than specific implementations of them, which are described in the [logical data layer](#) and implemented by [System](#) assets.

In this way, information stored in the conceptual data layer is kept to a minimum and the Data Domain and Data Concept assets are referred to as often as necessary.



In summary, Line of Business, Data Concept and Data Domain assets are independent assets that do not, by nature, encapsulate or organize the structure of other assets. The Name and ID Number Data Concept assets exist independently of the Data Domain assets that group them. A Customer can have a Name and a Product can have a Name, but you need only one Data Concept asset to

encapsulate the idea of “name”.

Conceptual data layer versus the Business Glossary

This section examines the differences and relation between the conceptual data layer and the Collibra [Business Glossary](#).

Business terms: context-dependent representations of business concepts

In short, the Business Glossary is a system that helps organizations govern their business terms.

Example Let's consider the business term Customer, within a multinational consumer goods organization that deals with different consumer groups in different cultural contexts. This organization uses business terms to create a shared understanding of Customer, across different geographical regions. Its offices around the world create their own business terms to encapsulate the specific cultural complexity of a customer, in their own way. Its various business units also have their own definitions, to address different operational, legal and compliance demands.

Business terms are a flexible tool that account for complex business and organizational structures. Anything can be represented by a business term, including the nuanced representations specific to different languages, cultures and branches of business.

Data, on the other hand, can be more explicitly defined and grouped. While there may be several ways to describe Customer, based on cultural and geographic nuance, when we consider data, a customer can be uniquely identified, defined and grouped. This is where the conceptual data layer comes in.

The conceptual data layer: context-independent representation of the structure of data

A [data domain](#) is a container for other data domains and [data concepts](#) that encompass associated terminology and definitions that an organization intends to govern.

Example Customer Master Data, Product Master Data, Reference Data

While business terms represent Customer in the context of a specific language, culture or branch of business, a customer data domain represents the structure of Customer in a data environment, and encapsulates all of the different nuances of the business term. By abstracting the idea of Customer in a data domain, one can start to consider how customers can be represented by physical data.

The same applies to data concepts, such as Year, Date, Address, and Name. While there may be many business terms that represent Year, across different teams and geographies, the data concept encapsulates all of them and creates a layer of abstraction that allows you to define high-level data structures.

Logical data layer

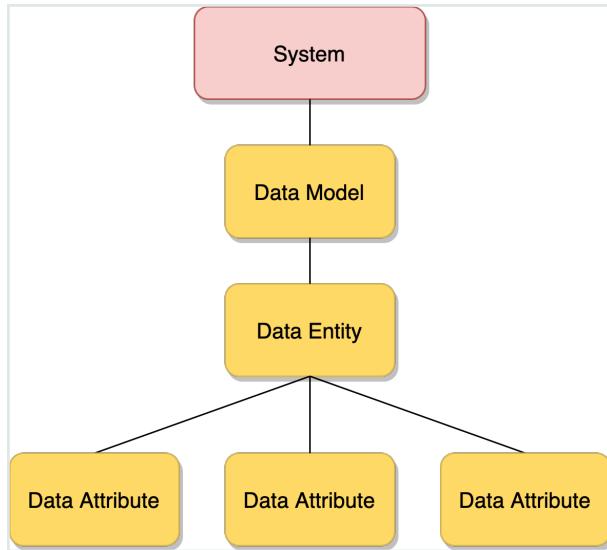
The logical data layer defines data structures within an organization's systems, whereas the [conceptual data layer](#) represents context-independent data structures within an organization.

The Data Entity-Data Attribute structure is closely related to the Data Domain-Data Concept structure of the conceptual data layer. The main difference between the two is that the conceptual data layer is context-independent, whereas the logical data layer describes the structure in an individual [System](#).

The logical data layer consists of the following asset types:

- [Data Model](#)
- [Data Entity](#)
- [Data Attribute](#)

The logical data layer can be visualized as a tree-like structure, starting with a high-level System and Data Model assets, and branching out with implementation-specific Data Entity and Data Attribute assets.



Note Although the System asset type is a [Technology Asset](#), it adds higher-level structure to the logical data layer and is considered part of the logical data layer.

Data Model asset type

The Data Model asset is the highest level of organizational structure in the [logical data layer](#), and defines the specific structure of data in a [System](#).

Key relation types

Data Model assets are:

Related to...	Via the relation type...	Description
System assets	System implements / is implemented in Data Model	<p>One-to-one relation, whereby:</p> <ul style="list-style-type: none"> • A System asset can implement only one Data Model asset. • A Data Model asset can be implemented in only one System asset. <p>Note The one-to-one nature of this relationship is what makes Data Models - and, therefore, the entire logical data layer - context-dependent, as opposed to the context-independent conceptual data layer.</p>
Data Entity assets	Data Model contains / is contained in Data Entity	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Data Model asset can contain many Data Entity assets. • A Data Entity asset can be contained in only one Data Model asset.

Data Entity asset type

Data Entity assets are the [logical data layer](#) correlate to [Data Domain](#) assets of the [conceptual data layer](#). They can be thought of as system-specific implementations of a Data Domain assets.

Key relation types

Data Entity assets are:

Related to...	Via the relation type...	Description
Data Model assets	Data Model contains / is contained in Data Entity	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Data Model asset can contain multiple Data Entity assets. • A Data Entity asset can be contained in only one Data Model asset.
Data Domain assets	Data Domain classifies / is classified by Data Entity	<p>One-to-one relation, whereby:</p> <ul style="list-style-type: none"> • A Data Domain asset can classify only one Data Entity asset. • A Data Entity asset can be classified by only one Data Domain asset.
Data Attribute assets	Data Entity contains / is contained in Data Attribute	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Data Entity asset can contain many Data Attribute assets. • A Data Attribute asset can be contained in only one Data Entity asset.

Data Attribute asset type

Data Attributes assets are the [logical data layer](#) correlate to [Data Concept](#) assets of the [conceptual data layer](#). They can be thought of as system-specific implementations of Data Concept assets.

Key relation types

Data Attribute assets are:

Related to...	Via the relation type...	Description
Data Entity assets	Data Entity contains / is contained in Data Attribute	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> A Data Entity asset can contain many Data Attribute assets. A Data Attribute asset can be contained by only one Data Entity asset.
Data Concept assets	Data Concept classifies / is classified by Data Attribute	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> A Data Concept asset can classify many Data Attribute assets. A Data Attribute asset can be classified by only one Data Concept asset.

Physical data layer

The physical data layer represents the actual data - the schemas, tables and columns - in an organization's systems.

The physical data layer consists of the following asset types:

- Schema
- Table
- Column

Note

- Although the **Database** asset type is a **Technology Asset**, it is considered part of the physical data layer.
- The Schema, Table and Column assets in a Collibra Data Intelligence Cloud environment are almost never created manually; rather, they are automatically created via the Data Catalog ingestion process, when registering a data source.

Schema asset type

A Schema is the highest level of physical structure in a [Database](#). It defines, in a formal language, the structure of the tables and columns in the database.

Key relation types

Schema assets are:

Related to...	Via the relation type...	Description
Database assets	Database has / belongs to Schema	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Database asset can have many Schema assets. • A Schema asset can belong to only one Database asset.
Table assets	Schema contains / is part of Table	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Schema asset can contain many Table assets. • A Table asset can be part of only one Schema asset.

Table asset type

Table assets represent the physical tables in a data environment.

Key relation types

Tables assets are:

Related to...	Via the relation type...	Description
Schema assets	Table is part of / contains Schema	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Table asset can be a part of only one Schema asset. • A Schema asset can contain many Table assets.
Column assets	Table contains / is part of Column	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Table asset can contain many Column assets. • A Column asset can be a part of only one Table asset.

Column asset type

Column assets represent the physical columns in a data environment. It is the lowest level of definition in the [physical data layer](#).

Key relation types

Column assets are:

Related to...	Via the relation type...	Description
Table assets	Table contains / is part of Column	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Table asset can contain many Column assets. • A Column asset can be a part of only one Table asset.
Data Attribute assets	Data Attribute represents / is represented by Column	<p>One-to-one relation, whereby:</p> <ul style="list-style-type: none"> • A Data Attribute asset can represent only one Column asset. • A Column asset can be represented by only one Column asset.

Technology Assets

Two Technology Assets are included in the Data Catalog operating system:

- [System](#), which is part of the [logical data layer](#).
- [Database](#), which is part of the [physical data layer](#).

Database asset type

Database assets represent the physical databases in your data environment. They are the highest level of physical data organization in a data environment. Database assets should have specific names, and implement specific technologies, such as PostgreSQL.

Key relation types

Database assets are:

Related to...	Via the relation type...	Description
System assets	System groups / is grouped by Database	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A System asset can group many Database assets. • A Database asset can be grouped by only one System asset.
Schema assets	Database has / belongs to Schema	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A Database asset can have many Schema assets. • A Schema asset can belong to only one Database asset.

System asset type

System assets represent executable software that an organization uses to automate business functions that help run the business smoothly and efficiently. Systems can be

any commercially available or privately developed software that is running in your environment.

Example CRM, ERP and EDW software

Key relation types

System assets are:

Related to...	Via the relation type...	Description
Data Model assets	System implements / is implemented in Data Model	<p>One-to-one relation, whereby:</p> <ul style="list-style-type: none"> • A System asset can implement only one Data Model asset. • A Data Model asset can be implemented by only one System asset.
Database assets	System groups / is grouped by Database	<p>One-to-many relation, whereby:</p> <ul style="list-style-type: none"> • A System asset can group many Database assets. • A Database asset can be grouped by only one System asset.

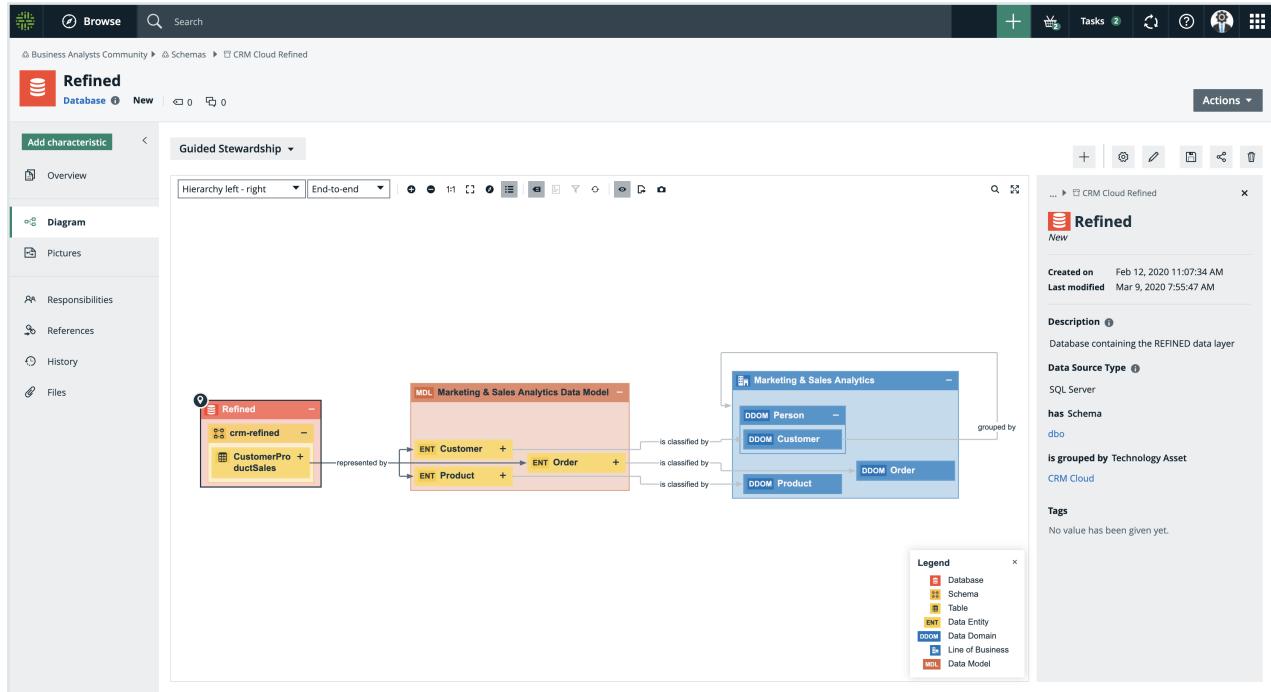
Guided Data Stewardship diagram views

For assets in the [Guided Data Stewardship operating model](#), there are two packaged diagram views: Guided Data Stewardship and Guided Data Stewardship - Data Concept. These diagram views show the relation types that bind assets, as established through the Physical Data Connector.

Guided Data Stewardship view

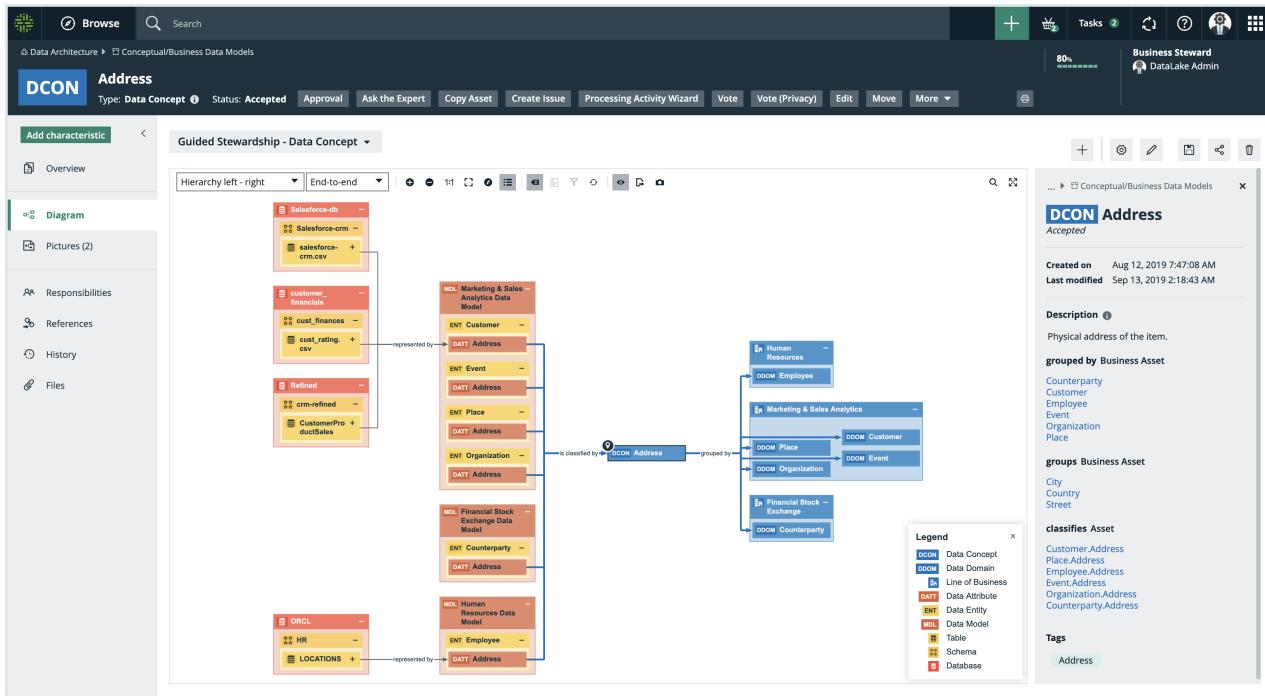
The Guided Data Stewardship view is the default diagram view designed to help you visualize direct and indirect relations across the entire data environment. For the [logical](#)

data layer, this view shows the relation types that bind the Data Model, Data Entity, and Data Attribute assets. For the conceptual data layer, it shows the Line of Business and Data Domain assets.



Guided Data Stewardship- Data Concept view

The Guided Data Stewardship - Data Concept view is the default diagram view for Data Concept assets only. This diagram view shows the logical and physical data associated with a Data Concept.



For more information, see [Diagram views](#).

Physical Data Connector

The Physical Data Connector shows a high-level overview of database information on which you can filter.

You can use the Physical Data Connector to:

- Connect the Data Catalog [physical data layer](#) to the [logical data layer](#).
- [Manually classify](#) columns.

About the Physical Data Connector

The Physical Data Connector shows a table with a high-level overview of database information. The table has a tree-like structure that enables you to drill down to the column level of a database. It shows the connection between the [physical data layer](#) and

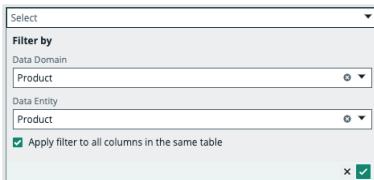
the [logical data layer](#) and enables you to find Data Attribute assets that relate to individual Column assets.

You access the Physical Data Connector via the Physical Data Connector subpage on the [Stewardship](#) tab.

Name	Data Classification	Data Attribute	Context
<ul style="list-style-type: none"> [+] crm-consumption <ul style="list-style-type: none"> [+] ProductSalesReporting <ul style="list-style-type: none"> [!] UnitPrice [!] EnglishProductName [!] OrderQuantity [!] TotalProductCost [!] ListPrice [+] MTU_english [+] MTU2 [+] MTU [+] CustomerSalesReporting [+] CustomerChurnReporting 			
		List Price <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 5px; margin-bottom: 5px;" type="text" value="Product name"/> Product Name DDOM Product ENT Product	DDOM Product ENT Product

No.	Name	Description
1	Drop-down	A drop-down list to filter on a specific database.
2	Table menu	The table menu contains buttons for actions you can perform on the table.
	[grid]	A button to manage the columns shown.

No.	Name	Description
3	Table with database information	A table that shows the content of the registered database and the connections between the physical data layer and logical data layer.
	Name	<p>The name of the asset and the icon of the asset type.</p> <p>If you click on the asset, the asset page opens. To sort assets alphabetically, click on the column header.</p>
	Data Classification	<p>The data class of an asset.</p> <p>You can manually add, edit or remove the data class of a Column asset. You can also approve or reject suggested classes</p>

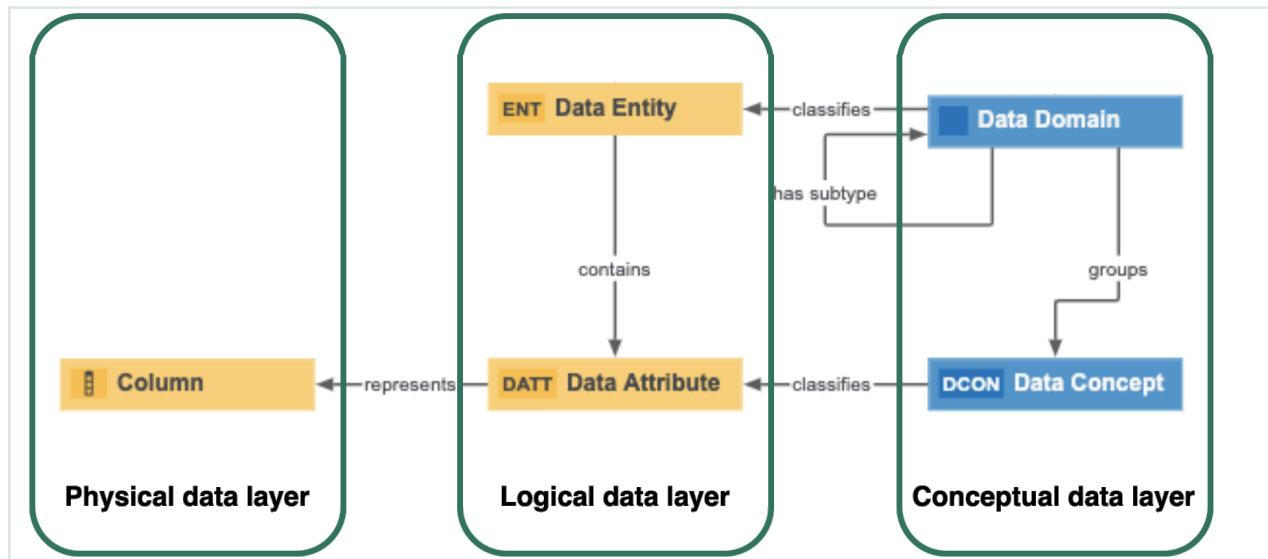
No.	Name	Description
	Data Attribute	<p>The Data Attribute asset linked to the Column asset via relation type "Data Attribute represents / represented by Column".</p> <p>When you filter on a Data Domain or Data Entity, the other drop-down lists dynamically update to only show content that relates to your filter. You can select the Apply filter to all columns in the same table checkbox to use the same filters to link a Data Attribute to other Column assets in the same table.</p>  <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Tip The physical data connector enables you to quickly connect Data Attribute assets to Column assets. However, you can also connect the physical data layer to the logical data layer via Data Catalog's asset pages by adding a relation of the type Data Attribute represents / represented by Column.</p> </div>
	Context	<p>The context of the data.</p> <p>This field is read-only and is filled with the Data Domain asset and Data Entity asset related to the Data Attribute asset, if a relation exists.</p>

Physical Data Connector relation types

The Physical Data Connector enables you to easily [connect](#) the **physical data layer** to the **logical data layer** by filtering on the [conceptual data layer](#).

The Physical Data Connector uses the following relation types to connect assets from the different [data layers](#):

- Business Dimension (Data Domain) classifies / is classified by Asset (Data Entity)
- Business Asset (Data Domain) groups / grouped by Business Asset (Data Concept)
- Data Domain has subtype / is subtype of Data Domain
- Business Dimension (Data Concept) classifies Asset (Data Attribute)
- Data Entity contains Data Attribute
- Data Attribute represents Column



Manually classify columns

The [Physical Data Connector](#) enables you to manually add, edit or remove a data class of a Column asset. This is useful, for example, if [Automatic Data Classification](#) missed some data classes.

Tip You can also [automatically classify](#) all columns in a table using Automatic Data Classification.

Prerequisites

- You have [configured](#) Automatic Data Classification for the DGC service.
- You have the [correct permissions](#) to classify tables and columns.
- You have [registered](#) a data source.
- [Data Catalog experience](#) is enabled in the DGC service configuration.

Steps

1. In the main menu, click  , then  [Stewardship](#).
2. In the submenu, click **Physical Data Connector**.
3. In the drop-down list, filter on a database.
 - » The table shows all ingested schemas in the database. You can use the asset tree to drill down to the column level of the database.
4. In the asset tree, find the Column asset that you want to classify.
5. In the Data Classification column, click .
6. Click in the **Select** field.
 - » The list with existing data classes appears.
7. In the **Select** field, use the drop-down list to find a data class or enter a new data class name and press **Enter**.

Note

- Data classes are case-sensitive.
- You can add more data classes if applicable, but avoid it as much as possible.
- If you created a new data class, it is automatically sent to the [Data Classification Platform](#).
- We recommend that you only add one data class to a column.

8. Click .
- » The data class is automatically accepted () .

Connect physical data to logical data

You can use the [Physical Data Connector](#) to easily connect a [Column](#) asset to a [Data Attribute](#) asset via the relation type Data Attribute represents / represented by Column.

A Column asset represents the lowest level of the [physical data layer](#), while a Data Attribute asset represents the lowest level of the [logical data layer](#).

Tip You can also [add a relation](#) of the type Data Attribute represents / represented by Column via a Data Attribute's or Column's asset page.

Prerequisites

- You have [registered](#) a data source.

Steps

1. In the main menu, click , then [Stewardship](#).
2. In the submenu, click **Physical Data Connector**.
3. In the drop-down list, filter on a database.
 - » The table shows all ingested schemas in the database. You can use the asset tree to drill down to the column level of the database.
4. In the asset tree, find the Column asset that you want to link to a Data Attribute asset.
5. In the **Data Attribute** column, click .
- » A Data Attribute drop-down list with two filters appears.
6. Link a Data Attribute asset to the Column asset based on the Data Domain and Data Entity filter.
 - a. Optionally, select a [Data Domain](#) asset and [Data Entity](#) asset that are related to the Data Attribute.
 - » When you filter on a Data Domain asset or Data Entity asset, the other drop-down lists are dynamically updated to only show content related to your filter.
 - b. If you want to use the same filters to find Data Attribute assets for other Column assets in the same table, select the **Apply filter to all columns in the same table** checkbox.
 - c. Select the correct Data Attribute asset in the drop-down list.

Note You can only select one Data Attribute asset. The Data Attribute asset must exist in your Collibra environment.

- d. Click  to accept the Data Attribute asset.
 - » The Data Attribute asset is now linked to the Column asset via the relation type "Data Attribute represents / represented by Column". This relation is also shown on the asset pages of the Column and Data Attribute assets.
 - » If there is a Data Domain asset and Data Entity asset that is related to the Data Attribute asset, they are shown in the Context column. If you used the filters in the

Data Attribute column, the same assets as your filters are shown in the Context column.

Warning If you click  to delete a Data Attribute asset in the physical data connector overview, you also delete the relation between the Column asset and the Data Attribute asset from the respective asset pages.

Working with Amazon S3

Amazon S3 is an online object storage service hosted by Amazon. With the integration in Collibra Data Governance Center, you can ingest data from Amazon S3 in Data Catalog. For more information about Amazon S3, see the [Amazon S3 documentation](#).

In this section, we describe how you can ingest and synchronize S3 data into Data Catalog.

About the Amazon S3 file system integration

The Amazon S3 file system integration enables registration of Amazon S3 as a data source in Collibra DGC and synchronization of data in Amazon S3. After synchronization, the files and directories of Amazon S3 are represented in Collibra DGC by [specific asset types](#), retaining the original names. However, not all [file types](#) are fully supported.

Note In [Collibra Console](#), you can [restrict](#) the AWS regions to which Collibra Data Catalog is allowed to connect.

Amazon S3 ingestion

The ingestion of Amazon S3 data happens in several phases:

Step	What?	Description
1	Register an Amazon S3 file system as a data source	Creates an initial structure of a S3 Catalog domain and S3 File System asset in the selected parent community.
2	Connect to Amazon S3	Sets up the connection to Amazon S3.
3	Create crawlers	Creates crawlers to find and ingest the data of Amazon S3.
4	Synchronize Amazon S3	Runs the crawlers to ingest the data of Amazon S3.

Required Amazon Web Services

Collibra DGC relies on AWS Glue and AWS Identity and Access Management to ingest and synchronize data.

AWS Glue

AWS Glue is an Amazon cloud service to perform extract-transform-load (ETL) processes on data, stored in data sources such as Amazon S3. AWS Glue has the following components:

- **Glue crawlers:** Glue crawlers analyze and describe a wide range of data sources such as Amazon S3 or MySQL. However, Data Catalog only uses them for the Amazon S3 file system integration.
- **Glue database:** Glue crawlers store their results in a database in the form of tables and columns. Both the tables and columns in the Glue database contain metadata that describes the content of Amazon S3. Data Catalog reads those databases for data ingestion.
- **ETL processes:** The ETL processes can extract data from a data source, process that data, for example, categorize and clean it and produce output. This component is currently not used by Data Catalog.

Though you need an AWS account, you do not have to work in AWS Glue directly, because Collibra DGC does everything for you. For more information about AWS Glue, see the [AWS Glue documentation](#).

Note Collibra DGC only uses AWS Glue to ingest data from Amazon S3. All other features, such as crawling other data sources or ETL processes are not integrated.

AWS Identity and Access Management

Collibra DGC uses the AWS Identity and Access Management (IAM) service to manage access to Amazon S3 and AWS Glue. Similar to AWS Glue, you need an AWS account to use the IAM service, but after setting up the required users and roles, you do not have to work directly with IAM. For more information about IAM, see the [IAM documentation](#).

You need two things in IAM:

- An AWS programmatic user to access Amazon S3 and AWS Glue.
- An IAM role for the crawlers.

Programmatic user

Collibra DGC needs programmatic access to Amazon S3 and AWS Glue by means of a user. The following policies and permissions are required:

- Policies:

- AWSGlueServiceRole (AWS managed policy)
- pass_role (inline policy)

You can use the following JSON content:

```
{  
    "Version": "2012-10-17",  
    "Statement":  
    [  
        {  
            "Sid": "VisualEditor0",  
            "Effect": "Allow",  
            "Action": "iam:PassRole",  
            "Resource": "*"  
        }  
    ]  
}
```

- Permissions:

- In Collibra Data Intelligence Cloud 2020.11 and newer and Collibra Data Governance Center 5.7.7 and newer, the programmatic user needs the following permissions:

```
{  
    "Version": "2012-10-17",  
    "Statement": [  
        {  
            "Sid": "VisualEditor0",  
            "Effect": "Allow",  
            "Action": [  
                "glue:GetCrawler",  
                "glue:GetCrawlers",  
                "glue>DeleteDatabase",  
                "glue:GetTables",  
                "glue>DeleteCrawler",  
                "glue:StopCrawler",  
                "s3>ListBucket",  
                "glue:GetDatabases",  
                "glue>CreateCrawler",  
                "glue:GetDatabase",  
                "iam:PassRole",  
                "glue:StartCrawler",  
                "glue:BatchDeleteTable",  
                "s3:GetBucketLocation"  
            ],  
            "Resource": "*"  
        }  
    ]  
}
```

For more information about creating a user with programmatic access, see the [IAM documentation](#).

IAM role

AWS Glue Crawlers need an IAM role, to allow the crawlers to execute an operation on your behalf. The "pass_role" permission policy of the programmatic user is used to assign this role to the crawler.

You need at least the following parameters:

- Trusted entities: glue.amazonaws.com
- Policies:
 - AmazonS3ReadOnlyAccess (AWS managed policy, required when you need to access a private S3 bucket.)
 - AWSGlueServiceRole (AWS managed policy)

Note You can provide more restrictive permissions to the IAM role, if dictated by your security requirements. Your AWS subject matter expert can create the appropriate permission set using the steps in the [IAM documentation](#). We recommend that you test a crawler with an IAM role that has these permissions in the AWS console, to ensure that it is successful before you use the IAM role in Collibra.

You can also use the IAM role for [role-based access control](#), to authenticate to Amazon AWS without manually entering a user ID and secret access key.

Amazon S3 asset an domain types

The Amazon S3 file system integration of Collibra Data Governance Center uses a specific subset of [asset types](#). All of these come out of the box with your software.

Asset type	Description	Domain type
Data Asset ▶ Data Element ▶ Column	An atomic unit of data that can be stored in a database table. Examples: FST_NM, EMPID	<ul style="list-style-type: none"> • Physical Data Dictionary • S3 Catalog
Data Asset ▶ Data Structure ▶ Table	An implementation of data entities in columns and rows, in a given database system. It is the basic structure of a relational database. Examples: Account_tbl, CUST_ADDR	<ul style="list-style-type: none"> • Physical Data Dictionary • S3 Catalog

Asset type	Description	Domain type
Data Asset ▶ Data Structure ▶ Table ▶ Database View	A Database View is a virtual table based on the result-set of an SQL statement.	<ul style="list-style-type: none"> Physical Data Dictionary S3 Catalog
Technology Asset ▶ Directory	An organizational structure that contains files and other directories. Examples: C:\Collibra, D:\Collibra\GDC, /opt/collibra	<ul style="list-style-type: none"> S3 Catalog Technology Asset Domain
Technology Asset ▶ File	A collection of data that is treated by a computer as a unit, for the purposes of input and output. Examples: businessGlossary.xls, dataDictionary05220.csv, datacatalogv25.txt	<ul style="list-style-type: none"> S3 Catalog Technology Asset Domain
Technology Asset ▶ File Group	A collection of physical files which together represent a single logical file.	S3 Catalog
Technology Asset ▶ S3 Bucket	A container for S3 objects.	S3 Catalog
Technology Asset ▶ System ▶ S3 File System	Amazon S3 (Simple Storage Service) file system abstraction.	S3 Catalog

S3 supported file types

Amazon S3 can contain a wide range of objects in different file types. However, not all file types are fully supported due to limitations of AWS Glue.

The following list shows the file types that are supported by Collibra Data Governance Center. Note that other file types may work properly as well. For an exhaustive list of supported file types, see the [AWS Glue documentation](#).

- AVRO
- ORC
- PARQUET
- JSON
- BSON
- XML
- ION
- COMBINED_APPACHE
- APACHE
- LINUX_KERNEL
- RUBY_LOGGER
- SQUID
- REDISMONLOG
- REDISLOG
- CSV
- ZIP
- TAR
- RAR
- GZ
- JAR

Register an Amazon S3 file system

You can register an [Amazon S3 file system](#).

The newly created data source does not automatically connect to Amazon S3. You [connect](#) manually in the S3 File System asset that is created during the registration of the S3 file system.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a role with the following [resource permissions](#) on the S3 community you create when you registered an Amazon S3 file system:
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add

Steps

1. In the main menu, click  Catalog.

 - » The Catalog Home opens.

2. In the main menu, click the Create (+) button.

 - » The Create dialog box appears.

3. In the Create dialog box, click Register system.

 - » The Register system page appears.

4. In the Register system page, click Amazon S3.

 - » The Register Amazon S3 file system dialog box appears.

5. Enter the required information.

Field	Description
Community	The parent community in which the initial Amazon S3 structure will be created.
File system name	The name for the S3 file system asset.
Description	The description to provide extra information about the file system. This is used as the Description attribute of the S3 File System asset.
Owner	The owner name of the data in the created community.

6. Click Register.

 - » An S3 File System asset is created.
 - » An S3 Catalog domain is created with the same name as the S3 File System asset.
 - » The [configuration page](#) of the S3 File System asset is automatically opened.

What's next?

You can now [connect](#) to Amazon S3.

Connect to Amazon S3

To retrieve data from Amazon S3, you have to connect via an S3 File System asset. You always have to do that after registering a new Amazon S3 File System. You can also edit the settings afterwards, for example, if you want to use another Jobserver than the one you originally selected.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) an Amazon S3 file system.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have a programmatic AWS user and IAM role with the [required permissions](#).

Steps

1. Open an [S3 File System asset page](#).
2. In the tab pane, click Configuration.
3. In the **Connection details** section, click **Edit connection details**.
 - » The connection details can be edited.
4. Enter the required information.

Field	Description
Connect via	The Jobserver used for synchronizing.
Access key ID	The access key ID of the programmatic AWS user.
Secret access key	The secret access key of the programmatic AWS user.
IAM role	The IAM role to be assigned to the crawlers.

5. Click **Save**.

What's next?

You can now [create crawlers](#).

Configure role-based Amazon S3 access control

When you register an [Amazon S3 file system](#), you can authenticate to Amazon S3 based on an [IAM role](#). As a result, you can [connect to Amazon S3](#) without an access key ID and secret access key.

Prerequisites

- You have access to the AWS IAM console.
- You have access to the Amazon EC2 console.
- You have an [Amazon EC2 instance](#).

Steps

1. In AWS Identity and Access Management, do the following:
 - a. [Create](#) a new IAM role or select an existing IAM role.
 - b. Attach the following policies to the IAM role:
 - AWSGlueServiceRole (AWS managed policy)
 - pass_role (inline policy)

You can use the following JSON content:

```
{  
  "Version": "2012-10-17",  
  "Statement":  
  [  
    {  
      "Sid": "VisualEditor0",  
      "Effect": "Allow",  
      "Action": "iam:PassRole",  
      "Resource": "*"  
    }  
  ]  
}
```

2. In the Amazon EC2 console, attach the IAM role to the Amazon EC2 instance.
3. [Install the Jobserver service on the Amazon EC2 instance node.](#)

More information

If the credentials in the Amazon EC2 instance can't be used to authenticate, you can create a credentials file and save it in the `user_home/.aws/` folder. The credentials file should look like this:

```
[default]
aws_access_key_id = <access key ID>
aws_secret_access_key = <secret access key>
```

For more information, see the [AWS developer guide](#).

Warning Do not use a credentials file unless absolutely necessary.

What's next?

You can now [connect to Amazon S3](#) via the jobserver service on the [Amazon EC2](#) instance node.

Crawlers

A crawler is an automated script that ingests data from [Amazon S3](#) to Data Catalog.

You can [create](#), [edit](#) and [delete](#) crawlers in Collibra Data Governance Center. When you [synchronize](#) Amazon S3, the crawlers are created in AWS Glue and executed. Each crawler crawls a location in Amazon S3 based on its include path. You can make an S3 bucket accessible for [crawlers](#) from the same or [other](#) AWS accounts than the account in which the S3 bucket is located. The results are stored in one AWS Glue database per domain assigned to one or more crawlers. Those databases are ingested in Data Catalog in the form of assets, attributes and relations. The databases are stored in AWS Glue until the next synchronization. At that moment, they are deleted and re-created. The crawlers in AWS Glue are deleted immediately after as the synchronization is finished.

Note

- By default, AWS Glue allows up to 25 crawlers per account. For more information, see the [AWS Glue documentation](#). This has consequences for Collibra DGC:
 - If you created crawlers in AWS Glue directly, Collibra DGC can create less crawlers for synchronization.
 - Because Collibra DGC creates the crawlers in AWS Glue during synchronization, you should avoid having 25 or more crawlers in one S3 File System asset.
 - You can synchronize several S3 File System assets simultaneously, but if the total number of crawlers exceeds the maximum amount in AWS Glue, synchronization will fail. Since Collibra DGC deletes the crawlers from AWS Glue after synchronization, it is safer to synchronize each S3 File System asset at a unique time.
- Crawlers in AWS Glue can crawl multiple buckets, but in Collibra DGC, each crawler can only crawl a single bucket.

Create a crawler

You can create a [crawler](#) for an S3 File System asset in Data Catalog.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) an Amazon S3 file system.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have [connected](#) an S3 File System asset to Amazon S3.

Steps

1. Open an [S3 File System asset page](#).
2. In the tab pane, click  Configuration.
3. In the **Crawlers** section, click **Create crawler**.
 - » The **Create crawler** dialog box appears.

4. Enter the required information.

Field	Description
Domain	<p>The domain in which the assets of the S3 file system are created.</p> <p>More information about linking domains to crawlers:</p> <ul style="list-style-type: none"> ◦ A specific S3 Catalog domain is created automatically when the S3 File System asset is created. That domain is selected by default. However, you can manually create a new S3 Catalog domain and select it. ◦ If multiple crawlers point to the same domain, then all assets are created in the same domain. ◦ If multiple crawlers point to different domains, then all assets are created in their respective domains. ◦ If multiple crawlers from the same S3 File System asset overlap and point to different domains, then overlapping assets are created in each domain. ◦ If multiple crawlers from the same S3 File System asset overlap and point to the same domain, then overlapping assets are created once in that domain. ◦ If crawlers from multiple S3 File System assets overlap and point to different domains, then overlapping assets are created in each domain. ◦ If crawlers from multiple S3 File System assets overlap and point to the same domain, then overlapping assets are created once in the domain and the S3 Bucket asset has a relation to both S3 File System assets.

