



Collibra Data Intelligence Cloud
Asset Grid

Collibra Data Intelligence Cloud - Asset Grid

Release date: August 7th, 2022

Revision date: Thu Aug 04, 2022

You can find the most up-to-date technical documentation on our Documentation Center at

https://productresources.collibra.com/docs/collibra/latest/Content/AssetGrid/to_asset-grid.htm

Contents

| | |
|---|----|
| Contents | 3 |
| About Asset Grid | 1 |
| What is Asset Grid? | 1 |
| How does Asset Grid work? | 1 |
| Who benefits from the Asset Grid? | 2 |
| Asset Grid limitations | 2 |
| Enable Asset Grid | 3 |
| Steps | 3 |
| What's next? | 3 |
| Start Asset Grid | 4 |
| Asset Grid interface | 5 |
| Asset Grid homepage | 5 |
| Grid page | 6 |
| Query Builder page | 8 |
| Grid Builder page | 9 |
| Creating Asset Grids | 11 |
| Creating a grid | 11 |
| Using the Query Builder | 12 |
| Using the Grid Builder | 16 |
| Asset Grid layout | 18 |
| Edit legend colors | 21 |
| Working with Asset Grid | 23 |
| Create an Asset Grid group | 23 |

| | |
|--|----|
| Add a grid to a group | 24 |
| Edit a grid | 25 |
| Clone a grid | 27 |
| Edit an Asset Grid group | 28 |
| Refresh a grid | 29 |
| Filtering data in grids | 29 |
| Embed a grid in Collibra Data Intelligence Cloud | 30 |
| Download grid as CSV | 32 |
| Export grids | 33 |
| Import grids | 34 |
| Switch grids | 35 |
| Delete a grid | 35 |
| Delete an Asset Grid group | 36 |
| Use cases | 37 |
| Use case - Discover data | 37 |

About Asset Grid

Asset Grid enables visualization of thousands of asset relationships. In this visualization, you can aggregate and show data across multiple dimensions, which increases the understanding of relationships across many assets simultaneously.

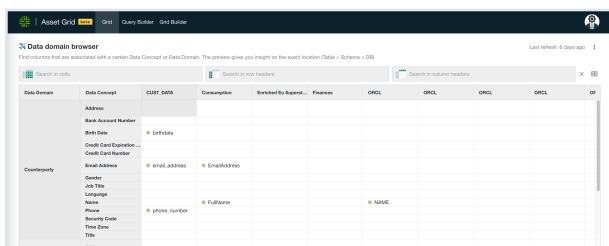
Note Asset Grid is a cloud-only application.

What is Asset Grid?

Showing thousands of related assets in a single view can be daunting, making it difficult for users to gain insight and take action on data.

Asset Grid is a feature to display assets in pivot table format. It makes data more accessible, insightful and actionable for a variety of users and use cases, such as a responsibility matrix, impact analysis, data discovery grids, status reporting and so on.

Similar to Diagrams, it shows traversing asset relations. But whereas Diagrams show data from the perspective from a single asset, Asset Grid shows relations for thousands of assets at once.



The screenshot shows the Asset Grid application interface. It features a search bar at the top, a navigation pane on the left, and a main data grid. The data grid is a pivot table with columns for 'Data Domain', 'Data Concept', 'CUST DATA', 'Consumption', 'Broken By Report...', 'Finance', and several 'ORCL' columns. The rows are categorized by 'Data Domain' and 'Concept'. The 'Data Domain' section includes 'Address' and 'Bank Account Number'. The 'Concept' section includes 'Bank-Over', 'Credit Card Expiration...', 'Credit Card Number', 'Email Address', 'Gender', 'Job Title', 'Last Name', 'Phone', 'Phone Number', 'Primary Email', 'Time Zone', 'Title', and 'Address'.

How does Asset Grid work?

Start by selecting the root asset for your grid. The root asset aggregates data in your grid.

Once you have selected the root asset, use the Query Builder to select the data to show in the grid.. From your root asset, you can start traversing relations to aggregate or categorize the data you need. You can enrich each data point with attributes and responsibilities to make the grid more insightful.

Now map your data points onto your pivot table in the Grid Builder. Optionally, categorize the cell data by status or other characteristics from your data set.

Optionally, tailor the layout of the grid to the content it is showing with the layout settings.

Lastly, share the grid with others or embed the grid in Collibra Dashboards, portal sites or intranet pages to make sure you reach your target audience in their natural working context.

Who benefits from the Asset Grid?

Asset Grid is potentially relevant for all personas within an enterprise. It enables Collibra champions to make data more accessible to data citizens, enabling them to solve additional use cases that depend on understanding relationships across large numbers of assets, such as data exploration, impact analysis, and status reporting.

Asset Grid limitations

Currently, Asset Grid has the following limitations:

- Asset Grid is a cloud-only application.
- A grid can show a maximum of 8,000 assets.
- A grid cannot show communities or domains.
- A grid cannot show complex relations.
- Grids are not included in the Collibra Data Intelligence Cloud [backups](#). To create backups of your grid, use the [export](#) function.

Enable Asset Grid

Before you can start using Asset Grid, you have to enable it.

Steps

1. Enable Asset Grid in Collibra Console:
 - a. Open Collibra Console.
 - » Collibra Console opens with the **Infrastructure** page.
 - b. In the tab pane, expand an environment to show its services.
 - c. In the tab pane, click the Data Governance Center service of that environment.
 - d. Click **Configuration**.
 - e. Click **Edit configuration**.
 - f. In the **General settings** section, set the option **Add Asset Grid link to menu** to True.
 - g. Click the green **Save all** button.
2. In Collibra Data Intelligence Cloud, [add](#) users to the global role **Asset Grid Admin**.

Important Only users who have the **Asset Grid Admin** global role can use Asset Grid.

What's next?

[Start](#) Asset Grid via the main menu of your Collibra environment.



Start Asset Grid

When you have enabled Asset Grid, you can start the app from the main menu in your Collibra Data Intelligence Cloud environment.

Prerequisites

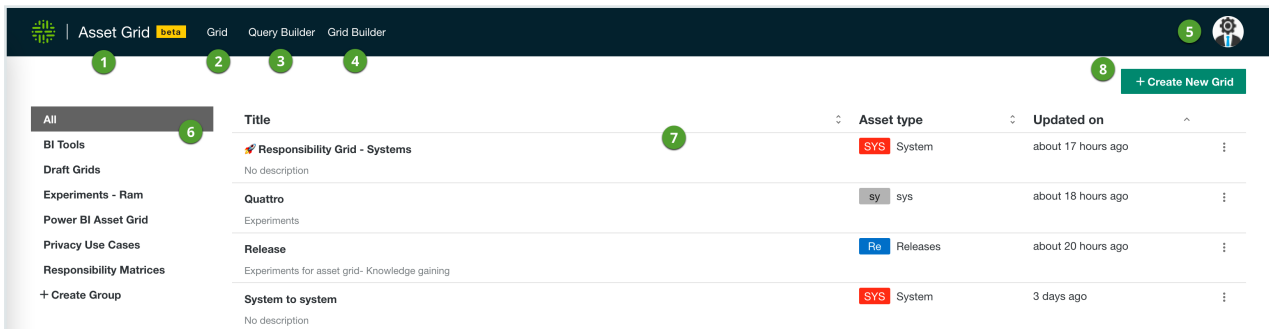
You need the Asset Grid Administration [global permission](#).