Field	Description
Name	<p>The name of the crawler in Collibra DGC.</p> <p>More information about crawler names:</p> <ul style="list-style-type: none"> ◦ You cannot use the same name for two crawlers in the same S3 File System asset. ◦ The name of the corresponding crawler in AWS Glue will contain this name. Its name will follow the following convention: <code>collibra_catalog_<s3fs asset id>_<name_of_the_crawler_in_Collibra DGC></code>. ◦ The crawler name must be compliant with the AWS Glue limitations: <ul style="list-style-type: none"> ■ It has to match the single-line string pattern: <code>[\u0020-\uD7FF\uE000-\uFFFF\uD800\uDC00-\uDBFF\uDFFF\t]*</code>. ■ The length should be between 1 and 255 bytes long, including the fixed prefix that Collibra DGC adds. That means that you can use roughly 65 characters, depending on the characters that were used.
Include path	<p>The case-sensitive path to a directory of a bucket in Amazon S3. All objects and subdirectories of this path are crawled.</p> <p>For more information and examples, see the AWS Glue documentation.</p>
Exclude patterns	<p>Glob pattern that represents the objects that are in the include path, but that you want to exclude.</p> <p>For more information and examples, see the AWS Glue documentation.</p>
Add pattern	Button to add additional exclude patterns.

5. Click **Create**.

What's next?

You can now [synchronize](#) Amazon S3 manually or define a synchronization schedule.

Edit a crawler

You can edit a [crawler](#) of an S3 File System asset in Data Catalog. For example, you can do this if you want to edit the exclude pattern.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) an Amazon S3 file system.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have [connected](#) an S3 File System asset to Amazon S3.
- You have [created](#) one or more crawlers.

Steps

1. Open an [S3 File System asset page](#).
2. In the tab pane, click **Configuration**.
3. In the **Crawlers** section, in the row of the crawler that you want to edit, click .

- » The Edit crawler window appears.
4. Enter the required information.

Field	Description
Domain	<p>The domain in which the assets of the S3 file system are created.</p> <p>More information about linking domains to crawlers:</p> <ul style="list-style-type: none"> ◦ A specific S3 Catalog domain is created automatically when the S3 File System asset is created. That domain is selected by default. However, you can manually create a new S3 Catalog domain and select it. ◦ If multiple crawlers point to the same domain, then all assets are created in the same domain. ◦ If multiple crawlers point to different domains, then all assets are created in their respective domains. ◦ If multiple crawlers from the same S3 File System asset overlap and point to different domains, then overlapping assets are created in each domain. ◦ If multiple crawlers from the same S3 File System asset overlap and point to the same domain, then overlapping assets are created once in that domain. ◦ If crawlers from multiple S3 File System assets overlap and point to different domains, then overlapping assets are created in each domain. ◦ If crawlers from multiple S3 File System assets overlap and point to the same domain, then overlapping assets are created once in the domain and the S3 Bucket asset has a relation to both S3 File System assets.

Field	Description
Name	<p>The name of the crawler in Collibra DGC.</p> <p>More information about crawler names:</p> <ul style="list-style-type: none"> ◦ You cannot use the same name for two crawlers in the same S3 File System asset. ◦ The name of the corresponding crawler in AWS Glue will contain this name. Its name will follow the following convention: <code>collibra_catalog_<s3fs asset id>_<name_of_the_crawler_in_Collibra DGC></code>. ◦ The crawler name must be compliant with the AWS Glue limitations: <ul style="list-style-type: none"> ■ It has to match the single-line string pattern: <code>[\u0020-\uD7FF\uE000-\uFFFF\uD800\uDC00-\uDBFF\uDFFF\t]*</code>. ■ The length should be between 1 and 255 bytes long, including the fixed prefix that Collibra DGC adds. That means that you can use roughly 65 characters, depending on the characters that were used.
Include path	<p>The case-sensitive path to a directory of a bucket in Amazon S3. All objects and subdirectories of this path are crawled.</p> <p>For more information and examples, see the AWS Glue documentation.</p>
Exclude patterns	<p>Glob pattern that represents the objects that are in the include path, but that you want to exclude.</p> <p>For more information and examples, see the AWS Glue documentation.</p>
Add pattern	Button to add additional exclude patterns.

5. Click **Save**.

Delete a crawler

You can delete a [crawler](#) from an S3 File System asset.

Note If you **delete** an S3 File System asset that contains one or more crawlers, the crawlers are also deleted.

Prerequisites

- You have a resource role with the Configure external system **resource permission**, for example Owner.
- You have a **global role** with the Catalog **global permission**, for example Catalog Author.
- You have **registered** an Amazon S3 file system.
- You have **configured** one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have **connected** an S3 File System asset to Amazon S3.
- You have **created** one or more crawlers.

Steps

1. Open an **S3 File System asset page**.
2. In the tab pane, click **Configuration**.
3. In the **Crawlers** section, in the row of the crawler that you want to delete, click .
 - » The **Delete Crawler** confirmation message appears.
4. Click **Delete crawler**.

About synchronizing Amazon S3

Synchronizing Amazon S3 is the process of ingesting metadata from a selected Amazon S3 repository and making the data available in Collibra Data Governance Center.

When you synchronize **Amazon S3**, the content of your Amazon S3 repository is analyzed and represented in Collibra DGC by means of assets and their characteristics. Technically, the synchronization happens in several steps:

1. Collibra DGC creates crawlers in **AWS Glue**, based on the crawlers defined in Collibra DGC.

2. If AWS Glue contains databases with metadata from a previous synchronization, the databases are deleted.
3. Each AWS Glue crawler crawls a location in Amazon S3 based on its include path. For each domain assigned to one or more crawlers, AWS Glue creates a database with the crawling results.
4. Collibra DGC ingests those databases and creates assets, attributes and relations as required to match the metadata.
5. The AWS Glue crawlers are deleted.

Starting synchronization

You can [synchronize manually](#), or you can automate it by [adding](#) a synchronization schedule by means of a [cron](#) expression.

You can only synchronize one S3 File System at a time. If a synchronization job is in progress and a second one is triggered, manually or automatically, it will be queued.

If a synchronization job is still running and a new synchronization of the same S3 File System is triggered (manually or automatically), the running synchronization will continue and the new synchronization request is ignored.

Results

After synchronization, the resulting assets are in the domain that was specified in the crawler.

Warning Do not move the assets to another domain. Doing so may lead to errors during future synchronizations. This is a [known limitation](#).

By default, the assets are shown in a plain list, but you can [enable](#) a multi-path hierarchy to show it in a tree structure. For the best result, we recommend that you use the following relations:

1. S3 Bucket contains Directory
2. Directory contains Directory
3. Directory contains File
4. Directory contains File Group

5. File contains Table
6. File Group contains Table
7. Table contains Column

The following images shows the resulting hierarchical table.

Name	Asset Type
collibra-catalog	S3 Bucket
/	Directory
gluetest	Directory
ingestion copy	Directory
airline-sample-data.xls	File
FL_insurance_sample_1krows.csv	File
FL_insurance_sample.csv	File
fl_insurance_sample_csv	Table
construction	Column
county	Column

Naming convention

Synchronizing Amazon S3 relies on a naming convention to match assets during the synchronization process. We highly recommend that you not change the S3 File System asset's full name.

Warning Editing full name of the Tableau Server or Tableau Online assets may lead to errors during the synchronization process.

Synchronize Amazon S3 manually

You can manually start a [synchronization](#) job of an S3 File System asset. This can be useful if you want to test your crawlers, or if you want to synchronize immediately.

Tip You can also [add](#) a synchronization schedule to synchronize automatically.

Prerequisites

- You have [registered](#) an Amazon S3 file system.
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.

- You have a programmatic AWS user and IAM role with the [required permissions](#).
- You have [connected](#) an S3 File System asset to Amazon S3.
- You have [created](#) one or more crawlers.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a role with the following [resource permissions](#) on the S3 community you created when you registered an Amazon S3 file system:
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add

Steps

1. Open an [S3 File System asset page](#).
2. In the tab pane, click  Configuration.
3. In the Crawlers section, click **Synchronize now**.
 - » The synchronization job appears in the **Activities** list as a bulk synchronization.
 - » When the synchronization finishes, the [resulting assets](#), including their attributes and relations, are created, edited or deleted in the selected domain(s) and in the [Data Sources page](#) of Data Catalog.

What's next?

You can [view](#) a summary of the results from the Activities list.

You can view the assets in their domain.

Add an S3 synchronization schedule

To keep the content of Collibra Data Governance Center [synchronized](#) with your Amazon S3 File System, you can synchronize manually or create a schedule to automatically do this with a fixed interval.

Note You can only create one synchronization schedule.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) an Amazon S3 file system.
- You have a programmatic AWS user and IAM role with the [required permissions](#).
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have [connected](#) an S3 File System asset to Amazon S3.
- You have [created](#) one or more crawlers.
- You have a role with the following [resource permissions](#) on the S3 community you created when you registered an Amazon S3 file system:
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add

Steps

1. Open an [S3 File System asset page](#).
2. In the tab pane, click Configuration.
3. In the **Synchronization schedule** section, click Add Schedule.
4. Enter the required information.

Field	Description
Cron	The Quartz Cron expression that determines when the synchronization will take place.
Timezone	The time zone for the Cron expression.

5. Click **Save**.

Edit an S3 synchronization schedule

You can edit the [synchronization](#) schedule of an Amazon S3 File System asset. For example, you can do this if you think the synchronization job runs too often or not often enough.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) an Amazon S3 file system.
- You have a programmatic AWS user and IAM role with the [required permissions](#).
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have [connected](#) an S3 File System asset to Amazon S3.
- You have [created](#) one or more crawlers.
- You have [added](#) a synchronization schedule.

Steps

1. Open an [S3 File System asset page](#).
2. In the tab pane, click Configuration.
3. In the **Synchronization schedule** section, click **Edit Schedule**.
4. Enter the required information.

Field	Description
Cron	The Quartz Cron expression that determines when the synchronization will take place.
Timezone	The time zone for the Cron expression.

5. Click **Save**.

Remove an S3 synchronization schedule

You can remove a [synchronization](#) schedule from an Amazon S3 File System asset to stop automatically synchronizing Amazon S3.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) an Amazon S3 file system.
- You have a programmatic AWS user and IAM role with the [required permissions](#).
- You have [configured](#) one or more Jobservers in Collibra Console. If there is no available Jobserver, the **Register data source** actions will be grayed out in the global create menu of Collibra Data Governance Center.
- You have [connected](#) an S3 File System asset to Amazon S3.
- You have [created](#) one or more crawlers.
- You have [added](#) a synchronization schedule.

Steps

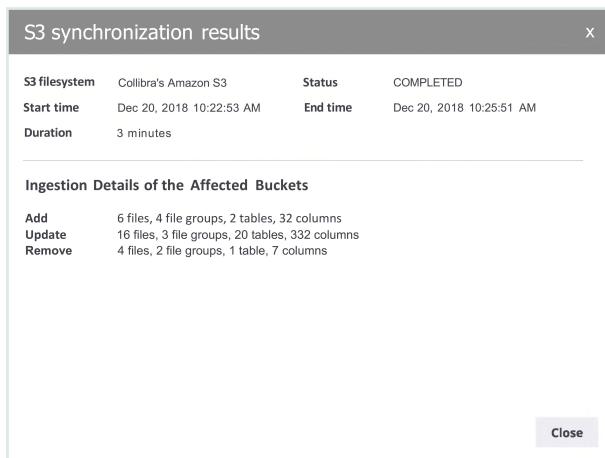
1. Open an [S3 File System asset page](#).
2. In the tab pane, click  Configuration.
3. In the **Synchronization schedule** section, click Remove Schedule.

View the summary of an Amazon S3 synchronization

After you [synchronized](#) Amazon S3, you can view the summary of the results. This shows the impact of the synchronization on the assets in Collibra Data Governance Center

Steps

1. Open the Activities list.
2. In the row containing the S3 synchronization job, click **Result**.
» The **S3 synchronization results** dialog box appears.



Delete an S3 File System asset from Collibra DGC

You can delete an S3 File System asset from Collibra Data Governance Center.

Note

- The **crawlers** of the S3 File System asset are deleted.
- The assets that were created by **synchronizing** are not deleted.

Prerequisites

- You have **registered** an Amazon S3 file system.
- You have a **global role** with the Catalog **global permission**, for example Catalog Author.
- You have a **resource role** with the Asset > Remove **resource permission**.

Steps

1. Open an [S3 File System asset page](#).
2. In the view toolbar, click **Actions → Delete**.
 - » The **Delete Confirmation** dialog box appears.

Tip If **Data Catalog experience** is disabled, the **More** menu is shown instead of **Actions**.

3. Click **Delete S3 File System**.

Troubleshooting for the S3 file system integration

In this topic

1. Message "Could not add/change/delete crawler '<crawler name>' for S3 File System '<asset name>'."
2. Message "Value not allowed. The credential for term id 'xxx' is not valid, please check and try again."
3. Glue Crawler failed and AWS logs show an "Internal server error"
4. No assets created after synchronization job is completed
5. Only part of the expected files or file groups were ingested
6. File size (or other property) is not filled for file xxx.yyy
7. A file is wrongly considered as a File Group
8. My table name has a strange hash-code at the end
9. Synchronizing an S3 File System fails with an `relationMaxLimitReachedTarget` message in logs
10. Partial ingestion or update of assets
11. Synchronization fails when a directory contains a file and a directory with the same name (known issue)
12. JSON ingestion shows partial value in technical data type attributes (known issue)
13. Error message "The AWS Access Key Id you provided does not exist in our records" though credentials are accepted
14. Some of the folders and files in Amazon S3 are not visible in Collibra DGC
15. Synchronizing Amazon S3 fails because you don't have the necessary permissions

Message "Could not add/change/delete crawler '<crawler name>' for S3 File System '<asset name>'."

You can find more information about the actual problem in the Jobserver logs. The problem is usually described in the AWS SDK error message.

Cause	Description	Solution
Incorrect or too limited IAM permissions for the programmatic user defined in the connection details.	<p>While connecting, the verification process only checks that the user can log in, but it doesn't verify permissions. Any further operation may therefore fail if the IAM permissions are wrong or too limited.</p> <p>This also applies to the AWS regions. Collibra DGC checks the credentials in the default region, based on the region AWS SDK. Because the IAM service is global, that is sufficient in most cases. However, it is possible to put constraints on specific regions, including the AWS SDK default region.</p>	<p>Edit the IAM permissions or connect to Amazon S3 with another IAM user or role.</p>

Cause	Description	Solution
Maximum number of crawlers in AWS Glue reached.	<p>When you synchronize Amazon S3, Collibra DGC creates crawlers in AWS Glue and executes them. After synchronization, they are deleted.</p> <p>By default, each AWS Glue account can only store 25 crawlers. This number can be reached easily, especially if the customer uses AWS Glue apart from Collibra DGC.</p>	<ul style="list-style-type: none"> • Delete one or more crawlers. • Create an advanced crawler by tweaking the include path and the exclude patterns. • Create additional S3 File System assets and divide the required crawlers between the assets. Then synchronize them at different times. • Synchronize different S3 File Systems at different times. • Ask Amazon support to increase that number. <p>For more information, see the AWS Glue documentation.</p>
Bucket does not exist	Typo in a bucket name - bucket doesn't exist.	Edit the crawler's include path to correct the bucket name.
No permission to access the bucket in Amazon S3.	This includes buckets that exist but belong to different accounts.	Request permission or delete the relevant crawler.
Unsupported AWS region.	S3 ingestion in Collibra Data Catalog relies on AWS Glue to analyze S3 buckets. However, AWS Glue is currently not supported in all AWS regions, which may lead to failing crawling creation. The log will display an UnknownHostException.	This is a built-in limitation of AWS Glue. For the list of supported regions for AWS Glue, see the AWS documentation .

Cause	Description	Solution
Incorrect AWS region.	<p>AWS regions can be restricted so that S3 ingestion and synchronization in Collibra Data Catalog can only be performed in the regions your AWS account has access to.</p> <p>Example You will get an error message when:</p> <ul style="list-style-type: none"> • A user with a European account tries to perform S3 ingestion in AWS region Canada. • A user with a European account tries to synchronize S3 buckets for AWS regions Europe and Canada. • A user with a Chinese and Canadian account tries to synchronize buckets for AWS regions Ireland and Canada. 	This is a security measure. The AWS regions to which Collibra Data Catalog is allowed to connect can be restricted via Collibra Console .

Example [2018-08-03 13:50:38,347] INFO
 .agent.SprayRoutesProvider [] [] - output: (500 Internal Server Error, {"messageCode":"s3_bucketDoesntExist","messageArguments":["qsdgqsbqfdscs"]})

Message "Value not allowed. The credential for term id 'xxx' is not valid, please check and try again."

Cause	Description	Solution
The credentials for the AWS user are incorrect.	This message appears when the credentials for the AWS user are incorrect. The access key ID and/or secret access key are wrong.	Pay attention that they do not contain trailing spaces.
Your AWS account doesn't have access to an AWS region where the S3 bucket is located.	This message appears when you add an AWS region in Collibra Console to which your AWS account doesn't have access and then try to ingest an S3 file system.	Make sure that you have access to the AWS region where the S3 bucket is located.

Glue Crawler failed and AWS logs show an "Internal server error"

When checking the logs in Jobserver you may notice that one or more crawlers failed in AWS Glue. In that case, you need to open the AWS console and check the crawlers list in AWS Glue. Because crawlers are deleted from AWS Glue after ingestion, you will have to manually re-create the crawlers and run them again before proceeding. The failing crawler has a red exclamation mark and the Failed status. You can check the logs for more information.

Sometimes, the logged message just shows an "Internal server error". The only way to get more information is to contact the Amazon helpdesk. However, we noticed such errors often happen in the following situations

- The number of files to crawl is very large (> 100k)
- There is a series of very small files to crawl (>100).

In both cases, the problem is caused by AWS Glue. All Amazon services are protected against DDoS attacks and they throw throttling exceptions when too many operations are done in a specific time frame. Unfortunately this limit also applies between Amazon services. In this specific case, the AWS Glue database service is denying requests from the AWS Glue crawler service, which causes the crawling process to abort. Because this is an inherent Amazon limitation, Collibra cannot fix this problem. A possible work-around is to use more S3 File System assets with more restricted include paths.

No assets created after synchronization job is completed

This is usually because AWS Glue didn't find any suitable files to process. A typical problem is a typo in the include path or exclude patterns. AWS Glue does not fail when an include path points to a directory that doesn't exist. Also, always verify there are no leading or trailing spaces in those fields.

Only part of the expected files or file groups were ingested

Jobs in Collibra DGC can only succeed or fail. It's possible that some of the crawlers are correctly defined while others contain errors, such as a typo in an include path or an unsupported AWS region. In that case, the activity is marked as successful, though part of it didn't succeed. Currently, the only way to confirm this is to read the log files of Collibra DGC and the Jobserver.

Note When you start synchronization, the crawlers are created in AWS Glue. Once the crawlers are created, they are executed. If Collibra DGC cannot create one or more crawlers, synchronization fails immediately. If the crawlers are created successfully, but fail later, synchronization only fails if all crawlers fail.

File size (or other property) is not filled for file xxx.yyy

AWS Glue only provides the file size for known file types (called "classifiers" in the AWS Glue terminology). Files that are classified as Unknown are registered but won't have any property associated. For the list of built-in classifiers, see the [AWS Glue documentation](#).

A file is wrongly considered as a File Group

AWS Glue preferably considers a directory as a data set when possible. This leads to a File Group being created in Data Catalog. There are multiple cases where it considers (possibly wrongly) one or more files as a File Group. Unfortunately, those rules are not clearly defined in AWS Glue documentation. Collibra noticed that AWS Glue considers a directory as a data set in the following cases:

- A directory only contains one file that belongs to a known classifier (file type).
- All files contained in a directory (including sub-directories) expose a similar schema (for example, all CSV files with columns of text type)

The only work-around that Collibra found, is to experiment with include paths and exclude patterns of the crawlers. For example, if a crawler wrongly takes a directory with subdirectories as a single File Group, the official work-around is to add crawlers with the subdirectories as include paths. Unfortunately, this work-around requires a lot of manual work and is limited by the number of crawlers in AWS Glue (25 by default - can be expanded on request).

My table name has a strange hash-code at the end

AWS Glue appends a hash code to differentiate two different files of the same name but different directories, for example, csv_boolean_csv_fe8de80c6f9a2b31463801aa2778a427. This name, including the hash code, is actually transferred to Data Catalog.

Synchronizing an S3 File System fails with an relationMaxLimitReachedTarget message in logs

This error comes from a broken relation in the assets tree. An asset created by S3 ingestion gets more than one parent asset. For example, a File asset has more than one parent directory or a Directory asset has more than one parent directory.

This typically happens when a user moves S3 assets to a different domain and then starts a synchronization. In that case, the ingestion jobs try to recreate the missing assets in the original domain while old relations are still present. This can lead to an inconsistency in the relation tree.

We strongly recommend that you never move assets created by S3 ingestion to another domain.

Example

You work in domain called Amazon, which contains a Directory asset called Main. The Main Directory asset has a child asset of the File type, called Names.

You move the Main Directory asset to another domain called Local.

When you synchronize again, Data Catalog first recreates the Main Directory asset in the Amazon domain and then it updates the Names File asset.

As a consequence, the Names File has 2 parent directories, which is a relation cardinality error.

Partial ingestion or update of assets

It is possible to store a very large number of files in S3 buckets, hence leading to a large number of assets, attributes and relations to ingest into Data Catalog. To optimize memory and speed, the ingestion process is not transactional as a whole. It works with small transactional batches. If ingestion fails and aborts after some batches are already executed, it is possible that the ingested data is incomplete (if it is the first synchronization) or only partly updated (if it is not the first synchronization). In this case, it's advised to fix the problem and re-synchronise as soon as possible.

Synchronization fails when a directory contains a file and a directory with the same name (known issue)

In Amazon S3, you can use periods (.) in the name of a directory. As a consequence, you can give the directory a name that is identical to a file name, for example, Collibra.txt. However, if this happens, ingestion fails. This is a known issue.

The screenshot shows the 'Overview' tab selected in the top navigation bar. Below it is a search bar with placeholder text: 'Type a prefix and press Enter to search. Press ESC to clear.' Underneath the search bar are four buttons: 'Upload' (blue), 'Create folder' (blue), 'Download' (gray), and 'Actions' (blue dropdown). The main area displays a list of files. A header row includes a checkbox, a 'Name' column, and a sorting icon. The file list contains the following items:

	Name
<input type="checkbox"/>	WHAT.csv
<input type="checkbox"/>	WHAT.csv
<input type="checkbox"/>	adv_single_pattern_detection.csv
<input type="checkbox"/>	bson_bytes(1).bson
<input type="checkbox"/>	csv_whole_number.csv

JSON ingestion shows partial value in technical data type attributes (known issue)

For security reasons, all values that contain information between < and > characters are automatically trimmed by Collibra DGC. However, if JSON is ingested by AWS Glue, the technical data type attribute contains those characters to represent the JSON structure. As a consequence, the value is trimmed and thus invalid. In future releases of Collibra DGC, several attribute types will be changed to the plain text kind to avoid this issue.

Error message "The AWS Access Key Id you provided does not exist in our records" though credentials are accepted

A user may be able to store S3 credentials in the S3 File System asset, though he cannot synchronize Amazon S3, create, edit or delete crawlers. The following message appears:

```
The AWS Access Key Id you provided does not exist in our records.  
(Service: Amazon S3; Status Code: 403; Error Code: InvalidAccessKeyId; ...)
```

This may be caused by insufficient permissions on AWS Glue services. For more information, see [About the Amazon S3 file system integration](#).

Some of the folders and files in Amazon S3 are not visible in Collibra DGC

You may notice that the content of your Amazon S3 does not always match the content in Collibra DGC. Some folders from Amazon S3 may not appear in Collibra DGC and some files are merged or split into different assets. This is not a bug in Collibra DGC. When you synchronize Amazon S3, you create and execute crawlers in AWS Glue. Those crawlers create a table with metadata. That table is ingested in Collibra DGC and is the basis for the relevant assets.

However, the crawlers in AWS Glue have some specific behavior to deal with partitioned tables. When the majority of schemas at a folder level are similar, the AWS Glue crawler creates partitions of a table instead of separate tables. Based on that information, the assets in Collibra DGC are created.

See the AWS Glue documentation for more information about [folders and tables in Amazon S3](#) and [what happens when a crawler runs](#).

Synchronizing Amazon S3 fails because you don't have the necessary permissions

In Collibra Data Intelligence Cloud 2020.11 and newer and Collibra Data Governance Center 5.7.7 and newer, Collibra checks the permissions of the [AWS user](#) when you

synchronize Amazon S3. Synchronizing Amazon S3 fails if the AWS user does not have the necessary permissions.

A dialog box shows the following message:

```
Could not get/delete Glue database for S3 File System <name-of-Amazon-S3-file-system>, please make sure you have all the necessary permissions.
```

You must grant the AWS programmatic user the following permissions to synchronize Amazon S3 :

```
{
    "Version": "2012-10-17",
    "Statement": [
        {
            "Sid": "VisualEditor0",
            "Effect": "Allow",
            "Action": [
                "glue:GetCrawler",
                "glue:GetCrawlers",
                "glue:DeleteDatabase",
                "glue:GetTables",
                "glue:DeleteCrawler",
                "glue:StopCrawler",
                "s3>ListBucket",
                "glue:GetDatabases",
                "glue>CreateCrawler",
                "glue:GetDatabase",
                "iam:PassRole",
                "glue:StartCrawler",
                "glue:BatchDeleteTable",
                "s3:GetBucketLocation"
            ],
            "Resource": "*"
        }
    ]
}
```

For more information about AWS requirements, see the [Amazon S3 file system section](#).

Working with Tableau

Tableau is business intelligence software that helps people see and understand their data. With the integration in Collibra Data Governance Center, you can see metadata from Tableau Server and Tableau Online in Collibra Data Catalog.

In this section, we describe how you can ingest and synchronize Tableau metadata into Collibra Data Catalog.

About the Tableau integration

The Tableau integration enables you to register Tableau as a system in Collibra Data Governance Center and synchronize with Tableau. After synchronization, metadata of Tableau Server or Tableau Online are represented in Collibra DGC by specific [asset](#) and [domain types](#), retaining their original names.

Tableau ingestion

The table below shows the steps required for ingesting Tableau metadata.

Step	What?	Description
1	Register Tableau as a system.	Creates an initial structure of a community, BI Catalog domain and Tableau Server asset in the selected parent community.
2	Connect to Tableau Server or Tableau Online.	Connects to Tableau server or Tableau Online.
3	Synchronize Tableau Server or Tableau Online.	Ingests the metadata from Tableau.
4	Stitch Tableau logical data layer and physical data layer.	Optionally, stitch Tableau assets to assets of registered data sources in Data Catalog.

Authentication

Data Catalog uses Tableau's REST API to get metadata information and follows Tableau's requirements regarding authentication methods. As a consequence, you need a Tableau user with access to the relevant Tableau sites.

Note Tableau supports multiple authentication methods, but the Tableau REST API only supports username and password authentication for registered users in Tableau Server.

For more information, see the [Tableau documentation](#).

Supported Tableau Server versions

Collibra Data Intelligence Cloud supports the following Tableau Server versions:

- 10.4
- 10.5
- 2018.x
- 2019.x
- 2020.1
- 2020.2
- 2020.3
- 2020.4
- 2021.1

Note Depending on your Tableau version, Data Catalog uses different APIs to integrate Tableau. You need different [Tableau permissions](#) according to the Tableau version that you want to integrate.

Tableau terminology

Before you start using Tableau to ingest data, read more about the Tableau terminology and how it maps with the Collibra Data Governance Center terminology.

Tableau term	Description	Collibra DGC equivalent
Site	A site is a stand-alone collection of content, such as projects, workbooks and users. Each site has its own URL and its own set of users.	Subcommunity and Tableau Site asset
Project	A project organizes related content resources. Content resources are workbooks, views and data sources.	Tableau Project asset
Workbook	A workbook is a collection of views.	Tableau Workbook asset
View	A view is a way to represent data.	Tableau View asset
Story	A story contains a sequence of worksheets or dashboards that work together to convey information.	Tableau Story asset
Dashboard	A dashboard is a collection of views from multiple worksheets.	Tableau Dashboard asset
Worksheet	A worksheet contains a single view, along with shelves, legends, and the Data pane.	Tableau Worksheet asset
Tableau data sources	Tableau Data Sources consist of metadata that describe the connection information, information about how to access or refresh the data and customizations.	Tableau Data Source asset
Dimension	Dimensions contain qualitative values (such as names, dates, or geographical data).	Tableau Report Attribute asset
Measure	Measures contain numeric, quantitative values that you can measure.	Tableau Report Attribute asset
Tableau data attribute	Tableau Data Attributes define a property of a Tableau data entity.	Column asset

Tableau term	Description	Collibra DGC equivalent
Tableau data entity	Tableau Data Entities are an abstraction of the physical implementation of database tables, used for Tableau report creation.	Schema asset and Table asset
Tableau data model	Tableau Data Models are an abstraction for the physical implementation of databases, schemas, files, etc., used for Tableau report creation.	Database asset

Tableau asset and domain types

The [Tableau integration](#) of Collibra Data Governance Center uses a specific subset of [asset types](#) and [domain types](#). All of these come out of the box with your software.

The following table contains the asset and domain types that are used for the Tableau integration. Above each asset type you can see the parent asset types in the breadcrumbs.

Asset type	Description	Domain type
Business Asset › Business Dimension › BI Folder › Tableau Project	Collection of Tableau workbooks and data sources.	BI Catalog
Business Asset › Business Dimension › BI Folder › Tableau Site	Collection of content (workbooks, data sources, users, ...) that's walled off from any other content on that instance of Tableau Server.	BI Catalog

Asset type	Description	Domain type
Business Asset ▶ Report ▶ BI Report ▶ Tableau View	A representation of your data in a Tableau worksheet or dashboard.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Tableau View ▶ Tableau Dashboard	A collection of several worksheets and supporting information, shown on a single screen, so that you can simultaneously compare and monitor a variety of data.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Tableau View ▶ Tableau Story	Sequence of visualisations that work together to convey information.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Tableau View ▶ Tableau Worksheet	A worksheet is a single sheet on which you can build views of your data.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Tableau Workbook	Collection of sheets. A sheet can be a worksheet, a dashboard or a story.	BI Catalog
Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ Tableau Data Attribute	A specification that defines a property of a Tableau data entity. Examples: CustomerBirthDate, EmployeeFirstName.	BI Catalog

Asset type	Description	Domain type
Data Asset ▶ Data Element ▶ Report Attribute ▶ BI Report Attribute ▶ Tableau Report Attribute	An atomic unit of data that represents a Tableau report. Examples: ExpenseAmount, RiskAmount	BI Catalog
Data Asset ▶ Data Structure ▶ Data Entity ▶ BI Data Entity ▶ Tableau Data Entity	An abstraction from the physical implementation of database tables, used for Tableau report creation.	BI Catalog
Data Asset ▶ Data Structure ▶ Data Model ▶ BI Data Model ▶ Tableau Data Model	An abstraction from the physical implementation of database, schema, file, etc., used for Tableau report creation.	BI Catalog
Technology Asset ▶ Server ▶ BI Server ▶ Tableau Server	A visual analytics platform for creating interactive dashboards and rich visualisations	BI Catalog
Technology Asset ▶ System ▶ BI Data Source ▶ Tableau Data Source	The link between Tableau and an external system. A Tableau data source contains the information to connect to external data, table names, the table relationships, and any customizations that you make.	BI Catalog

Note The BI Data Catalog domain type was formerly known as the Tableau Data Catalog domain type.

Tableau business logic

Tableau business users usually work with Tableau projects, workbooks and worksheets to make business decisions. Collibra's [Tableau integration](#) offers business users several advantages:

- Easily find certified Tableau content.
- Shop for Tableau reports.
- Trace Tableau data to its source.
- Find where content is stored in Tableau.

Tableau asset pages

Tableau metadata is represented by [assets of various types](#). Depending on the Tableau asset type, the asset page shows different information ingested from Tableau. You can find a specific Tableau asset page using [Data Catalog search](#) or via the Data Catalog BI domains in which you ingested the Tableau metadata.

Details

An asset page contains attributes and relations to other assets. This information is synchronized from Tableau. However, you can add additional characteristics, tags or comments.

If you want to use one or more Tableau assets, you can add them to the [Data Basket](#) and check it out. You can do that for the following assets:

- Tableau Workbook
- Tableau Worksheet
- Tableau Dashboard
- Tableau Story

Example The following Tableau Worksheet asset shows in which Tableau Dashboard and Tableau Story it is used and which Tableau Report Attribute it uses. This asset and the related reports are certified, indicating that the data is considered reliable.

The screenshot shows a Tableau Data Catalog page for a 'Sales Amount (\$ Per Customer)' worksheet. The top navigation bar includes links to Business Analysts Community, Tableau Demo Server, Tableau Demo Server > Product Demo, Internet Sales Insights, and an 'Add to Data Basket' button. The main content area displays the following information:

- Details:** URL (<https://<tableau-environment>/#/site/ProductDemo/SalesAmountPerCustomer>), Certified (✓), Visits count (22).
- Responsibilities:** Document creation date (12/19/2019), Document modification date (4/15/2020).
- History:** Shows the asset was last modified on 4/15/2020.
- Files:** Shows the asset was last modified on 4/15/2020.
- Visible on server:** ✓
- used in Report:** TDSH Customer Sales Insights Dashboard and TSTR Customer Sales Insights Story, both marked as certified.
- uses Report Attribute:** TRA Customer Key, TRA Email Address, and TRA Sales Amount, all marked as certified.

Diagrams

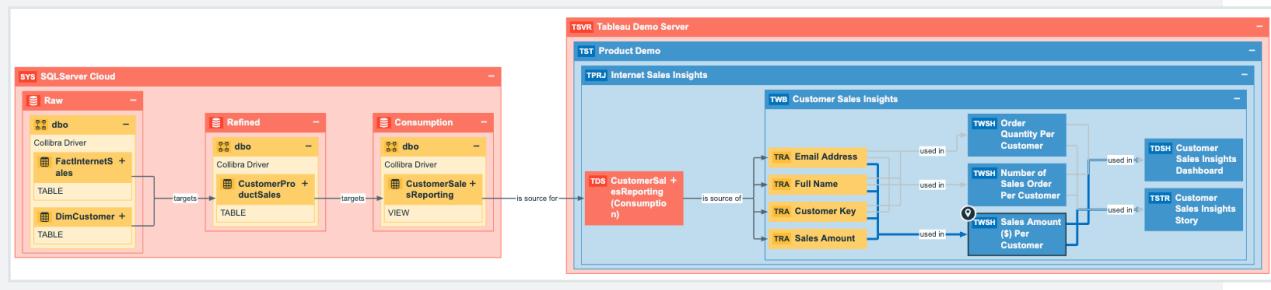
Diagrams is a feature to show and interact with assets based on their relations in an easy-to-read diagram. The diagram helps you to quickly see how assets are related. As such, the diagram can show a high-level presentation of a Tableau Workbook. If the Tableau assets are **stitched** to registered assets in Data Catalog, you can also **see the stitching results** in the diagram. This enables you, for example, to see:

- In which Tableau Project the Tableau Workbook is stored.
- In which Tableau Site the Tableau Project is stored.
- Which Tableau Data Source is the source of the Tableau Report Attributes in the

Tableau Workbook.

- Which Table assets are the source for the Tableau Data Source asset via stitching.

Example The following diagram shows the *Customer Sales Insights* Tableau Workbook, which is stored in the *Internet Sales Insights* Tableau Project. The Tableau Workbook contains Tableau Report Attributes that have the *CustomerSalesReporting* Tableau Data Source as source. This Tableau Data Source is stitched to the *CustomerSalesReporting* Table asset in the *SQL Server Cloud* data source.



Report views

The Tableau integration feature enables you to find all ingested Tableau Workbook assets and children of this asset type in a single location.

In the **Reports** tab page in Data Catalog you can see an overview of all BI Report assets and their children. Optionally, you can [create a view](#) with a [filter](#) to only show Tableau assets. This is useful if you quickly want to find a specific report or if you want to know which reports are certified.

The screenshot shows a grid of report tiles in the Tableau Report Catalog. Each tile contains a thumbnail, a title, a subtitle, and a brief description. The titles include 'Ways to Retain Implemented', 'Total Sales Revenue Per Product Implemented', 'Total Profit Label Implemented', 'Story 1 Candidate', 'Story 1', 'Sales Trend Implemented', 'Sales Trends Implemented', 'Sales Per Employee Dashboard Candidate', and 'Sales Per Employee Candidate'. The descriptions provide context for each report, such as 'Product Demo' or 'Corporate Sales Reports'.

Register a Tableau server

Before you can synchronize [Tableau](#), you have to register a Tableau server to create an initial structure of a community, a BI Catalog domain and a Tableau Server asset in a selected parent community in Collibra Data Governance Center.

Prerequisites

- You have a resource role with the [Configure external system resource permission](#), for example Owner.
- You have a [global role with the Catalog global permission](#), for example Catalog Author.
- You have a [global role that has the Manage all resources global permission](#).
- You have a role with the following [resource permissions](#) on the Tableau community you create when you [register a Tableau server](#):
 - Asset: add
 - Attribute: add

- Domain: add
- Attachment: add
- You have enabled the Tableau metadata API in [Collibra Console](#) and in [Tableau](#) if you use Tableau 2020.2 or newer.

Steps

1. In the main menu, click , then  Catalog.
» The Catalog Home opens.
2. In the main menu, click the **Create** (+) button.
3. In the **Create** dialog box, click **Register system**.
4. In the **Register system** dialog box, click **Tableau Server**.
5. In the **Register Tableau server** dialog box, enter the required information.

Field	Description
Community	The name of the parent community in which the initial Tableau structure will be created.
Tableau server name	The name of the Tableau server. The name that you fill in here will be the name of the subcommunity, the domain in this subcommunity and the Tableau Server asset.
Description	A description to provide extra information about the Tableau server. This content is used as the description of the Tableau Server asset.
Owner	The owner of the data in the created community. By default, your user is selected.

6. Click **Register**.
 - » A Tableau Server asset is created.
 - » A Tableau Catalog domain is created.
 - » The configuration page of the Tableau Server asset is automatically opened.

What's next?

You can now [connect](#) to Tableau Server or Tableau Online.

Connect to Tableau

To retrieve data from [Tableau](#), you have to connect via a Tableau Server asset. You always have to do that after registering a new Tableau Server asset. You can also edit the settings afterwards, for example, if you want to use another user than the one you originally used.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) Tableau.
- If you connect to Tableau Online, you have a Tableau user with at least Viewer rights.
- If you connect to Tableau Server, you have a Tableau user with access to at least one site.
- You have the necessary [Tableau permissions](#).

Steps

1. Open a [Tableau Server asset page](#).
2. In the tab pane, click  Configuration.
3. In the **Connection details** section, click **Edit connection details**.

- » The connection details can be edited.
4. Enter the required information.

Field	Description
On-premise s Online	The Tableau product that you use.
Tableau URL or end-point	<p>The URL of your Tableau Server or Tableau Online.</p> <p>Example <code>http://my-tableau.collibra.com</code></p>
Site ID	<p>The ID of a tableau site.</p> <p>If you connect to Tableau Online, this field is mandatory.</p> <p>If you connect to Tableau Server, this field is optional.</p> <ul style="list-style-type: none"> ◦ If you don't enter a Site ID, your Tableau user must have access to the Default site. ◦ If you enter a Site ID, your Tableau user must have access to that site. <p>Note If you connect to Tableau Server, the Site ID does not determine which sites you can synchronize from that server. It is merely used to validate the permissions of the Tableau user. In other words, even if you enter a Site ID, you can still synchronize the other sites from Tableau Server.</p> <p>Tip You can find the site ID in the URL of the Tableau site. The site ID is the string between /site/ and /projects/. In the following URL, the site ID is collibra. <code>https://example.collibra.online.tableau.com/#/site/colibra/projects</code></p>

Field	Description
User-name	The username of the Tableau user.
Pass-word	The password of the Tableau user.

5. Click **Save**.

» The connection is verified. If successful, you can see the list of available sites in Tableau.

What's next?

You can now [synchronize](#) one or more sites.

About synchronizing Tableau

Synchronizing Tableau is the process of ingesting metadata from a selected Tableau Server or Tableau Online and making the data available in Collibra Data Governance Center.

In this section, you can find the relevant actions and permissions to successfully synchronize Tableau.

Synchronizing Tableau

Synchronizing Tableau is the process of ingesting metadata from a selected Tableau Server or Tableau Online and making the data available in Collibra Data Governance Center.

Synchronization includes the following actions:

- For each Tableau site, a subcommunity is created in the community that was created during the [registration](#) of Tableau Server or Tableau Online.
- For each Tableau project, a Tableau Catalog domain is created in the community.

- In each Catalog BI domain, a Tableau Site asset is created, with the same name as the site.
- In each Catalog BI domain, the relevant **assets** are created, depending on the Tableau user's **permissions**.

Note Relations that were created between Tableau assets and other assets via a relation type in the Tableau operating model, are deleted after synchronization.

Note Currently, we only support published Tableau data sources with an extract or a live connection. For more information, see the [Tableau documentation](#).

Example

The following image shows an example structure after synchronizing Tableau.

The screenshot shows the 'Business Analysts Community' page. The left sidebar has links for Overview, Organization, Comments, Responsibilities, Assets, History, and Files. The main area has tabs for Description (selected) and Organization. The Description tab shows a note: 'No value has been given yet. Double click or use the edit button.' The Organization tab displays a hierarchical list of Tableau assets:

Name	Description	Domain Type	Owner	Stakeholder	Business Steward
New Tableau		Tableau Catalog	Admin Istrator		
Schemas	Community containing all inge...				
Tableau		Tableau Catalog	Admin Istrator		
Tableau > Annual reporting		Tableau Catalog			
Annual financial reporting					
Default		Tableau Catalog			
Tableau > Management reporting					
Tableau > Wholesale reporting					
Tableau		Tableau Catalog			
New Data Sets		Data Usage Registry			

Starting synchronization

You can [synchronize manually](#), or you can automate it by [adding a synchronization schedule by means of a cron expression](#).

You can only synchronize one Tableau Server asset at a time. If a synchronization job is in progress and a second one is triggered, manually or automatically, it will be queued.

If a synchronization job is still running and a new synchronization of the same Tableau Server asset is triggered (manually or automatically), the running synchronization will continue and the new synchronization request is ignored.

Note If you have [stitched](#) Tableau's logical data layer to Data Catalog physical data layer, you have to restitch to make sure that all relations are up to date.

Synchronization errors

In the following situations, nothing is synchronized and no subcommunities, domains or assets are created:

- If the job fails to start due to connection problems.
- If the job fails in the middle of the procedure.
- If the job is canceled.

Warning If you upgrade to Tableau version 2020.2 or newer, but previously synchronized an older Tableau version via the REST API and XML mapping, you have to prepare the [migration procedure](#) to prevent losing manually added relations, attributes, tags, comments and stitching results.

Naming convention

When you synchronize Tableau, Collibra DGC follows a strict naming convention for the [names](#) of the new assets. Each asset has a display name and full name. The full name represents the asset path from asset to the database it belongs to. You can freely edit the display name. However, you should never edit the full name, because Data Catalog may need it to synchronize and [stitch](#) data sources. This may cause unexpected results and break the synchronization process.

Warning Editing full name of the Tableau Server or Tableau Online assets may lead to errors during the synchronization process.

Synchronized Tableau data

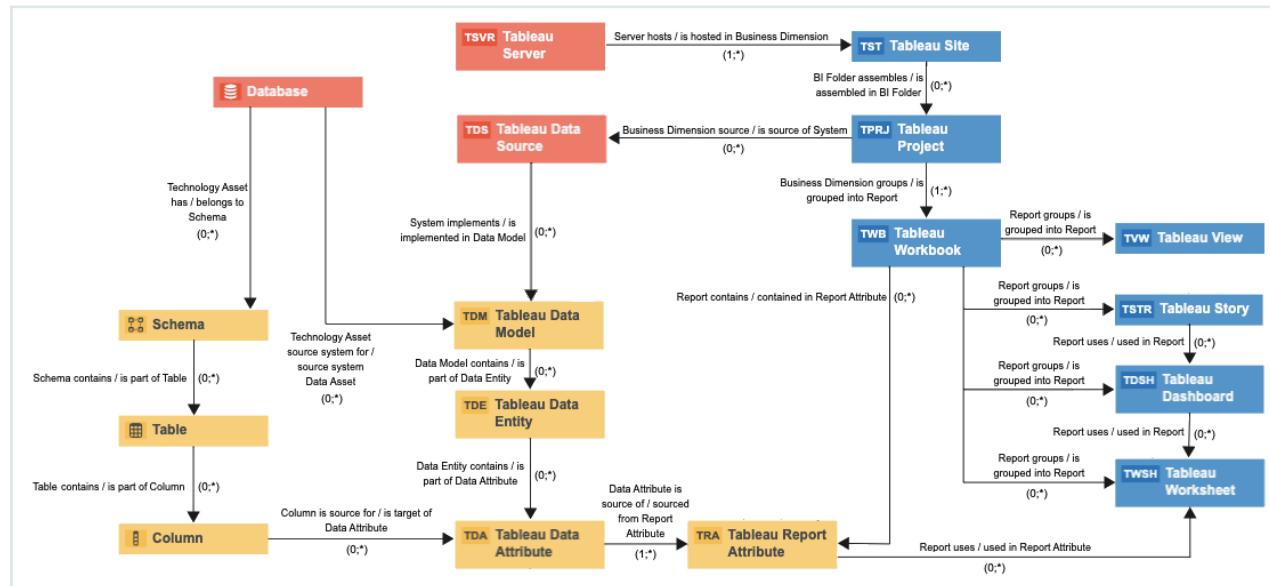
The Tableau integration ingests metadata from Tableau. This metadata is represented as assets of specific types and their characteristics. You can see them on the asset page overview or visualize them in a diagram.

Note

- The assets have the same names as their counterparts in Tableau.
- Some asset types are only created if the Tableau user has specific permissions.
- If the Tableau data has tags, they are also added to the corresponding assets in Collibra DGC with the prefix *Tableau_*.
- Relations that were created between Tableau assets and other assets via a relation type in the Tableau operating model, are deleted after synchronization.

Tableau operating model

The following image shows the relations between Tableau asset types and the cardinality of the relation types in the assets' assignment.



Synchronized metadata per asset type

This table shows the metadata for each Tableau asset type.

Asset type	Synchronized metadata
Tableau Server	<ul style="list-style-type: none"> • URL • Server hosts / is hosted in Business Dimension
Tableau Site	<ul style="list-style-type: none"> • URL: The link to the data in Tableau • Original name: The name of the data as used in Tableau • BI Folder assembles / Is assembled in BI Folder • Server hosts / is hosted in Business Dimension
Tableau Project	<ul style="list-style-type: none"> • Description • Original name: The name of the project in Tableau • Business Dimension groups / grouped into Report • Business Dimension source is / source of System • BI Folder assembles / is assembled in BI Folder • Business Asset groups / is grouped by Business Asset
Tableau Workbook	<ul style="list-style-type: none"> • Certified • Original name: The name of the workbook in Tableau. • Report image: The image of the report. <p>Note</p> <ul style="list-style-type: none"> ◦ Images are not downloaded or stored in Data Catalog. Instead, Data Catalog stores a link to the image. Every time you open the asset page, the image is fetched from Tableau. If the images do not render correctly, see the Troubleshooting section. ◦ You can also exclude images from synchronization in the Tableau sites section on the Configuration page of the Tableau Server asset. <ul style="list-style-type: none"> • File size • Document creation date • Document modification date • Report groups / is grouped into Report • Report is grouped in / groups Business Dimension • Report relates / is impacted by Business Asset • Report Attribute contained in / contains in Report • Technology Asset is source for / sourced from Business Asset

Asset type	Synchronized metadata
Tableau View	<ul style="list-style-type: none"> • URL: The link to the data in Tableau • Certified • Original name: The name of the view in Tableau. • Report image: The image of the report <p data-bbox="504 512 584 545">Note</p> <ul style="list-style-type: none"> ◦ Images are not downloaded or stored in Data Catalog. Instead, Data Catalog stores a link to the image. Every time you open the asset page, the image is fetched from Tableau. If the images do not render correctly, see the Troubleshooting section. ◦ You can also exclude images from synchronization in the Tableau sites section on the Configuration page of the Tableau Server asset. <ul style="list-style-type: none"> • Visits count: The number of times that the view has been visited in Tableau • Document creation date • Document modification date • Visible on server • Tags • Report groups /is grouped into Report • Report relates / is impacted by Business Asset <p data-bbox="465 1354 1335 1477">Note Assets of this type are only created if the Tableau user does not have the Download/Save As permission on the workbook.</p>

Asset type	Synchronized metadata
Tableau Story	<ul style="list-style-type: none"> • URL: The link to the data in Tableau • Certified • Original name: The name of story in Tableau. • Report image: The image of the report. <p data-bbox="504 512 584 545">Note</p> <ul style="list-style-type: none"> ◦ Images are not downloaded or stored in Data Catalog. Instead, Data Catalog stores a link to the image. Every time you open the asset page, the image is fetched from Tableau. If the images do not render correctly, see the Troubleshooting section. ◦ You can also exclude images from synchronization in the Tableau sites section on the Configuration page of the Tableau Server asset. <ul style="list-style-type: none"> • Visits count: The number of times that the view has been visited in Tableau. • Document creation date • Document modification date • Visible on server • Tags • Report groups /is grouped into Report • Report related to / is impacted by Business Asset • Report uses / used in Report <p data-bbox="465 1410 1335 1489">Note Assets of this type are only created if the Tableau user has the Download/Save As permission on the workbook.</p>

Asset type	Synchronized metadata
Tableau Dashboard	<ul style="list-style-type: none"> • URL: The link to the data in Tableau • Certified • Original name: The name of story in Tableau. • Report image: The image of the report. <p data-bbox="504 512 584 545">Note</p> <ul style="list-style-type: none"> ◦ Images are not downloaded or stored in Data Catalog. Instead, Data Catalog stores a link to the image. Every time you open the asset page, the image is fetched from Tableau. If the images do not render correctly, see the Troubleshooting section. ◦ You can also exclude images from synchronization in the Tableau sites section on the Configuration page of the Tableau Server asset. <ul style="list-style-type: none"> • Visits count: The number of times that the view has been visited in Tableau. • Document creation date • Document modification date • Visible on server • Tags • Report groups /is grouped into Report • Report related to / is impacted by Business Asset • Report uses / used in Report <p data-bbox="465 1410 1335 1489">Note Assets of this type are only created if the Tableau user has the Download/Save As permission on the workbook.</p>

Asset type	Synchronized metadata
Tableau Worksheet	<ul style="list-style-type: none"> • URL: The link to the data in Tableau • Certified • Original name: The name of the data as used in Tableau • Report image: The image of the report. <p data-bbox="504 512 584 545">Note</p> <ul style="list-style-type: none"> ◦ Images are not downloaded or stored in Data Catalog. Instead, Data Catalog stores a link to the image. Every time you open the asset page, the image is fetched from Tableau. If the images do not render correctly, see the Troubleshooting section. ◦ You can also exclude images from synchronization in the Tableau sites section on the Configuration page of the Tableau Server asset. <ul style="list-style-type: none"> • Visits count: The number of times that the view has been visited in Tableau. • Document creation date • Document modification date • Visible on server • Tags • Report contains / is contained in Business Asset • Report uses / used in Report Attribute <p data-bbox="466 1356 1335 1435">Note Assets of this type are only created if the Tableau user has the Download/Save As permission on the workbook.</p>

Asset type	Synchronized metadata
Tableau Report Attribute	<ul style="list-style-type: none"> • Description • Original Name: The name of the attribute as used in Tableau • Technical Data Type • Calculation formula: Formula used in measure • Report Attribute contained in / contains in Report • Report Attribute is source for / is target of Report Attribute • Report Attribute sourced from / is source of Data Attribute • Report uses / used in Report Attribute <p>Note</p> <ul style="list-style-type: none"> • Assets of this type are only created if the Tableau user has the Download/Save As permission on the workbook. • These are only the report attributes that are used in Tableau Worksheet of the Tableau Workbook.
Tableau Data Attribute	<ul style="list-style-type: none"> • Original Name: The name of the attribute as used in Tableau • Technical Data Type: The Data Type of a data asset as it is declared by the data source. • Report Attribute sourced from / is source of Data Attribute <p>Note Assets of this type are only created if the Tableau user has the Download/Save As permission on the data source.</p>
Tableau Data Entity	<ul style="list-style-type: none"> • Data Entity contains / is part of Data Attribute • Data Entity is part of / contains Data Model • Technology Asset implements / is implemented in Data Asset <p>Note Assets of this type are only created if the Tableau user has the Download/Save As permission on the data source.</p>

Asset type	Synchronized metadata
Tableau Data Model	<ul style="list-style-type: none"> • Data Source Type • Location • Data Entity is part of / contains Data Model • System implements / is implemented in Data Model <p data-bbox="462 534 1335 624">Note Assets of this type are only created if the Tableau user has the Download/Save As permission on the data source.</p>
Tableau Data Source (Published only)	<ul style="list-style-type: none"> • Certified • Original name: The name of the data as used in Tableau • Document creation date • Document modification date • Business Dimension sources / is source of System • System implements / is implemented in Data Set • Technology Asset implements /is implemented in Data Asset <p data-bbox="462 1051 1335 1163">Note Currently, we only support published data sources with an extract or a live connection. For more information, see the Tableau documentation.</p>

Examples of synchronized metadata

The following image shows an example structure after synchronizing Tableau.

Chapter 7

The screenshot shows a community management interface for the "Business Analysts Community". The left sidebar includes sections for Overview, Responsibilities, Assets, History, and Files. The main content area displays a hierarchical tree under the "Organization" tab, with columns for Name, Description, Domain Type, Owner, Stakeholder, and Business Steward.

Name	Description	Domain Type	Owner	Stakeholder	Business Steward
New Tableau	No value has been given yet. Double click or use the edit button.	Tableau Catalog	Admin Istrator		
New Tableau	Community containing all inge...	Tableau Catalog	Admin Istrator		
Schemas		Tableau Catalog			
Tableau		Tableau Catalog	Admin Istrator		
Tableau > Annual reporting		Tableau Catalog			
Annual financial reporting		Tableau Catalog			
Default		Tableau Catalog			
Tableau > Management reporting		Tableau Catalog			
Tableau > Wholesale reporting		Tableau Catalog			
Tableau		Tableau Catalog			
New Data Sets		Data Usage Registry			

The following image shows an example of a diagram of a Tableau server.

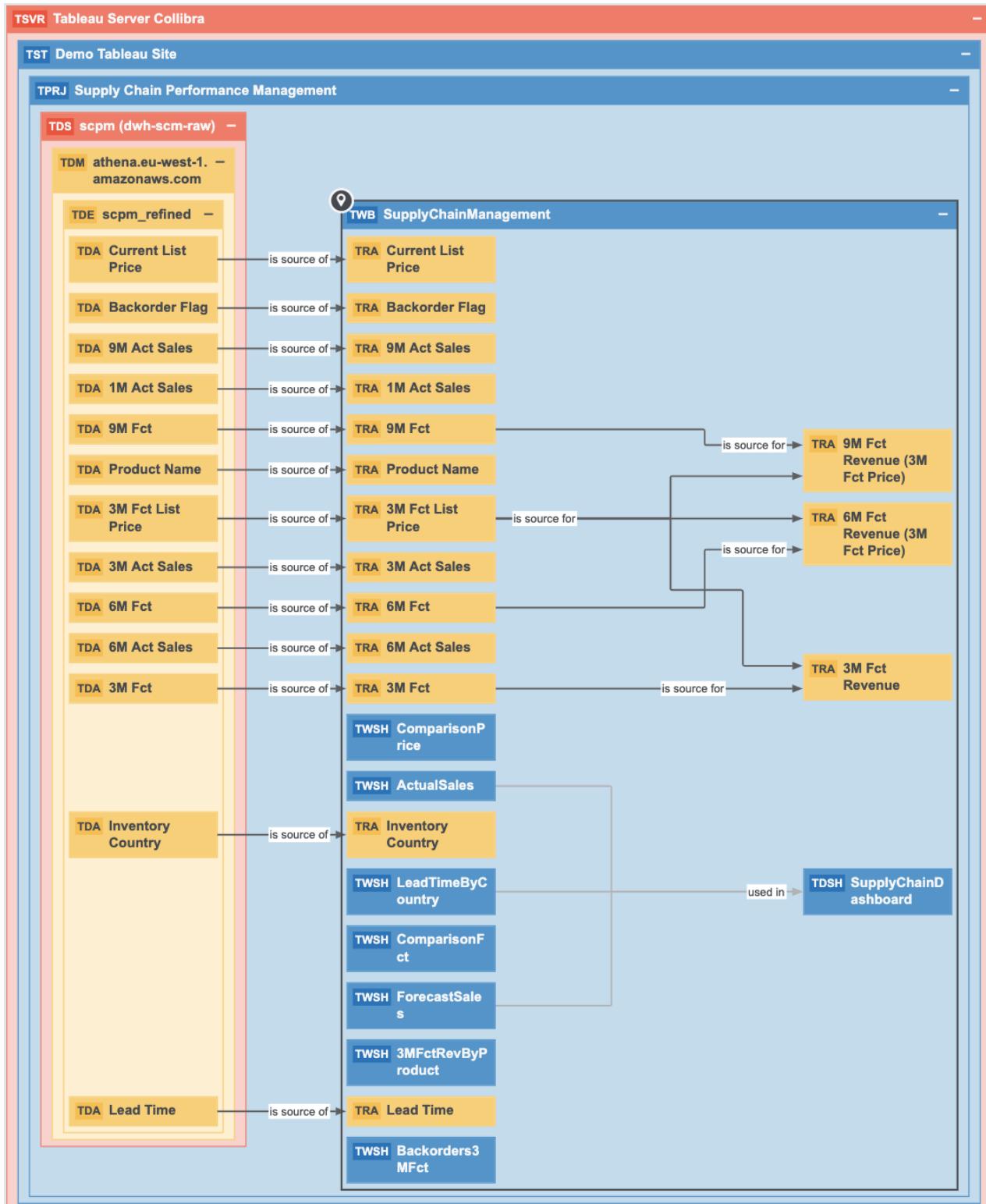


Tableau permissions and ingestion results

When you [synchronize Tableau](#), you need permissions to the data in Tableau.

Depending on the amount and type of permissions in Tableau, you may see more assets, and have more precise [metadata](#) on the Tableau assets.

To synchronize successfully, you need at least the role and permissions as listed in the table below.

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
Older than 2020.2	Viewer	View	View	View	<p>Tableau Workbooks and Tableau Data Sources are not parsed.</p> <p>Resulting asset types:</p> <ul style="list-style-type: none"> • Tableau Server • Tableau Site • Tableau Project • Tableau Data Source • Tableau Workbook • Tableau View

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
Older than 2020.2	Explorer Note If your Tableau version is older than 2018.1, the Tableau site role is Interactor.	View	View	View, Download/Save As	<p>Tableau Data Sources are parsed.</p> <p>Resulting asset types:</p> <ul style="list-style-type: none"> • Tableau Server • Tableau Site • Tableau Project • Tableau Workbook • Tableau View • Tableau Data Source • Tableau Data Model • Tableau Data Entity • Tableau Data Attribute

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
Older than 2020.2	Explorer Note If your Tableau version is older than 2018.1, the Tableau site role is Interactor.	View	View, Download/Save As	View	<p>Tableau Report Attributes are synchronized and Tableau Workbooks are parsed.</p> <p>Resulting asset types:</p> <ul style="list-style-type: none"> • Tableau Server • Tableau Site • Tableau Project • Tableau Data Source • Tableau Workbook • Tableau Story • Tableau Dashboard • Tableau Worksheet

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
Older than 2020.2	Explorer Note If your Tableau version is older than 2018.1, the Tableau site role is Interactor.	View	View, Download/Save As	View, Download/Save As	<p>Tableau Report Attributes are synchronized, and Tableau Data Sources and Tableau Workbooks are parsed.</p> <p>Resulting asset types:</p> <ul style="list-style-type: none"> • Tableau Server • Tableau Site • Tableau Project • Tableau Data Source • Tableau Data Model • Tableau Data Entity • Tableau Data Attribute • Tableau Workbook • Tableau Story

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
					<ul style="list-style-type: none">• Tableau Dashboard• Tableau Worksheet

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
2020.2 and newer	Viewer or Explorer	View	View	View	If you enabled the metadata API, Data Catalog creates new assets according to your content in Tableau without accessing metadata in Tableau databases and tables. Resulting asset types: <ul style="list-style-type: none">• Tableau Server• Tableau Site• Tableau Project• Tableau Data Source• Tableau Workbook• Tableau Story• Tableau

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
					<p>Dashboard</p> <ul style="list-style-type: none"> • Tableau Worksheet <p>If you did not enable the Tableau metadata API, Tableau reports and data sources are ingested into Catalog, but with a limited scope.</p> <p>Resulting asset types:</p> <ul style="list-style-type: none"> • Tableau Server • Tableau Site • Tableau Project • Tableau Data Source • Tableau Workbook • Tableau View

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
2020.2 and newer	Tableau Server Administrator or Site Administrator	View	View	View	If the metadata API is enabled , Data Catalog creates new assets according to your content in Tableau using metadata in Tableau databases and tables. Resulting asset types: <ul style="list-style-type: none">• Tableau Server• Tableau Site• Tableau Project• Tableau Data Source• Tableau Report Attribute• Tableau Data Model

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
					<ul style="list-style-type: none"> • Tableau Data Entity • Tableau Data Attribute • Tableau Workbook • Tableau Story • Tableau Dashboard • Tableau Worksheet <p>If you did not enable the Tableau metadata API, Tableau reports and data sources are ingested into Catalog, but with a limited scope.</p> <p>Resulting asset types:</p> <ul style="list-style-type: none"> • Tableau Server • Tableau Site • Tableau

Tableau version	Tableau site role	Minimum required permissions			Result in Data Catalog
		Project	Workbook	Data Source	
					Project • Tableau Data Source • Tableau Workbook • Tableau View

Warning We do not support a full ingestion of Tableau Server or Tableau Online version 2020.2 or newer if the metadata API is disabled. If you try to synchronize a Tableau Server or Tableau Online asset after a Tableau upgrade to 2020.2 or newer without the metadata API, the synchronization result in Data Catalog will fail. This prevents data loss of manually added relations and attributes.

Tip For more information about Tableau permissions, site roles and licenses, see the [Tableau Online Help](#).

Tableau data structure

You can only synchronize Tableau elements if the Tableau user has permissions to them. You may have permission to a Tableau element, but not to its parent elements. Consequently, these parent elements are skipped when synchronizing Tableau and do not appear in Data Catalog.

This happens in the following situations:

- The Tableau user has permission to a Tableau workbook, but no permissions to its parent, the Tableau project.
- The Tableau user has permission to a Tableau view, but no permissions to its parent, the Tableau workbook.
- The Tableau user has permission to a Tableau view, but no permissions to its parent, the Tableau project.

Metadata API

If you [register](#) a Tableau Server or Tableau Online version 2020.2 or newer, Data Catalog requires the metadata API to synchronize Tableau assets.

Tableau metadata consists of information about Tableau content and assets. Data Catalog creates GraphQL queries to collect metadata from Tableau Online or Tableau Server. If the metadata API is enabled in [Tableau](#) and in [Collibra Console](#), Collibra Data Governance Center uses this metadata to create new assets in Data Catalog.

Upgrading Tableau to 2020.2 or newer

If you have previously ingested and synchronized a version of Tableau older than 2020.2 and have since upgraded to version 2020.2 or newer, you have to enable the metadata API in [Tableau](#) and in [Collibra Console](#). If you synchronize using the metadata API, Data Catalog removes all Tableau assets created via XML mapping and creates new ones using the [metadata API](#). This means that all manually added relations, attributes, tags, comments and stitching results will be lost.

Tip We highly recommend to contact your Collibra Customer Success Manager before you synchronize a Tableau Server or Tableau Online asset after [upgrading to Tableau version 2020.2 or newer](#).

Parsing Tableau metadata

Parsing Tableau metadata is an automated procedure that allows the metadata to be captured and identified in Data Catalog at a more granular level. Typically, the result is that you have more assets of different types in Data Catalog, which leads to more complete information and better lineage diagrams.

Parsing takes place automatically during Tableau [synchronization](#), depending on the Tableau permissions of the Tableau user who launched the synchronization process.

Parsing Tableau workbooks

Without parsing, Tableau Workbooks contain Tableau Views, without further details. However, if your Tableau user has the Download/Save As permission for the Workbook, the Tableau workbook is parsed. As a consequence, there is no Tableau View asset, but there is at least one Worksheet asset, and, if they exist on Tableau: Tableau Story assets and Tableau Dashboard assets.

Without Parsing	With Parsing
<ul style="list-style-type: none"> • Tableau Workbook • Tableau View 	<ul style="list-style-type: none"> • Tableau Workbook • Tableau Story • Tableau Dashboard • Tableau Worksheet

Parsing Tableau Data Source

Without parsing, Tableau Data Sources do not contain further information about the data source. However, if your Tableau user has the Download/Save As permission for the Data Source , the Tableau Data Source is parsed. As a consequence, there is at least one Tableau Data Model asset and one or more Tableau Data Entity assets and Tableau Data Attribute assets. These assets are required for [Tableau stitching](#).

Without parsing	With parsing
<ul style="list-style-type: none"> • Tableau Data Source 	<ul style="list-style-type: none"> • Tableau Data Source <ul style="list-style-type: none"> ◦ Tableau Data Model ◦ Tableau Data Entity ◦ Tableau Data Attribute

Working with Tableau APIs

When you [register](#) or [synchronize](#) a Tableau Server, Data Catalog uses the Tableau APIs to ingest the Tableau metadata. Data Catalog uses different APIs depending on your version of Tableau. This happens automatically and should have little impact on the resulting assets. However, if you synchronize Tableau 2020.2 or newer, you must perform a few extra actions.

Tableau versions

The following table shows which APIs Data Catalog uses to register or synchronize a Tableau Server.

Tableau versions using the REST API and XML parsing	Tableau versions using the REST API in combination with the GraphQL metadata API
<ul style="list-style-type: none">• 10.4• 10.5• 2018.x• 2019.x• 2020.1	<ul style="list-style-type: none">• 2020.2• 2020.3• 2020.4

Warning If you upgrade to Tableau version 2020.2 or newer, but previously synchronized an older Tableau version via the REST API and XML mapping, you have to prepare the [migration procedure](#) to prevent losing manually added relations, attributes, tags, comments and stitching results.

Differences between the metadata API and XML parsing via REST API

The following table shows the differences and similarities between the metadata API and the REST API with XML parsing.

Part of synchronization process	REST API and XML parsing	Metadata API
API	<p>Data Catalog connects to Tableau via the REST API and uses custom parsing mechanisms. The result is XML data.</p>	<p>Data Catalog connects to Tableau via the REST API and the metadata API. The result is GraphQL data.</p> <p>Note We highly recommend that you synchronize Tableau after working hours. This is necessary to make sure that no Tableau data is added, changed, renamed or deleted on Tableau's side during the synchronization process. If there are any inconsistencies between the Tableau data collected via the REST API and Tableau data collected via the GraphQL metadata API, the corresponding Tableau assets are not synchronized in Data Catalog.</p>

Part of synchronization process	REST API and XML parsing	Metadata API
Settings	You don't need change any settings to start Tableau synchronization.	You have to enable the Tableau metadata API in Collibra Console before you can ingest or synchronize. <div style="background-color: #f0f8ff; padding: 10px; margin-top: 10px;"> Note Also make sure that the Tableau metadata API is enabled in Tableau. </div>
Relevant asset types	The resulting Tableau assets that are created after registering or synchronizing a Tableau Server are similar and mainly depend on the permissions of your Tableau user.	
Performance	Performance results are similar.	
Collibra Data Governance Center permissions	The required permissions are the same: a resource role with the Configure external system resource permission.	
Stitching	Stitching works the same.	

Migration procedure

When you synchronize a Tableau Server for the first time after you upgraded to Tableau 2020.2 or newer, Data Catalog tries to match your Tableau assets that were previously ingested via the Tableau REST API in Data Catalog to their counterparts in Tableau. If the asset names match, Data Catalog changes the full name of the Tableau assets without removing manually added data and stitching results.

To make sure Collibra Data Intelligence Cloud is able to match your Tableau assets in Data Catalog to their counterparts in Tableau, you must prepare the [migration procedure](#).

Tip We highly recommend that you [create a backup](#) of your Collibra environment before synchronizing a Tableau Server asset after you upgraded to Tableau 2020.2 or newer. We also recommend that you synchronize the first time after working hours.

Prepare migration after upgrading to Tableau 2020.2 or newer

If you upgraded to Tableau version 2020.2 or newer, but previously synchronized an older version via [XML mapping](#), Data Catalog changes the full names of your Tableau assets to match them to their counterparts in Tableau. This is necessary to prevent losing manually added relations, attributes, tags, comments and stitching results.

You only have to follow these steps once after your upgrade to Tableau 2020.2 or newer. After that, you can follow the default [synchronization process](#).

Note Collibra Data Intelligence Cloud can only migrate your assets if:

- All Tableau Report Attribute assets have the same name as their counterparts in Tableau.
- Each Tableau Report Attribute asset name is unique within the same Tableau workbook.

Tip If you never manually changed the name of the assets in Data Catalog, they should automatically be the same as their counterparts in Tableau.

Prerequisites

- You have [registered](#) Tableau.
- You have [connected](#) a Tableau Server asset to a Tableau Server or Tableau Online.
- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [resource role](#) with the Asset > Update [resource permission](#).

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have previously ingested Tableau 2020.1 or older and have since upgraded to Tableau 2020.2 or newer.
- Your Tableau user has the right [permissions](#) to synchronize Tableau 2020.2 or newer.
- You have [enabled](#) the Tableau metadata API in Tableau.

Steps

1. Match the names of all Tableau Report Attributes assets of a Tableau Workbook with their counterparts in Tableau.

- a. Open a Tableau Report Attribute asset page.
- b. In the resource toolbar, click **Edit**.
 - » The **Edit <asset name>** dialog box appears.
- c. Change the name of the asset to the exact name used in Tableau.
- d. Click **Save**.

Tip We highly recommend that you also match the display names of Tableau Data Attribute assets, Tableau Data Entity assets and Tableau Data Model assets. While Data Catalog automatically tries to match these assets to their counterparts in Tableau based on the Tableau Report Attribute asset, making sure the Tableau assets have the same name helps to prevent issues. Unless you manually changed their names in Data Catalog, the names should already be the same as their counterparts in Tableau.

2. Optionally, [create a backup](#) of your Collibra environment.

Note We highly recommend that you create a backup before you synchronize a Tableau Server to prevent losing data in Data Catalog if something goes wrong during the migration process.

3. [Enable](#) the Tableau metadata API in Collibra Console.

4. Synchronize a Tableau Server asset after working hours.

Note We highly recommend that you synchronize the first time after upgrading to Tableau 2020.2 or newer after working hours. This is necessary to make sure that no Tableau data is added, changed, renamed or deleted on Tableau's side during the synchronization process.

- a. Open a [Tableau Server asset page](#).
- b. In the tab pane, click  Configuration.
- c. In the **Tableau sites** section, do the following:
 - i. Select one or more sites.
 - ii. Enable or disable report images as required for each site.

Note Images are never downloaded or stored in Data Catalog. Depending on the Report image setting, Data Catalog either ignores images completely or stores a link to the image on Tableau and loads that image when you open the relevant asset page.

- d. In the **Tableau sites** section, click **Synchronize now**.
 - » The synchronization job appears in the **Activities** list as a bulk synchronization.
 - » The full names of the Tableau assets are updated to include the GraphQL ID.
 - » The log files show a summary of the migration process.

Example

```
"Summary of tableau xml to graphql data migration for  
site with id <Tableau-site-ID> and name <Tableau-site-  
name> executed on server"
```

The log files also show how many Tableau assets were found in Data Catalog and how many were migrated to match their counterparts in Tableau.

Example

```
"Found 50 existing xml assets to migrate.";  
"Migrated 48 assets.";
```

If some Tableau assets could not be migrated, Collibra Data Intelligence Cloud recreates the Tableau asset so that it matches in Tableau. The log file shows how many and which assets were recreated in Data Catalog.

Example

```
"It was impossible to migrate 2 assets. These assets  
were re-created based on graphql data.";  
    List of assets that were not migrated:  
        ID: xxxxxxxx-xxxx-xxxx-xxx, Fullname: Tableau-  
migration > tableaumigration.xxxxx > [tableau-  
migration-asset-name-1] (Tableau Report Attribute).",  
        ID: xxxxxxxx-xxxx-xxxx-xxx, Fullname: Tableau-  
migration > tableaumigration.xxxxx > [tableau-  
migration-asset-name-2] (Tableau Report Attribute)."
```

Synchronize Tableau site manually

You can manually start a [synchronization](#) job of a Tableau Server asset. This can be useful if you don't want to wait for the scheduled job to synchronize your Tableau sites.

Warning You can choose which sites to synchronize after successfully connecting to Tableau. Select the same or more sites when you synchronize again. If you only synchronize some of the Tableau sites, Data Catalog [deletes](#) all other Tableau sites and their content from Collibra Data Governance Center.

Tip You can also [add](#) a synchronization schedule to synchronize automatically.

Prerequisites

- You have [registered](#) Tableau.
- You have [connected](#) a Tableau Server asset to a Tableau Server or Tableau Online.
- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a role with the following [resource permissions](#) on the Tableau community you create when you [register a Tableau server](#):
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add
- If you want to [stitch](#) Tableau's logical data layer to Data Catalog's physical data layer, the Tableau user must have the Download/Save As permission on the data source.
- You have enabled the Tableau metadata API in [Collibra Console](#) and in [Tableau](#) if you use Tableau 2020.2 or newer.

Warning If you upgrade to Tableau version 2020.2 or newer, but previously synchronized an older Tableau version via the REST API and XML mapping, you have to prepare the [migration procedure](#) to prevent losing manually added relations, attributes, tags, comments and stitching results.

Steps

1. Open a [Tableau Server asset page](#).
2. In the tab pane, click  Configuration.

3. In the **Tableau sites** section, do the following:

- a. Select one or more sites.
- b. Enable or disable report images as required for each site.

Note Images are never downloaded or stored in Data Catalog. Depending on the Report image setting, Data Catalog either ignores images completely or stores a link to the image on Tableau and loads that image when you open the relevant asset page.

4. In the **Tableau sites** section, click **Synchronize now**.

- » The synchronization job appears in the **Activities** list as a bulk synchronization.

Note We highly recommend that you synchronize a Tableau Server version 2020.02 and newer after working hours. This is necessary to make sure that no Tableau data is added, changed, renamed or deleted on Tableau's side during the synchronization process. If there are any inconsistencies between the Tableau data collected via the [REST API](#) and Tableau data collected via the GraphQL metadata API, the corresponding Tableau assets are not synchronized in Data Catalog.

Tip If your Tableau synchronization fails, go to the [troubleshooting section](#) to find a solution.

What's next?

When the synchronization finishes, the [resulting assets](#), including their attributes and relations, are created, edited or deleted in the selected domain(s) and in the [Data Sources page](#) of Data Catalog.

If you have [stitched](#) Tableau's logical data layer to Data Catalog's physical data layer, you have to restitch to make sure that all relations are up to date.

Add a Tableau synchronization schedule

To keep the content of Collibra Data Governance Center [synchronized](#) with your Tableau Server or Tableau online, you can synchronize manually or create a schedule to automatically do this with a fixed interval.

Note

- You can only create one synchronization schedule.
- If you have **stitched** Tableau's logical data layer to Data Catalog physical data layer, you have to **restitch** after each synchronization to make sure that all relations are up to date.
- We highly recommend that you synchronize a Tableau Server version 2020.02 and newer after working hours. This is necessary to make sure that no Tableau data is added, changed, renamed or deleted on Tableau's side during the synchronization process. If there are any inconsistencies between the Tableau data collected via the **REST API** and Tableau data collected via the GraphQL metadata API, the corresponding Tableau assets are not synchronized in Data Catalog.

Prerequisites

- You have a resource role with the Configure external system **resource permission**, for example Owner.
- You have a **global role** with the Catalog **global permission**, for example Catalog Author.
- You have a role with the following **resource permissions** on the Tableau community you create when you **register a Tableau server**:
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add
- You have **registered** Tableau.
- You have **connected** a Tableau Server asset to a Tableau Server or Tableau Online.
- You have enabled the Tableau metadata API in **Collibra Console** and in **Tableau** if you use Tableau 2020.2 or newer.

Warning If you upgrade to Tableau version 2020.2 or newer, but previously synchronized an older Tableau version via the REST API and XML mapping, you have to prepare the **migration procedure** to prevent losing manually added relations, attributes, tags, comments and stitching results.

Steps

1. Open a [Tableau Server asset page](#).
2. In the tab pane, click  Configuration.
3. In the **Synchronization schedule** section, click **Add Schedule**.
4. Enter the required information.

Field	Description
Cron	The Quartz Cron expression that determines when the synchronization will take place.
Timezone	The time zone for the Cron expression.

5. Click **Save**.

Tip If your Tableau synchronization fails, go to the [troubleshooting section](#) to find a solution.

Edit a Tableau synchronization schedule

You can edit the [synchronization](#) schedule of a Tableau Server asset. For example, you can do this if you think the synchronization job runs too often or not often enough.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) Tableau.
- You have [connected](#) a Tableau Server asset to a Tableau Server or Tableau Online.
- You have [added](#) a synchronization schedule.

Steps

1. Open a [Tableau Server asset page](#).
2. In the tab pane, click  Configuration.
3. In the **Synchronization schedule** section, click **Edit Schedule**.
4. Enter the required information.

Field	Description
Cron	The Quartz Cron expression that determines when the synchronization will take place.
Timezone	The time zone for the Cron expression.