Steps

1. Sign in to your Collibra with a user who has the right permission.
2. In the main menu, click , then  Asset Grid.

Asset Grid interface

Asset Grid homepage





| Item | Description |
|------|--|
| 1 | The link to go to the Asset Grid homepage. |
| 2 | The link to the result of your grid. This link is only available when you open a grid or create a grid. |
| 3 | The link to open the Query Builder . On this page, you build the queries to retrieve the data from your Collibra Data Intelligence Cloud environment. |
| 4 | The link to open the Grid Builder . On this page, you define what data you want to show in your grid. |
| 5 | Via your avatar you can return to your Collibra environment, and import and export grids. |

| Item | Description |
|------|---|
| 6 | The list of Asset Grid groups. If you have a large list of grids, you can create groups to organize them. |
| 7 | The table with the grids. Click each of the column header to sort the table in ascending or descending order. |
| 8 | The button to create a new grid. |

Grid page

The screenshot shows the 'Asset Grid v2.0.1' interface. At the top, there are navigation tabs for 'Grid', 'Query Builder', and 'Grid Builder'. The main area is titled 'Data domain browser' and contains a search bar (1) with options for 'Search in cells', 'Search in row headers', and 'Search in column headers'. Below the search bar are various filter controls like 'Preset', 'Hovering', 'Cell items limit', and sliders for 'Header columns width', 'Header row height', and 'Grid columns width' (3). A data grid is displayed with columns for 'Data Domain', 'Data Concept', 'CUST_DATA', 'Consumption', 'Enriched Eu Superst...', 'Finances', and 'ORG'. A legend (4) is visible on the right side of the grid, showing options like 'Business Process performed for Purpose', 'Accepted', and 'Candidate'. On the far right, there is a sidebar with 'Asset details' (6) and a list of roles including 'Data Custodian', 'Owner', 'Normal', 'Technical Steward', 'Data Steward', and 'Stakeholder'.

| Item | Description |
|------|--|
| 1 | Search area to search for your data. You can search in the grid cells, grid header rows and grid column rows. Search queries are not case-sensitive. |

| Item | Description |
|------|--|
| 2 | <p>Grid options:</p> <ul style="list-style-type: none"> • Edit or refresh the grid. • Export the grid to CSV. • Copy the grid's URL. • Edit the grid layout settings. |
| 3 | <p>Grid layout setting, for example to edit the layout of the grid. This section is only visible if you enabled it via the Grid options.</p> |
| 4 | <p>Grid legend with the meaning of the used color codes in the grid. You can open the legend with the  icon.</p> <p>In the legend, you can select items to filter the content in your grid.</p> <p>You can edit the colors of the legend items.</p> |
| 5 | <p>Asset Grid table showing the retrieved data. Click a cell to open the asset details.</p> |
| 6 | <p>The asset preview side pane.</p> <p>In this section you can see more information on the selected asset in the grid. You can define the content of the details on the Grid Builder page.</p> <p>Click the header to expand or collapse a section. Clicking an item opens the asset in your Collibra environment.</p> <p>Click  next to a name to send an email with your default email application.</p> |

Query Builder page

| Item | Description |
|------|---|
| 1 | <p>The actual Query Builder that allows you to select asset types via the relation of a parent asset type.</p> <ul style="list-style-type: none"> > : Hide the Asset count field. Click < to show the Asset count field. The Asset count field is shown by default. ⌵ and ⌴ : Collapse all (⌵) or expand all (⌴) nodes. ⌵: Download the query in JSON format. ▶ : Execute the query. This downloads the result of the query in JSON format. |

| Item | Description |
|-----------------|---|
| <p>2</p> | <p>The Query Builder information pane. In this pane, you find extra information about the selected item in the actual Query Builder.</p> <ul style="list-style-type: none"> • Asset count: The statistics of your query showing how many assets there will be in your grid, per selected relation. • Filters: The filter that is applied on your relation, to make the data as relevant as possible for your grid. This section is only visible if you select a relation in the query. • Sample data: Sample data that is found for your query. If there is no data available, then it is likely that you selected the wrong relation. This section is only visible if you select a relation, attribute or responsibility in the query. <p>Note The maximum number of assets that can be shown in a grid is 8,000.</p> |

Grid Builder page

The screenshot shows the 'Grid Builder' page in the 'Asset Grid' application. The interface is split into two main panes. On the left, the 'Grid level 1' pane shows a table with columns for 'Asset Name' and 'Asset Name' under different grid levels. A green circle '1' highlights the first column. Below the table is a button that says 'Add additional data to grid'. On the right, the 'Mapper Configuration' pane shows settings for a 'Grid cell'. A green circle '2' highlights the 'Data Type' field, which is set to 'Asset'. Other fields include 'Title: Table contains Column', 'Category', 'Column: Security Classification', and 'Database: Data Source Type'.

| Item | Description |
|------|--|
| 1 | <p>The table to define the content of the grid.</p> <ul style="list-style-type: none">• In the first two columns of the first row, you set the label of the columns. Make sure that you enter meaningful names and that the names reflect the content of these columns. You define the content of these columns in the second row.• The third column of the first row is the asset type that you selected when creating the grid.• In the first two columns of the second row, you define how you want to group the assets. The grouping can be dynamic or static. |
| 2 | <p>The section to define the asset preview.</p> <p>In this section, you define the information you want to show in the grid and the asset preview side pane.</p> <ul style="list-style-type: none">• You can categorize the assets. The category is shown via a color code in the grid cells.• You can add attributes in the asset preview. You can only select attributes that you selected in the Query Builder. |

Creating Asset Grids

This section provides the general principles of creating Asset Grids.

| | |
|-------------------------------|----|
| Creating a grid | 11 |
| Using the Query Builder | 12 |
| Using the Grid Builder | 16 |
| Asset Grid layout | 18 |
| Edit legend colors | 21 |

Creating a grid

The first step in creating a grid is to make the grid asset. The most important part is selecting the right asset type, because you cannot change it afterwards. If you want to start from another asset type, you have to create a new grid.

Select Asset type

The asset type that you select becomes the column header of your grid and aggregates the data. To select the right asset type, you need to know the operating model of your Collibra Data Intelligence Cloud environment as well as how you want to visualize the data.

For example, if you want to know in which databases certain columns with personal information exist, you shouldn't select the column asset type. Selecting the column asset type would mean that each column would become a column header. As a database contains columns, it would be more logical to aggregate the column information by database; therefore, database would be the best asset type to select.

View permissions

When you create a grid, you can set view permissions. By default, grids are only visible to users who belong to the user group Admins. This is a packaged user group in your Collibra environment. You can only set the view permissions for the user groups in your environment, not for individual users.

Tip Asset Grid does not evaluate view permissions on asset level. Instead, the grid administrator or creator defines the view permissions for grids on user group level. Therefore, you might be able to view an asset in a grid, but not in your Collibra environment.

Refresh data

When you have created a grid, the grid data is synchronized with the data in your Collibra environment. The data will only be refreshed at the selected refresh schedule, which is by default weekly. So it could happen that the grid data is out of sync with the actual data. You can change this to a daily, monthly or yearly schedule.

To ensure that you are working with the most recent data, you can also [refresh the data](#) manually.

Using the Query Builder

With the Query Builder, you decide which data you add to the grid data set. In a grid, you can only show the data from this data set.

Adding assets

When you want to add data to your data set, you create a hierarchy of relations. Each node in the hierarchy is represented by a relation, except the top node which is the asset type that you selected when you created the grid.

For each node, you can select attributes, responsibilities and a relation to another asset type. Adding a relation means that you add a new asset type to the data set. A relation has the format "<head> <relation> <tail>". The new asset type is then the tail of the relation.

Example In the relation "Table has Column", "Table" is the head, "has" is the relation and "Column" is the tail, so adding this relation adds the Column asset type to your data set.

The easiest way to find the relations is to use the [Collibra for Desktop](#) app. If you know the grid's root asset type, look up any asset of that asset type in the app. From this asset, you can follow the relations until you have all the necessary asset types. Each of the relations that you follow will become a node in your query.

Example On a database asset page, you can see the relation to schemas. If you follow a related schema asset, you see the relation to a table and lastly, if you follow a Table asset, you see the relation between tables and columns.

This can involve trial and error, as it can happen that the first asset you look up does not lead you to all the data you need. In that case, you have to find another asset and again follow the relations to the necessary asset types.

Tip Sometimes it can be easier to start from your end-point and then look up the relations to your starting point. It's easier to find the relation between a column asset and its data domain if you start your search via the data domain, rather than via the column asset.