5. Click **Save**.

Remove a Tableau synchronization schedule

You can remove a [synchronization](#) schedule from a Tableau Server asset to stop automatically synchronizing Tableau.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [registered](#) Tableau.
- You have [connected](#) a Tableau Server asset to a Tableau Server or Tableau Online.
- You have [added](#) a synchronization schedule.

Steps

1. Open a [Tableau Server asset page](#).
2. In the tab pane, click  Configuration.
3. In the **Synchronization schedule** section, click **Remove Schedule**.

Delete a Tableau site from Collibra DGC

You can delete a Tableau site and all of its contents from the Tableau site synchronization. Collibra Data Governance Center then deletes the community related to the Tableau site, including the domains and assets that it contains.

Note The **Tableau sites** section on a Tableau Server asset page shows all sites that exist in Tableau. If you want to remove Tableau sites from this list, you must remove them in Tableau.

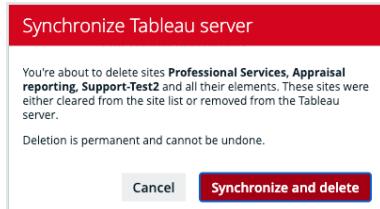
Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have [connected](#) a Tableau Server asset to a Tableau Server or Tableau Online.
- You have [registered](#) Tableau.
- You have [synchronized](#) Tableau at least once.

Steps

1. Open a [Tableau Server asset page](#).
2. In the tab pane, click  Configuration.
3. In the **Tableau sites** section, clear the sites that you want to delete from Data Catalog.

Tip Only select the Tableau sites that you would like to keep. If you want to delete all Tableau sites from Data Catalog, clear all checkboxes.
4. In the **Tableau sites** section, click **Synchronize now**.
 - » The **Synchronize Tableau server** dialog box appears.



5. Click **Synchronize and delete**.

- » The synchronization job appears in the **Activities** list as a bulk synchronization.
- After the synchronization, the cleared sites are deleted.

What's next?

If you deleted the wrong Tableau site or you want to reintroduce it, you can select that Tableau site and [synchronize](#) it again.

Tableau stitching

Stitching is a process that creates relations between assets representing the same data source: the data source of a Tableau report and the Data Catalog database. This allows you to clearly represent the lineage from the data source to the Tableau reports where it is used. As a consequence, you can easily perform impact analyses. For example, you can quickly see which reports will be affected if you refresh a table of your database, or which reports will be impacted if you drop one column from the table.

About Tableau stitching

Before you can perform stitching, you have to ingest a Tableau report—including its data source—and register that data source separately in Data Catalog. The same data is then represented by Tableau assets as well as by regular Data Catalog assets such as Schema, Table and Column assets. Tableau stitching is based on the matching of the full name of Tableau Data Attribute assets and Column assets of registered data sources in Data Catalog. Follow the steps in the table below to enable Collibra Data Governance Center to automatically create relations between Tableau assets and assets of a registered data source in Data Catalog.

Note

- You can only perform stitching if the Tableau report is based on a database. Stitching Tableau reports based on files such as CSV is not supported.
- Tableau stitching is based on full names and is case-sensitive. As a consequence, we recommend that you do not manually edit any asset names of data sources or Tableau assets. See the [Tableau naming convention](#) for more information.

Tableau stitching steps

To use Tableau stitching, you have to prepare the assets representing the data source in Tableau's logical data layer and in Data Catalog's physical data layer:

Step	What	Simplified instructions
1	Prepare the Tableau logical data layer.	<ol style="list-style-type: none"> 1. Register Tableau Server or Tableau Online. 2. Connect to Tableau Server or Tableau Online. 3. Synchronize Tableau sites.
2	Prepare the physical data layer.	<ol style="list-style-type: none"> 1. Register a database as data source. 2. Create a Database asset with the same name as the data source. 3. Create a relation between the Database asset and the Schema asset using the Technology Asset has / belongs to Schema relation type.
3	Stitch Tableau logical data layer and physical data layer.	<ol style="list-style-type: none"> 1. On the Tableau Data Model asset page, click Stitch with data source.
4	View stitching results.	<ol style="list-style-type: none"> 1. Open the asset page of the Tableau Server asset. 2. In the tab pane, click Diagram. 3. In the Explore drop-down list, select Data Catalog Lineage 5.7.

Note

- If there were changes in Tableau or the data source, you have to do the following:
 - a. [Synchronize](#) Tableau. This can be done manually or automatically, by means of a synchronization schedule.
 - b. [Refresh](#) the schema of your data source. This can be done manually or automatically, by [scheduling](#) it during data source registration.
 - c. [Restitch](#) Tableau's logical data layer or Data Catalog's physical data layer. This has to be done manually.
- You can also [remove](#) stitching.

Data layers

Tableau's logical data layer

We call the data source in Tableau the logical data layer, because it consists of Tableau metadata, rather than the physical data. It is created when you [synchronize](#) a Tableau server. It contains Tableau report metadata, including the data source.

Note

- You can combine different data sources in one Tableau data source by using different methods, for example, [Join](#), [Union](#) or a [Custom SQL query](#).
- If you combine physical data sources in the Tableau data source with the [Join](#) method, the Tableau logical data layer is created in Data Catalog. For more information about the [Join](#) method, see [Join Your Data](#).
- If you combine physical data sources in the Tableau data source with other methods, for example, [Union](#), the Tableau logical data layer is not created in Data Catalog.

Data Catalog's physical data layer

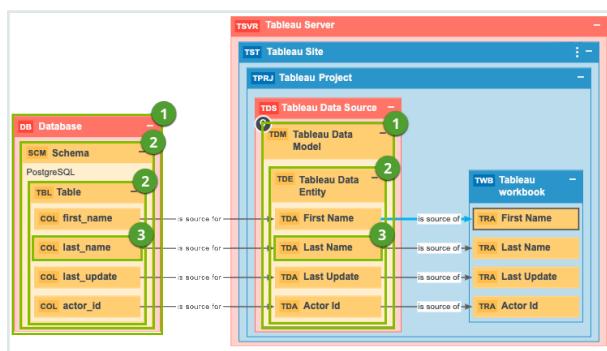
We call the data source in Data Catalog the physical data layer, which contains the physical tables and columns. It is created when you [register](#) a database as a data source. It contains the physical data of the data source.

Stitching results

Each element is represented twice in Collibra DGC: once in Tableau's logical data layer and once in Data Catalog's physical data layer.

The corresponding assets are linked by relations:

- A relation of the "Technology Asset source system for/source system Data Asset" type between the Database asset and the Tableau Data Model asset.
- Relations of the "Column is source for/is target of Data Attribute" type between the Column assets and the Data Attribute assets, based on the full names of the assets.



Number	Data Catalog's physical data layer	Tableau's logical data layer	Description
1	Database (DB)	Tableau Data Model (TDM)	An abstraction from the physical implementation of database, schema, file, etc., used for Tableau report creation.
2	Schema (SCM) and Table (TBL)	Tableau Data Entity (TDE)	An abstraction from the physical implementation of database tables, used for Tableau report creation.

Number	Data Catalog's physical data layer	Tableau's logical data layer	Description
3	Column (COL)	Tableau Data Attribute (TDA)	A specification that defines a property of a Tableau data entity. Examples: CustomerBirthDate, EmployeeFirstName.

Naming convention

When you ingest a data source in Tableau, Tableau automatically creates names for the data source, data model, data elements and data attributes. When you create the logical data layer by [synchronizing Tableau](#), Data Catalog uses the names in Tableau to create the corresponding Tableau assets. As a result, in Data Catalog, Tableau assets have as a full name the same name as the original data source names in Tableau.

When you create the physical data layer by [registering the data source](#) directly in Data Catalog, you enter the names of the Schema and Database assets manually. To make stitching work, we highly recommend to use the same name as the original data source to which the Tableau assets correspond as well:

- The name of the Schema asset should match a part of the Tableau Data Entity asset's full name. For example, *database-name > schema-name*.
- The name of the Database asset should match a part of the Tableau Data Model asset's full name.

The full name of the asset should match the asset path from the asset to the database it belongs to. For example, the full name of a Column asset would be *database>schema>table>column name*.

Warning Editing full name of the Tableau Server or Tableau Online assets may lead to errors during the synchronization process.

Prepare the Tableau logical data layer

Before you can perform [stitching](#), you have to prepare Tableau's logical data layer and Data Catalog's physical data layer. In this section, we describe how to prepare the logical data layer.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- The Tableau user has the Download/Save As permission on the data source.

Steps

1. [Register Tableau Server or Tableau Online](#).
2. [Connect to Tableau Server or Tableau Online](#).
3. [Synchronize Tableau sites](#).
 - » After synchronization, the assets of the following [asset types](#) are created in Data Catalog:
 - Tableau Data Model
 - Tableau Data Entity
 - Tableau Data Attribute

What's next?

If you haven't done so yet, [prepare the Data Catalog physical data layer](#).

After both the logical data layer and the physical data layer are created, you can [stitch](#) them.

Prepare the Data Catalog physical data layer for Tableau stitching

Before you can perform [stitching](#), you have to prepare Tableau's logical data layer and Data Catalog's physical data layer. In this section, we describe how to prepare the physical data layer.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a role with the following [resource permissions](#) on the Schema community:
 - Asset: add
 - Attribute: add
 - Domain: add
 - Attachment: add

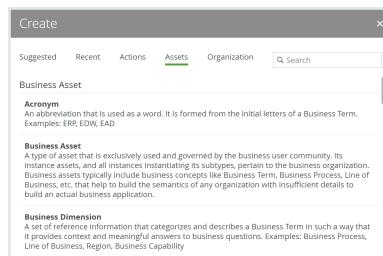
Steps

1. [Register](#) a database as data source.
 - » After registration, the assets of the following asset types are created in Data Catalog:
 - Schema
 - Table
 - Column
2. Create a Database asset.

Tip We strongly recommend to use the name as your original data source, so that the name of the Database asset matches [Tableau's naming convention](#).

1. Open Catalog.
2. In the main menu, click the **Create** (+) button.

3. Click the Assets tab.



4. Click Database.

» The **Create Asset** dialog box appears.

5. Enter the required information.

Field	Description
Type	The asset type of the asset that you are creating, in this case Database.
Domain	The domain to which the new asset will belong. You can only create a asset type in any domain of a domain type that is assigned to a Database asset type.
Name	<p>The name of the Database asset. This has to match the name of the Tableau Data Model.</p> <p>Tip You can create multiple assets in one go. To do this, press <code>Enter</code> after typing a value and then type the next. Depending on the settings, asset names may have to be unique in their domain. If you type a name that already exists, it will appear in strike-through style.</p>

6. Click Create.

» A message at the top-right of your screen confirms that one or more assets are created.

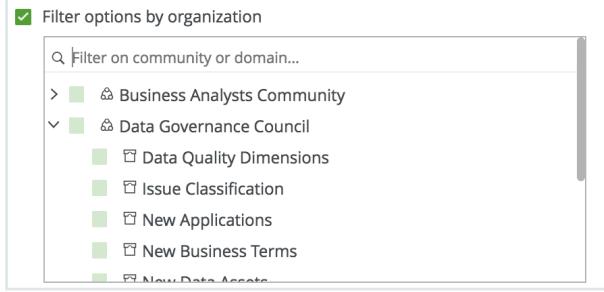
3. Create a relation between the Database asset and the Schema asset using the Technology Asset has / belongs to Schema relation type.

a. In the tab pane, click Add Characteristic.

» The **Add a characteristic** dialog box appears.

b. Click Relations.

- c. Search for and click **has schema**.
 - » The Add **has schema** dialog box appears.
- d. Enter the required information.

Option	Description
Assets	The name of the schema.
Filter suggested assets by organization	<p>Option to filter the suggestions based on selected communities and domains.</p> <p>If this option is selected, the organization tree appears. You can then filter and select domains and communities.</p>  <pre> <input checked="" type="checkbox"/> Filter options by organization <input type="text"/> Filter on community or domain... > <input type="checkbox"/> Business Analysts Community ▽ <input type="checkbox"/> Data Governance Council <input type="checkbox"/> Data Quality Dimensions <input type="checkbox"/> Issue Classification <input type="checkbox"/> New Applications <input type="checkbox"/> New Business Terms <input type="checkbox"/> New Data Assets </pre>
Start date	Optionally enter the date on which the relation between the assets becomes applicable. Leave this field empty to create a permanent relation.
End date	Optionally enter the date on which the relation between the assets is no longer applicable. Leave this field empty to create a permanent relation.

- e. Click **Save**.
4. Check that the following relations are created for all Column assets that you want to stitch to Tableau assets:
 - Schema contains / is part of Table
 - Column is part of / contains Table

What's next?

If you haven't done so yet, [prepare](#) the Tableau logical data layer.

After both the logical data layer and the physical data layer are prepared, you can [stitch](#) them.

Supported data sources for Tableau stitching

You can [stitch](#) Tableau's logical data layer and Data Catalog's physical data layer for several data sources. The following table contains the packaged data sources and the driver versions that have been tested for Tableau stitching. We cannot guarantee that stitching works as expected for other data sources or versions.

Data source	Tested versions for Tableau stitching
Amazon Redshift	1.0.124969
HP Vertica	7.1.1-0
IBM DB2	This data source is not supported by Tableau.
MySQL	Tableau stitching is not possible because this data source has no schema.
Oracle	11.2.0.4.0
PostgreSQL	9.5.1
Microsoft SQL Server	2014 (12.0.4422.0)

Note Currently, we only support published Tableau data sources with an extract or a live connection. For more information, see the [Tableau documentation](#).

Stitch the Tableau logical data layer and the Data Catalog physical data layer

You can [stitch](#) Tableau's logical data layer and Data Catalog's physical data layer to represent the lineage from the data source to the Tableau reports.

Prerequisites

- You have **prepared** Tableau's logical data layer.
- You have **prepared** Data Catalog's physical data layer.

Steps

1. Open the Tableau Data Model asset page.

Tip You can use the [Search](#) to quickly find the relevant asset.

2. In the upper-right corner, click **Stitch**.
» The **Stitch with data source** dialog box appears.
3. Enter the required information.

Field	Description
Data Source	The Database asset that you want to stitch to this Data Model asset.
Filter suggested assets by organization	<p>Option to filter the suggestions based on selected communities and domains.</p> <p>If this option is selected, the organization tree appears. You can then filter and select domains and communities.</p>

4. Click **Stitch**.

Note

If a relation exists between the Tableau Data Model and the corresponding Database asset, of the "Technology Asset source system for / source system Data Asset" type, stitching happens immediately after clicking **Stitch**, without showing the dialog box.

This occurs if you [created](#) the relation manually, or if you restitch.

What's next?

Stitching is performed, creating relations between assets of Data Catalog's physical data layer and those of Tableau's logical data layer.

More precisely, these relations are created:

- A relation of the "Technology Asset source system for/source system Data Asset" type between the Database asset and the Tableau Data Model asset.
- Relations of the "Column is source for/is target of Data Attribute" type between the Column assets and the Data Attribute assets, based on the full names of the assets.

Tip You can [view](#) the stitching result as a diagram.

Restitch the Tableau logical data layer and the Data Catalog physical data layer

After you completed [stitching](#), there might be changes in Tableau or in the data source. For example, Tableau may have a new report and the data source may have a new column. To make sure that the lineage diagrams are also updated, you can restitch the data layers.

Prerequisites

- You have previously [stitched](#) Tableau's logical data layer and Data Catalog's physical data layer.
- You have a resource role with the Configure external system [resource permission](#), for example Owner.

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a [resource role](#) with the Attribute > Add [resource permission](#).

Steps

1. Ensure that Tableau's logical data layer is [synchronized](#).
2. Ensure that Data Catalog's physical data layer is [refreshed](#).
3. Open the Tableau Data Model asset page.

Tip You can use the [Search](#) to quickly find the relevant asset.

4. In the upper-right corner, click **Stitch**.

View stitching results

When [stitching](#) is complete, you can view the end-to-end lineage between the database and the Tableau report.

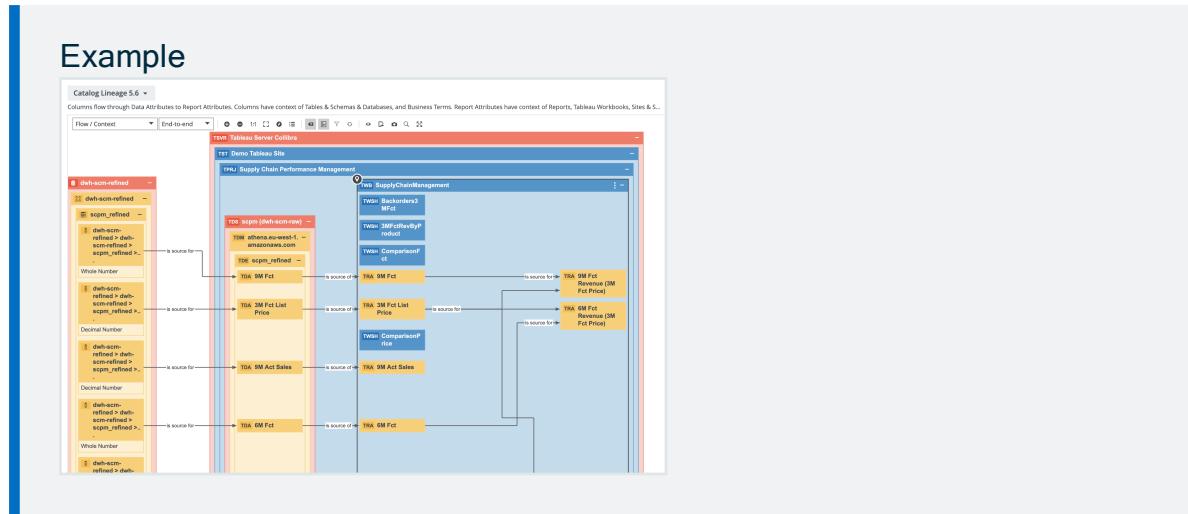
Prerequisites

- You have [prepared](#) Tableau's logical data layer.
- You have [prepared](#) Data Catalog's physical data layer.
- You have [stitched](#) the logical data layer and the physical data layer.

Steps

1. Open the Tableau Server asset page.
2. In the tab pane, click  **Diagram**.

3. In the view selector, select Data Catalog Lineage 5.7.



Remove stitching between the Tableau logical data layer and the Data Catalog physical data layer

You can remove **stitching** to remove the relations between the logical data layer in Tableau and the physical data layer in Data Catalog.

More precisely, the following relations are removed:

- A relation of the "Technology Asset source system for/source system Data Asset" type between the Database asset and the Tableau Data Model asset.
- Relations of the "Column is source for/is target of Data Attribute" type between the Column assets and the Data Attribute assets, based on the full names of the assets.

Prerequisites

- You have a resource role with the Configure external system [resource permission](#), for example Owner.
- You have a [resource role](#) with the Attribute > Remove [resource permission](#).
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [stitched](#) Tableau's logical data layer and Data Catalog's physical data layer.

Steps

1. Open the Tableau Data Model asset page.

Tip You can use the [Search](#) to quickly find the relevant asset.

2. Click **Actions** → **Remove stitching**.

Tip If [Data Catalog experience](#) is disabled, the **More** menu is shown instead of **Actions**.

Tableau provisioning

With Data Catalog, you can create data sets and convert them to the Tableau format. This enables you to use Collibra DGC-managed data in Tableau.

The Tableau provisioning file

A Tableau provisioning file is a packaged data source file with the extension TDSX. The packaged data source file is a ZIP file that contains a data source file and any local file data sources. You can import it in Tableau to, for example, analyze the data. It has the extension TDSX.

You can [create](#) a Tableau provisioning file from any data set in Data Catalog.

The file contains the following information:

- A TDS file: This is an XML file that contains the data source definition.
- The actual ingested files, if the data set contains data from Excel or CSV data sources.

```
<?xml version="1.0" encoding="UTF-8"?>
<datasource xmlns:user="http://www.tableausoftware.com/xml/user"
  formatted-name="<name of your data set>" inline="true" ver-
  sion="10.0">
  <connection class="federated">
```

```

<named-connections>
    <named-connection caption="public" name="<connection-ID>">
        <connection authentication="username-password"
source-type"> dbname="<database-ID>" port="" schema="public"
server="<hostname:port>"/>
    </named-connection>
</named-connections>
<relation connection="<relation-ID>" name="<name-of-relation>">
table=" [public].[<name-of-relation>]" type="table"/>
</connection>
</datasource>

```

Required JDBC driver information for Tableau provisioning

To [create a Tableau provisioning file](#) from a data set, the JDBC driver of its data source needs the following properties:

Data source	Required connection properties
Amazon Redshift	<ul style="list-style-type: none"> host port database schema
HP Vertica	<ul style="list-style-type: none"> host port database schema
MySQL	<ul style="list-style-type: none"> host port database
Oracle	<ul style="list-style-type: none"> host port database schema

Data source	Required connection properties
PostgreSQL	<ul style="list-style-type: none"> host port database schema
SQL Server	<ul style="list-style-type: none"> host port database schema

For more information, see the [JDBC configuration details](#) of the various databases.

Create Tableau provisioning file

In Data Catalog, you can create [Tableau provisioning](#) files from data sets.

Tip If your data set's origin is a relational database, you need the credentials to connect to that database. Make sure the JDBC driver has all the [required information](#) in the correct format before you create the provisioning file.

Prerequisites

- You have a [resource role](#) with the Access data [resource permission](#), for example Data Analyst Level 2.
- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have [enabled](#) Tableau provisioning in Collibra Console.

Steps

1. In the main menu, click  , then  **Catalog**.
 - » The Catalog Home opens.
2. In the submenu, click **Data Sets**
3. Click the data set that you want to use in Tableau.

4. Above the table, to the right, click **Actions → Access Tableau source (beta)**.

The screenshot shows a 'Customer Analytics Anonymized' dataset in the Data Catalog. The 'Actions' menu is open, and the 'Access Tableau source (beta)' option is highlighted with a green arrow.

» The [Tableau provisioning file](#) in TDSX format is downloaded.

Tip If [Data Catalog experience](#) is disabled, the **More** menu is shown instead of **Actions**.

What's next?

You can now import the TDSX file in Tableau.

Troubleshooting

The following table contains the most common issues that you can encounter while ingesting or synchronizing Tableau.

Issue	Solution
Tableau images are not fetched correctly	<p>The Tableau integration ingests metadata from Tableau. This metadata is represented as assets of specific types and their characteristics. You can see them on the asset page overview or visualize them in a diagram. Images such as report thumbnails are not downloaded and stored in Data Catalog. Instead, Data Catalog stores a link to the image. Every time you open the asset page, the image is fetched from Tableau.</p> <p>Images are not fetched correctly if there is a problem with this link. A common issue is caused by the base URL parameter, which is part of the link. If the base URL is not set correctly in Collibra Console, the links to the Tableau images are broken.</p> <p>To fix this issue, edit the base URL in Collibra Console.</p>
When you synchronize a Tableau Server 2020.2, some Tableau data is skipped.	<p>In most cases, this occurs when people are actively using Tableau while Data Catalog is synchronizing the Tableau Server. The technical reason is that the APIs collect Tableau data at different times. If users make changes in Tableau, the data that is collected by the APIs may be inconsistent. When that happens, the corresponding assets are not synchronized in Data Catalog.</p> <p>We highly recommend that you synchronize Tableau after working hours. This reduces the chance that Tableau data is added, changed, renamed or deleted on Tableau's side during the synchronization process.</p>

Issue	Solution
Tableau synchronization fails with error message Duplicate key .	The Tableau synchronization fails with the Duplicate key error when you have multiple views with the same name in the same workbook. To solve this problem, we highly recommend to give each view in Tableau a unique name before you synchronize the Tableau Server in Data Catalog.

Working with Power BI

Power BI is a business intelligence software that helps you see and understand your data. You can ingest Power BI metadata in Data Catalog and create a technical lineage.

Note If you want to ingest Power BI metadata in Data Catalog, you have to purchase the Power BI connector and lineage feature.

Warning Power BI integration is a cloud-only feature. It is only available for Collibra Data Governance Center 2020.11 and newer.

Power BI asset and domain types

The [Power BI](#) integration of Collibra Data Intelligence Cloud uses a specific subset of packaged [asset types](#) and [domain types](#).

The following table contains the asset and domain types that are used for the Power BI integration. You can see the parent asset types in the breadcrumbs above each asset type.

Asset type	Description	Domain type
Business Asset ▶ Business Dimension ▶ BI Folder ▶ Power BI Capacity	A resource that hosts Power BI Workspaces.	BI Catalog
Business Asset ▶ Business Dimension ▶ BI Folder ▶ Power BI Workspace	A collection of Power BI Dashboards, Reports and Data Models.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Power BI Dashboard	A collection of Power BI tiles with metrics from one or more Reports and Data Models.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Power BI Report	A detailed view of a Power BI Data Model, with visualizations of findings and insights.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Power BI Tile	An element representing data on the Power BI Dashboard.	BI Catalog

Asset type	Description	Domain type
Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ Power BI Column	A column in a Power BI Data Model.	BI Catalog
Data Asset ▶ Data Structure ▶ Data Entity ▶ BI Data Entity ▶ Power BI Table	A table in a Power BI Data Model.	BI Catalog
Data Asset ▶ Data Structure ▶ Data Model ▶ BI Data Model ▶ Power BI Data Model	A collection of data that is used to create a Power BI report.	BI Catalog
Technology Asset ▶ Server ▶ BI Server ▶ Power BI Server	A visual analytics platform for creating and storing Power BI Reports and Data Models.	BI Catalog

Working with Power BI Reporting Services (PBRS)

Power BI Reporting Services is a on-premises report generating software that helps you see and understand your data.

Note Collibra Data Governance Center already has the required asset types and domain types to support Power BI Reporting Services. However, you cannot ingest a Power BI Reporting Services yet.

Warning Power BI Reporting Services integration is a cloud-only feature. It will only be available for Collibra Data Governance Center.

Warning Power BI Reporting Services integration is a cloud-only feature. It is only available for Collibra Data Governance Center 2021.06 and newer.

Power BI Report Server asset and domain types

The Power BI Report Server integration of Collibra Data Governance Center uses a specific subset of [asset types](#) and [domain types](#). All of these come out of the box with your software.

Note Collibra Data Governance Center already has the required asset types and domain types to support Power BI Report Server. However, you cannot ingest a Power BI Server or Power BI Report Server yet.

The following table contains the asset - and domain types that are used for the Power BI Report Server integration. You can see the parent asset types in the breadcrumbs above each asset type.

Asset type	Description	Domain type
Business Asset ▶ Business Dimension ▶ BI Folder ▶ Power BI Folder	A collection of Power BI Report Server Dashboards, Reports and Data Models.	BI Catalog
Business Asset ▶ Report ▶ BI Report ▶ Power BI KPI	A key performance indicator of Power BI Report Server.	BI Data Catalog
Business Asset ▶ Report ▶ BI Report ▶ Power BI Report	A detailed view of a Power BI Data Model, with visualizations of findings and insights.	BI Catalog
Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ Power BI Column	A column in a Power BI Data Model.	BI Catalog
Data Asset ▶ Data Element ▶ Report Attribute ▶ BI Report Attribute ▶ Power BI Parameter	A column that is part of a Power BI Report Server Data Model and that is used in a KPI.	BI Catalog

Asset type	Description	Domain type
Data Asset ▶ Data Structure ▶ Data Model ▶ BI Data Model ▶ Power BI Data Model	A collection of data that is used to create a Power BI report.	BI Catalog
Technology Asset ▶ Server ▶ BI Server ▶ Power BI Server	A visual analytics platform for creating and storing Power BI Reports and Data Models.	BI Catalog

Working with SQL Server Reporting Services (SSRS)

SQL Server Reporting Services is a server-based report generating software that helps you see and understand your data.

Note Collibra Data Governance Center already has the required asset types and domain types to support the SQL Server Reporting Services integration. However, you cannot ingest SQL Server Reporting Services yet.

Warning SQL Server Reporting Services integration is a cloud-only feature. It will only be available for Collibra Data Governance Center.

Warning SQL Server Reporting Services integration is a cloud-only feature. It is only available for Collibra Data Governance Center 2021.05 and newer.

SQL Server Reporting Services asset and domain types

The SQL Server Reporting Services integration of Collibra Data Governance Center uses a specific subset of [asset types](#) and [domain types](#). All of these come out of the box with your software.

Note Collibra Data Governance Center already has the required asset types and domain types to support SQL Server Reporting Services. However, you cannot ingest SQL Server Reporting Services yet.

The following table contains the asset - and domain types that are used for the SQL Server Reporting Services integration. You can see the parent asset types in the breadcrumbs above each asset type.

Asset type	Description	Domain type
Business Asset › Business Dimension › BI Folder › SSRS Folder	A collection of SQL Server Reporting Services Dashboards, Reports and Data Sets.	BI Catalog
Business Asset › Report › BI Report › SSRS KPI	A key performance indicator of SQL Server Reporting Services.	BI Catalog
Business Asset › Report › BI Report › SSRS Report	A detailed view of an SQL Server Reporting Services Data Set, with visualizations of findings and insights.	BI Catalog

Asset type	Description	Domain type
Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ SSRS Column	A column in an SQL Server Reporting Services Report Data Set.	BI Catalog
Data Asset ▶ Data Element ▶ Report Attribute ▶ BI Report Attribute ▶ SSRS Parameter	A column that is part of an SQL Server Reporting Services Data Set and that is used in a KPI.	BI Catalog
Data Asset ▶ Data Set ▶ BI Data Set ▶ SSRS Data Model	A collection of data that is used to create an SQL Server Reporting Services Report.	BI Catalog
Data Asset ▶ Data Element ▶ Data Attribute ▶ BI Data Attribute ▶ Power BI Table ▶ SSRS Table	A table in an SQL Server Reporting Services Report Data Set.	BI Catalog
Technology Asset ▶ Server ▶ BI Server ▶ SSRS Server	A visual analytics platform for creating and storing SQL Server Reporting Services Reports and Data Sets.	BI Catalog

Working with Looker

Looker is a business intelligence software that helps people see and understand their data.

For more information about Looker, see the [Looker documentation](#).

Note When you ingest Looker metadata, you automatically create a technical lineage for Looker.

Warning Looker integration is a cloud-only feature. It is only available for Collibra Data Intelligence Cloud 2020.12 and newer.

Looker asset and domain types

The Looker integration of Collibra Data Governance Center uses a specific subset of [asset types](#) and [domain types](#). All of these come out of the box with your software.

The following table contains the asset and domain types that are used for the Looker integration. Above each asset type you can see the parent asset types in the breadcrumbs.

Asset type	Description	Domain type
Business Asset › Business Dimension › BI Folder › Looker Folder	A container that stores Looker Looks, Dashboards and other folders.	BI Catalog

Asset type	Description	Domain type
Business Asset › Report › BI Report › Looker Dashboard	A collection of Looker tiles with metrics from one or more Looker Looks.	BI Catalog
Business Asset › Report › BI Report › Looker Look	A detailed view of a Looker Data Set, with visualizations of findings and insights.	BI Catalog
Business Asset › Report › BI Report › Looker Query	A query that creates a simple report in a Looker Tile or Looker Look.	BI Catalog
Business Asset › Report › BI Report › Looker Tile	An element that represents data on the Looker Dashboard.	BI Catalog
Data Asset › Data Element › Data Attribute › BI Data Attribute › Looker Data Set Column	An atomic unit of data that is used in a Looker Look or Looker Tile. It represents a column in a Looker Data Set.	BI Catalog
Data Asset › Data Element › Report Attribute › BI Report Attribute › Looker Report Attribute	An atomic unit of data that is used in a Looker Look or Looker Tile. It represents the actual use a Looker Data Set Column.	BI Catalog

Asset type	Description	Domain type
Data Asset ▶ Data Set ▶ BI Data Set ▶ Looker Data Set	A collection of data that is used to define Looker Dimensions and Measures.	BI Catalog
Technology Asset ▶ Server ▶ BI Server ▶ Looker Tenant	A platform to create Looker Dashboards and rich visualizations.	BI Catalog

Collibra Data Lineage

Collibra Data Lineage is a product that allows you to trace how data flows from source to destination. It consists of two components to accommodate two different personas:

- A [technical lineage](#) for Data Engineers, Data Architects and similar personas.
- A diagram with [Business Summary Lineage](#) for Business Analysts and other business users.

Technical lineage is a detailed lineage graph that shows where data objects are used and how they are transformed. A diagram with the Business Summary Lineage shows the relations between Data Assets in Data Catalog after stitching. Both map the flow of data, but a technical lineage provides a detailed overview of the data flow, while a diagram with Business Summary Lineage only provides a summary of it.

Note Collibra Data Lineage is only available to customers that have [Collibra Data Intelligence Cloud](#) 5.7.3 or newer.

Data Catalog Home

The Collibra Data Catalog Home is the landing page when you click the Data Catalog tab. This page is designed to help you quickly and easily find Data Catalog-related assets.

Note You need the Data Catalog global role or Data Catalog Author role to view Data Catalog Home.

The page is organized into five groupings, or sections, of assets and a Data Catalog-specific search field, as described in the following image and table.

The screenshot shows the Collibra Data Catalog Home page with the following sections:

- Data Sets you might like:** Displays four asset cards: ADOPTasset2 (related to GIS, GIS CORELATION), ADOPTasset4 (related to GIS, GIS CORELATION), ADOPTasset1, and ADOPTasset10.
- Recently viewed:** Displays four asset cards: TDSH 2000-2003, ADOPTasset2, Default (The default project that was automatically created by Tableau), and Defaultcsvcatalog.
- Reports:** Displays four report cards: TWSH GIS CORELATION (bar chart), TWSH GIS (map), TDSH Product (Product Drilldown heatmap), and TDSH Order Details (table).
- Data sources:** Displays a single data source card: TDSH 2000-2003.

Note The **Data sets you might like** section is enabled and disabled via Collibra Console. By default, it is enabled (shown) on the page. The other four sections are always shown and cannot be disabled. However, for any of the five sections, if there is no relevant data, nothing is shown on the page, including the section header.

Element name	Description
Search field	<p>A Data Catalog-specific search field that you can use to find any asset in CollibraData Catalog, for example assets of asset types Data Set, Schema, Table, Column, Tableau Workbook and Tableau View.</p> <p>This search field works in the same manner as does the global search field, but it uses a default 'Data Catalog' filter.</p>
Data Catalog Data Sets you might like	<p>Shows up to four data sets you might be interested in, as determined by the recommender, which takes into account your data sets and the data sets of similar users.</p> <p>The Show more button enables you to view up to eight data sets on this page.</p>
Recently viewed	<p>Shows the four most recently viewed Data Catalog-related assets.</p> <p>This section uses the Recent widget functionality.</p> <p>The Show more button enables you to view the eight most recently viewed assets.</p>
Reports	<p>Shows the four most recently created assets of asset type Report and its child asset types.</p> <p>Clicking the asset name takes you to the asset page.</p> <p>Clicking View all reports takes you to the Catalog reports page.</p>
Data sources	<p>Shows the four most recently created assets of asset type Table.</p> <p>Clicking the asset name takes you to the asset page.</p> <p>Clicking View all data sources takes you to the Data Sources page.</p>
Data sets	<p>Shows the four most recently created assets of asset type Data Set.</p> <p>Clicking the asset name takes you to the asset page.</p> <p>Clicking View all data sets takes you to the Data Sets overview page.</p>

Recommenders

The recommenders aim to suggest relevant business assets and data sets.

Recommenders have to train regularly to update the recommendations. By default, this is done every night. Recommendations can be calculated on the basis of several algorithms. These algorithms also calculate an error margin for each recommendation, and eventually only the algorithm with the lowest error margin provides the recommendations.

You can [edit](#) the settings of the recommenders and [matchers](#) to optimize the recommendations.

Note The recommender uses statistical information. Therefore, your recommendations will be empty or less useful if your company just started using Collibra Data Governance Center.

Recommendation of data sets to users

Description

The data set recommender recommends data sets to users, based on the data sets of similar users.

If you use some of the same data sets as some other users, you are probably also interested in data sets that they use but you don't. The recommendations are shown on [Data Catalog Home](#).

Example

The screenshot shows the Collibra Data Catalog interface. At the top, there's a navigation bar with icons for Recommendations, Data Sets, Data Sources, Data Dictionary, Technology Assets, Metrics, Access Requests, and Advanced Data Types. A green 'Create' button is also visible. Below the navigation bar, a search bar says 'Search...'. To the right, there are icons for '3 tasks', a user profile, and help.

In the main content area, a heading 'Data Sets you might like:' is displayed above a grid of six data set cards. Each card includes a green icon, the data set name, a brief description, and a green bookmark icon.

- DGC**
This is the raw ingested data from the PostgreSQL database from dg.collibra.com
- Jira Feature Requests**
This is the raw and enriched data on FeatureRequests exported from Jira using the filter AllFeatureRequest
- Key Customer FR Data**
This is a subset of relevant information around FR from our Key customers
- Movie Metadata**
Sample file for Catalog testing purposes
- Customers**
A flattened data set optimized for self-service analysis in Tableau or other self-service BI tool. This data set is sourced from a Salesforce.com report,...
- Sales Opportunities**
Sales opportunities optimized for self-service sales analysis. This is a CSV file sourced from a Salesforce report - it's a simple, columnar format that is easy t...

Strategy

The data set recommender compares the data sets used by the users to find relevant data sets. It roughly follows these steps:

1. See which data sets you are currently using.
2. Look for other users that also use your data sets.
3. See which data sets those users use, but you don't.
4. Recommend up to 9 of those data sets to you.

Note

If the recommender does not have enough data, for example if you just started using Collibra DGC, it only considers 3 parameters:

- Certified
- Quality
- Popularity (number of views of the data set asset page)

Recommendation of business assets to data sets

Description

The asset recommender recommends business assets to data sets, based on business assets it is related to.

If two data sets have relations to the same business assets, business assets related to only one of the two data sets may be relevant to the other data set as well.

Example

Business Analysts Community ▶ New Data Sets

Miscellaneous

Data Set Candidate | ★★★★★ (0) | 0 0 5%

Add to Data Basket Actions ▾

Add characteristic < Description ⓘ
No value has been given yet. Double click or use the edit button.

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

related to Business Asset

Name	Asset Type	Status
Customer	Acronym	Candidate
Customer Revenue	Acronym	Candidate

2

Data Profiling

Sample data

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

Click here 2 suggestions Add

Add related to Business Asset

Enter the asset name min. 1

Start Date M/D/YYYY

End Date M/D/YYYY

ARR
RecommendationsCommunity ▶ Domain

Revenue
RecommendationsCommunity ▶ Domain

Cancel Save

Strategy

The asset recommender uses the relation **data set related to business asset** set to find relevant assets. It roughly follows these steps:

1. See which business assets are related to the current data set.
2. Look for other data sets related to those business assets.
3. See whether those data sets are also related to other business assets.
4. Recommend those business assets on the data set page and in the **Add related to** dialog box.

Note If the recommender does not have enough data, for example if you just started using Collibra DGC, it does not give you any recommendations.

Recommendation of business assets to column assets

Business assets are recommended to column assets based on the search engine in Collibra DGC. The recommendations are shown in the section of **data asset represented by business asset** relation.

Example

Miscellaneous

Data Set Candidate **Add to Data Basket** Actions

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

Personally Identifiable Information: No value has been given yet. Double click or use the edit button.

Security Classification: No value has been given yet. Double click or use the edit button.

represented by Business Asset

Name	Domain	Definition
account reference number	New Business Terms	

Comments: Write a comment... There are no comments yet.

Click here 4 suggestions Add

Add represented by Business Asset

Enter the asset name

Start Date M/D/YYYY

End Date M/D/YYYY

outstanding capital reference account

collateral account reference

Account Number

Cancel **Save**

Recommendation of business assets to Tableau workbook assets and Tableau view assets

Business assets are recommended to Tableau workbook assets and Tableau view assets based on the search engine in Collibra DGC. The recommendations are shown in the section of **report related to business asset relation**.

Matchers

The matchers aim to suggest assets and data sets that might be interesting for you.

Matchers find similar data sets and schemas based on the name and the attributes.

You can [edit](#) the settings of the [recommenders](#) and matchers to optimize the recommendations.

Note The matcher uses statistical information. Therefore, your recommendations will be empty or less useful if your company just started using Collibra Data Governance Center.

Data set matcher

The data set matcher looks at the names and attributes of the column assets that a data set contains. It shows similar data sets on the [data set asset page](#).

The screenshot shows the 'Miscellaneous' data set asset page. On the left, there's a sidebar with tabs like 'Add characteristic', 'Summary', 'Details', 'Data Elements', 'Sample data', 'Diagram', and 'Pictures'. Below that is a 'Similar Data Sets' section with 'Responsibilities' and 'References' tabs. The main content area has a heading 'Data Sets with similar data assets:' followed by a list of two items:

- Customer Revenue**: Description: Aggregated Annual Revenue of all customers. A green checkmark icon is next to it.
- Annual Revenue**: Description: Aggregated Annual Revenue of all customers. Related to: Annual rate, ARR, Customer.

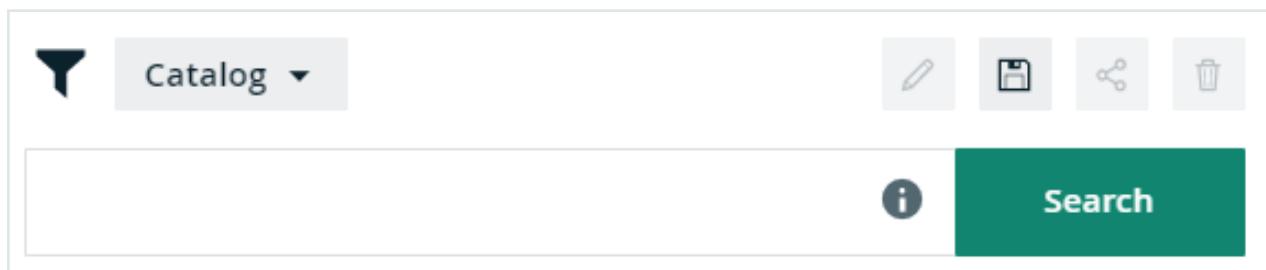
Schema matcher

The schema matcher is currently not used in Collibra DGC.

Data Catalog Search

The [Data Catalog Home](#) page has a Data Catalog-specific search field that you can use to find assets in Data Catalog. When you launch a search from Data Catalog, the search page is the regular Collibra DGC [search](#) page, but with the **Catalog** search filter applied.

Note You need the Data Catalog global role or Data Catalog Author role to view the Data Catalog search page and use the Data Catalog Search.



In the search input field, you can type any text and press `Enter` or click **Search** to launch the [search](#).

The search finds resources that contain a word that begins with your search text. For example, if you type *ca*, the search results could contain 'California' and 'Lewis Carroll', but not 'Meercat'.

You can also use wildcards and symbols to search, see [Wildcards and symbols for searching](#).

Catalog reports

The **Reports** page is a view that shows:

- All **Report** assets.
- All packaged or manually created child asset types of **Report**, for example BI Report, Tableau View, and Looker Query.

Report views

You can view the assets in table or tile display mode, and can perform all the same actions you can for any other table or set of tiles.

Reports in tile display mode

In tile display mode, you can do the following:

- Click an asset name to open the relevant asset page.
- Click anywhere else in the tile to select one or more assets. The list of available actions appears in the action toolbar.

Reports in table display mode

In table display mode, you can do the following:

- Click an asset name to open the relevant asset page.
- Click anywhere else in the tile to select one or more assets. The list of available actions appears in the action toolbar.
- Edit cells in the table.

Name	Status	Domain	Community
3MFctRevByProduct	Accepted	Supply Chain Performance Ma...	Tableau Server - Official Demo...
ActualSales	Candidate	Supply Chain Performance Ma...	Tableau Server - Official Demo...
aws_financial_use_case	Candidate	FinancialServices	Tableau Server - Official Demo...
Backorders3MFct	Candidate	Supply Chain Performance Ma...	Tableau Server - Official Demo...
ComparisonFct	Candidate	Supply Chain Performance Ma...	Tableau Server - Official Demo...
ComparisonPrice	Candidate	Supply Chain Performance Ma...	Tableau Server - Official Demo...
ForecastSales	Candidate	Supply Chain Performance Ma...	Tableau Server - Official Demo...

Filters

The default **All reports** view does not contain a **filter**, so it shows all Report assets. Some of the other packaged views do contain a filter. For example the **Certified reports** view only shows reports that are certified.

You can also **create** your own filter and, if necessary, save the filtered view as a new view. For example, you can create separate views for Report assets belonging to a specific source, for example Tableau, Looker or Power BI.



Data Catalog Data Sets

A data set is a logical, handpicked collection of data elements that can come from multiple data sources.

The **Catalog Data Sets** overview page displays existing data sets in a table or as tiles. The page displays the name of the data set, its description, its certification status, and, if there are any, connections to existing business assets in Collibra Data Governance Center.

Data Sets overview page

The Data Sets overview page contains the data sets that are available in Collibra Data Governance Center. You can view the data sets in table display mode or tile display mode.

Tile display mode

- Click a data set title to open its details.

The screenshot shows a list of data sets in tile format. Each tile contains the following information:

- PBDS Coronavirus in US**: Candidate status, 4 stars, Description: Data set containing information on our internet sales combined with relevant customer and product data, Business Context: Churn Rate, Customer, Customer Lifetime Value, Leads, Order, Product, Tags: CRM, Analytics.
- Customer Analytics Anonymized**: Accepted status, 5 stars, Description: Data set containing information on our internet sales combined with relevant customer and product data, Business Context: Churn Rate, Customer, Customer Lifetime Value, Leads, Order, Product, Tags: CRM, Analytics.
- PBDS Customer Churn Insights**: Candidate status, 4 stars, Description: Data set containing information on our internet sales combined with relevant customer and product data, Business Context: Churn Rate, Customer, Customer Lifetime Value, Leads, Order, Product, Tags: CRM, Analytics.

- Click anywhere in the tile except for the title to select the data set. The list of actions that you can perform is displayed.

The screenshot shows the same list of data sets as the previous one, but the second tile ('Customer Analytics Anonymized') is selected, highlighted with a green border. Above the selected tile, a horizontal bar displays the following actions: Delete, Move, Validate, Add to Data Basket, Add Relationship, Approval, and Approval.

Table display mode

- Click a name of the data set to open its details.

The screenshot shows a table view of data sets. The columns are:

- Name (sorted ascending)
- Action buttons: Delete, Move, Validate

The data rows are:

Name	Action Buttons
1SalesMarketing	Delete, Move, Validate
Admin Usage Model	Delete, Move, Validate
AdventureWorksLT(AzureSQL)	Delete, Move, Validate
AdventureWorksLT(AzureSQL)	Delete, Move, Validate

The first row ('1SalesMarketing') is highlighted with a green border.

- Select one or more data sets. The list of actions that you can perform is displayed.

Name	Description	Certified	Status
1SalesMarketing		✗	Candidate
Admin Usage Model		✓	Candidate

Note The Sample Data tab shows the first 100 columns of data. If you have more than 100 columns, they are not shown.

Data Sets asset page

The **Data Sets** asset page is basically the same as any [asset page](#) in Collibra Data Governance Center with the following differences:

- The data set asset page has a special attribute, namely **Certified**. That attribute indicates whether a data set is certified or not. There are no restrictions for certifying a data set, except the ones your organization chooses. You decide when a data set can or has to be certified. For more information about how to do this, have a look at [Certify a data set](#).
- It contains suggestions for related Business Assets, based on the [asset recommender](#).
- It contains a **Data Profiling** and **Sample data** section which contains respectively a data profile and sample data, if available.

You can perform the following actions on this page:

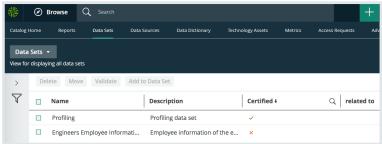
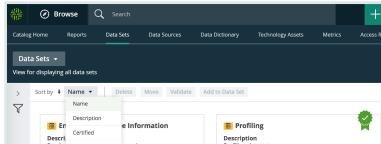
- [Create a view](#)
- [Asset filters](#)
- [Sorting Data Catalog overview pages](#)
- [Request access to data sets and reports](#)
- [Delete data sets](#)

Sorting Data Catalog overview pages

To reorder the data on Catalog pages, such as reports, data sets, data sources and so on, follow these steps:

1. In the main menu, click  , then  Catalog.
- » The Catalog Home opens.
2. Click any of the items in the submenu, for example Data Sets.
3. Sort your data:

Table display mode	Tile display mode (if available)
Click any column header to sort the data sets. Click again to toggle between ascending and descending order.	Click Sort by to sort ascending or descending, click the dropdown box to select on what you want to sort.

Creating data sets

You create data sets to add data to them.

After you have created a data set, you have to add data to it. In this section you can learn how to create a data set and how to add data to data sets.

Create a data set

You create data sets to add data to them.

Steps

1. In the main menu, click the **Create** (+) button.
- » The **Create** dialog box appears.
2. In the **Create** dialog box, click the **Asset** tab.

3. Click **Data Set**.
4. In the **Domain** field, select the domain to which you want to add one or more data sets.
5. In the **Name** field, type the name of the data set, press **Enter** to add other data set names.
6. Click **Create**.

Add data to data sets from an asset page

When you come across a data asset that you want to add to a data set, you can add that asset right from that asset page.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a [resource role](#) with the Attribute > Add [resource permission](#).

Steps

1. Navigate to an asset page of a schema, table or column asset.
2. In the upper-right corner, click **Add to Data Set**.
3. Enter the required information in the **Add data to data set** dialog box.
 - Existing data set:
 - a. Select the data set.
 - b. Click **Add to data set**.
 - New data set:
 - a. Type a name in the **Data set name** field.
 - b. Type a description in the **Data set description** field.
 - c. Click **Create & Add data**.

Add data to data sets from the Data Dictionary

When you come across data in the Data Dictionary that you want to add to a data set, you can add that asset right from the Data Dictionary.

Prerequisites

- You have a [global role](#) with the Data Dictionary [global permission](#), for example Data Dictionary.
- You have a [resource role](#) with the Attribute > Add [resource permission](#).

Steps

1. In the main menu, click , then Catalog.
- » The Catalog Home opens.
2. In the submenu, click **Data Dictionary**.
If necessary, filter the list of data assets.
3. Select the check boxes of the data assets you want to add to a specific data set.

Note

- Some data assets are nested. If you select the top one, all its children are added as well.
- Keep in mind that you can only add schemas, tables and columns.

4. Above the table, click **Add to Data Set**.
5. Enter the required information in the **Add data to data set** dialog box.
6. Click **Add to data set**.

A notification at the top right lets you know how many assets you have added to the data set.

Certify a data set

You can approve, endorse or guarantee the contents of a data set.

Steps

1. Navigate to the asset page of a data set that you want to certify.
2. Find the **Certified** characteristic and double-click the line of text below it.
3. Click in the field that is displayed.
4. Click **True**.
5. Click **Save**.

Tip You can design a workflow to take care of the certification of a data set.

Delete data sets

If you no longer need a certain data set, you can delete it from the repository.

Steps

1. In the main menu, click , then  Catalog.
 - » The Catalog Home opens.
2. In the submenu, click **Data Sets**
3. Search for the data sets that you want to delete.
You can use the Filter pane or [sort](#) your data sets.
4. In table mode, select the check boxes on the data sets that you want to delete.
In tile mode, hold the SHIFT key to select multiple data sets.
5. Click **Delete**.
6. Click **Yes** to confirm.

Shopping for data

Shopping for data means adding one or more data sets or reports to the Data Basket and requesting access to the data by checking out the Data Basket.

Adding data sets or reports to the Data Basket

You can add data sets or reports to the Data Basket by clicking **Add to Data Basket**. This button appears:

- When you've selected one or more data sets or reports, in Catalog.
- On Data Set asset pages and report asset pages.

When you click **Add to Data Basket**:

- A Data Usage asset is created.
- All of the data sets you selected are shown in the Data Basket.

The Data Usage asset

The Data Usage asset is created in the Data Usages domain. The name of the Data Usage asset is "USER_BASKET_" followed by the UUID of the user.

Tip The Data Usages domain is a "hidden" domain in the Business Analysts Community. This means it doesn't appear in the Collibra DGC Browser, which helps to avoid it being inadvertently deleted. To view the Data Usages domain, go to the Access Requests page and click the name of a Data Usage asset. The Data Usages domain appears in the breadcrumb, on the Data Usage asset page.

Name	Purpose	Effective Start Date	Effective End Date	Status
2019-12-16 #3	Activities related to employee management	12/19/2019	12/27/2019	Invalid

The Data Usage asset page shows all of the pertinent information related to your access request, including:

- The data sets or reports to which you are requesting access.
- The purpose for requesting access to the data.
- The access start date and end date.

DU 2019-12-17 #1

Type: Data Usage Status: Approval Pending Approval Simple Approval Vote Edit Move Delete Auto hyperlinks

Add characteristic < Description ⓘ

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

Overview

Purpose ⓘ Customer marketing program

Diagram

Effective Start Date ⓘ 12/18/2019

Effective End Date ⓘ 12/19/2019

requires Asset

Name ⓘ	Domain	Description
customer data	New Data Sets	

The Data Basket

The Data Basket is a view that shows all of the data sets or reports you've selected, to which you want access.

To access the Data Basket, click .

You can remove one or more data sets or reports from the Data Basket by clicking on the relevant tiles, and then clicking **Remove from data basket**.

Data Basket

8 Item(s) Checkout Data Basket

3 selected Remove from data basket

Publicly available information
Description: Information that is lawfully made available from federal, state, or local government records.

Employee Travel Information
Description: Employee travel information: contact, employment, identification, financial, personal, and family.

Employee Statistical Information
Description: Anonymized employee information: basic, contact, education, employment, family, financial, payroll, and travel.

Employee Recruiting Information
Description: Recruiting information about potential employees.

Employee Professional Information
Description: Employee professional information: contact, education, travel, employment, payroll, personal, and family.

Employee Personal Information
Description: Employee personal information: contact, education, travel, employment, financial, identification numbers, immigration documents, payment history, payroll, personal identifiable, and family.

Note Selecting tiles has no bearing when checking out the Data Basket. When you click **Checkout Data Basket**, an access request is made for all data sets in the Data Basket and the Data Basket is emptied, regardless of which tiles might have been selected.

Checking out the Data Basket

After you've selected one or more data sets or reports, click **Checkout Data Basket**. This starts the packaged Request Assets Access workflow, by which your request is approved or rejected.

Data Basket

6 Item(s) Checkout Data Basket

0 selected Remove from data basket

... ► 06 Data Set Catalog
HR001 Human Resource management-Aetna Healthcare Website-Group login-Input.1
Description

... ► 06 Data Set Catalog
HR001 Human Resource management-Aetna Healthcare Website-Group login-Input
Description

... ► 06 Data Set Catalog
Customer Onboarding-Workforce-Output
Description

When you check out the Data Basket, the Data Usage asset is renamed in the format YYYY-MM-DD #X, where X is a sequential number, for example **2019-12-16 #3**.

All your access requests are shown in Catalog, on the Access Requests page.

Request access to data sets and reports

To access to the data in one or more data sets or reports, you need to request access to the data sets or reports.

Steps

1. In the main menu, click  Catalog.
 - » The Catalog Home opens.
2. In the submenu, click **Data Sets or Reports**.
3. If necessary, search for the data sets or reports that you want to access.
4. Select the check boxes of the data sets or reports that you want to access.
5. Above the tiles, click **Add to Data Basket**.

A message at the top right lets you know that the assets have been added to your basket.
6. Open your basket by clicking  on the main menu bar.
7. Review your basket.

To remove unnecessary assets, select them and click **Remove from data basket**.
8. Click **Checkout Data Basket**.
9. Fill in the **Start Form** and click **Submit**.
10. If the **Add Purpose to the Data Usage** dialog box appears, start typing and select the Purpose asset that describes the business use for which you are requesting access to the data sets or reports, and then click **Submit**.

Note This dialog box appears only if Collibra Data Privacy is installed.

What's next?

- A workflow is started, to approve the request and grant you access to the data.

- A Data Usage asset is created in Collibra Data Governance Center. You can view all your requests and their current status on the Access Requests page.

Name	Purpose	Effective Start Date	Effective End Date	Status
2019-12-16 #3	Activities related to employee management	12/19/2019	12/27/2019	Invalid

Catalog asset pages

The asset pages in Data Catalog provide an overview of information related to an asset, based on its asset type's [assignment](#).

Data Catalog experience

The Data Catalog asset pages have been tailored specifically to improve user experience of Data Catalog. The improvements include:

- Custom tabs corresponding to the page you are working on.
- Streamlined title bar showing general information.
- Quicker and easier navigation which requires less scrolling.

Data Catalog experience is enabled by default but you can [disable](#) it in Collibra Console.

Tip Some features require you to enable Data Catalog experience. For example [Collibra Data Lineage](#), Power BI and [Looker](#).

Page layout

For more information on the Catalog asset pages, see the online [user guide](#).

Data Sources page

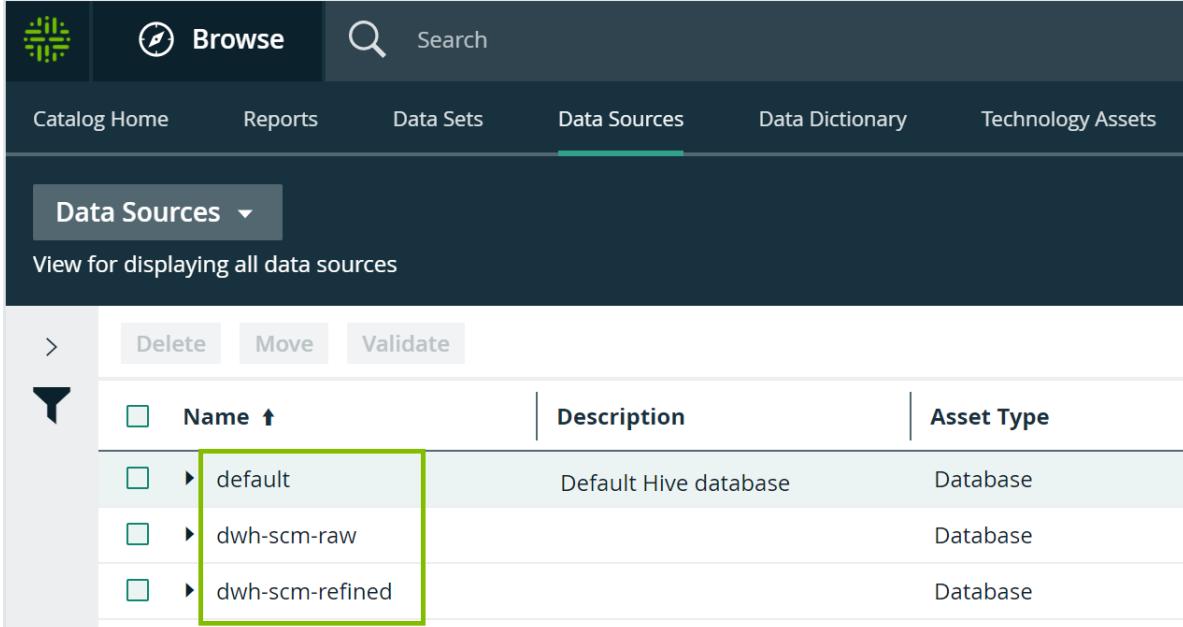
The **Data Sources** page is a view that shows all the data sources (in other words, all assets of asset type **Data Assets**) that were used in the creation of [Data Catalog Data Sets](#).

You can view the assets in table [display mode](#) or tile display mode.

Data sources in table display mode

With [hierarchies](#) enabled, you can expand the assets to consult the structure of the data sources.

- Click an asset name to open the relevant asset page.



Name ↑	Description	Asset Type
default	Default Hive database	Database
dwh-scm-raw		Database
dwh-scm-refined		Database

- Select one or more assets. The list of actions that you can perform is then displayed.

Name ↑	Description	Asset Type
<input type="checkbox"/> Employeeinformation		Schema
<input checked="" type="checkbox"/> EngineeringInformation		Schema
<input type="checkbox"/> Profiling	test	Schema

Data sources in tile display mode

- Click an asset name to open the relevant asset page.

default

Description
Default Hive database

Asset Type
Database

sampledb

Description
Sample database

Asset Type
Database

- Click anywhere else in the tile to select the asset. The list of actions that you can perform is then displayed.

Asset	Description	Asset Type
default	Default Hive database	Database
sampledb	Sample database	Database

Data Dictionary page

The **Data Dictionary** page is a [view](#) that shows all assets of every [data asset type](#) in Collibra Data Governance Center.

You can view the assets in table [display mode](#) or tile display mode.

On this page, you can perform the following actions:

- [Create views.](#)
- [Filter assets.](#)
- [Sort assets by name, description and asset type.](#)
- [Delete assets.](#)
- [Move assets.](#)
- [Add assets to data sets.](#)
- [Start an asset workflow from an asset table, for assets.](#)

Technology Assets page

The **Technology Assets** page is a view that shows all assets of every [technology asset type](#) in Collibra Data Governance Center.

You can view the assets in table [display mode](#) or tile display mode.

On this page, you can perform the following actions:

- [Create views.](#)
- [Filter assets.](#)
- [Sort assets by name, description and asset type.](#)
- [Delete assets.](#)
- [Move assets to another domain.](#)

Access Requests page

If you have requested access to one or more [Data Catalog Data Sets](#), the Access Requests page allows you to view the status of your requests.

When you request access to a data set:

- an asset of the Data Usage type is created in the Data Usages domain in your community.
- the [request Assets Access workflow](#) is started.

Name	Purpose	Effective Start Date	Effective End Date	Status
2018-04-20 #2	Testing the Access Requests page functio...	4/23/2018	4/24/2018	Approval Pending
2018-04-20 #1	tygfddgdf	4/21/2018	5/4/2018	Approval Pending

The names of your requests are automatically generated with the date of your request. You can click the request name to open the asset page, which shows all the information relative to your request.

If you've requested access to many data sets, you can [Sort on one or more columns](#) on any of the columns on the Access Requests page, to help you find a specific access request.

Advanced data types

When you profile data when registering a data source, Collibra Data Governance Center can detect some basic data types, such as numbers and text. Besides these basic data types, you can create your own advanced data types.

In this section, you learn how to work with advanced data types.

Data type detection

When you run a data profiling when registering a data source, Collibra Data Governance Center tries to detect the data type of each column.

1. Collibra DGC tries to match the fields of each column with every data type.
 2. Collibra DGC remembers the matches for each field, also if a field has multiple matches.
 3. Collibra DGC calculates the matching percentage of how many fields of the column match the same data type.
 4. Collibra DGC verifies the matching percentage against the data type detection threshold.
- Tip** You can define the data type detection threshold in Collibra Console, see the Collibra DGC Installation and Configuration Guide.
5. Collibra DGC assigns the data type with the highest matching percentage to the source column, provided that the matching percentage exceeds the threshold.

Out of the box, there are several base data types such as integer, text and boolean. With each data profiling, these base data types are evaluated. If your data source contains special data types such as social security numbers or international bank account numbers, you can define them as advanced data types. In the data source registration wizard, you can then choose to also evaluate the data on these advanced data types.

Keep in mind that detecting advanced data types significantly increases the data profiling job execution time.

Advanced data type management prerequisites

To manage advanced data types, you need the following prerequisites:

- Catalog role
- Advanced Data Type global permission

Create an advanced data type

If the basic data types, such as numbers and text, are not specific enough, you can create your own advanced data types.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a [global role](#) with the Advanced Data Type > Add [global permission](#).

Steps

1. In the main menu, click  , then  Catalog.
» The Catalog Home opens.
2. In the submenu, click **Advanced Data Types**.
3. Above the table, to the right, click **Add Advanced Data Type**.
4. In the **Add Advanced Data Type** dialog box, fill in the new data type properties.

Option	Description
Name	The name of the advanced data type. The name has to be unique, including the basic data types.
Description	The description of the advanced data type.

Option	Description			
Base data type	<p>The data type used as basis for the advanced data type:</p> <ul style="list-style-type: none"> ◦ Text ◦ Geographical ◦ True/False ◦ Date ◦ Time ◦ Date and Time ◦ Whole Number ◦ Decimal Number ◦ Array ◦ N/A 			
Examples				
Base data type	Field name	Patterns		
Text	Email address	[a-zA-Z]+[_a-zA-Z\.-]*[a-zA-Z]+@[a-zA-Z-]+(\.[a-zA-Z-]+)*(\.[a-zA-Z]{2,4})		
Text	IP address	\b(?:(:?2(?:[0-4][0-9] 5[0-5])) [0-1]?[0-9]?[0-9])\.\{3\}(?:(:?2([0-4][0-9] 5[0-5])) [0-1]?[0-9]?[0-9]))\b		
Date	Custom Date	yyyy-MM-dd		
Time	Custom Time	HH mm		
Date and Time	Custom Date and Time	MM/dd/yyyy HH:mm:ss		
True/False	Boolean (French)	<ul style="list-style-type: none"> ◦ true: vrai, v ◦ false: faux, f 		

Option	Description		
Advanced data type (variable field name)	Base data type	Field name	Description
	Text	Regular expressions	<p>List of regular expressions.</p> <p>For more information about regular expressions, see regular-expressions.info.</p>
	Geographical	Regular expressions	<p>List of regular expressions.</p> <p>For more information about regular expressions, see regular-expressions.info.</p>
	Date	Date pattern	<p>List of date patterns using the DateTimeFormatter format. See the official Java documentation.</p>
	Time	Time pattern	<p>List of time patterns using the DateTimeFormatter format. See the official Java documentation.</p>
	Date and Time	Date and Time pattern	<p>List of date and time patterns using the DateTimeFormatter format. See the official Java documentation.</p>
	Whole Number	Numeric format	Locale for the format of whole numbers.

Option	Description		
	Base data type	Field name	Description
Decimal Number	Numeric format	Locale for the format of decimal numbers.	
True/False	<ul style="list-style-type: none"> ◦ True values ◦ False values 		<ul style="list-style-type: none"> ◦ List of values that are accepted as True value. ◦ List of values that are accepted as False value.
Array or N/A			Not applicable for advanced data type detection.

5. Click **Save**.

Edit an advanced data type

If an existing advanced data type is incorrect, you can edit it.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a [global role](#) with the Advanced Data Type > Update [global permission](#).

Steps

1. In the main menu, click , then **Catalog**.
» The Catalog Home opens.
2. In the submenu, click **Advanced Data Types**.
3. In the row of the data type that you want to edit, click .

The **Edit Advanced Data Type** dialog box appears.

4. Enter the required information.

Option	Description
Name	The name of the advanced data type. The name has to be unique, including the basic data types.
Description	The description of the advanced data type.

Option	Description			
Base data type	<p>The data type used as basis for the advanced data type:</p> <ul style="list-style-type: none"> ◦ Text ◦ Geographical ◦ True/False ◦ Date ◦ Time ◦ Date and Time ◦ Whole Number ◦ Decimal Number ◦ Array ◦ N/A 			
Examples				
Base data type	Field name	Patterns		
Text	Email address	[a-zA-Z]+[_a-zA-Z\.-]*[a-zA-Z]+@[a-zA-Z-]+(\.[a-zA-Z-]+)*(\.[a-zA-Z]{2,4})		
Text	IP address	\b(?:(:?2(?:[0-4][0-9] 5[0-5])) [0-1]?[0-9]?[0-9])\.\{3\}(?:(:?2([0-4][0-9] 5[0-5])) [0-1]?[0-9]?[0-9]))\b		
Date	Custom Date	yyyy-MM-dd		
Time	Custom Time	HH mm		
Date and Time	Custom Date and Time	MM/dd/yyyy HH:mm:ss		
True/False	Boolean (French)	<ul style="list-style-type: none"> ◦ true: vrai, v ◦ false: faux, f 		

Option	Description		
Advanced data type (variable field name)	Base data type	Field name	Description
	Text	Regular expressions	<p>List of regular expressions.</p> <p>For more information about regular expressions, see regular-expressions.info.</p>
	Geographical	Regular expressions	<p>List of regular expressions.</p> <p>For more information about regular expressions, see regular-expressions.info.</p>
	Date	Date pattern	<p>List of date patterns using the DateTimeFormatter format. See the official Java documentation.</p>
	Time	Time pattern	<p>List of time patterns using the DateTimeFormatter format. See the official Java documentation.</p>
	Date and Time	Date and Time pattern	<p>List of date and time patterns using the DateTimeFormatter format. See the official Java documentation.</p>
	Whole Number	Numeric format	Locale for the format of whole numbers.

Option	Description		
	Base data type	Field name	Description
Decimal Number	Numeric format	Locale for the format of decimal numbers.	
True/False	<ul style="list-style-type: none"> ◦ True values ◦ False values 		<ul style="list-style-type: none"> ◦ List of values that are accepted as True value. ◦ List of values that are accepted as False value.
Array or N/A			Not applicable for advanced data type detection.

You cannot change the base data type.

5. Click **Save**.

Delete one or more advanced data types

If you no longer use an advanced data type, you can delete it.

Prerequisites

- You have a [global role](#) with the Catalog [global permission](#), for example Catalog Author.
- You have a [global role](#) with the Advanced Data Type > Remove [global permission](#).

Steps

1. In the main menu, click , then **Catalog**.
» The Catalog Home opens.
2. In the submenu, click **Advanced Data Types**.

Single advanced data type	<ol style="list-style-type: none"> In the row of the data type that you want to delete, click . In the Delete advanced data type dialog box, click Delete advanced data type.
3.	

Multiple advanced data types	<ol style="list-style-type: none"> a. Select the check boxes in front of the advanced data types that you want to delete. b. In the action toolbar, click Delete. <p>Tip You can select all the visible assets at once by clicking the check box next to the Name column header.</p> <ol style="list-style-type: none"> c. In the Delete (x) advanced data type(s) dialog box, click Delete (x) advanced data type(s).
------------------------------	--

The data type attributes that contain the deleted advanced data type are reset to the base data type that was used for the advanced data type.

Catalog workflows

To keep the information flows that are shipped with the Catalog product configurable, a part of the functionality is achieved through workflows. You can configure the packaged workflows, but they are designed to work together: if you decide to change one of the workflows, verify the other Catalog workflows, since they may depend on one another.

Tip For more information about workflows, see the [Collibra Developer portal](#).

Name	Description
Assign Owner To Data Set	<p>This process automates adding owners to data sets.</p> <p>This workflow is automatically triggered when a new Data Set asset is created.</p>
Cancel Process	This process notifies the concerned users of a workflow cancellation.
Escalation Process	This process is the default mechanism for the escalation of user tasks in workflows.

Name	Description
Post Data Ingestion Workflow	<p>This process facilitates assigning the Owner and Technical Steward for newly ingested Schema assets.</p> <p>This workflow is automatically triggered when a new Schema asset is created and after a data source is registered.</p>
Propose New Business Asset	This process facilitates the creation of new Business Assets in the Data Governance Council community.
Propose New Data Asset	This process facilitates the creation of new Data Assets in the Data Governance Council community.
Propose New Technology Asset	The Propose New Technology Asset workflow allows you to create a new Technology asset in Collibra Data Governance Center. By default, the asset is added to the Data Governance Council community, in the New Applications domain.

Name	Description
Request Assets Access	<p>The Request Assets Access workflow allows you to request access to assets that are referenced in your shopping cart. All data owners have to approve the request before you can access the assets.</p> <p>More information</p> <p>The workflow calculates the name of the asset by combining the creation date with a sequential number for that day, for example 2019-09-30 #1 and sets the asset characteristics according to the data submitted through the start form. The user who started the workflow receives the Requester role. The user with an Owner role approves the request for each data set and the Owner or Technical Steward provides access to the data set elements.</p> <div style="background-color: #f0f0f0; padding: 10px;"> <p>Note This workflow replaces the Request Data Sets Access workflow. If you restore a 5.4.x backup or older, the Requests Data Sets Access will overwrite the packaged Request Assets Access workflow. You have to deploy the Requests Assets Access workflow again and apply all possible customizations to the new workflow.</p> </div> <p>You can also manually request access to data sets access to data sets and reports.</p>
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Data Governance Center.
Voting Sub-Process	<p>The Voting Sub-Process is a workflow that can be called by other workflows when users need to vote. It is used within other packaged workflows such as the Approval Process, the Simple Approval or the Issue Management workflow.</p> <p>You can use this sub-process in new custom workflows. The result is a true or false boolean that is provided to the parent workflow.</p>

Catalog Troubleshooting

If you are experiencing general issues with the Data Catalog feature, consult the articles in this section.

If you have issues with ingesting a BI source or with Collibra Data Lineage, please visit their individual troubleshooting sections:

- [Tableau troubleshooting](#)
- [Power BI troubleshooting](#)
- [Looker troubleshooting](#)
- [Collibra Data Lineage troubleshooting](#)

What's the difference between Data Catalog and Collibra Connect?

Data Catalog and Collibra Connect have many overlapping features. Which of them is more suited for your situation, depends on a number of factors.

In a nutshell, you use Data Catalog for ingesting metadata from popular database types via a predefined ingestion logic, which is ideal for business users. You can then see the metadata in the form of assets and characteristics. You use Collibra Connect to read and write metadata in any API-supported system and provide the metadata to Collibra Data Governance Center. Collibra Connect has more flexibility with regard to ingestion, but requires technical skills.

	Data Catalog	Collibra Connect
Definition	The Collibra Data Catalog is an application that helps the business data analyst to discover, describe, assemble and govern data sets, in order to improve trust in analytics based on those data sets.	Collibra Connect is an integration platform that enables integrations between Collibra DGC and other third-party products, such as Informatica, Salesforce.com and JIRA.

	Data Catalog	Collibra Connect
Purpose	Data Catalog can ingest and represent metadata of specific data sources as assets and characteristics, including diagrams.	Collibra Connect is meant as an advanced interface between Collibra DGC and data sources of any third-party vendors.
Processes	<ul style="list-style-type: none"> Metadata ingestion Profiling and data type detection Read only 	<ul style="list-style-type: none"> Bidirectional synchronization of metadata No profiling Read and write
Integrations	<ul style="list-style-type: none"> JDBC-supported databases such as PostgreSQL and IBM DB2. File-based databases in Excel and CSV. External systems such as Tableau and Amazon S3. 	Any system with: <ul style="list-style-type: none"> API support Structured metadata format such as XML and JSON
Ingestion	Predefined metamodel and ingestion logic	Flexible and configurable metamodel and ingestion logic
Usability	<ul style="list-style-type: none"> Usable via Collibra DGC Business user friendly 	<ul style="list-style-type: none"> Configuration via IDE Requires development skills to set up
More information	<ul style="list-style-type: none"> The Data Catalog: What it is, Why you Need it, and How to Make it Successful The Data Catalog section of the Collibra DGC user guide. 	<ul style="list-style-type: none"> Introduction to Collibra Connect The Collibra Connect user guide.

How to enable logging for data ingestion

If you want to troubleshoot issues with data ingestion, you have to enable logging for data ingestion. By default, logging for data ingestion is disabled because your data can be exposed.

Warning If you have investigated the data ingestion issue, don't forget to revert all the changes from this section.

Steps

1. Open the Data Governance Center logging settings.
2. Click Add logger.
3. In the Add logger dialog box, enter the necessary information.
 - **Logger name:** Add the name of the logger.
Data ingestion and profiling loggers:
 - com.collibra.dgc.catalog.service.schema.impl
 - com.collibra.dgc.catalog.service.impl
 - com.collibra.jobserver.client
 - com.collibra.dgc.catalog.service.datausage.impl
 - com.collibra.catalog.core.service.datausage.impl
 - com.collibra.catalog.core.service.schema.impl
 - com.collibra.catalog.core.service.schema.impl.ingestion
 - com.collibra.catalog.core.service.schema.impl.profiling
 - com.collibra.catalog.core.service.schema.impl.report
 - com.collibra.catalog.core.schema.impl
 - com.collibra.catalog.core.schema.impl.ingestion
 - com.collibra.catalog.core.schema.impl.profiling
 - com.collibra.catalog.core.schema.impl.report
 - **Logger level:** Select *DEBUG*.
4. Click Add logger.
5. Repeat this until you have added all the loggers.
6. On the node that runs the Jobserver service, open the file **log4j-server.properties** in the **collibra/spark-jobserver/conf** directory.
7. Update the values of the following parameters from **WARN** to **INFO**:
Spark job loggers:
 - log4j.logger.org.apache.spark.scheduler
 - log4j.logger.org.apache.spark.executor
 - log4j.logger.org.apache.spark.storage
 - log4j.-
logger.org.apache.spark.sql.catalyst.expressions.codegen.CodeGenerator
 - log4j.logger.org.apache.spark.ContextCleaner

- log4j.logger.spark.jobserver.WebApi
 - log4j.logger.com.collibra.jobserver.job
8. Restart the Jobserver service, by [stopping](#) and [starting](#) it.

The Jobserver logs are out of memory

When the Jobserver log files are out of memory, the logs that are created during ingestion or profiling are deleted immediately after they are created.