Adding attributes

To show attributes in the asset preview of your grid, you can add asset attributes to the data set.

Example If you want to show the description of a database when you open the details of a database, you have to include the description attribute at the database level in the Query Builder.



Adding responsibilities

To organize the data by the responsibilities, you have to add responsibilities in the Query Builder.

Example If you want to show the responsible users of reports, you should add the responsibilities at grid level.

| Function | Date | Customer Churn Dashboard... | Customer Details | Customer Loyalty and Ch... | Customer Sales Insights ... | Dashboard 1 | Gender Equality Insights |
|-----------------------|------|-----------------------------|------------------|----------------------------|-----------------------------|------------------|--------------------------|
| Owner | | © Cliff Baker | © Cliff Baker | © Cliff Baker | © Cliff Baker | © Cliff Baker | © Cliff Baker |
| Subject Matter Expert | | © Eliza Arquette | © Eliza Arquette | © Eliza Arquette | © Eliza Arquette | © Eliza Arquette | © Eliza Arquette |
| App of Panel | | | | | | © Cliff Baker | © Eliza Arquette |

Query asset count

When you build your query, it's difficult to know if your grid will contain results. To avoid creating a query with no results, click the **Asset count** header on the right side of your query builder.

Tip If you don't see the Asset count section, click < in the top-right corner.

| Asset count | | | |
|--|-------------|-------------|------------|
| Asset | Count | Quota | Total |
| Database | 32 | 4% | 1% |
| Database has Schema | 34 | 4% | 2% |
| Schema contains Table | 160 | 18% | 7% |
| Table contains Column | 1744 | 196% | 81% |
| Column represented by Data Attribute | 63 | 7% | 3% |
| Data Attribute is classified by Data Concept | 92 | 10% | 4% |
| Data Concept grouped by Data Domain | 8 | 1% | 0% |
| Data Attribute is part of Data Category | 21 | 2% | 1% |
| Data Category complies to Standard | 5 | 1% | 0% |
| Total | 2159 | -889 | 27% |

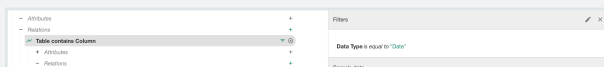
Currently a grid can contain a maximum of 8,000 assets. The Asset count not only helps you to know if there are results, it also show you how many assets your query will return. The number of assets are counted per asset type so you can easily identify which asset type will add most to the results. In the above example, you see that columns represent the majority of the 2,159 total assets.

Query filters

You can create filters for every relation in your query. This helps you limit the data to only the relevant data for your grid. You can only create simple filters with one or more criteria. If you use more than one criteria, the data must meet all criteria.

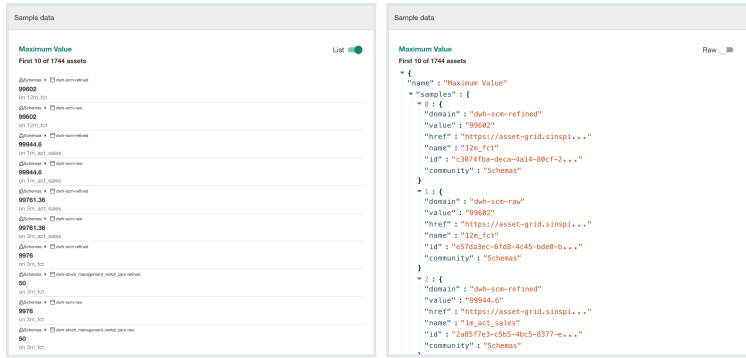
To create a filter, click \equiv to the right of a relation or the root asset type, or click $+$ in the Filters section of the Query Builder information pane.

Example If you are only interested in columns that show birthdays, you can filter on columns with a date format.



Sample data

When you select a node, attribute or responsibility in the Query Builder, you see sample data in the information pane, if available. You can present the sample data as raw data in JSON format or as a list. Click the **List/Raw** switch to switch the views.



Query Builder actions

Located between the fields to build the query and the asset count, are the following action icons:

| Icon | Description |
|--------|---|
| > | Expand the Query Builder canvas. This hides the information pane. |
| ⌵ or ⌶ | Collapse (⌵) or expand (⌶) all nodes of your query at once. |
| 📄 | Download your query in JSON format. |
| ▶ | Execute the query and download the result in JSON format. |

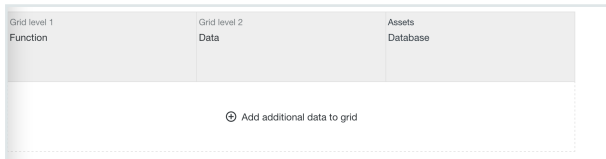
Using the Grid Builder

With the Grid Builder, you define the content that will be shown in your grid.

The Grid Builder page consists of **two sections**, one to define the content of your grid and one to define additional data.

Grid headers

When you create a new grid, the Grid Builder page shows an empty table showing only column headers.



| Grid level 1 Function | Grid level 2 Data | Assets Database |
|-------------------------------|----------------------|--------------------|
| ⊕ Add additional data to grid | | |

The first row contains the headers of the columns in the grid. On this row, the first two columns are your levels to organize the rows of the grid. You can edit the column headers of these columns. Double-click **Function** or **Data** to select the word and then replace it with your own title.

The third column is the asset type that you selected when you created the grid and cannot be edited. Each column will represent an asset of the asset type, in the above example a database.

Grid content

When you have defined the headers for the grid, you have to select the data for the grid. You do this by adding a new row to the grid. The first two columns of each row are row headers and can be static or dynamic. If you select static, the row header is just a label. If you select dynamic, the row header is content from the data set. With the two row headers, you can define the levels for your data, similar to a hierarchy. If you only need one level, leave one of the row headers empty.

In the third column, you select the one piece of data that you're interested in. Which asset data you select depends completely on what you want to show, whether it's an asset, meaning the asset name, the asset type, status or domain. You can even select an attribute.

Keep in mind that you select the asset via the relation, which has the format "`<head> <relation> <tail>`". When you select an asset, it is always the tail of the relation.

For example, if you select *Asset* in the **Table contains Column** relation, then you select a column asset name.

You can add multiple rows to have different views in one grid.

Additional data

The window to add additional data has the following sections:

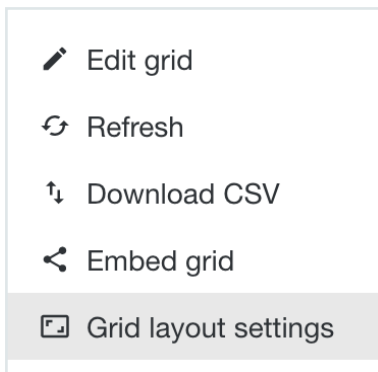
| Section | Description |
|---------------------------|---|
| Ignore Not-Defined values | Hide rows that have an undefined header value. Such an undefined header value can occur if a cell is aggregated to a non-existing category. |
| Grid cell | This section shows the selected relation and data type that you selected for the grid cell. |
| Category | <p>Add a category indication to the grid cell. The category is indicated by a color code. You can consult the meaning of the colors via the legend (📖) in the grid.</p> <p>To keep the categorization clear, you can only add one category.</p> |
| Configure asset preview | <p>In the asset preview side pane of the grid, you can add as many attributes as you want, as long as you added them to the data set in the Query Builder. Click + to add an attribute.</p> <p>You can arrange the order of appearance with ▲ and ▼ in each attribute section. Use ✎ to select another attribute.</p> |

You can collapse or expand each section by clicking in the section header. Only **Grid cell** is available for the column and row headers of the grid.

Asset Grid layout

When you have an operational Asset Grid, you can customize the layout to your liking.

To **edit** the layout, click  above the grid to the right and select **Grid layout settings**.