Solution

1. [Stop](#) the environment for which you want to update the memory settings.
2. Open a terminal session on the server that hosts the jobserver.
2. Open the file `/opt/collibra/spark-defaults.conf` and do the following.
 - a. Add the following line to the configuration file:

```
spark.driver.maxResultSize = 1536m
```

- b. Save and close the file.
3. Open the `/opt/collibra/spark-jobserver/conf/log4j-server.properties` file and do the following.
 - a. In the Root logger option section, update the properties to match this section:

```
# Root logger option
log4j.rootLogger=INFO,LOGFILE
log4j.appender.LOGFILE=org.apache.log4j.RollingFileAppender
log4j.appender.LOGFILE.File=${LOG_DIR}/spark-job-server.log
log4j.appender.LOGFILE.layout=org.apache.log4j.PatternLayout
log4j.appender.LOGFILE.layout.ConversionPattern=%d{yyyy-MM-
dd HH:mm:ss.SSS} %-5p [%t] %c{3} - %m%n
log4j.appender.LOGFILE.maxFileSize=100MB
log4j.appender.LOGFILE.maxBackupIndex=30
log4j.logger.org.apache.spark=WARN
log4j.logger.spark.jobserver.context=WARN
log4j.logger.akka=WARN
log4j.logger.com.collibra.jobserver.job=DEBUG
log4j.logger.com.collibra.catalog.profilers=DEBUG
log4j.-
log-
ger.com.collibra.catalog.profilers.Pass1TableProfiler$=INFO
log4j.logger.com.collibra.catalog.ingestion=DEBUG
log4j.logger.com.collibra.jdbc=DEBUG
```

- b. Save and close the file.
4. [Start](#) the environment again.

Ingestion out-of-memory error

When you upload a JDBC driver larger than 50 MB or when you have uploaded multiple JDBC drivers, you may encounter an out-of-memory error. Due to this problem, the jobserver does not release the memory needed to store the driver in memory.

Resolution

To solve this problem, you have to increase the memory of the Jobserver application, for example, increase it to 3 GB.

1. [Stop](#) the environment for which you want to update the memory settings.
2. Open a terminal session on the server that hosts the jobserver.
3. Open the file <drive>/collibra/spark-jobserver/conf/jobserver.conf for editing.
4. Look up the parameter **driver-memory**.
5. Edit the parameter value, for example, **3G**, corresponding with 3 GB.
The default value is **2G**.
6. Save and close the file.
7. Open the file <drive>/collibra_data/spark-jobserver/config/server.json for editing.
8. Look up the parameter **jobserverMemory**.
9. Edit the parameter value, for example, **2048M**, corresponding with 2 GB.
The default value is **1024M**.
10. Save and close the file.
11. [Start](#) the environment again.

Missing schema name during data ingestion

If you [ingest](#) a data source with a new JDBC driver, you can receive an error "No schema has been specified".

Note In the stacktrace you can see a "CollibraIllegalArgumentException" message.

Solution

Make sure that you defined a [schema](#) property for the new [JDBC driver](#).

Different versions for Collibra DGC and Jobserver

You can install the services of a Collibra Data Governance Center environment on multiple nodes. If you do so, make sure that you use the same installer on all the nodes. This also applies to upgrading an environment.

If your environment has different versions for the Data Governance Center and Jobserver services, the following errors will occur when you run an ingestion.

- **Spark Context's logs**

```
[2017-11-07 07:27:15,608] WARN nalRequestDataDeserializer []
[akka://JobServer/user/jobManager-c7-8eec-de0c02029808] - Package
com.collibra.jobserver.dto.catalog.ingestion, different version
detected: client uses version 1.2.4-SNAPSHOT, server uses version
1.2.2-SNAPSHOT
```

- **Collibra DGC logs**

```
20:21:43.407 [Procedure Manager] WARN c.c.j.c.i.s.StateDeseri-
alizer - Package com.collibra.jobserver.dto.catalog.profiling,
different version detected: client uses version 1.1.10, server
uses version 1.1.8
```

Solution

Install all the Collibra DGC services with the same installer.

Resolve schema refresh conflicts

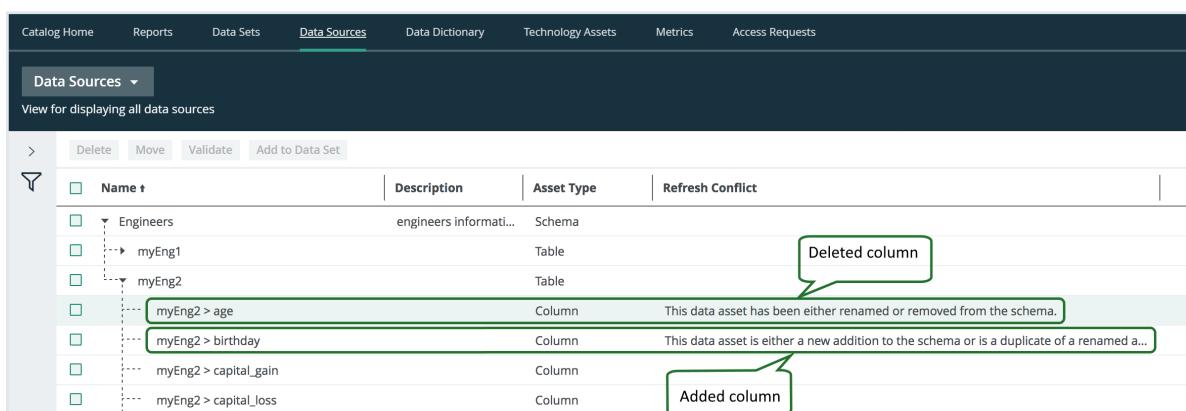
If you refresh a schema, the ingestion process detects differences between the original schema, already in Collibra Data Governance Center, and the updated schema.

If columns or tables have been added to or removed from the schema, the process will create or delete the corresponding Column and Table assets in Collibra DGC. However, the ingestion process results in a refresh conflict if one or more columns or tables were added and others were removed. If that happens, it adds a Refresh conflict attribute to all added and removed columns or tables. You have to resolve these conflicts before you can refresh the schema again. If you do not resolve the refresh conflicts, any future attempts to refresh the data source will fail.

To see if there are any conflicts after a refresh, you have to [add](#) the **Refresh Conflict** field to the **Data Sources** view of the schemas.

You may come across the following scenarios:

- A column is deleted from the schema and another one is added to the schema:
 - a. You have to manually delete the column asset.
 - b. You have to remove the **Refresh conflict** attribute from the added column asset.



Name	Description	Asset Type	Refresh Conflict
Engineers	engineers informati...	Schema	
myEng1		Table	
myEng2		Table	
myEng2 > age		Column	This data asset has been either renamed or removed from the schema.
myEng2 > birthday		Column	This data asset is either a new addition to the schema or is a duplicate of a renamed a...
myEng2 > capital_gain		Column	
myEng2 > capital_loss		Column	

- A column is renamed in the schema:
 - a. You have to remove the column asset with the updated column name.
 - b. You have to rename the original column name to the newly ingested column name and delete the **Refresh Conflict** attribute.

Data Sources			
View for displaying all data sources			
Delete Move Validate Add to Data Set			
Name	Description	Asset Type	Refresh Conflict
Engineers	Engineers employee personal ...	Schema	
myEng1		Table	
myEng2		Table	
myEng2 > age		Column	Original column name This data asset has been either renamed or removed from th...
myEng2 > capital_gain		Column	
myEng2 > capital_loss		Column	
myEng2 > country		Column	Updated column name This data asset is either a new addition to the schema or is a ...
myEng2 > current_age		Column	
myEng2 > education		Column	

- A column is deleted from the schema: this is automatically detected by the refresh operation. No further action is required of you.
- A column is added to the schema: this is automatically detected by the refresh operation. No further action is required of you.
- A table is renamed in the schema:
 - a. You have to manually delete the renamed new table and all the columns contained in the table.
 - b. You have to manually rename the existing old table and all the columns contained in the table.

Data Sources			
View for displaying all data sources			
Delete Move Validate Add to Data Set			
Filters	Edit	<	
Basic			
No filters defined. Click edit to add one.			
Name	Description	Asset Type	Refresh Conflict
Refresh		Schema	
firsttable		Table	This data asset has been either renamed or removed from the schema.
firsttable2		Table	This data asset is either a new addition to the schema or is a duplicate of a renamed asset.

- A table is deleted from the schema and another table is added to the schema:
 - a. You have to manually delete the deleted table and all the columns in the table.
 - b. You have to manually delete the Refresh Conflict attribute for the added table.

Data Sources			
View for displaying all data sources			
	Delete	Move	Validate
>	Add to Data Set		
	Name	Description	Asset Type
	Postgre		Schema
	CompanyList		Table
	Employee		Table
	Schools		Table

Resolve a schema refresh conflict when columns are added and deleted at the same time

If you refresh a schema, the ingestion process will detect conflicts if the data source has the following changes:

- A column has been removed.
 - A column has been added.

In the following example, the ingested schema has a column **age** and in the updated schema, the column **age** is removed and a column **birthday** is added.

To resolve such a refresh conflict, follow these steps:

1. Look up the data source with the search function or as follows:
 - a. In the main menu, click  Catalog, then  Catalog.
 - » The Catalog Home opens.
 - b. In the submenu, click Data Sources.
 - c. Optionally, add the Refresh Conflict column to the table.
 - d. In the table, expand the relevant schema and table to find the columns with refresh conflicts.

Catalog Home Reports Data Sets **Data Sources** Data Dictionary Technology Assets Metrics Access Requests

Data Sources ▾

View for displaying all data sources

> Delete Move Validate Add to Data Set

Name	Description	Asset Type	Refresh Conflict
Engineers	engineers informati...	Schema	
myEng1		Table	
myEng2		Table	
myEng2 > age		Column	This data asset has been either renamed or removed from the schema.
myEng2 > birthday		Column	This data asset is either a new addition to the schema or is a duplicate of a renamed a...
myEng2 > capital_gain		Column	
myEng2 > capital_loss		Column	

Deleted column

Added column

- Select the column that is removed from the data source. In this example it is the **age** column.

If necessary, select all column assets that are removed from the data source.

- Above the table click **Delete**.

Name	Description	Asset Type	Refresh Conflict
Engineers	engineers informati...	Schema	
myEng1		Table	
myEng2		Table	
<input checked="" type="checkbox"/> myEng2 > age		Column	This data asset has been either renamed or removed from the schema.
myEng2 > birthday		Column	This data asset is either a new addition to the schema or is a duplicate of a renamed a...
myEng2 > capital_gain		Column	

- Click **Yes** to confirm the deletion of the column.
- Click the name of the added column name.
» The column asset page appear.
- In the **Refresh Conflict** section of the column asset page, hover over the message and click on the right-hand side.

Business Analysts Community ▶ Schemas ▶ default

myEng2 > birthday

Column Candidate | 0 0

Add characteristic < Engineers ▶ myEng2 ▶ myEng2 > birthday

Summary	Description
Details	No value has been given yet. Double click or use the edit button.
Data Profiling	Refresh Conflict
This data asset is either a new addition to the schema or is a duplicate of a renamed asset.	

- Click **Yes** to confirm the deletion of the attribute.
 - Click the browser's **Back** button to return to the **Data Sources** view of the table.
- You can also click on the breadcrumb, as shown in the following image, to open the table asset page of the ingested schema.'

Business Analysts Community ▶ Schemas ▶ default

myEng2 > age

Column Candidate | 0 0

Add characteristic < Engineers ▶ myEng2 ▶ myEng2 > current_age

Summary	Description
----------------	--------------------

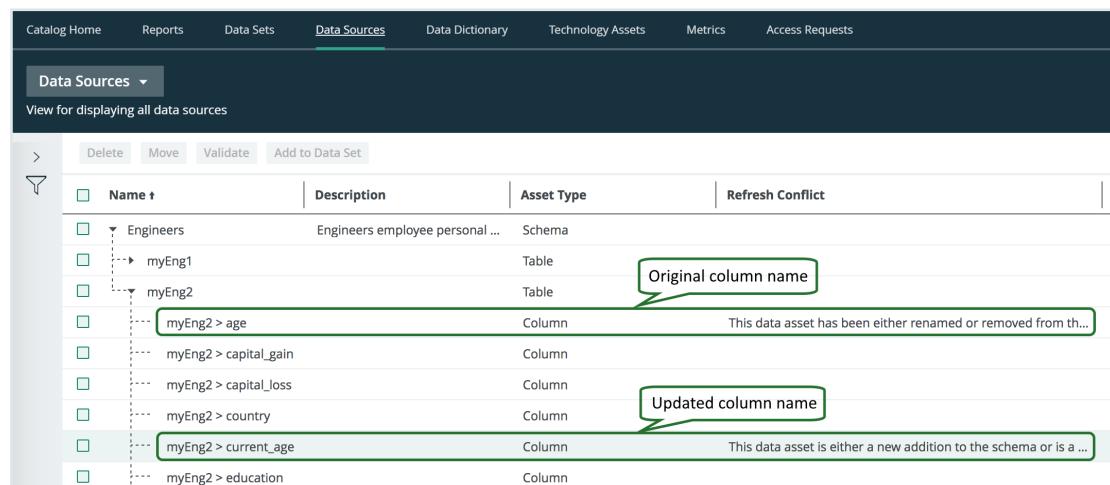
9. Repeat steps **5** to **8** for all other added columns.

Resolve a schema refresh conflict for a renamed column

If you refresh a schema where the data source contains a column that has been renamed, the ingestion process will detect a conflict. In the following example, the ingested schema contains a column **age**, and in the updated schema, the column name has become **current_age**.

To resolve a refresh conflict due to a column rename, follow these steps:

1. Look up the new column with the search function or as follows:
 - In the main menu, click  Catalog, then  Data Sources.
 - The Catalog Home opens.
 - In the submenu, click **Data Sources**.
 - Optionally, add the **Refresh Conflict** column to the table.
 - In the table, expand the relevant schema and table to find the columns with refresh conflicts.



The screenshot shows the Data Sources table in the Catalog interface. The table has columns: Name, Description, Asset Type, and Refresh Conflict. A tooltip 'Original column name' points to the 'age' column under 'myEng2'. A tooltip 'Updated column name' points to the 'current_age' column under 'myEng2 > current_age'. The 'Refresh Conflict' column contains status messages for each row.

Name	Description	Asset Type	Refresh Conflict
Engineers	Engineers employee personal ...	Schema	
myEng1		Table	
myEng2		Table	
myEng2 > age		Column	This data asset has been either renamed or removed from th...
myEng2 > capital_gain		Column	
myEng2 > capital_loss		Column	
myEng2 > country		Column	
myEng2 > current_age		Column	This data asset is either a new addition to the schema or is a ...
myEng2 > education		Column	

2. Select the updated column name and click **Delete** above the table.

If necessary, select all column assets that are removed from the data source.

Name	Description	Asset Type	Refresh Conflict
Engineers	Engineer employee ...	Schema	
myEng1		Table	
myEng2		Table	
myEng2 > age		Column	This data asset has been either renamed or removed from the schema.
myEng2 > capital_gain		Column	
myEng2 > capital_loss		Column	
myEng2 > country		Column	
myEng2 > current_age		Column	This data asset is either a new addition to the schema or is a duplicate of a
myEng2 > education		Column	

3. Click **Yes** to confirm the deletion of the column asset(s).

4. Click the name of the original column name.

» The column asset page appears.

5. In the resource toolbar, click **Actions > Edit**.

» The **Edit <asset name>** dialog box appears.

6. Change the name to the new ingested name.

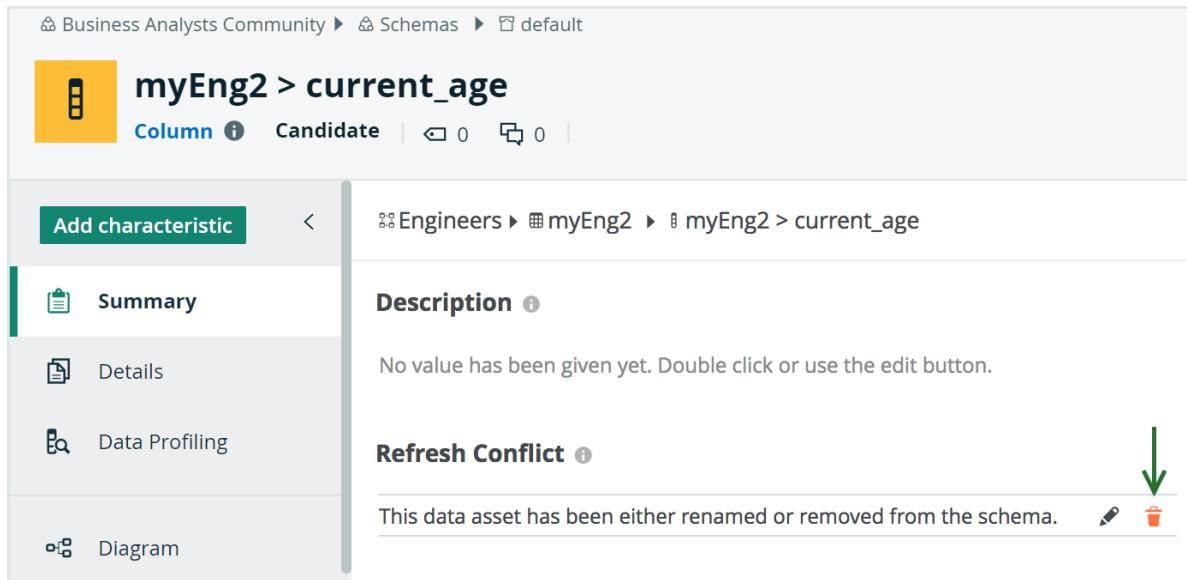


7. Click **Save**.

8. Refresh the page.

9. Leave the column asset page open.

10. In the Refresh Conflict section of the column asset page, hover over the message and click  on the right-hand side.



Business Analysts Community > Schemas > default

myEng2 > current_age

Column Candidate | 0 0 |

Add characteristic <

-  Summary
-  Details
-  Data Profiling
-  Diagram

Engineers > myEng2 > myEng2 > current_age

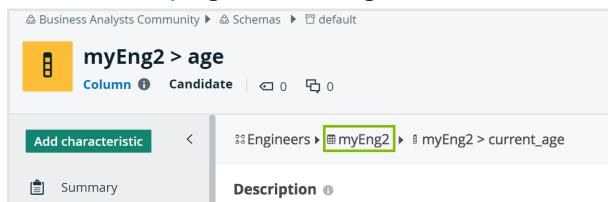
Description 

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

Refresh Conflict 

This data asset has been either renamed or removed from the schema.  

11. Click **Yes** to confirm the deletion of the attribute.
 12. Click the browser's **Back** button to return to the **Data Sources** view of the schema. You can also click on the breadcrumb, as shown in the following image, to open the table asset page of the ingested schema.



Business Analysts Community > Schemas > default

myEng2 > age

Column Candidate | 0 0 |

Add characteristic <

-  Summary
- Description 

Engineers > myEng2 > current_age

13. If necessary, repeat steps 4 to 12 for other renamed column assets.

What's next?

You can now safely refresh the schema with the new data source; however, keep in mind this may take some time.

Resolve a schema refresh conflict for a renamed table

If you refresh a schema where the data source contains a table that has been renamed, the ingestion process detects a conflict.

In the following example, the original schema **Refresh** contains the table **firsttable**. This table has been renamed to **firsttable2**. After refreshing the schema, refresh conflicts appear, as shown in the following image:

The screenshot shows a table titled "Data Sources" with a header row containing "Name", "Description", "Asset Type", and "Refresh Conflict". There are two rows of data. The first row is for the schema "Refresh", which is listed as a "Schema". The second row is for the table "firsttable2", which is listed as a "Table". The "Refresh Conflict" column for "firsttable2" contains the message: "This data asset has been either renamed or removed from the schema." The "Refresh Conflict" column for the schema row is empty.

Name	Description	Asset Type	Refresh Conflict
Refresh	Schema		
firsttable2	Table		This data asset has been either renamed or removed from the schema.

You have to manually resolve the conflicts before you continue. It is not possible to refresh a schema when there are conflicts.

Note You have to [add](#) the **Refresh Conflict** column to the table if it is not there already.

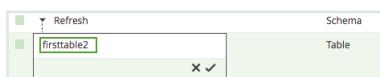
Steps

1. In the main menu, click , then **Catalog**.
 - » The Catalog Home opens.
 - » The Catalog Home appears
2. In the submenu, click **Data Sources**.
3. Expand the tables to see all the columns that are contained in them.
4. Select the renamed table and all its contained columns, in this example, **firsttable2**.

5. Above the table, click **Delete**.

Name	Description	Asset Type	Refresh Conflict
Refresh	Schema		
firstable	Table	Column	This data asset has been either renamed or removed from the schema.
firstable > column1	Column		
firstable > column2	Column		
firstable > column3	Column		
firstable > column4	Column		
firstable > column5	Column		
firstable > column6	Column		
firstable > column7	Column		
firstable > column8	Column		
firstable2	Table	Column	This data asset is either a new addition to the schema or is a duplicate of a renamed asset.
firstable2 > column1	Column		
firstable2 > column2	Column		
firstable2 > column3	Column		
firstable2 > column4	Column		
firstable2 > column5	Column		
firstable2 > column6	Column		
firstable2 > column7	Column		
firstable2 > column8	Column		

6. Click **Yes** to confirm the deletion.
7. Hover over the original table, in this example, **firstable**, and click to the right of the table name.
8. Change the name to the new ingested table name, in this example, **firstable2**, and click to apply the change.



9. Hover over a column contained in the table you just renamed and click to the right of the column name.
10. Rename the column by replacing the table part of the name with that of the renamed table and click to apply the change.

The column name is a concatenation of the table name and the original column name and so you just have to replace the table part of the name with the new table name. For example, to rename the column name **firstable > column1** to **firstable2 > column1**, you just have to change **firstable** to **firstable2** so that the column name becomes **firstable2 > column1**.

11. Repeat this action for all the columns in the renamed table.

Now, you only see the new ingested table, **firstable2**, and the columns contained in

the table.

Refresh	Schema	
firsttable2	Table	This data asset has been either renamed or removed from the schema.
firsttable2 > column1	Column	
firsttable2 > column2	Column	
firsttable2 > column3	Column	
firsttable2 > column4	Column	
firsttable2 > column5	Column	
firsttable2 > column6	Column	
firsttable2 > column7	Column	
firsttable2 > column8	Column	

12. Click the name of the renamed table.
» The table asset page appears.
13. In the **Refresh Conflict** section, hover over the refresh conflict message and click  on the right-hand side.



14. Click **Yes** to confirm the deletion of the Refresh Conflict attribute.

What's next?

You can now safely refresh the schema with the data source.

Resolve a schema refresh conflict when tables are added and deleted at the same time

When you refresh a schema, the ingestion process detects conflicts if the data source has the following changes at the same time:

- A table has been removed.
- A table has been added.

In the following example, the original schema **Postgre** contains the table **Employee** and the table **CompanyList**. A new table **Schools** has been added to the schema and the table **CompanyList** has been deleted. After refreshing the schema, refresh conflicts

appear for the added table and the deleted table, as shown in the following image:

Data Sources				
View for displaying all data sources				
	Name	Description	Asset Type	Refresh Conflict
	Postgre	Schema		
	CompanyList	Table		This data asset has been either renamed or removed from the schema.
	Employee	Table		
	Schools	Table		This data asset is either a new addition to the schema or is a duplicate of a renamed asset.

You have to manually resolve the conflicts before you continue. It is not possible to refresh a schema when there are conflicts.

Note You have to **add** the **Refresh Conflict** column to the table if it is not there already.

Steps

1. In the main menu, click  , then  **Catalog**.
 - » The Catalog Home opens.
 - » The Catalog Home appears.
2. In the submenu, click **Data Sources**.
3. Select the deleted table and all its contained columns, in this example, **CompanyList**.

3 / 6 Delete Move Validate Add to Data Set Approval Simple Approval Vote				
	Name	Description	Asset Type	Refresh Conflict
	Postgre	Schema		
<input checked="" type="checkbox"/>	CompanyList	Table		This data asset has been either renamed or removed from the schema.
<input checked="" type="checkbox"/>	CompanyList > column1	Column		
<input checked="" type="checkbox"/>	CompanyList > column2	Column		
	Employee	Table		
	Schools	Table		This data asset is either a new addition to the schema or is a duplicate of a renamed asset.

4. Above the table, click **Delete**.
5. Click **Yes** to confirm the deletion.
6. Click the name of the added table, in this example, **Schools**.
 - » The table asset page appears.
7. In the **Refresh Conflict** section, hover over the refresh conflict message and click  on the right-hand side.



8. Click **Yes** to confirm the deletion of the Refresh Conflict attribute.

What's next?

You can now safely refresh the schema with the data source.

Advanced data type detection is slow

Advanced data type (ADT) detection is the process that compares each value in the database with each pattern in the ADT definition list.

The following non-exhaustive list contains the factors that affect the detection time:

- The higher the number of ADTs in Catalog, the longer the detection time.
- The higher the number of patterns in each ADT, the longer the detection time.
For example, a text ADT can contain one or more regular expressions. The more regular expressions that you add to this ADT, the longer the detection time will take.

Tip As a general rule, try to limit both the number of ADTs and the number of patterns per ADT.

Jobserver troubleshooting

This is a list of known issues in versions older than Collibra DGC 5.7.9.

Problem	Solution
<p>One or more of the following error messages appear:</p> <ul style="list-style-type: none"> context JS-<context ID> not found in the Jobserver node in DGC logs. manager_start - /opt/collibra/spark-jobserver/bin/manager_start.sh: line 73: <process id> killed in the Jobserver server logs. Spark context logs are interrupted during Spark processing. It is not possible to allocate enough memory in the Spark process or other process on the same machine. 	<p>If the Spark context crashes or is unresponsive, it can be related to a memory shortage. Make sure that you have enough memory.</p> <ul style="list-style-type: none"> In 5.7, a Jobserver node should have 64GB RAM, 16 CPUs and 500GB SSD. In 5.7.1, the Spark context process configuration for each Jobserver requires you to change the lower the heap memory to 40GB and replace the -XX:+UseG1GC option by -XX:+UseParallelGC.
<p>An ingestion job keeps on running due to lingering Spark Context.</p>	<p>Restart the Jobserver, then restart Collibra DGC.</p>
<p>Communication failure occurs between Jobserver and Spark Context when profiling large tables.</p>	<p>The following relevant parameters can be edited in the Jobserver configuration file to decrease the chance that this problem occurs:</p> <ul style="list-style-type: none"> acceptable-heartbeat-pause should be 600s. heartbeat-interval should be 300s. threshold should be 12.0

Jobserver jobs

To ingest data in Collibra Data Governance Center, you have to [register](#) a data source. During the ingestion, you can include to run a data profiling, data sampling and to detect advanced data types in the data.

The DGC service is responsible for the ingestions, the Jobserver is responsible for the data profiling, data sampling and advanced data type detection.

The following table shows how many jobs it takes to complete a task. The jobs are executed sequentially.

Task	Number of jobs
Data profiling	4 jobs per table
Data sampling	2 jobs per table
Advanced data type detection	1 job per table
Data ingestion	0 job

If you have to troubleshoot Jobserver jobs, you need the following log files when you [create a diagnostic file](#).

- Collibra DGC logs
- Jobserver logs: You have to [enable](#) the ingestion and profiling logs.
- Spark logs: You have [enable](#) to the Spark logs. When you create a diagnostic file, these are included with the Jobserver logs.

Data Helpdesk

With the Data Helpdesk application of Collibra Data Governance Center, you can:

- Manage **data issues**¹ efficiently.
- Quickly view newly created issues.
- Process issues assigned to a given user.
- Track the progress of the issues.
- View the data quality dimensions (accuracy, completeness, conformity, consistency, integrity are available out of the box) and the data quality rules.

The following sections describe the issue roles, how to log issues and how to use the default 'Issue Management' workflow. Note that since administrators can change and customize the workflow, the actual behavior of your Collibra DGC may be different than described.

Data Helpdesk submenu pages

Page	Description
Issues	Contains a table with Issue assets in Collibra DGC.
Data Quality	Contains tables with Data Quality and Data Quality Dimension assets.
Metrics	Contains a variety of statistics related to how the assets of the Data Helpdesk are used.

In this chapter

¹A problem related to issue management; also referred to as issue.

Issue roles

There are several roles involved in the issue management workflow. Some of the roles are assigned automatically by the workflow and others have to be configured or assigned while tasks of the workflow are being executed. Predefined variables can determine which users to select for a given situation. To learn more about configuring variables for workflows, see [Managing workflows in Collibra DGC](#).

The following table contains the different roles in an issue.

Role	Description
Requester	The requester is the user who has logged an issue, which means that there can only be one requester per issue. The requester is kept up to date on the issue resolution progress and can be asked to provide more information.
Reviewer	<p>The reviewer analyzes the created issue and proposes a solution for it but does not implement the solution. The reviewer is responsible to ensure that all the information is available for solving the issue. This user can also mark an issue as invalid.</p> <p>Which user is assigned as reviewer, depends on the issue management workflow configuration. The reviewerUserExpression variable of the workflow determines which users are able to assign themselves as reviewer for the issue. By default this is the steward. After the workflow has started, the issue manager or the current reviewer can assign a different user as reviewer.</p>
Stakeholder	The stakeholders of an issue are responsible for accepting or rejecting the analysis and solution that was proposed by the reviewer. The stakeholders of an issue can be configured through a variable called the stakeholderUserExpression in the workflow. By default, this is the steward. It is not possible to change the stakeholders after the workflow has started.

Role	Description
Assignee	<p>The assignee is responsible for the actual implementation of the solution. It is the requester's responsibility to appoint assignees. The assignee receives a task for the implementation of the solution.</p> <p>Assignees are suggested by the workflow. The suggested assignees can be configured through the assigneeUserExpression variable of the workflow. Assignees can also assign another assignee after the workflow has started.</p>

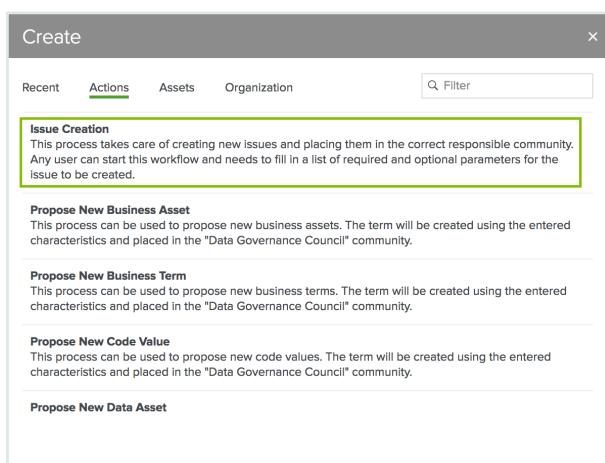
Create a data issue

By creating a new data issue, you start a workflow to resolve data issues. The workflow behavior varies per company.

Steps

To create a data issue, follow these steps:

1. In the main menu, click the **Create** (+) button.
» The **Create** dialog box appears.
2. In the **Create** dialog box, click the **Actions** tab.
3. Click **Issue Creation**.



If you don't see **Issue Creation**, you have to add the **Issue Creation** workflow to the global create, see [I don't see a workflow in the global create](#).

4. Complete the Log Issue dialog box.

- **Title** (mandatory): The name and a short descriptive title for the issue.
- **Description** (mandatory): A full description to explain the details of the issue.
- **Priority**: The priority of the issue. Possible values are (in order of importance from high to low):
 - Blocking
 - Critical
 - Urgent
 - Normal
 - Minor
- **Responsible Community**: The community that is, according to you, responsible for solving the issue. By default, this is the Data Governance Council community, which is responsible for taking in all new types of assets and assigning them to the right community.
- **Relevant Assets**: A list of assets that are impacted by the issue. When you start typing in this field, suggestions appear. Click a suggestion to add the asset to the issue. You can add multiple relevant assets.



Click ✖ next to a related asset to remove it from the list.

5. Click Create Issue.

Example:

The screenshot shows a 'Log Issue' dialog box with the following fields:

- Title:** An input field containing a single character.
- Description:** A rich text editor with a toolbar and placeholder text 'Click here and start typing..'
- Priority:** A dropdown menu set to 'Normal'.
- Responsible Community:** A dropdown menu set to 'Data Governance Council'.
- Relevant Assets:** A text input field with placeholder 'Type something here and confirm using enter...' and a '...' button.
- Issue Classification:** A text input field with placeholder 'Select business asset.' and a '...' button.

A 'Create Issue' button is located at the bottom right of the dialog.

What's next?

The data issue is created and the proper workflow is automatically started. On the **Diagram** page of the created Data Issue asset page, you can find the assets that are related to the issue.

Create issue: options

Option	Description
Title	Mandatory. The name and a short descriptive title for the issue.
Description	Mandatory. A full description to explain the details of the issue.
Priority	The priority of the issue. Possible values are (in order of importance from high to low): <ul style="list-style-type: none"> • Blocking • Critical • Urgent • Normal • Minor

Option	Description
Responsible Community	The community that is, according to the reporter, responsible for solving the issue. By default, this is the Data Governance Council community, which is responsible for taking in all new types of assets and assigning them to the right community.
Relevant Asset	A list of assets that are impacted by the issue or that are subject of the issue. When you start typing in this field, suggestions appear. Click a suggestion to add the asset to the issue. You can add multiple relevant assets.  Click X next to a related asset to remove it from the list.
Issue Classification	The classification of the issue, indicating what the issue type is.

Tasks in the Issue Management workflow

In this section you can find more information about the various tasks in the Issue Management workflow. For more information about workflows, see [Managing workflows in Collibra DGC](#) section.

Note It is possible that your Collibra Data Governance Center administrator has renamed the Issue Management workflow.

Accepting or rejecting a data issue

When the issue management workflow is started, tasks are assigned to the users that are defined in the workflow. These are by default the issue stewards. This workflow task has to be completed before a predefined deadline, if not, the issue is escalated to the issue manager who will set a reviewer manually.

The stewards can accept or reject an issue. When one steward accepts the issue, its status becomes **Under Review**.

Only when all stewards reject an issue, the issue is marked as invalid and the requester is notified.

You can check if you have issues to accept or reject if you click the **Tasks** button in the main menu. Issues that have passed the due date, appear in red.

Click on the task row to select it. You can accept or reject the task from the sidebar.

Task	Resource	Due	Error
Assign Technical steward	DPM	10/17/16	
Assign Technical steward	ICB subsectors	10/21/16	
Accept Review	COREP - Report C 06.02 - Update list of legal entities	10/24/16	
Accept Review	COREP - Report C 41.00 - Missing nominal amount	10/24/16	
Assign Technical steward	Customer	10/26/16	
Assign Technical steward	COREP C06.02	10/26/16	

Assign Technical steward
 Please assign a Technical Steward to the domain.
 Target: DPM
 Due Date: Oct 17, 2016
 Created On: Sep 16, 2016
 Assalonee

When you click the name of the task or the related resource, the issue page opens.

You can accept or reject the issue from the sidebar.

Open tasks (1/1)

Due: 1/11/2021

Accept Review

Do you want to review this issue?

Related to: Data Issue

Accept **Reject**

When you accept the issue, the workflow automatically advances to the next step.

Tip You can also access the issues via **Data Helpdesk → Issues** and apply a filter to find the issues that require an action from you.

Analyzing and proposing a solution

When the status of a task is **Under Review**, you can perform the following actions:

- **Reassign Reviewer:** Choose this action if you find that another user is more suited to analyze the issue. The status of the task becomes **Reassign Reviewer**. Click **Submit** to assign a new user, role or group as the new reviewer for the issue.

Open tasks (1/1)

Due: 1/11/2021

Reassign Reviewer

Assign a new reviewer for this issue.

Related to

User

Group

Role

Select role
in community
Select community.

Submit

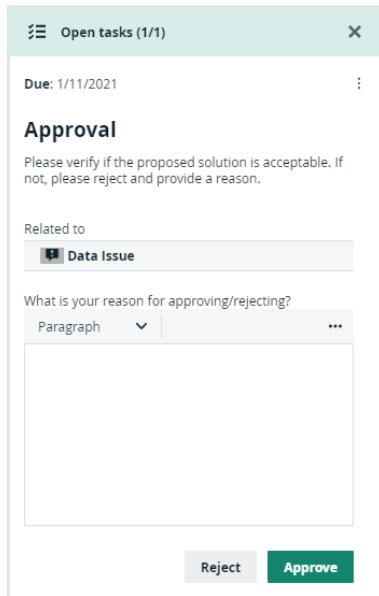
- **More Information:** Choose this action if you need more information from the issue requester. The status of the issue becomes **Pending**. This action creates a task for the requester to provide more information about the issue.
When the requester has completed this task, the workflow returns to you with a task with the same four options.
- **Invalid Issue:** Choose this action to mark the issue as invalid. The requester is notified and the issue management workflow is finished. Note that this is an irreversible action.
- **Request Approval:** Choose this action to request an approval for your analysis and solution proposal. You can only click this action when you have provided a detailed analysis of the issue in the issue's **Analysis** attribute. In the **Resolution** attribute, you can propose a solution to the issue. When you request an approval, the contents of the **Analysis** and **Resolution** attributes can be evaluated and approved. The issue is marked as **Submitted for approval**.

Approve or reject a solution

In the approve/reject step, each stakeholder assigned to the issue is requested to accept or reject the analysis and solution proposed by the reviewer. All the stakeholders have to

accept, otherwise the solution is not approved. If one stakeholder rejects the solution, the workflow creates a new task for the reviewer to update the analysis and solution, taking into account the comments given by the stakeholder who rejected the proposed solution. If approved, the issue is marked as Accepted.

1. In the sidebar, provide a reason for your action.
2. Click the **Approve** or **Reject** button.

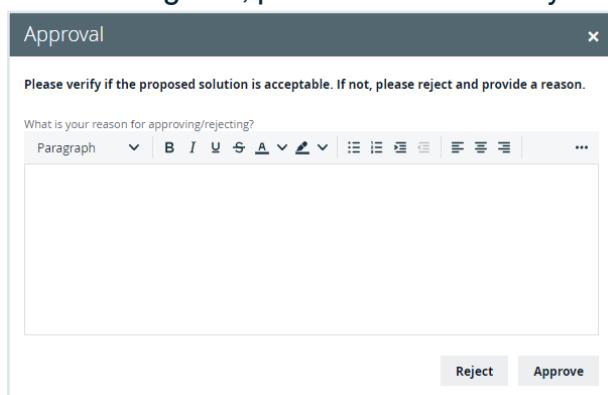


1. In the task bar, click the **Approve/Reject** button.



» The Approval dialog box appears.

2. In the dialog box, provide a reason for your action.



3. Click the **Approve** or **Reject** button.

When all the stakeholders have approved the solution, the status of the issue becomes **Approved**.

If the last stakeholder is a reviewer, the user can immediately appoint an assignee to solve the issue or close the issue if no further action is required.

Appoint assignee or resolve the issue

When all the stakeholders have accepted the proposed solution, it does not necessarily mean that the issue is resolved. It is possible that the solution still has to be implemented.

When the solution is approved, the reviewer can decide to appoint an assignee who can implement the actual solution to resolve the issue, or mark the issue as resolved if there is no need for a specific implementation.

After appointing an assignee, the issue is marked as 'In Progress'.

You can appoint an assignee in the following ways:

- Fill in a list of users in the **User** field.
- Add groups in the **Group** field.
- Specify a role, in the **Role** field, that the selected user has to have on the current issue. If you also fill in the **in community** field, all the users with the specified role for the given community become the assignee of the issue.