When you enable the layout settings, a row appears between the search boxes and the grid.



| Setting | Description |
|---------------|--|
| Preset | <p>A list of predefined grid layout settings. You can start from one of the presets to further customize your layout:</p> <ul style="list-style-type: none"> • default • comfortable • compact <p>When you change a preset, the preset is marked as "custom".</p> |
| Related Grids | <p>Grids are considered related if they are part of the same grid group. Select a grid group to switch from one grid to another within this grid group.</p> |

| Setting | Description |
|----------------------|--|
| Hovering | <p>The way of highlighting in the grid when hovering your mouse over the grid:</p> <ul style="list-style-type: none"> • off: no highlighting at all. • cell: the row and column of the cell are highlighted up to the selected cell. • full: the full row and column of the selected cell are highlighted. • headers: only the row and column headers of the selected cell are highlighted. |
| Align Row Header | <p>The vertical alignment of the row header of the grid. For large rows, it is possible that the row header is not visible. With this alignment, you can ensure that the header is always visible.</p> |
| Cell items limit | <p>The maximum number of elements that are shown per cell.</p> <p>If the value is 0, all elements are shown.</p> <p>If there are more elements than the set limit, you see the first elements and an extra option to show all elements.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <ul style="list-style-type: none"> ● AccountCodeA... ● AccountDescri... ● AccountKey <p style="text-align: center;">Show 416 More</p> </div> |
| Header columns width | <p>The width of the column header. This only applies to the first two columns of the grid.</p> |
| Header row height | <p>The height of the row header. This only applies to the first row of the grid.</p> |
| Grid columns width | <p>The width of the grid columns.</p> |

| Setting | Description |
|--------------------|--|
| Grid rows height | The height of the grid cells. |
| Hide empty rows | The option to hide empty rows. If this option is selected, only rows that have a value in at least one column are shown. |
| Hide empty columns | The option to hide empty columns. If this option is selected, only columns that have a value in at least one row are shown. |

You can hide the layout settings by clicking  to the right of the layout settings.


Edit legend colors

In an Asset Grid, the legend colors are automatically selected. These colors could be meaningless or even confusing. You can edit these colors to suit your needs.

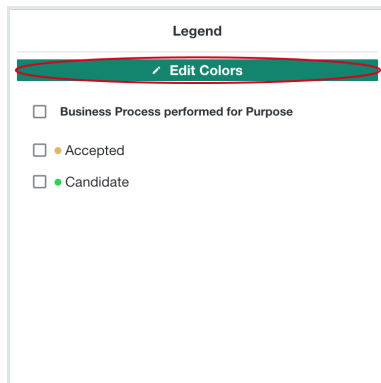
Prerequisites

You have the Asset Grid Admin global role.

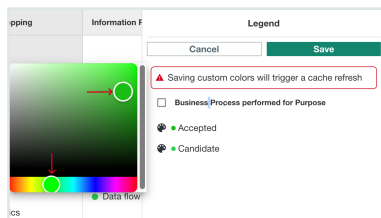
Steps

1. In Asset Grid, open a grid.
2. Near the top-right corner, click .
 - » The grid legend appears.

3. In the **Legend** window, click **Edit Colors**.



4. Select the legend item for which you want to edit the color.
» The color selector appears.



5. At the bottom of the color selector, select a color from the color palet. Above the color palet, select the gradient.
6. Click outside the color selector window to close it.
7. Repeat steps 4 to 6 for each item that you want to edit.
8. Click **Save**.
» The grid is updated with the new colors.

Working with Asset Grid

In this section, you learn how you can organize, export and import grids.

| | |
|--|----|
| Create an Asset Grid group | 23 |
| Add a grid to a group | 24 |
| Edit a grid | 25 |
| Clone a grid | 27 |
| Edit an Asset Grid group | 28 |
| Refresh a grid | 29 |
| Filtering data in grids | 29 |
| Embed a grid in Collibra Data Intelligence Cloud | 30 |
| Download grid as CSV | 32 |
| Export grids | 33 |
| Import grids | 34 |
| Switch grids | 35 |
| Delete a grid | 35 |
| Delete an Asset Grid group | 36 |

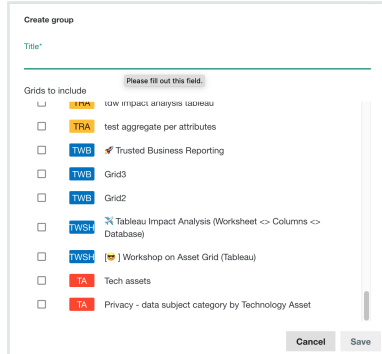
Create an Asset Grid group

If you have many grids, it might be difficult to find your grid in the grid list. To help you organizing your grids, you can create groups.

1. Go to the Asset Grid homepage.
2. In the tab pane, click **+ Create Group**.

3. In the **Title** field, enter a name. The name can contain any character and even emojis.

Choose a meaningful name. For example, to organize all grids that handle privacy information, you could choose "Privacy".



Tip You can always edit the group name later on.

4. Optionally, select the grids that you want to include in this group.

Tip You can also [add](#) grids to a group from the grid list.


5. Click **Save**.

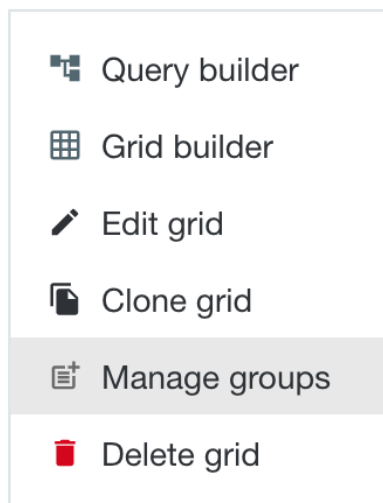
What's next?

[Add grids to the group.](#)

Add a grid to a group

To organize your grids, you can [create](#) groups and then add grids to these groups.

1. Go to the Asset Grid homepage.
2. At the end of a grid row, click  and then **Manage groups**.




3. In the **Manage grid groups** window, select the groups to which you want to add the grid.
You can select more than one group.
4. Click **Save**.

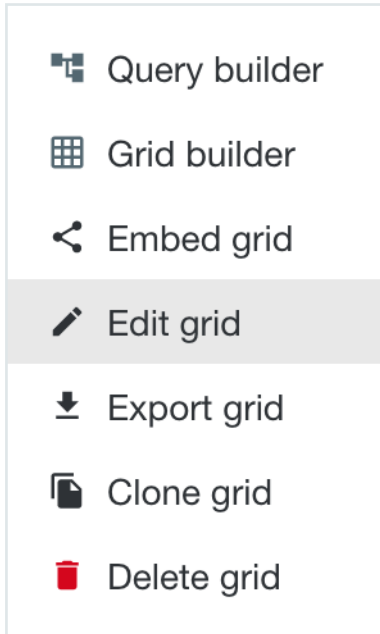
If you want to add multiple grids to a group at once, [edit](#) the group.

Edit a grid

Editing a grid allows you to rename the grid, update the description and change the view permissions.

Via Asset Grid homepage

1. Go to the Asset Grid homepage.
2. At the end of a grid row, click  and then **Edit grid**.



3. In the **Edit grid** window, edit the grid details:
 - Rename the grid.
 - Update the description.
 - Change the view permissions.
 - Change the refresh frequency.

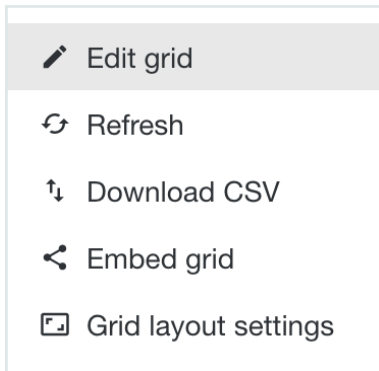
Note It is not possible to change the grid's asset type. If you want to change the asset type, you have to [create](#) a new grid.

4. Click **Save**.

Via the grid page

1. Go to the Asset Grid homepage.
2. Open a grid.

3. Above the grid to the right, click  and then **Edit grid**.




4. In the **Edit grid** window, edit the grid details:
 - Rename the grid.
 - Update the description.
 - Change the view permissions.
 - Change the refresh frequency.

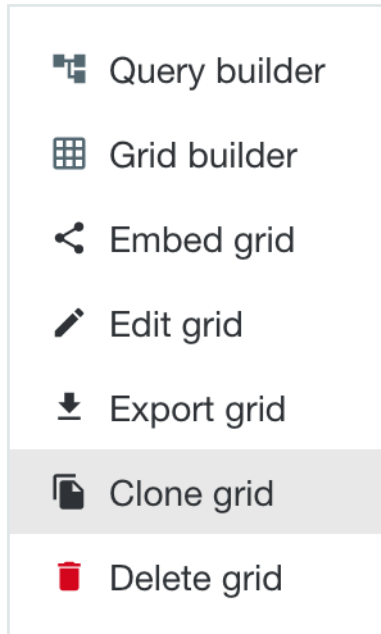
Note It is not possible to change the grid's asset type. If you want to change the asset type, you have to [create](#) a new grid.

5. Click **Save**.

Clone a grid

When cloning a grid, the new grid takes over all settings of the cloned grid, from data set to grid layout and even the Asset Grid group.


1. Go to the Asset Grid homepage.
2. At the end of a grid row, click  and then **Clone grid**.



3. Enter a name for the new grid, or accept the proposed name.
4. Click **Clone**.

Edit an Asset Grid group

If you want to rename a group or if you want to add multiple grids at once to a group, you can edit the group.


1. Go to the Asset Grid homepage.
2. Hover over a group name, click  to the right of the name and then **Edit group**.

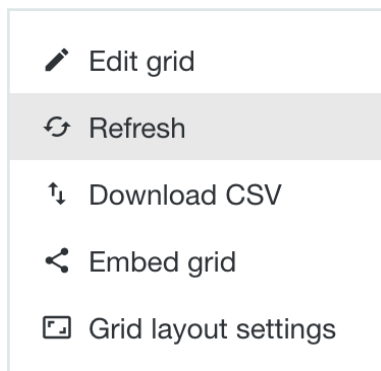


3. In the **Edit group** window, edit the group:
 - Rename the group.
 - Select the grids that you want to add to this group.
4. Click **Save**.

Refresh a grid

By default, the content of a grid is **refreshed** on a weekly basis. If you want to see the latest information from your Collibra Data Intelligence Cloud environment in your grid, you have to refresh the grid.

1. Go to the Asset Grid homepage.
2. Open a grid.
3. Above the grid to the right, click  and then **Refresh**.



» Your grid refreshes the data.

Filtering data in grids

If a grid contains a lot of data, you can filter it, to help you find what you're looking for.

You can filter content in:

- Grid cells
- Grid row headers
- Grid column headers

All resources that include the filter text are found. Filters are not case-sensitive.


Example

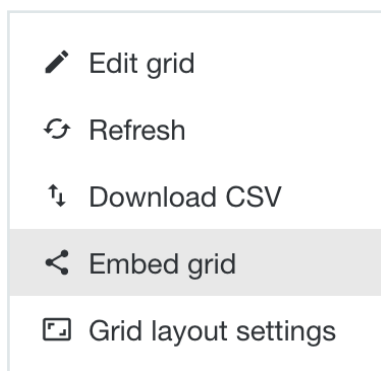
- The filter text "email" will show email_address, EmailAddress and EMAIL, but not e-mail.
- The filter text "add" will show EmailAddress, AdditionalInfo and ip_address, but not AD_develop.

Embed a grid in Collibra Data Intelligence Cloud

You can embed a grid in Collibra Data Intelligence Cloud, to avoid having to switch between the Asset Grid and Collibra interfaces. In this section, we describe how to use the [Embedded Webpage widget](#) to embed a grid on a dashboard in Collibra.

Tip Asset Grid does not evaluate view permissions on asset level. Instead, the grid administrator or creator defines the view permissions for grids on user group level. Therefore, you might be able to view an asset in a grid, but not in your Collibra environment.

1. In Asset Grid, open a grid.
2. Above the grid to the right, click  and then **Copy embed url**.



Tip You can also embed the grid via the Asset Grid homepage.

3. In the **Embed grid** window, select your options:

| Option | Description |
|-------------|---|
| Grid header | Embed the full grid, including the name of the grid and the grid options. |
| Grid only | Embed only the grid with the filter options. |

| Option | Description |
|----------|---|
| Full app | Embed the full application, you can then also edit the grid such as updating the query or the grid content. |
| Link | Embed the grid by using a link. |
| iframe | Embed the grid as an iframe on a web page. |

4. Click **Copy To Clipboard**.
5. Open Collibra.
6. Open or [create](#) a new dashboard.

Tip To show a grid on a dashboard, you typically select a single column dashboard.

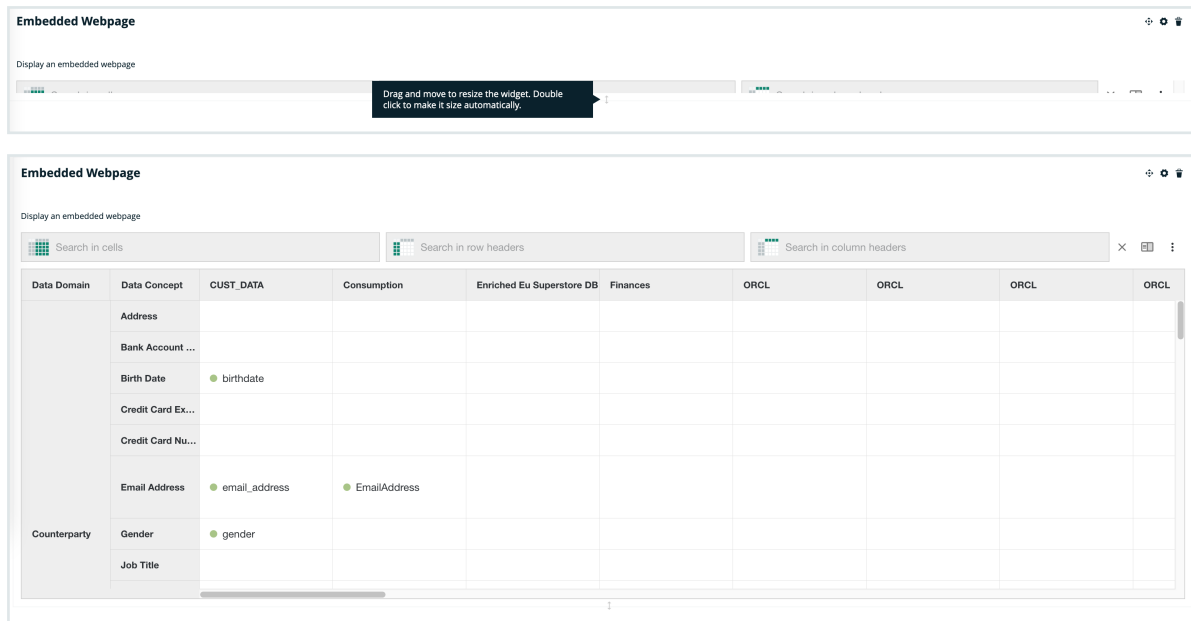
7. [Add](#) the **Embedded Webpage** widget to the dashboard.
8. On the **Content** tab, paste the URL of your grid.

Note If you selected iframe, then you have to paste the content in an HTML page.

9. Optionally set a title and description on the **Widget** tab.
10. Click **Save**.


Tip If the grid does not appear because of an error, edit the widget again and clear the option **Run in sandbox**.

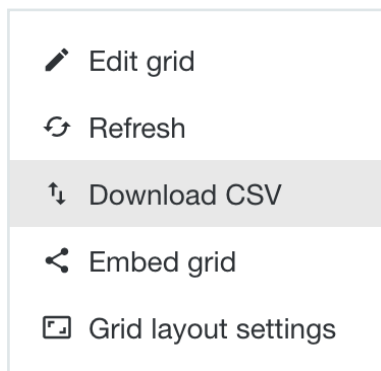
11. Resize the widget to show the grid on the dashboard.