The screenshot shows a dialog box titled 'Appoint assignee or mark as resolved'. It contains the following fields:

- User:** A dropdown menu showing 'Judy Clark' with a small profile icon and three dots at the end.
- Group:** A dropdown menu showing 'EDW Data Operations' with a small group icon and three dots at the end.
- Role:** A dropdown menu labeled 'Select role' with three dots at the end.
- in community:** A dropdown menu labeled 'Select community.' with three dots at the end.

At the bottom of the dialog are two buttons: 'Assign' and 'Resolve'.

Depending on the issue management workflow configuration, a user can already be proposed to you in the **User** field.

Provide a solution

In the step to provide a solution, the assignee resolves an issue and provides an implementation.

- The assignee can reassign the task to someone else if that user is more suited to perform the task. When reassigning the task, a similar form is presented as described in the earlier step where the new assignee can be appointed, see [Appoint assignee or resolve the issue](#).
- The assignee can also mark the issue as **Solved**. This ends the task and the workflow afterwards asks the reviewer to check if the solution matches the expectations. In this case, the issue is marked as **Resolution Pending**.

The screenshot shows a modal window titled "Provide Solution". At the top left, it says "Due: 1/11/2021". Below the title, there is a text input field with the placeholder "Please provide the solution for this issue.". Underneath the text input, there is a "Related to" section with a dropdown menu currently set to "Data Issue". At the bottom of the form, there are two buttons: a grey "Solved" button and a green "Reassign" button. The "Solved" button has a small lock icon next to it, indicating it is disabled.

This task has to be completed within a predefined period, if not, the workflow returns to the previous step and presents a new task to the reviewer to appoint a new assignee to perform the task.

Instead of resolving the issue by implementing the proposed solution, it is possible that the issue can be resolved by linking it to a governance asset. For example, by forcing all assets to comply to a business rule so that the problem described in the issue can not happen again.

To resolve an issue with a related asset, you need the correct rights in the community as assignee.

You can link the issue with a governance asset as follows:

1. On the issue page, click **Characteristic**.
2. Click the **Relations** tab.
3. Choose the **Resolved by** relation.

4. Enter the resolving governance assets in the dialog box, optionally set a **Start Date** and **End Date**.
5. Click **Save**.
6. The relation appears in the **resolved by Governance Asset** table on the issue page.
7. Click **Solved** in the green bar to mark the issue as resolved.

Review a solution

In the last step of the 'Issue Management' workflow, the reviewer can review the provided solution:

The screenshot shows a software interface for managing an issue titled "customer table in EDW needs to be masked". The top navigation bar includes buttons for Move Issue, Edit, Move, and Delete. Below the title, it says "Type: Data Issue" and "Status: New". The "Created On" field shows "6/13/15". On the right, there's a sidebar titled "Assignee" listing "John Fisher" and "Judy Clark". At the bottom, there are buttons for "Accept", "Reject", "View relevant changes", and "Other". The "Other" button has a dropdown menu with options: "Reassign", "Cancel", and "View in Workflow Diagram".

- Click **Accept** to accept the solution and mark the issue as **Resolved** and the requester is notified. This action ends the issue management workflow.
If there are multiple reviewers, there is only one reviewer who has to accept the solution.
- Click **Reject** to reject the solution and mark the issue as **Under review**. The workflow returns to the Analyze and Propose Solution step, see [Analyzing and proposing a solution](#).
- Click **View relevant changes** to view the history of the issue.

The screenshot shows a modal dialog box titled "Relevant changes". It lists several status updates and approvals in a table format. The columns include a pencil icon, the change type (e.g., add, status), the user who made the change, and the timestamp. The entries are as follows:

		User	Date
	Status In Progress > Resolution Pending	Judy Clark	10/4/16 4:20 PM
	add last 5 changes	Judy Clark	10/4/16 4:12 PM
	Status Submitted for Approval > Approved	Judy Clark	10/4/16 4:03 PM
	Status Under Review > Submitted for Approval	John Fisher	10/4/16 3:56 PM
	Status Under Review > Submitted for Approval	Judy Clark	10/4/16 1:14 PM
	add last 3 changes	Admin Istrator	10/4/16 1:13 PM

At the bottom right of the dialog is an "Ok" button.

- Click **Other → Reassign** to assign the review step to an other user.

Collibra Assessments

Assessments help you to validate the risks related to data subjects' personal data as a result of your business processes. They are an integral part of every privacy program.

Collibra Assessments enables you to design, publish and archive assessment templates. Users can then [conduct](#) assessments and submit them for review and approval or rejection.

Important

- The [Assessments workflow](#) is packaged with Collibra Data Intelligence Cloud 2021.03 and newer; however, it is intended only for data privacy contexts. It is hard-coded to work only with the Privacy Steward resource role.

Enable or disable Collibra Assessments 814

Open Collibra Assessments 815

Enable or disable Collibra Assessments

Collibra Assessments is packaged with Collibra Data Governance Center and is enabled by default.

If you are using an on-premises version of Collibra, you can disable and enable Collibra Assessments on your own. If you are using a cloud version of Collibra DGC, you need to open a ticket with your Collibra representative.

Note If you disable Collibra Assessments, the [packaged resources](#) remain in your Collibra environment. We recommend that you do not delete them, in case you decide to re-enable the feature at a later date.

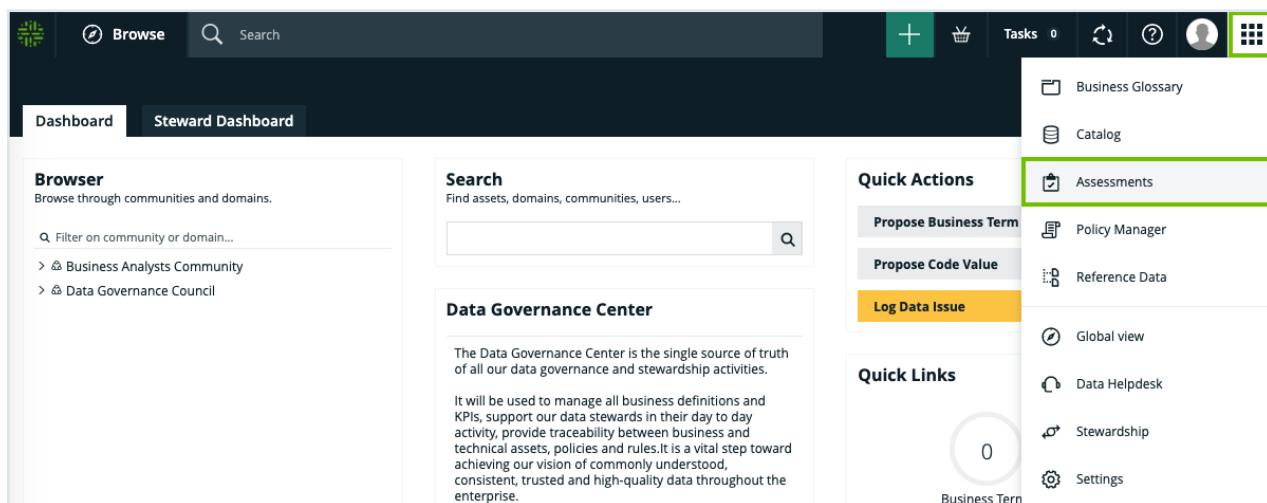
Steps

1. Open Collibra Console.
 - » Collibra Console opens with the **Infrastructure** page.

2. In the tab pane, expand an environment to show its services.
3. In the tab pane, click the Data Governance Center service of that environment.
4. Click **Infrastructure configuration**.
5. Click **Edit configuration**.
6. In the tab pane, click **JVM configuration**.
7. Scroll to the bottom, and in the empty field, enter one of the following:
 - `-Dfeature.assessments=false`, to disable the feature.
 - `-Dfeature.assessments=true`, to enable the feature.
8. Click the green **Save all** button.

Open Collibra Assessments

To open Collibra Assessments, click  in the Collibra Data Intelligence Cloud main menu, and then select **Assessments**.



Note If the **Assessments** feature is not shown when you click , that means the feature is not **enabled**.

Data privacy-related assessments

You can use Collibra Assessments to create your own templates to assess any of the assets in your Collibra Data Governance Center environment. This section, however, focuses on the data privacy use cases.

Collibra Assessments comes with templates that address the following assessment types:

Type	Description
Privacy Impact Assessment	Covers use cases for DPIA, PIA, and all variations
Validation Test Assessment	Covers various types of threshold assessments, to determine the need for a DPIA, PIA or another assessment.
Balancing Test Assessment	Covers use cases for determining the legitimate interest of a business process and similar use cases.

Assessments-related resources

When you install Collibra Data Governance Center, the following assessments-related resources are created in your environment.

New Assessments domain

The New Assessments domain:

- Is in the Data Governance Council community.
- Is of the domain type Assessment Review Register.
- Is the default domain for all new Assessment Review assets.

Tip Ensure that the [required responsibilities](#) exist for the New Assessments domain.

Assessment Review asset type

When you [submit](#) an assessment for review, an Assessment Review asset is created, by default, in the New Assessments domain.

Relation type

Head	Role	Co-role	Tail
Asset	is assessed by	assesses	Assessment Review

Required license, permissions and responsibilities

To use Collibra Assessments, you need:

- An Author [license](#).
- Certain permissions.
- A [responsibility](#), to act on the permissions conveyed via the resource role.

Responsibilities

To submit an assessment, you need an Author license and a [resource role](#) that has the following resource permissions:

- Asset > add
- Attribute > add

for either:

- The New Assessments (default) domain.
- The relevant domain, if the default domain was changed.

Tip Some packaged resource roles are configured with the necessary resource permissions, for example: Business User and Business Steward.

Workflow requirements

Warning When you [submit](#) an assessment for review, an Assessment Review asset is created in your Collibra DGC environment. For the [Assessments workflow](#) to work correctly, a Privacy Steward must be assigned to the domain you specify when submitting an assessment.

Assessments landing page

The landing page is the hub from which you can:

- Access the template gallery.
- Conduct an assessment.
- View a list of all existing assessments and details, including the template used to conduct the assessment, the status of the assessment and the date on which the assessment was last updated.

The screenshot shows the 'Assessments' landing page. At the top, there's a dark header bar with the 'Assessments' icon and the 'Template Gallery' link. Below the header, a section titled 'Conduct assessments' features a 'Select template' dropdown and a 'Start' button. The main area displays a table of existing assessments with columns for 'Assesses', 'Assessment Template', 'Status', and 'Updated on'. The table contains three rows of data.

Assesses	Assessment Template	Status	Updated on
Direct Marketing	DPIA	Submitted	16-Feb-2021
Adzilla	Data Transfer Impact Assessment	Submitted	12-Feb-2021
Company social media channels development	Datepicker test	Submitted	08-Feb-2021

Working with templates

A template is a set of questions designed to elicit information during an assessment. When [conducting](#) an assessment, users provide information via the [questions](#) you add to

the templates.

An assessment template can serve as an approved assessment from which to launch an assessment, or a starting point from which to design customized templates.

Data Privacy comes packaged with templates that you can use as is, or [copy](#) and [edit](#) to suit your needs. All versions of the templates are stored in the DGC database.

You can [publish](#) your customized templates to make them available for use throughout your organization.

Template gallery

The template gallery is a collection of all packaged data privacy assessment templates and those you've [created](#).

The screenshot shows the 'Template gallery' interface. At the top, there's a dark header bar with the 'Assessments' icon and the title 'Template gallery'. Below the header, there are two sections: 'Privacy assessment templates' and 'Your templates'. The 'Privacy assessment templates' section contains three tiles: 'DPIA v1' (Data Protection Impact Assessment), 'DPIA Threshold v1' (Data Protection Impact Assessment Threshold), and 'LIA v1' (Legitimate Interest Assessment). The 'Your templates' section contains four tiles: 'Acronym template v1' (Published), 'asdfaeghqewbh v1' (Published), 'Business Asset assessment t... v1' (Draft), and 'Data Transfer Impact Assess... v3' (Published). A green button labeled 'Create new template' is located in the top right corner of the 'Your templates' section.

Each template is shown as a tile, with the following details:

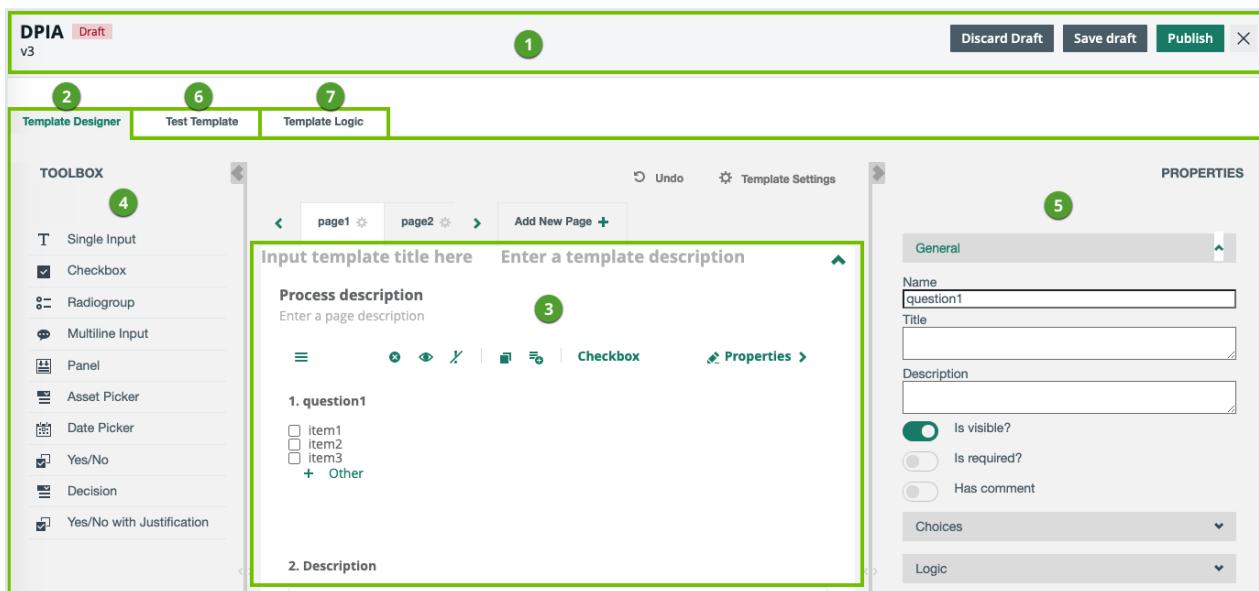
- The title of the template.
- The status of the template, either Draft or Published.

- A description of the template (optional).
- The version of the template.

Note The packaged templates can be [copied](#), but not edited. Therefore, they are always v1 and always have the Published status.

Template editor

The template editor enables you to [copy](#) the packaged data privacy assessment templates and design your own customized templates.



No.	Part name	Description
1	Action bar	<ul style="list-style-type: none"> • Template title, status and version number • Buttons to copy the template, discard or save drafts, and publish assessments. <p>Note The availability of the buttons depends on the type of template (packaged or customized) and the status of the template.</p>

No.	Part name	Description
2	Template Designer tab	<ul style="list-style-type: none"> The toolbox and properties sections. Tabs for the various pages in your template. Undo button, to reverse the last edit you made to the template. Template Settings button, for quick access to the template title, description and the target asset type to be assessed.
3	Building area	The body of the Template Designer tab, where you add and work with questions.
4	Toolbox	A set of question types, such as checkbox, comment and date picker.
5	Properties	Context-specific settings, based on the active page or question in the questions building area.
6	Test Template tab	A viewer that allows you to view the result of your work in the Template Designer tab. You can respond to your questions to test, for example, how the configured logic will work when conducting an assessment.
7	Template Logic tab	A view on all logic conditions configured in the template. You can also add , edit and delete logic conditions in this tab.

Create a template

Although there is no strict procedure, the following steps describe the basic flow in creating a new **template**, adding questions to the building area and configuring properties.

Steps

1. Go to the **template gallery** and click **Create new template**.
 - » A new template opens.
2. In the **Properties**, enter a title for your new template.
3. Optionally, in the **Properties**:
 - Add a description for your new template.
 - **Specify** a target asset type to be assessed.

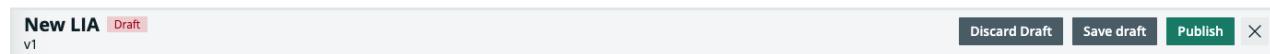
- Select or clear the **Governance** checkbox, to enable or disable **Governance option** for any assessments that will be conducted from this template.
4. In the building area of the **Template Designer tab**, click  and enter a page title and page description for Page 1.
 5. In the **toolbox**, click a question type, to add a question to the building area, or click and drag into the building area.
 6. Configure the **question settings**.
 7. In the **Properties**, configure logic conditions for the question.
 8. Add more pages and more questions, as necessary.

Note Each page in a template appears as a separate section in the assessment.

9. In the **action bar**, click **Save draft**.
 - » The template appears in the **Your templates** section of the template gallery, as a v1 template with the Draft status.

The action bar

The action bar allows you to control your draft templates and publish them for use throughout your organization.



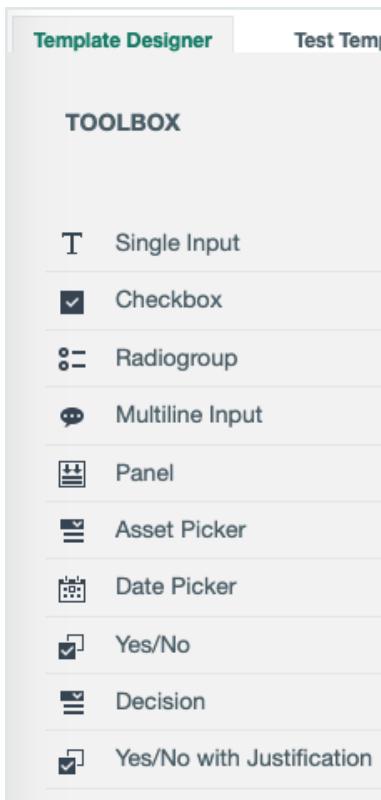
Note The availability of the buttons depends on the type of template (packaged or customized) and the status of the template.

Element	Description
Name	The name of the template.
Status	Status of the open template: Draft or Published .

Element	Description
Discard draft	<p>Revert to the previous version of a template, regardless of the status of the template and whether or not you made any changes to it.</p> <div data-bbox="409 444 1330 720" style="background-color: #f0f8ff; padding: 10px;"> <p>Note</p> <ul style="list-style-type: none"> If you revert to a previous version of a v1 template, it is permanently deleted from the template gallery. All published versions, however, remain archived in the DGC database. The packaged templates can be copied, but not edited. Therefore, they are always v1 and always have the Published status. They cannot be deleted. </div>
Save draft	<p>Save any changes you've made to the template.</p> <ul style="list-style-type: none"> If the status of the template was Draft, the status and the version number are unchanged. If the status of the template was Published, the status becomes Draft and the version number increases incrementally, even if you made no changes to the template.
Publish	<p>Set the status of the template to Published.</p> <ul style="list-style-type: none"> If the status of the template was Draft, the status becomes Published and the version number is unchanged. If the status of the template was Published, the status remains Published, but the version number increases incrementally, regardless of whether or not you made changes to the template.
Copy Template	<p>Make a copy of a packaged template. The copy is added to Your templates section, as a v1 with the Draft status.</p>
X	<p>Close the template without saving any changes you may have made. The status and the version number of the template are unchanged.</p>

The toolbox

In the **Template Designer tab**, the toolbox contains various question types, such as Single input, Yes/No and Checkbox. You use these question types to add questions and statements to the building area, to elicit input from the user conducting an assessment.



Tip

- Click a question type to add it to the current page or click and drag to a specific location on the page.
- You can also [add](#) a question to the toolbox.

Question type	Allows you to...
Single input	Enter a single line of text.
Checkbox	Select one or more of the predefined values.
Radiogroup	Select only one of the predefined values.
Multiline input	Enter multiple lines of text.

Question type	Allows you to...
Panel	<p>Frame two or more questions, typically in reference to another question.</p> <p>Tip Let's imagine you have a Radiogroup question that asks if the organization has identified all Controllers. The possible responses are "Yes" and "No". You could then:</p> <ul style="list-style-type: none"> Follow this question with a Panel that contains three additional Controller-specific questions. Configure a logic condition so that the Panel and the three questions it frames appear if the response to the Radiogroup question is "No".
Asset picker	Select one or more assets of a predefined asset type.
Date picker	Enter a date.
Yes/No	Select "Yes" or "No".
Decision	<p>Return the value "Yes" or "No", based on the scoring of Yes/No questions and a scoring threshold.</p> <p>For more information, see Working with scores and decisions.</p>
Yes/No with justification	Select "Yes" or "No" and enter a free-text justification.

Specifying an asset type for a template

When you [create](#) a template, you can specify a target asset type to be associated with the template. In this case, when a user selects the template for conducting an assessment, the accompanying drop-down list on the landing page will include all approved assets of the that asset type, in your Collibra Data Governance Center environment.

You can specify an asset type for a template when you:

- [Copy](#) a packaged template.
- [Create](#) a new template.
- [Edit](#) a customized template.

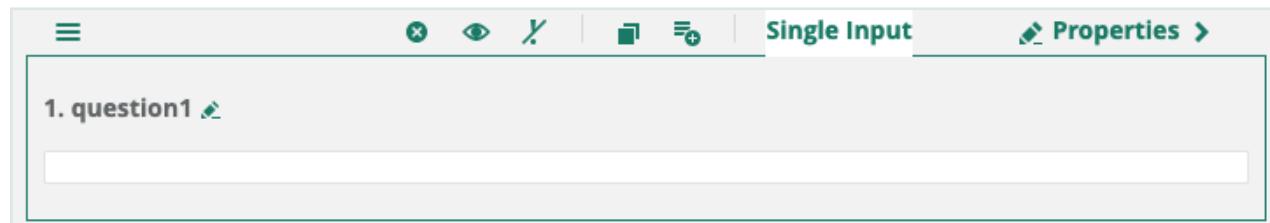
Important If you don't specify an asset type for a template, you will not be able to select an asset to assess, when conducting the assessment. Instead, you will enter a short description of what you want to assess and then **conduct the assessment without an underlying asset**. When you submit the assessment for review, an Assessment Review asset is created in your Collibra environment, but without a relation to an underlying asset.

Note You can still conduct an assessment without selecting an underlying asset, even if you specify a target asset type for the selected template.

Working with questions

The toolbox contains a number of question types, such as checkboxes, text boxes and date pickers. You use these question types to add questions and statements to the building area, to elicit input from the user conducting an assessment.

Click a question in the building area to view the available settings.



Icon button	Description
The edit icon appears when you hover over the question title. Alternatively, you can provide a title in the Properties.	Edit the title. The edit icon appears when you hover over the question title. Alternatively, you can provide a title in the Properties .

Icon button	Description
	<p>Click and drag the question to a different location on the page.</p> <p>Tip To move a question to another page, you can:</p> <ol style="list-style-type: none"> 1. Click to add the question to the toolbox. 2. Go to the page on which you want to add the question. 3. Drag the question from the toolbox to the page.
	<p>Delete the question from the building area.</p> <p>Tip If you think you might want to use the question at a later time, or add it to another page, you can click to add the question to the toolbox. Deleting a question from the building area does not delete it from the toolbox.</p>
	<p>Determine whether or not the question is visible during an assessment.</p>
 	<p>Determine whether a response to the question is optional or mandatory.</p> <p>Click to toggle between the two conditions.</p> <p>: Optional (default)</p> <p>: Mandatory</p>
	<p>Copy the question. The copy appears directly below the active question.</p>
	<p>Add the question to the toolbox.</p> <p>Note You can add up to three questions, for a total of 13 question types in the toolbox. If you have 13 questions types and you add another one, the last question type in the toolbox is overwritten.</p>

Icon button	Description
Question type label, for example Single Input	The question type. For some question types, you can click this button to toggle between two similar question types. Specifically: <ul style="list-style-type: none"> • If the question type is Single input, you can click this button to change it to a Comment, and vice versa. • If the question type is Checkbox, you can click this button to change it to a Radiogroup, and vice versa.
 Properties >	Click to show the question properties in the Properties .
+ Other	Click to add another choice to radiogroup or checkbox question.

Add a question to the toolbox

The **toolbox** includes a set of question types. You can customize the toolbox by adding up to three questions from the building area. These question can then be reused throughout your template.

Tip This is helpful if, for example, you [configure a checkbox question with the following values](#):

- Successfully implemented
- Partially implemented or planned
- Not yet implemented or planned
- Not applicable

If you then add the question to the toolbox, you can reuse the question throughout your template, without having to configure the values each time.

Note Any questions you add are not saved in the toolbox when you close the template, even if you save the changes you made in the template.

Steps

1. Go to the [template gallery](#) and open a template, or [create](#) a new template.
2. Click on a question in the building area or add one to the building area.
3. Configure the question to suit your needs.
4. Click .
 - » The question is added to the toolbox, as an additional question type.

Note You can add up to three questions, for a total of 13 question types in the toolbox. If you have 13 questions types and you add another one, the last question type in the toolbox is overwritten.

Configure values for checkbox and radiogroup questions

You can configure the values for checkbox and radiogroup [questions](#).

Steps

1. Go to the [template gallery](#) and open a template, or [create](#) a new template.
2. Click the relevant question or add a new question to the building area.
3. Do any the following:
 - o Click  next to a value, to edit the label.
 - o Click  next to a value and drag to reorder it among the other values.
 - o Click  next to a value, to delete it.
 - o Click  **Other** to add another value.
 - o In **Properties**, expand the **Choices** section and select **Has other item**, to allow users to select the value "Other" and add free-text clarification.

Yes/No question scores and decisions

You can configure a series of Yes/No questions, followed by a Decision question, so that when an assessment is conducted, the responses to the Yes/No questions determine the value shown in the Decision question.

You can **assign** weighted values, or scores, to Yes/No questions in your template. Then, if the response to a question is "Yes", the specified score is added to a total score. If the response is "No", the specified score is not added to the total score.

If the total score reaches a specified scoring threshold:

- Your Decision question returns the value "Yes", as the final decision.

Final Decision
18. Is a DPIA required for the Business Process asset?
Yes

- When the assessment is submitted for review, the assessment details page includes a button by which you can launch the resulting assessment, as specified when configuring the Decision question.

For more information on question types, see [The toolbox](#).

Example

In this example, you design a template with the following:

- Yes/No questions and properties:

Question type	Title	Score property
Yes/No	Does the processing activity present a high level of risk for the rights and freedoms of the concerned data subjects?	2
Yes/No	Does the processing activity make innovative use of new technological or organizational solutions?	1
Yes/No	Does the processing activity match or combine data sets?	1

- Decision question and properties:

Question type	Title	Score threshold property	Assessment template property
Decision	Is a DPIA required for the Business Process asset?	2	DPIA

Result

During an assessment, the scores are added for each question to which the response is "Yes". If the total is less than 2, the decision for the question "Is a DPIA required for this asset?", is "No". If the sum is equal or greater than 2, the decision is "Yes".

Configure Yes/No question scores and decisions

You can assign weighted scores to [Yes/No questions](#) in your template. The scores are used to determine the decision shown to the user in your Decision question.

For more information on question types, see [The toolbox](#).

Steps

1. Go to the [template gallery](#) and open a template, or [create](#) a new template.
2. Add Yes/No questions to the template, or work with the existing Yes/No questions.
You can also use Yes/No with Justification questions.

3. For the relevant Yes/No questions, specify the following properties:

Property	Description
Title	<p>The question or statement.</p> <p>Example "Does the processing activity present a high level of risk for the rights and freedoms of the concerned data subjects?"</p>
Score	<p>The score for the question or statement.</p> <p>Note The score is added to the total if the user responds "Yes" to the question. If the user responds "No", the score is ignored.</p>

4. In a Decision question, specify in the following properties:

Property	Description
Title	<p>The question that appears in the final decision. Consider the fact that the decision value shown in the final decision will be "Yes" or "No".</p> <p>This should be in the form of a question. If the score threshold is met, the value returned is "Yes". If not, the value returned is "No".</p> <p>Example "Is a DPIA required for the Business Process asset?"</p>
Score threshold	The limit at, or beyond, which the Decision question returns the value "Yes".
Assessment template	<p>The assessment that should be conducted if the scoring threshold is met.</p> <p>Note When the assessment is submitted for review, the assessment details page includes a button to launch the assessment you specify here.</p>

Properties

The **Properties** section on the [Template Designer tab](#) contains context-specific settings, based on the active page or question in the questions building area.

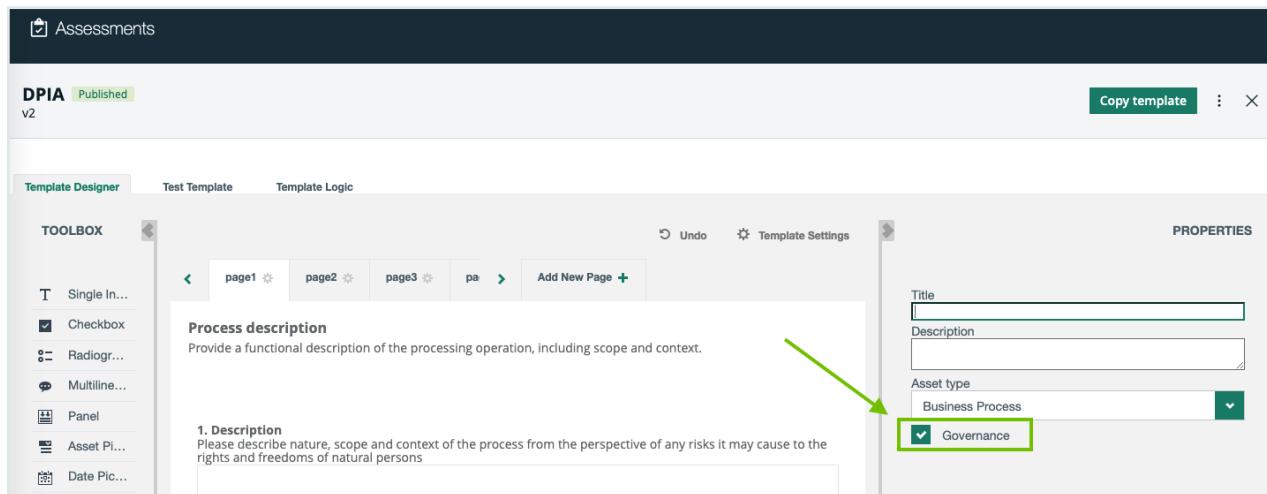
Property	Description
General	
Name	<p>The ID of a question.</p> <p>Applies only to questions, not pages.</p>
Score	<p>The score allows you to give weighted importance to questions.</p> <p>This property is used in conjunction with the "Score threshold" and "Assessment template" properties described in this table.</p> <p>For more information, see Working with scores and decisions.</p>
Title	<p>The title of the template, page or question.</p> <p>The title of a question is the actual question or statement put forth in the assessment, for example "Have you identified all Controllers?"</p>
Description	A description of the template, page or question.
Governance	The Governance option determines whether or not an assessment conducted from a specific template will create an asset in your Collibra DGC environment and trigger the Assessments workflow. It is available in the Properties section on the Template Designer tab . See Governance for assessments .
Is visible?	Determines whether or not the question is visible during an assessment.
Is required?	Determines whether the question is optional or mandatory, when conducting an assessment.

Property	Description
Input placeholder	Allows you to enter text that appears in a text field. The text is overwritten when the user enters text in the field.
Has comment	Determines whether or not a free-text field is available, allowing users to enter a comment pertaining to the question.
Comment text	Text that accompanies a free-text field that is available to users if you enable the "Has comment" property.
Score threshold	<p>The value at, or above which, the accompanying Decision question returns a "Yes" value.</p> <p>This property is used in conjunction with the "Score" and "Assessment template" properties described in this table.</p> <p>For more information, see Working with scores and decisions.</p>
Assessment template	<p>The template to use for the assessment that should be conducted if the value in the "Score threshold" property is reached.</p> <p>This property is used in conjunction with the "Score" and "Score threshold" properties described in this table.</p> <p>For more information, see Working with scores and decisions.</p>
Choice	
Has other item	Allows you to select the value "Other" and add free-text clarification.

Property	Description
Logic	<p>Allows you to define the logic for the selected question.</p> <p>See:</p> <ul style="list-style-type: none"> • Logic settings in the Template Designer tab • Logic settings in the Template Logic tab

Governance for assessments

The Governance option determines whether or not an assessment conducted from a specific template will create an asset in your Collibra DGC environment and trigger the Assessments workflow. It is available in the **Properties** section on the [Template Designer tab](#).



What happens if the Governance option is selected or cleared?

Selected/Cleared	Description
Selected	<p>When you conduct an assessment that uses the template, the Submit button is available.</p> <p>When you click Submit:</p> <ul style="list-style-type: none"> An Assessment Review asset with the Under Review status is created in your Collibra DGC environment. The Assessments workflow is triggered and a task is assigned to the Privacy Steward. <p>Warning Do not select the Governance option if you are using Collibra Assessments in a context other than Privacy. The Assessments workflow is intended only for data privacy contexts and is hard-coded to work only with the Privacy Steward resource role.</p>
Cleared	<p>When you conduct an assessment that uses the template, the Complete button is available.</p> <p>When you click Complete, the status of the assessment changes from Draft to Completed.</p> <ul style="list-style-type: none"> No asset is created in your Collibra DGC environment. No associated workflow is triggered.

Configuring logic for questions and pages in a template

For each question or page in a [template](#), you can configure logic, whereby if certain conditions are met, a specified action occurs.

You can [create](#), [edit](#) and [delete](#) logic conditions using:

- The [logic settings in the Template Designer tab](#).
- The [logic settings in the Template Logic tab](#).

Note

- Any logic that you configure for a given question overrides the **Is visible?** and **Is required?** settings that you may have set in the **General** section in **Properties**.
- Any logic that you configure via the Template Designer tab appears in the Template Logic tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the Template Designer tab and do not appear in the Template Logic tab.

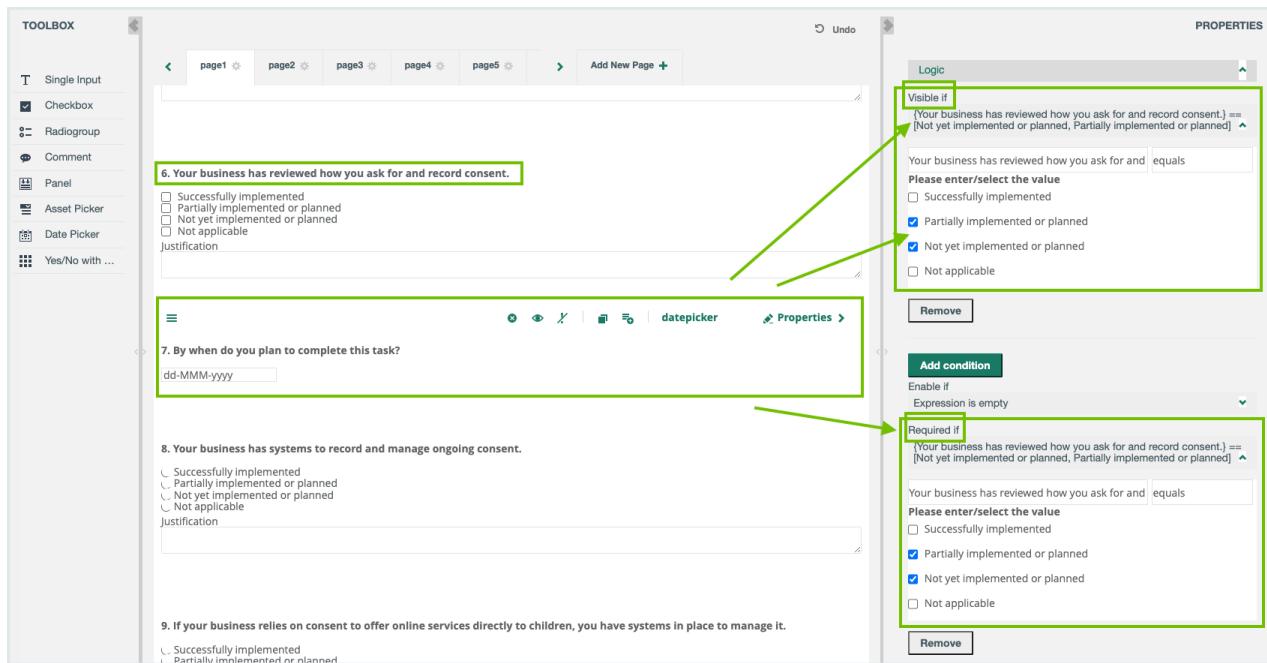
Example

Question 6 in your template, a checkbox question type, asks if your organization has reviewed how they ask for and record consent.

Question 7, a date picker question type, asks by when the task will be complete. If the response to Question 6 is "Successfully implemented" or "Not applicable", there is no need to show Question 7.

Therefore, you configure the logic for Question 7, as follows:

- **Visible if:** If the user responds to Question 6 with "Partially implemented or planned" or "Not yet implemented or planned", Question 7 is shown.
- **Required if:** Furthermore, if either of those values are selected for Question 6, Question 7 is a required question.



Create a logic condition for a question or page

There are two ways to create **logic conditions** in your template.

- Via the **Template Designer** tab
- Via the **Template Logic** tab

Note Any logic that you configure via the **Template Designer** tab appears in the **Template Logic** tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the **Template Designer** tab and do not appear in the **Template Logic** tab.

Via the **Template Designer** tab

1. Go to the **template gallery** and open a template.
2. Click the question or page tab for which you want to create a logic condition.
3. In the **Properties**, expand the **Logic** settings.
4. Expand the settings for the relevant logic option:
 - a. **Visible if**
 - b. **Enable if**
 - c. **Required if**

5. In the **Select question...** field, select the question to which the user's response can trigger the action.

Note The questions are ordered alphabetically, not in the order of which they appear in the template.

6. Click **equals**, and then select a logical operator.

Note Not all logical operators are applicable to all question types.

7. Enter or select a value.

Via the Template Logic tab

Note You can only create page-related logic conditions via the Template Design tab.

1. Go to the [template gallery](#) and open a template.
2. Click the **Template Logic** tab.
 - » A list of all logic conditions configured for the template is shown.
3. Specify the conditions:
 - a. Click **Add New**.
 - b. In the **Select question...** field, select the question to which the user's response can trigger the action.

Note The questions are ordered alphabetically, not in the order of which they appear in the template.

- c. Click **equals**, and then select a logical operator.

Note Not all logical operators are applicable to all question types.

- d. Enter or select a value.

4. Specify the action that occurs if the conditions are met:
 - a. In the **Select an action to add...** drop-down list, select an action type.
 - b. In the **Select question...** drop-down list, select the question that will be affected if the conditions are met.
5. Do one of the following:
 - Click **Save and return**, to save the configurations and return to the list of logic conditions.
 - Click **Save**, to save your configurations.
 - Click **Return without saving**, to discard your configurations and return to the list of logic conditions.

Edit a logic condition for a specific question

There are two ways to edit the [logic conditions](#) in your template.