Download grid as CSV

You can download each grid as a CSV file. You can then visualize the grid in spreadsheet software, such as Microsoft Excel.

1. Go to the Asset Grid homepage.
2. Open a grid.
3. Above the grid to the right, click  and then **Download CSV**.




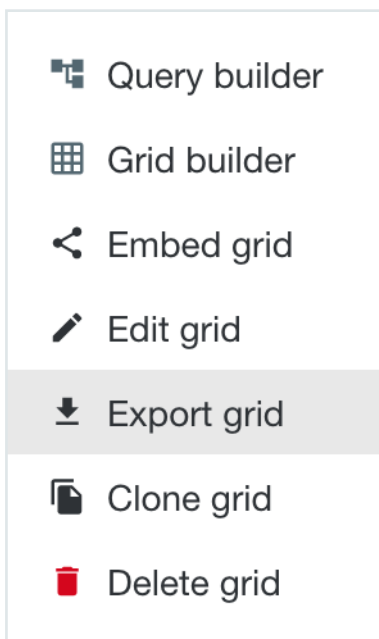
Depending on your settings, you can open or save the file.

Export grids

Asset Grids are not included in the backup process of your Collibra Data Intelligence Cloud environments. By exporting the grids, you can create your own backup. You can also use these exports to use them in another Collibra environment.

Export a single grid

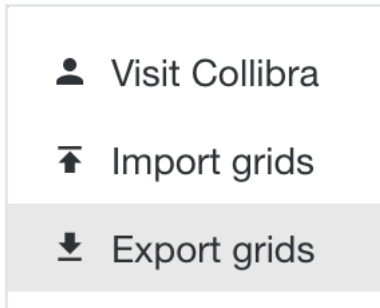
1. Go to the Asset Grid homepage.
2. At the end of a grid row, click  and then **Export grid**.



3. In the popup window, select **Save File** and click **OK**.
 - » Your grid is saved as a ZIP archive.

Export all grids

1. Open Asset Grid.
2. Click the avatar in the top-right corner and then **Export grids**.



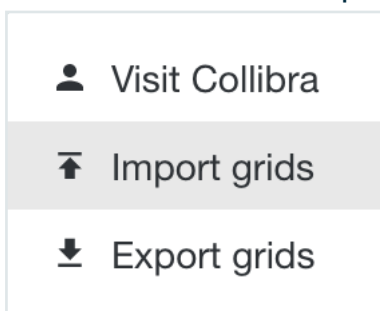
3. In the popup window, select **Save File** and click **OK**.
 - » All your grids are saved in a ZIP archive. The name of the archive file includes the creation date and time.

Import grids

You can use an asset grid export ZIP archive to restore your grids or add them to another environment.

Note If you import grids in another environment, it is possible that some grids won't work due to incompatible operating models.

1. Open Asset Grid.
2. Click the avatar in the top-right corner, and then click **Import grids**.



3. In the **Import grids** window, upload or drop a grid ZIP archive.
Optionally, select the **Overwrite existing grids** option. Beware that this is an irre-

versible action.

4. Click **Import**.

» The grids are uploaded.

Switch grids

If you are viewing a grid that belongs to a grid group, you can switch between grids in that grid group. All of the grids in a given grid group appear in the Related Grids drop-down list, in the grid layout settings.

Prerequisites

You have selected an asset group in the [grid layout settings](#).

Steps


1. In Asset Grid, open a grid.
2. Above the grid, click **Related Grids**.

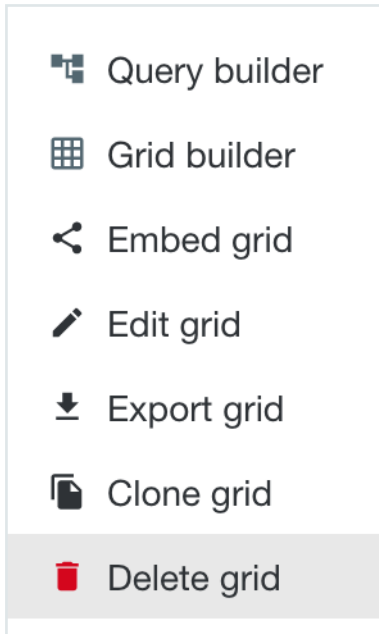
| Cost consideration | Credit card number | Customer benefit | Dependenci |
|--------------------|--------------------|------------------|------------|
| | | | |

3. From the list, click the grid that you want to see.

Delete a grid

If you no longer need a grid, you can delete it to keep your grid list clean.

1. Go to the Asset Grid homepage.
2. At the end of a grid row, click  and then **Delete grid**.




3. In the **Delete grid** window, click **Delete**.

Delete an Asset Grid group

If you no longer need a group, you can delete it to leave your list of groups without clutter.

Deleting a group does not delete the grids that belong to it.

1. Go to the Asset Grid homepage.
2. Hover over a group name, click  to the right of the name and then **Delete group**.



3. In the **Delete group** window, click **Delete**.

Use cases

In this section, you will find a couple of use cases and learn how to create the asset grids for them.

| | |
|--------------------------------|----|
| Use case - Discover data | 37 |
|--------------------------------|----|

Use case - Discover data

In the discover data use case, we are going to create a grid that gives you an overview of columns that are associated with a certain Data Concept or Data Domain. The grid will group the columns per database, per data domain and per data concept in the data domain. The grid will also show which security classification is applied on each column and the asset preview shows the responsibilities and the corresponding database's data source type and security level.

Create a grid

When you create the grid, you need to select the asset type that aggregates the data in the column headers of the grid. We are interested in columns and want to group them per database. The database will be the column headers of the grid. Therefore, select Database as the asset type of the grid.

Create a data set with the Query Builder

In the Query Builder, start from the asset type that you selected when you created the grid. From this asset type, you can add attributes, relations and responsibilities to build your data set. You can only use the information that you add in your data set in the Grid Builder.



Add data

Now find the relation between databases and columns and between columns and data domains.

In [Collibra for Desktop](#), find any asset of the database asset type. On the asset page, you have a clear overview of all attributes, relations and responsibilities from where you can traverse to the next step. This is useful for finding relations between asset types that are not directly linked, such as a database and a column.

For example, on the database asset page, you can see its relation to schemas. If you follow a related schema asset, you see its relation to tables and lastly, if you follow a table asset, you see its relation to columns.

Add attributes

Let's show the description of a database when you open the details of a database. To do this, include the description attribute at the database level in the Query Builder.

Add responsibilities

Let's see the users who have a specific role on a database in the grid. To do this, add responsibilities at grid level in the Query Builder.

Create the grid with the Grid Builder

When you have created your data set, it is time to build the grid. On the Grid Builder page, you see the mockup of the grid.

Let's organize the columns per data domain and data concept. Data concepts are lower in the hierarchy, so we'll use *Data domain* as the header for Grid level 1 and *Data concept* as the header for Grid level 2.

Click in the second row to add content to the grid. We are organizing the columns per data domain and data concept, which is dynamic content that we have to retrieve from the Collibra platform. Select the *Asset* of the **Data Concept grouped by Data Domain** relation and *Asset* of the **Data Attribute is classified by Data Concept** relation, respectively.

Discover data - Create a grid

The first step in creating a grid, is to create the grid asset. In this example, we will create a grid for the [discover data use case](#).

1. Open Asset Grid.
2. In the top-right corner, click **Create New Grid**.

The **Create new grid** window appears.

3. Enter the required information:

| Grid setting | Description |
|--------------|--|
| Title | <p>The title of your grid, for example Data domain browser.</p> <p>Select a short but meaningful name that best describes what the grid contains. The title can contain spaces and special characters. Avoid duplicate titles for the ease of use.</p> |
| Description | <p>More extensive information about the grid.</p> <p>This information can be useful to further describe the purpose of the grid if the title cannot be clear enough.</p> |
| Asset type | <p>The asset type of the grid, in this use case, select <i>Database</i>.</p> <p>The selected asset type aggregates the data in the column headers of the grid. Start typing in the field to search the wanted asset type.</p> |

| Grid setting | Description |
|-----------------------------|--|
| View permissions | The groups of users who can see the grid. By default, only users of the Admins user group can see the grids. |
| Refresh the grid data every | The refresh rate of the grid date. You can automatically refresh the grid data on a daily, weekly, monthly or yearly basis. |

4. Click **Submit**.

» You are redirected to the **Query Builder** page.