- Via the **Template Designer** tab
- Via the **Template Logic** tab

Note Any logic that you configure via the **Template Designer** tab appears in the **Template Logic** tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the **Template Designer** tab and do not appear in the **Template Logic** tab.

Via the **Template Designer** tab

1. Go to the [template gallery](#) and open a template.
2. Click the question for which you want to edit the logic.
3. In the **Properties**, expand the **Logic** settings.
4. Expand the settings of the condition you want to edit.
5. Edit the condition to suit your needs.

See [Logic settings in the Template Designer tab](#).

Via the **Template Logic** tab

Note You can only edit page-related logic conditions via the **Template Design** tab.

1. Go to the [template gallery](#) and open a template.
2. Click the **Template Logic** tab.
 - » A list of all conditions configured for the template is shown.
3. Click  next to the condition you want to edit.
4. Edit the condition to suit your needs.
See [Logic settings in the Template Logic tab](#).
5. Do one of the following:
 - Click **Save and return**, to save the configurations and return to the list of logic conditions.
 - Click **Save**, to save your configurations.
 - Click **Return without saving**, to discard your configurations and return to the list of logic conditions.

Delete a logic condition for a specific question

There are two ways to delete the [logic conditions](#) in your template.

- [Via the Template Designer tab](#)
- [Via the Template Logic tab](#)

Note Any logic that you configure via the Template Designer tab appears in the Template Logic tab, and vice versa, with the exception of page-related logic conditions, which can only be configured via the Template Designer tab and do not appear in the Template Logic tab.

Via the Template Designer tab

1. Go to the [template gallery](#) and open a template.
2. Click the question for which you want to configure logic.
3. In the **Properties** section, expand the **Logic** settings.
4. Expand the settings for the condition you want to delete.
5. Click **Remove**.

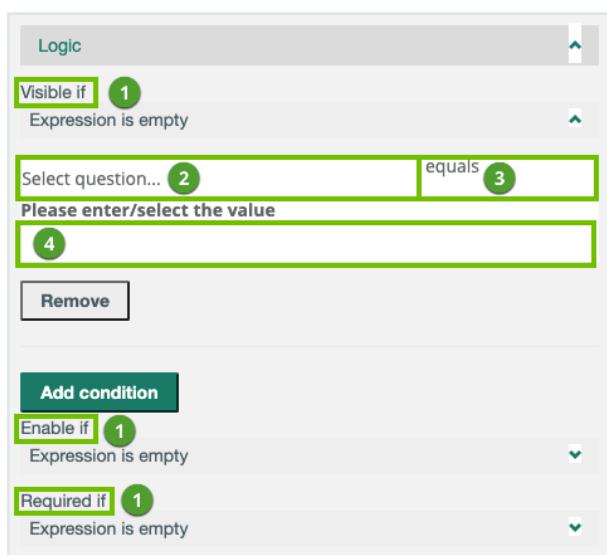
Via the Template Logic tab

Note You can only delete page-related logic conditions via the Template Design tab.

1. Go to the [template gallery](#) and open a template.
2. Click the **Template Logic** tab.
 - » A list of all conditions configured for the template is shown.
3. Click  at the end of the row of the condition you want to delete.

Logic settings in the Template Designer tab

The following image shows the logic settings in the **Template Designer** tab.



Number	Setting	Description
1	Visible if	<ul style="list-style-type: none"> If the conditions are met, the question is shown in the assessment and you can respond to it. If the conditions are not met, the question is not shown in the assessment. <p>Note This logic condition overrides the Is visible? setting in the General section in Properties.</p>
	Enable if	<ul style="list-style-type: none"> If the conditions are met, the question is enabled, meaning you can respond to it. If the conditions are not met, the question is disabled, meaning you cannot respond to it.
	Required if	<ul style="list-style-type: none"> If the conditions are met, the question is mandatory and is identified by an asterisk (*). You must respond to mandatory questions before you can submit the assessment for review. If the conditions are not met, the question is optional. You can submit the assessment for review without having responded to optional questions. <p>Note This logic condition overrides the Is required? setting in the General section in Properties.</p>
2	Select question...	The question that determines whether or not the action will happen.
3	Logical operator	All or some of the following, based on the question type of the selected question. <ul style="list-style-type: none"> is empty is not empty equals (default) not equals any of all of
4	Value	The response to the question that determines whether or not the action will happen.

Logic settings in the Template Logic tab

The following image shows the logic settings in the **Template Logic** tab.

Define condition(s)

End date **1** equals **2** **x**
Please enter/select the value
dd-MMM-yyyy **3**

Add condition

Define action(s)

Question visibility **4** Make the question visible when the logic expression returns true. Otherwise keep it invisible. **x**
Select question... **5**

Number	Field	Description
1	Select question...	<p>The question that determines whether or not the action will occur.</p> <p>Note In the previous example image, the "End date" question has been selected in order to show the Please enter/select the value field, which only appears once a question is selected.</p>
2	Logical operator	<p>All or some of the following, based on the question type of the selected question.</p> <ul style="list-style-type: none"> • is empty • is not empty • equals (default) • not equals • any of • all of

Number	Field	Description
3	Please enter/select the value	The response to the question that determines whether or not the action will occur.
4	Select an action to add...	<p>The action that occurs if the conditions are met.</p> <p>Note In the previous example image, the "Question visibility" action has been selected in order to show the Select question... field, which only appears once an action is selected.</p>
5	Select question...	The question that is subject to the action.

Copy a packaged template

You can copy any of the packaged [templates](#).

Steps

1. Go to the [template gallery](#) and open the packaged template that you want to copy.
2. In the **Properties**, enter a title for your new template.
3. Optionally, in the **Properties**: Add a description for your new template. [Specify](#) a target asset type to be assessed. Select or clear the **Governance** checkbox, to enable or disable [governance](#) for any assessments that will be conducted from this template.
4. Click **Copy Template**.
 - » The new template opens automatically. The template is also added in the **Your templates** section of the template gallery, as a version 1, with the Draft status.

Edit a template

You can edit any of your customized [templates](#).

Tip You cannot edit the packaged templates, but you can [copy](#) them and edit the new templates.

Steps

1. Go to the [template gallery](#) and open one of your customized templates.
2. Edit the template to suit your needs.
3. Click **Save draft**.
 - » If the template you edited:
 - Had the Draft status, the status remains Draft and the version number remains the same.
 - Had the Published status, the status becomes Draft and the version number increases incrementally.

Delete a template

You can delete any of your customized [templates](#). You cannot delete the packaged templates.

Note Any assessments in draft that were started using a deleted template will not be affected. You can complete the assessment and submit it when you're ready. You cannot, however:

- Conduct new assessments using a deleted template.
- Copy an assessment that used a deleted template.

Steps

1. Go to the [template gallery](#) and open the customized template that you want to delete.
2. Click **:** in the upper-right corner, and then click **Delete**.
 - » The **Confirm delete** dialog box appears.
3. Click **Delete** to confirm.

Discard a draft version of a template

If one of your customized templates has the Draft status, you can revert to the previous published version.

Note

- You can only revert to the previous version of a template that has the Draft status. Once a template has the Published status, you can **delete** it, but you cannot revert to a previous version.
- All versions of a template are archived in the DGC database, even versions that have been deleted from the template gallery.

Steps

1. Go to the [template gallery](#) and open a template that has the Draft status.
2. Click **Discard Draft**.
 - » The draft is deleted and the previous published version becomes available.

Publish a template

Although it is more likely that you will publish [templates](#) that have the Draft status, you can also publish templates that have the Published status.

If you publish:

- A template that has the Draft status, the version number is unchanged, but the status becomes Published.
- A template that has the Published status, the status remains Published, but the version number is incrementally updated, even if you didn't edit the template.

Note When [conducting an assessment](#), in the drop-down list of available assessment types, only the latest versions of published templates are available. If a user starts conducting an assessment with version 1 of a specific template, the template remains unchanged throughout the assessment, even if newer versions of the template have since been published.

Steps

1. Go to the [template gallery](#) and open a template.
2. Optionally, edit the template to suit your needs.

3. Click **Publish**.
 - » The status of the template is Published and it is made available throughout your organization.

Working with assessments

Assessments help you to validate the risks related to data subjects' personal data as a result of your business processes. You can conduct, edit and submit assessments of your assets. The Privacy Steward (by default) then reviews and approves or rejects the assessment.

Conduct an assessment

You can conduct **assessments** of the assets in your Collibra Data Governance Center environment.

Steps

1. Go to the Collibra Assessments [landing page](#)
2. Select the template that you want to use for your assessment.
3. Select the asset that you want to assess.

The drop-down list includes assets of a **specified** asset type, in your Collibra Data Governance Center environment. If no drop-down list of assets appears, that means no asset type was specified for the template.

Tip You can also **conduct an assessment without identifying an underlying asset**. In this case, select the **I do not have a <asset type> yet** checkbox, and then enter a description of what you want to assess.

4. Click **Start**.
5. If an existing assessment exists, in Draft status, for the combination of template and Business Process asset that you selected, the Existing draft dialog box appears. In this case, do one of the following:

- Click **Discard existing and conduct new**, to delete the draft and conduct a new assessment.
 - Click **Open existing draft**, to continue with the existing assessment.
6. Respond to the assessment questions.
 7. Do one of the following:
 - Click **Save draft**.
 - Click **Submit**. The **Submit** button is available if the **Governance option** is selected in the template used for the assessment.
- Then, in the **Submit assessment** dialog box:
- i. Select the domain in which you want to the Assessment Review asset to be created.
 - ii. Click **Submit**.
- Click **Complete**. The **Complete** button is available if the **Governance option** is cleared in template used for the assessment.
- Then, in the **Complete assessment** dialog box, click **Confirm**.

What's next?

See [What happens when you save, complete or submit an assessment?](#).

Conduct an assessment without an underlying asset

It is perhaps more likely that you will first onboard assets, and then use Collibra Assessments to assess various aspects of those assets. You can, however, conduct an **assessment** before you onboard assets; in other words, conduct an assessment without specifying an underlying asset. This can be helpful if you want to use an assessment to help guide the onboarding of an asset.

Steps

1. Go to the Collibra Assessments [landing page](#)
2. Select the assessment template you want to use for your assessment.
3. Select the **I do not have an asset yet** checkbox.
4. In the **Describe what you want to assess** field, briefly describe your objective.
5. Click **Start**.
6. Respond to the assessment questions.

7. Do one of the following:

- Click **Save draft**.
- Click **Submit**. The **Submit** button is available if the **Governance option** is selected in the template used for the assessment.

Then, in the **Submit assessment** dialog box:

- i. Select the domain in which you want to the Assessment Review asset to be created.
- ii. Click **Submit**.
 - » An Assessment Review asset is created in your Collibra environment, but without a relation to an underlying asset.
- Click **Complete**. The **Complete** button is available if the **Governance option** is cleared in template used for the assessment.

Then, in the **Complete assessment** dialog box, click **Confirm**.

What's next?

See [What happens when you save, submit or complete an assessment?](#)

Edit an assessment

You can edit any **assessment** that has the Draft status.

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment you want to edit.
 - » The [assessment details page](#) opens.
3. Click **Edit Draft**.
4. Edit the responses to the assessment questions.
5. Do one of the following:
 - Click **Save draft**.
 - [Complete or submit](#) the assessment.

What's next?

See [What happens when you save, complete or submit an assessment?](#).

Copy an assessment

You can copy any [assessment](#) that has the Draft status. The new assessment will be an exact copy, including all responses that were entered in the assessment you are copying.

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment you want to copy.
 - » The [assessment details page](#) opens.
3. Click : in the upper-right corner, and then click **Copy**.
 - » A new assessment, with the Draft status, opens immediately. You can verify this by the **Created on** time stamp, which reflects the current time and date. The new assessment also appears in the list of assessments on the landing page.

What's next?

You can [edit](#), [submit](#) or [delete](#) the assessment.

Complete or submit an assessment

You can complete or submit any [assessment](#) that has the Draft status.

Important The [Governance option](#), as set in the [template](#) that was used for your assessment, determines whether the **Submit** button or the **Complete** button is available when you are conducting an assessment.

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment you want to submit.
 - » The [assessment details page](#) opens.
3. Click **Edit Draft**.
4. Optionally, edit the responses to the assessment questions.

5. Do one of the following:

- Click **Submit**. The **Submit** button is available if the [Governance option](#) is selected in the template used for the assessment.

Then, in the **Submit assessment** dialog box:

- i. Select the domain in which you want to the Assessment Review asset to be created.
 - ii. Click **Submit**.
- Click **Complete**. The **Complete** button is available if the [Governance option](#) is cleared in template used for the assessment.

Then, in the **Complete assessment** dialog box, click **Confirm**.

What's next?

For details on the interaction between Collibra Assessments and Collibra Data Intelligence Cloud when you submit an assessment, see [What happens when you save, complete or submit an assessment?](#).

Delete an assessment

You can delete any [assessment](#), regardless of its status. The status, however, determines what happens when you delete the assessment.

- If you delete an assessment that has the Draft status, the assessment is deleted from the DGC database and removed from the list of assessments on the landing page.
- If you delete an assessment that has the Submitted status, the assessment is not deleted from the DGC database. The status becomes Obsolete and the assessment remains in the list of assessments on the landing page. The status of the Assessment Review asset that was created in your Collibra DGC environment when the assessment was submitted for review also becomes Obsolete.

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment you want to delete.
 - » The [assessment details page](#) opens.

3. Click  in the upper-right corner, and then click **Delete assessment**.
 - » The **Delete assessment** dialog box appears.
4. Click **Delete** to confirm.

What happens when you save, complete or submit an assessment?

This section addresses the interaction between Collibra Assessments and your Collibra Data Governance Center environment, when you:

- Save a draft of an assessment.
- Complete an assessment.
- Submit an assessment for review.

Important The [Governance option](#), as set in the [template](#) that was used for your assessment, determines whether the **Submit** button or the **Complete** button is available when you are conducting an assessment.

Save a draft of an assessment

When you are conducting an assessment, and you click **Save draft**:

- The assessment:
 - Is added to the list of assessments on the [landing page](#).
 - Has the Draft status. You can continue to [edit](#) and save it.
- Nothing happens in your Collibra Data Governance Center environment. An Assessment Review asset is only created when you submit the assessment for review.

Complete an assessment

When you are conducting an assessment, and you click **Complete**:

- The assessment:
 - Is added to the list of assessments on the landing page.
- Tip** Click the assessment to open the [details page](#) of that assessment.

- Has the Completed status. It can no longer be edited.
- Is stored in the DGC database, with all pertinent information, such as the creation date and the user who submitted the assessment.
- Nothing happens in your Collibra Data Governance Center environment.

Submit an assessment for review

When you are conducting an assessment, and you click **Submit**:

- The assessment:
 - Is added to the list of assessments on the landing page.

Tip Click the assessment to open the [details page](#) of that assessment.
 - Has the Submitted status. It can no longer be edited.
 - Is stored in the DGC database, with all pertinent information, such as the creation date and the user who submitted the assessment.
- An Assessment Review asset with the Under Review status is created in the domain you specified, in your Collibra Data Intelligence Cloud environment.
 - All responses to assessment questions are captured as attributes of the Assessment Review asset.
 - The Assessment Review asset is related to the underlying asset via the relation type *[Asset] is assessed by / assesses [Assessment Review]*, unless the assessment was [conducted without an underlying asset](#).

Tip On the assessment details page, click [View assessment asset page](#) to open the Assessment Review asset page in your Collibra DGC environment.
- The [Assessments workflow](#) is triggered. The workflow notifies the Privacy Steward that an assessment is ready for review. A workflow task prompts the Privacy Steward to review the assessment and approve or reject the Assessment Review asset.

Note If the Privacy Steward responsibility does not exist for the domain, the Assessment Review is still created, but the Assessments workflow is not triggered.

Assessment details page

When you **conduct** an assessment and click either **Save draft** or **Submit for review**, a link to the assessment is added to the **Landing page**. You can click the assessment to open the details page.

The assessment details page:

- Shows the responses to all answered questions.
- Identifies the time and date on which the assessment was started.
- Identifies the time and date on which the last changes were made to the assessment.

Note You cannot edit an assessment with the **Submitted** status.

- Includes, for assessments that have the **Draft** status, an **Edit draft** button.
- Includes, for assessments that have the **Published** status:
 - A button to the launch a follow-up assessment, if the template that was used included a **Yes/No and Decision questions** and the score threshold was reached.
 - A **View assessment asset page** button, to access the Assessment Review asset page in your Collibra Data Governance Center environment.

The following example image shows the assessment details page of a published assessment, in which it was determined, by the responses to Yes/No questions, that a DPIA assessment should be conducted for the underlying asset.

DPIA Threshold Submitted

Let's see how this works

Is your processing activity necessary for compliance with a legal obligation, or for the performance of a public interest task, and can be linked to a prior general impact assessment of that activity in the context of the adoption of its legal basis?	Is the processing activity very similar to another one with similar high risks, for which a DPIA has already been performed?	Created on 05-Feb-2021 10:32
✓ Yes	Not specified	Last updated on 05-Feb-2021 10:32
Is the processing activity included in the list published by the regulator that exempts the process from a DPIA?	Does the processing have a legal basis in the European Union, and was a DPIA performed in the context of this legal basis?	
Not specified	Not specified	
Final Decision		
Is a DPIA required for the Business Process asset?		
Yes Conduct DPIA assessment		

Download a PDF of an assessment

You can download a PDF of any [assessment](#), regardless of its status. The PDF captures all of the information shown on the [assessment details page](#).

Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment for which you want to download a PDF.
 - » The assessment details page opens.
3. Click : in the upper-right corner, and then click **Download PDF**.
 - » The PDF is downloaded to your hard drive.

Approve or reject an assessment

When you submit an [assessment](#) for review, an Assessment Review asset is created in the domain of your choice, in your Collibra Data Governance Center environment.

The Privacy Steward for the domain is notified that there is an assessment to review and a workflow task prompts the review and approval or rejection of the Assessment Review asset.

Note Neither the Assessment Review asset nor the submitted assessment can be edited.

Important This does not apply to assessments for which the [Governance](#) option was cleared in the template used for the assessment. In that case, no asset is created in your Collibra DGC environment and no workflow is triggered.

Steps

1. In your Collibra DGC environment, go to **My Tasks** and click the relevant task.



» The task is shown in the sidebar.

2. Review the assessment details, as necessary.

Tip To review the assessment details, you can:

- In the sidebar, click the Assessment Review asset name to go to the asset page.
- Click **View details in assessment app** to review the details in Collibra Assessments.

3. In the sidebar, click **Approve** or **Reject**.

Result

- The status of the Assessment Review asset becomes Approved or Rejected, accordingly.
- The status of the assessment in the Collibra Assessments:
 - Remains Submitted, if approved.
 - Becomes Obsolete, if rejected.

The Assessments workflow

This process notifies the Privacy Steward that an Assessment Review asset is ready for review and prompts the Privacy Steward to approve or reject the asset.

Warning

- The Assessments workflow is packaged with Collibra Data Intelligence Cloud 2021.03 and newer; however, it is intended only for data privacy contexts. It is hard-coded to work only with the Privacy Steward resource role.
- For the Assessments workflow to work correctly, a Privacy Steward must be assigned to the domain you specify when submitting an assessment.

Important The Assessments workflow is not relevant and not triggered if the **Governance option** is cleared in the template that was used for your assessment.

Tip If you want to use Collibra Assessments outside the context of data privacy:

- You can benefit from all features of Collibra Assessments without using this workflow.
- You can make a copy of this workflow, rename the copy, configure it to suit your needs, and then deploy it. For complete information on customizing workflows, see [Managing workflows in Collibra](#).

Assessments workflow description

When you submit an assessment for review:

- An Assessment Review asset with the Under Review status is created in the domain you specified, in your Collibra Data Intelligence Cloud environment.
- The Assessments workflow is triggered. The workflow notifies the Privacy Steward that an assessment is ready for review. A workflow task prompts the Privacy Steward to review the assessment and approve or reject the Assessment Review asset.

Note Neither the Assessment Review asset nor the submitted assessment can be edited.

Important The Assessments workflow is not relevant and not triggered if the [Governance option](#) is cleared in the template that was used for your assessment.

Relevant resource roles

The following table shows the relevant resource role and the workflow tasks they can carry out.

Resource role	Task	Required
Privacy Steward	<ul style="list-style-type: none">Review assessmentApprove or reject assessment	Yes

Workflow initiator

Any signed in user can start the workflow. The workflow starts when any user submits an assessment for review.

Status progression of the Assessment Review asset in your Collibra DGC environment

Status	Description
Under Review	The initial status of the Assessment Review asset, if the Governance option is selected in the template used for the assessment.

Status	Description
New	<p>The initial status of the Assessment Review asset:</p> <ul style="list-style-type: none"> If the Governance option is cleared in the template used for the assessment. If the Governance option is selected in the template used for the assessment, but no Privacy Steward is assigned to the domain you chose when submitting the assessment. <div style="background-color: #f0f0f0; padding: 10px;"> <p>Warning For the Assessments workflow to work correctly, a Privacy Steward must be assigned to the domain you specify when submitting an assessment.</p> </div>
Approved	The Privacy Steward approved the assessment.
Rejected	The Privacy Steward rejected the assessment.

Note Once the Assessment Review asset is approved or rejected, it cannot be edited.

Status progression of the assessment in Collibra Assessments

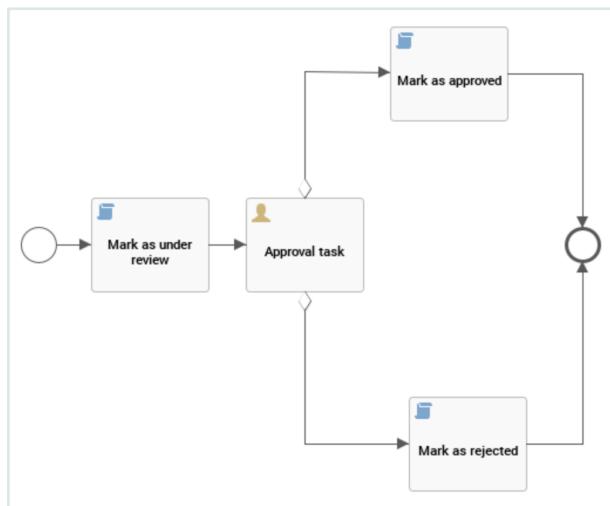
Condition	Status
Any user starts an assessment.	Draft
Any user submits an assessment for review.	Submitted

Note The **Submit** button is available if the Governance option is selected in the template used for the assessment.

Condition	Status
Any user completes an assessment. Note The Complete button is available if the Governance option is cleared in the template used for the assessment.	Completed
The Assessment Review asset in your Collibra DGC environment is approved.	Submitted
The Assessment Review asset in your Collibra DGC environment is rejected.	Obsolete

Assessments workflow walk-through

Diagram



Start the workflow

When you **submit** an assessment for review in Collibra Assessments:

- An Assessment Review asset with the Under Review status is created in the domain you specified, in your Collibra Data Intelligence Cloud environment.

- The Assessments workflow is triggered.

In Collibra Assessments, click **View assessment asset page**, to open the Assessment Review asset page in your Collibra DGC environment.

Review the assessment

Any user can:

- Review the Assessment Review asset and its attributes, in your Collibra DGC environment.
- Click the **view details in assessment app** link on the Assessment Review asset page, to view the assessment details in Collibra Assessments.

Approve or reject the assessment

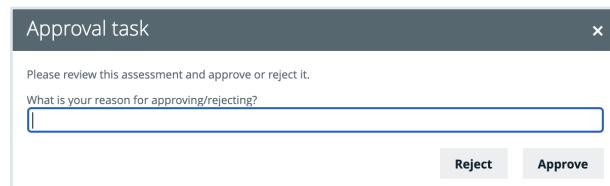
As the Privacy Steward, when you open the Assessment Review asset page, a workflow task prompts you to approve the assessment.



Click **View task**.

Tip You can also access the task via the [My Tasks page](#). In the side pane, click **More**, and then click **View task**.

The **Approval task** dialog box prompts the Privacy Steward to approve or reject the assessment.



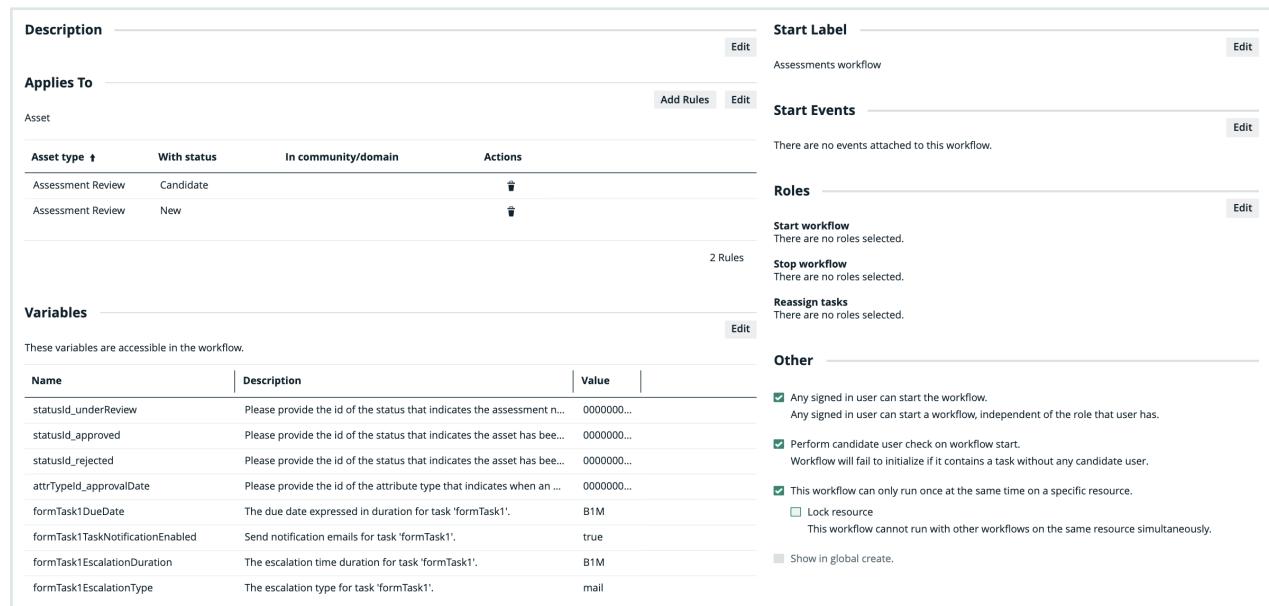
If the assessment is approved, the status of the Assessment Review asset becomes Approved.

If the assessment is rejected, the status of the Assessment Review asset becomes Rejected.

Assessments workflow configuration

Warning This workflow should not be modified. It is hard-coded to work only with the Privacy Steward resource role. If, for example, you want to modify the workflow to work with resource roles other than Privacy Steward, we recommend that you copy the workflow, rename the copy and configure it to suit your needs.

Access the workflow configuration via  **Settings** → **Workflows** → **Definitions** → **Assessments**.



The screenshot shows the 'Assessments workflow configuration' page. It includes sections for 'Start Label' (set to 'Assessments workflow'), 'Start Events' (no events), 'Roles' (no roles selected), and 'Other' (checkboxes for workflow start conditions). The 'Applies To' section shows rules for 'Asset type' (Assessment Review) and 'With status' (Candidate and New). The 'Variables' section lists several variables with their descriptions and values.

Name	Description	Value
statusid_underReview	Please provide the id of the status that indicates the assessment n...	0000000...
statusid_approved	Please provide the id of the status that indicates the asset has bee...	0000000...
statusid_rejected	Please provide the id of the status that indicates the asset has bee...	0000000...
attrTypeid_approvalDate	Please provide the id of the attribute type that indicates when an ...	0000000...
formTask1DueDate	The due date expressed in duration for task 'formTask1'.	B1M
formTask1TaskNotificationEnabled	Send notification emails for task 'formTask1'.	true
formTask1EscalationDuration	The escalation time duration for task 'formTask1'.	B1M
formTask1EscalationType	The escalation type for task 'formTask1'.	mail

Applies to

This workflow applies to the following asset types:

Asset type	Restriction	Remark
Assessment Review	None	None

Note When you select a parent asset type, it includes all of its children. For example, if you select **Business Asset**, the workflow also applies to **Business Term** because it is a type of **Business Asset**.

Configuration variables

You can edit the configuration variables directly from the workflow definition page by clicking  in the upper-right corner of the variables table.

Variable	Description	Default value
statusId_underReview	The UUID of the status that indicates the assessment needs to be reviewed before approval.	00000000-0000-0000-0000-000000005020
statusId_approved	The UUID of the status that indicates the asset has been approved.	00000000-0000-0000-0000-000000005025
statusId_rejected	The UUID of the status that indicates the asset has been rejected.	00000000-0000-0000-0000-000000005010
attrTypeId_approvalDate	The UUID of the attribute type that indicates when an assessment review was approved.	00000000-0000-0000-0000-00000000272
formTask1DueDate	The due date expressed in duration for task 'formTask1'.	B1M
formTask1TaskNotificationEnabled	Send notification emails for task 'formTask1'.	True
formTask1EscalationDuration	The escalation time duration for task 'formTask1'.	B1M
formTask1EscalationType	The escalation type for task 'formTask1'.	Mail

Start label

The start label is the name of the workflow when it is visible as a button on a resource page or in the drop-down list when you add it as a button on a dashboard. You can find the **Start Label** section in the upper-right corner of the workflow definition page.

Default value: Assessments workflow

Click  to edit the label.

Start Event

A start event is an event that triggers the workflow, for example starting the workflow when an asset is created.

In the context of this workflow definition, however, no start event is configured for the Assessments workflow. Rather, the workflow starts when any user submits an assessment for review.

Roles

The roles define the permissions to manage the workflow. For example, if a certain tasks must be urgently executed but the responsible person is on sick leave, a user with the defined role can reassign that task to somebody else.

Action	Roles
Start workflow ¹	There are no roles selected.
Stop workflow ²	There are no roles selected.
Reassign tasks ³	There are no roles selected.

¹The button with the start label is available to users with these roles.

²The option to cancel the workflow is available to users with these roles.

³The option to reassign the task is available to users with these roles.

Other

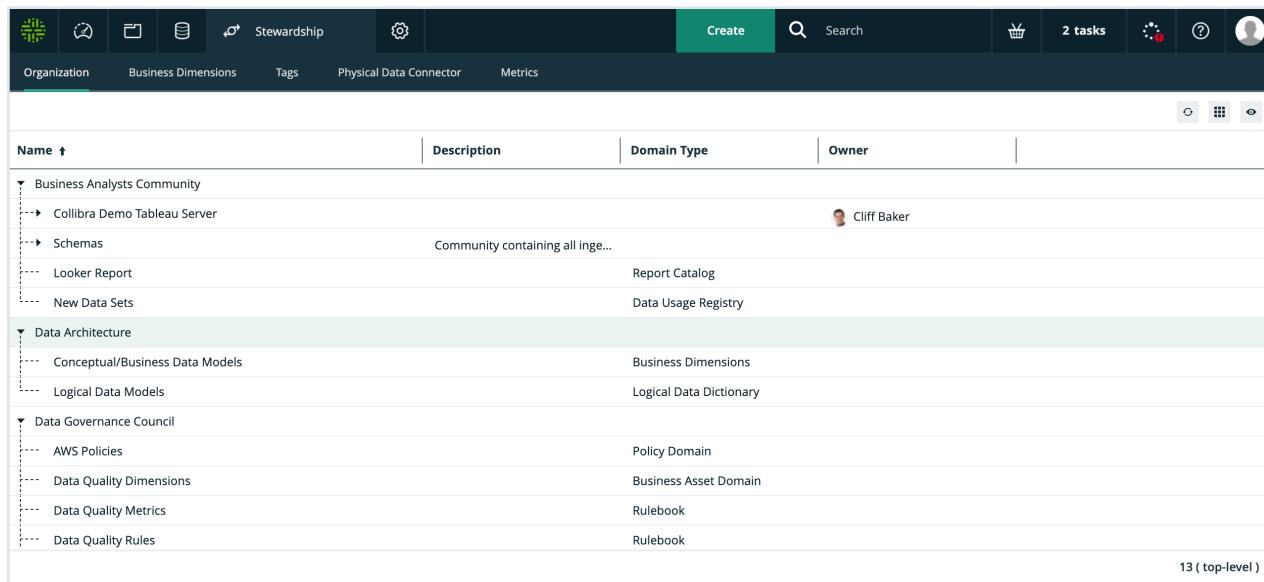
The settings in this section define global restrictions that apply to the workflow such as:

- Accessibility to guest or logged in users.
- Checking that the roles required by the workflow are not empty.
- Preventing the same workflow or other workflows from running on the same resource.
- Making the workflow available to be added to a dashboard.

Setting	Enabled
Any guest user can start the workflow.	No
Any signed in user can start the workflow.	Yes
Perform candidate user check on workflow start.	Yes
This workflow can only run once at the same time on a specific resource.	Yes
Lock resource.	No
Show in global create.	No

Data Stewardship

The Collibra Data Stewardship application helps data stewards manage their daily tasks. It also helps the administrators manage their stewards. Stewards can monitor and maintain their own space in the company's data governance ecosystem. This gives them a clear picture of their responsibilities inside the data governance structure.



The screenshot shows the Collibra Data Stewardship application interface. At the top, there is a navigation bar with icons for Home, Organization, Business Dimensions, Tags, Stewardship, Physical Data Connector, and Metrics. A green 'Create' button is located on the right side of the navigation bar. To the right of the 'Create' button are search, task management (2 tasks), and user profile icons. Below the navigation bar is a table with columns: Name, Description, Domain Type, and Owner. The table lists various organizational structures and their details:

Name	Description	Domain Type	Owner
Business Analysts Community	Community containing all inge...	Report Catalog	Cliff Baker
Collibra Demo Tableau Server			
Schemas			
Looker Report		Report Catalog	
New Data Sets		Data Usage Registry	
Conceptual/Business Data Models		Business Dimensions	
Logical Data Models		Logical Data Dictionary	
AWS Policies		Policy Domain	
Data Quality Dimensions		Business Asset Domain	
Data Quality Metrics		Rulebook	
Data Quality Rules		Rulebook	

At the bottom right of the table, it says '13 (top-level)'.

Data Stewardship submenu pages

Page	Description
Organization	Contains a table with the hierarchical overview of communities and domains.
Business Dimensions	Contains a table with Business Process assets.
Tags	Provides an overview of all tags in Collibra Data Governance Center.

Page	Description
Physical Data Connector	Contains a table with high-level database information.
Metrics	Contains a variety of statistics related to how the assets of the Stewardship application are used.

Policy Manager

The Policy Manager application provides the key functions to adopt, implement and monitor the digital policies for the enterprise.

The screenshot shows the 'Policies & Standards' view in the Collibra Data Governance Center. The top navigation bar has tabs for 'Governance Assets' and 'Metrics'. Below the tabs is a dropdown menu for 'Policies & Standards' and a sub-section titled 'View for displaying policies & standards'. On the right side of the header are five icons: a pencil, a copy, a share, and a trash can. Below the header is a toolbar with buttons for 'Delete', 'Move', and 'Validate', along with several small icons. A filter icon is on the left. The main area is a table with columns: 'Name' (sorted by name), 'Status', 'Domain', and 'Asset Type'. The table lists six entries, all of which are 'Accepted' and belong to the 'AWS Policies' domain, categorized as 'Policy'. At the bottom of the table are navigation links for page numbers (1-50, 51-100, 101-125) and a total count of 125.

Name	Status	Domain	Asset Type
collibra-demo-euwest2-refine...	Accepted	AWS Policies	Policy
collibra-demo-euwest2-refine...	Accepted	AWS Policies	Policy
collibra-dwh-config-dgc	Accepted	AWS Policies	Policy
collibra-dwh-config-dgc-2	Accepted	AWS Policies	Policy
collibra-dwh-config-mule	Accepted	AWS Policies	Policy
collibra-dwh-config-users-and...	Accepted	AWS Policies	Policy

With Policy Manager, Collibra Data Governance Center users can easily have:

- An overview of the enterprise's governance assets.
 - Standards, for example ISO-standards or other local standards.
 - External regulations, for example GDPR.
 - Entities, such as EBA, ISO, EC, FDA and so on.
 - Internal regulations, for example policies, goals, constraints and so on.
 - Controls, like a dissemination plan.

- Risks, evaluation and mitigation, for example privacy risk and market access risk.
- Accreditation and certificates, for example conformance certificates.
- An overview of the policy lifecycle:
 - Adoption: See the regulations and the respective regulations, paragraphs, sections, to check the adoption of the applicable regulations throughout the enterprise.
 - Compliance: Monitor how the enterprise's data governance program can be traced to the policies and if there are compliance gaps.
 - Risks: Define the risks and their mitigation rules, and trace them to the policies and data assets

Policy Manager submenu pages

Page	Description
Governance Assets	Contains a table with Governance assets.
Metrics	Contains a variety of statistics related to how the assets of the Policy Manager are used.

Troubleshooting

Text editor security issue	871
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Text editor security issue

There has been a security issue in [text widgets](#) on dashboards in Collibra Data Governance Center. The issue has been fixed in version 5.7.5 and will remove the following HTML tags from the text widgets:

- script
- svg
- frame
- frameset
- iframe
- any event handler such as `onclick`

However, to complete the fix, you have to do the following after the upgrade to 5.7.5:

1. [Open](#) the DGC service settings for editing.
2. In the **Security configuration** section, set the **Prevent advanced html features in text dashboard** to **True**.
3. Click the green **Save all** button.

The next steps will remove the mentioned tags from the text widgets on dashboards:

1. Sign in to Collibra DGC.
2. Open a dashboard that has a text widget.
3. Copy the content of the text widget.
4. Open the text widget for editing and save immediately.
 - » If there was a security issue in the text widget, original content may have been removed.
5. Compare the widget content with the copied content and add the missing content again.
6. Repeat these steps for all text widgets on all dashboards.

Glossary

A

Admin

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

Articulation score

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

Asset

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

Asset type

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

Assignment

Determines the visibility of a feature in the GUI.

Attribute

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

Attribute kind

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

Attribute type

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

B

Business asset

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

C

Code list

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

Code set

A grouping of code values.

Code value

A specific code.

Community

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

Corole

The reverse role in a fact type or relation type.

D

Data issue

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

Domain

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

F

Fact type

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

G

Global role

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

Glossary

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

Governance asset

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

H

Head

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

M

Metamodel

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

R

Reference data

Any kind of data that is used solely to categorize other data found in a database, or solely for relating data in a database to information beyond the boundaries of the enterprise.

Relation type

A fact type between two asset types.

Resource

An asset, a domain or a community.

Resource role

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

Role

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

S

Stakeholder

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

Steward

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

Subject matter expert (SME)

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

T

Tail

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

Technology asset

An asset type related to technology; database, system.

U

User

An individual who has access to Collibra Data Governance Center.

User group

A grouping of users.

V

View

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