What's next?

Start building your query to find the relevant data.

Create a data set with the Query Builder

With the Query Builder, you select all the data that you may need to visualize data. From the discover data use case, we know that we have to find the following relations:

- Database to column
- Column to data domain
- Column to (privacy) standard

To organize the data, we also want to find the relation between columns and data concepts and data domains.

Besides relations, we will also show how you can add attributes to the data set. Adding responsibilities follows the same steps.

Add database-column relations

We recommend that you use Collibra for Desktop to find the necessary relations.

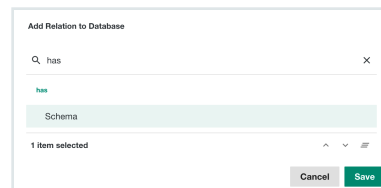
Actions in Collibra for Desktop

1. Look up and open a database asset.
2. On the **Overview** tab, you should see the relation **has Schema**.

This is the first relation that you have to add in the Query Builder.

Follow-up actions in Asset Grid


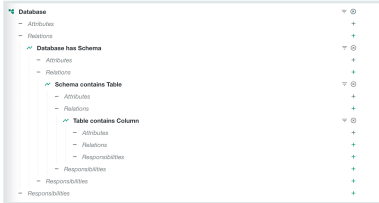
1. On the **Query Builder** page, click **+** next to **Relations**.
 - » The **Add Relation to Database** window appears.
2. In the search field, type *has*. This is the relation type between database and schema.
3. Click **Schema** so that it is highlighted.



4. Click **Save**.

You have added the first relation **Database has Schema**. This means that your data set contains schemas.



| Actions in Collibra for Desktop | Follow-up actions in Asset Grid |
|--|---|
| <ol style="list-style-type: none"> 1. Click a schema on the database asset page. 2. On the Overview tab, you should see the relation contains Table. <p>This is the next relation to find the relationship between database and column assets.</p> | <ol style="list-style-type: none"> 1. In the Database has Schema section, click + next to Relations. 2. In the search field type <i>contains</i>. This is the relation type between schema and table. 3. Click Table so that it is highlighted. 4. Click Save. <p>You have added the relation Schema contains Tables. This means that your data set contains tables.</p>  |
| <ol style="list-style-type: none"> 1. Click any table in the contains Table section. 2. On the Overview tab, you should see the section contains Columns. <p>This is the next relation to add in the Query Builder.</p> <p>You then have traversed from database to column.</p> | <ol style="list-style-type: none"> 1. In the Schema contains Tables section, click + next to Relations. 2. In the search field type <i>contains</i>. This is the relation type between table and column. 3. Click Column so that it is highlighted. 4. Click Save. <p>You have added the relation Table contains Column. This means that your data set contains tables.</p>  |

Add column-data domain relations

Finding the relation between Column assets and Data Concept assets and Data Domain assets is less straightforward.

Again, it is best to use Collibra for Desktop to find the relation.

We can now go in both directions, either find the relations from a data domain to a column or the other way around. It might be easier to start from a data domain and traverse over relations until you have a link with a column. If you start from a column, it is possible that you have to open many columns before you can find the relations path towards the data domain.

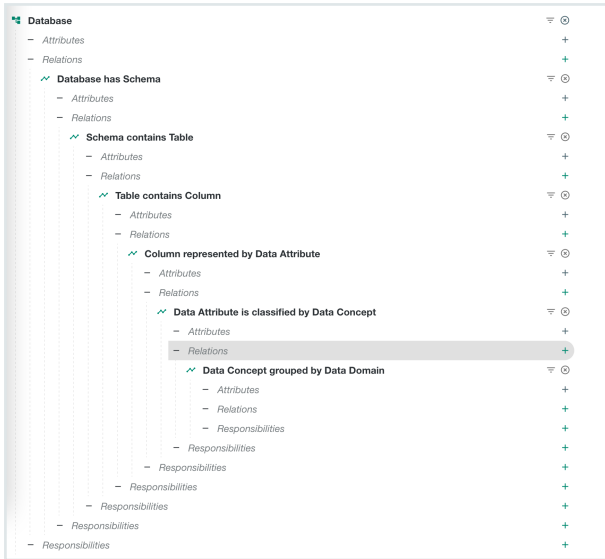
1. Look up a data domain in Collibra for Desktop.
2. A data domain groups data concepts.
3. A data concepts classifies data attributes.
4. Data attributes represents columns.

We have now found the relations between data domain and a column but for our use case, we have to revert the relations, leading to this result:

1. Column is represented by a data attribute.
2. A data attribute is classified by a data concept.
3. A data concept is grouped by a data domain.

These are the three relations that you have to add in the Query Builder, starting from the last relation (**Table contains Columns**) that you added.

Tip Instead of typing the relation type in the search field, you can also enter the asset type, for example *data attribute*.

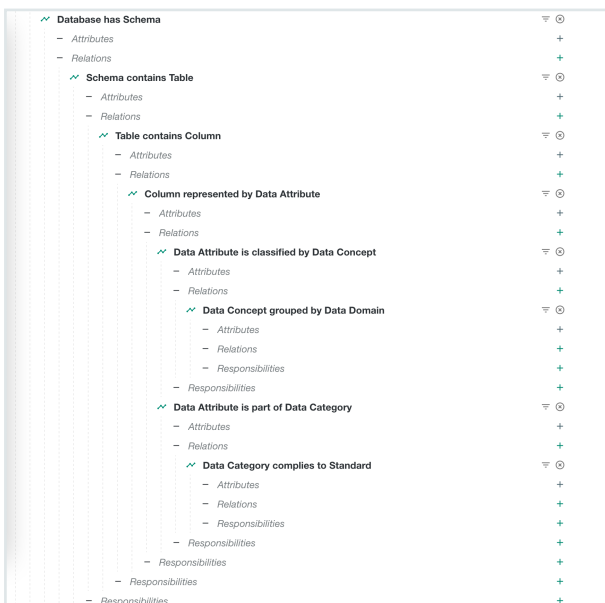


Add column-standard relations

In this section, we will add the relation between columns and privacy standards as we want to know which standard applies to the column. In this case, we can already start from the **Column represented by Data Attribute** relation.

On a data attribute asset, we see that there is a relation **is part of Data Category**, where some categories indicate a privacy law, for example CCPA or GDPR.

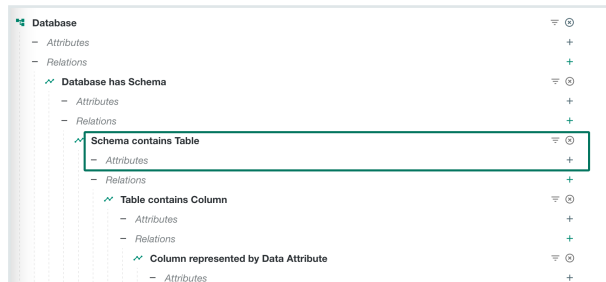
When you have added this new relation, you can easily add the new relation **complies to Standard**.



Add attributes to the data set

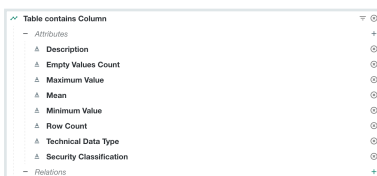
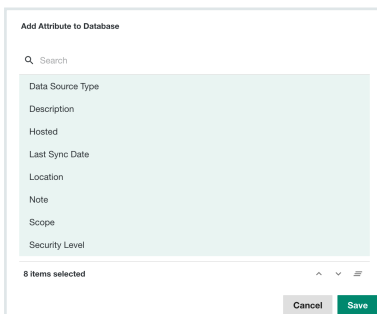
If you want to show extra information on the [details page](#) of an asset in your grid, you can add it per asset type that you have added.

1. Click **+** next to **Attributes** of the asset type, for example in the **Schema contains Table** section for table attributes as shown below.



2. In the **Add Attribute** window, click the relevant attributes, so that they are highlighted.
3. Click **Save**.
 - » The selected attributes are shown under **Attributes**.

For this use case, add attributes of the Database and Column asset types, as shown in the following images.



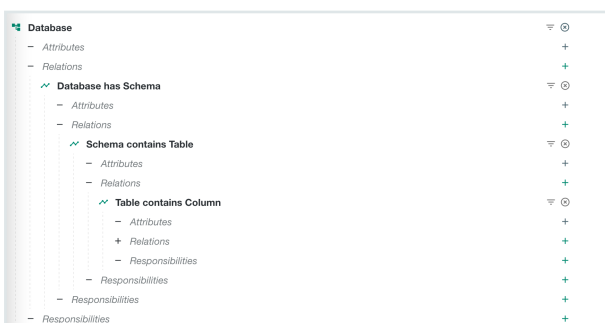
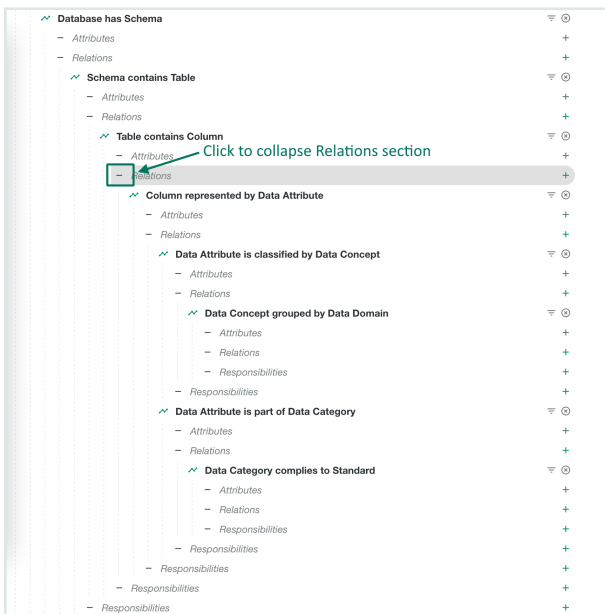
Add responsibilities to the data set

This section is just for information as we're not adding responsibilities for this use case.

If you want to show responsibility information in the asset preview in your grid, you can add it per asset type that you have added.

1. Click + next to **Responsibilities** of the asset type, for example in the **Table contains Column** section.
2. In the **Add Responsibility** window, click the relevant roles, so that they are highlighted.
3. Click **Save**.
 - » The selected roles are shown under **Responsibilities**.

If there are already a lot of relations expanded, ensure that you select the **Responsibilities** of the correct section. To easily find the correct section, collapse the relations in the section to which you want to add a responsibility by clicking — on the left of **Relations**.

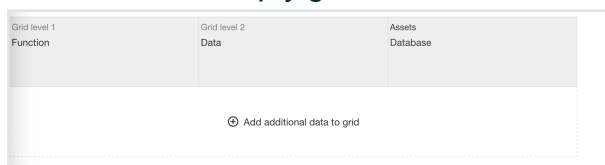


Visualize data with the Grid Builder

With the Grid Builder, you organize the data in your grid. In this use case, we will organize the columns first by data domain, then per domain by data concept. The grid content will contain columns.

Add data to the grid

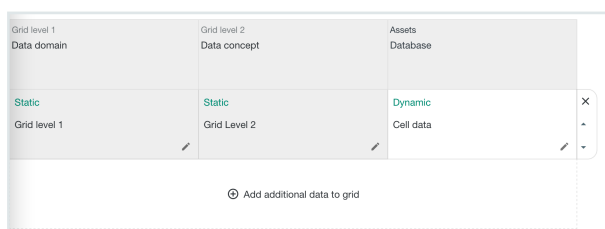
1. Go to the **Grid Builder** page.
 - » You see an empty grid.




2. In the **Grid level 1** field, double-click the word **Function** and replace it by *Data domain*.
3. In the **Grid level 2** field, double-click the word **Data** and replace it by *Data concept*.

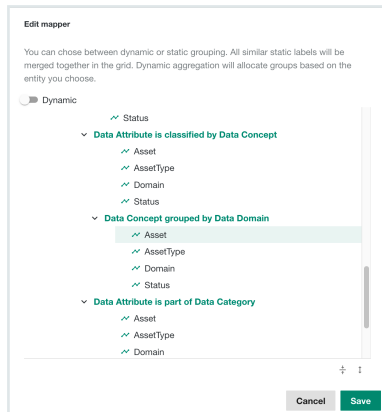
Tip You can always switch between the Grid page and Grid Builder page to see the changes that you applied.

4. Click **Add additional data to grid**.
 - » A new row is added.

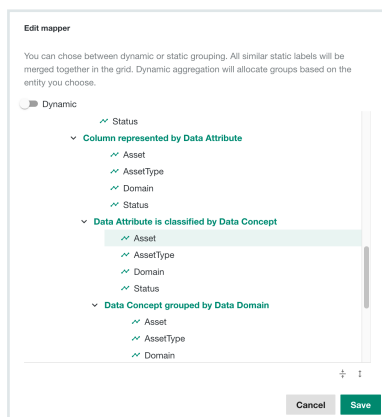


5. In the first column of this row, click .
6. Click **Static** to switch to Dynamic.
 - » The list of attributes and relations are shown, similar to the Query Builder layout.
7. Our first grid level is data domain, so look up **Data Concept grouped by Data Domain**.

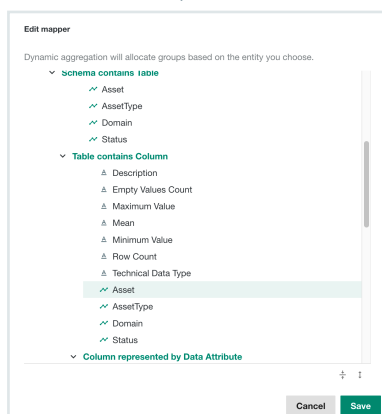
- As we're interested in the name of the data domain, click **Asset** in this section so that it is highlighted.



- Click **Save**.
- The second grid level is data concept. Again we are interested in the data concept name. Repeat steps 5 to 9 to select the data concept as the row header, but click **Asset** in the **Data Attribute is classified by Data Concept** section.



- In the third column of this row, we will add the columns. Repeat steps 5 to 9 to select the columns, therefore click **Asset** in the **Table contains Column** section.



- Go to the **Grid** page to see the result.

Define the asset preview in the grid


You can add details to the assets that are shown in your grid. The details that you can add depend on the [attributes](#) that you have added in the Query Builder. Categories are shown

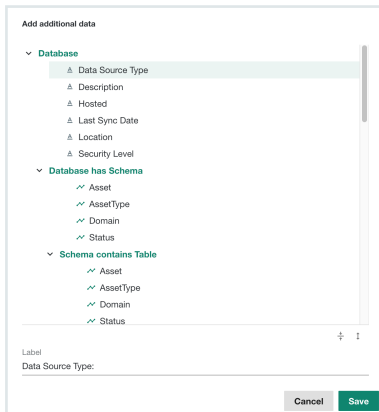
- On the **Grid Builder** page, click the third column of a data row.
On the right of the grid, you see the preview editor.

Tip If the grid is shown over the whole page, click < in the top-right corner.

- In this use case, we want to add the security classification for each column. We will show this information as category.
In the **Category** section, click +.
- In the **Add row category** window, click **Security Classification** in the **Table contains Column** section.

Tip If you don't see the Security Classification attribute, you have to add it in the Query Builder.

4. Click **Save**.
 - » In the grid, you now see colored bullets in front of the data. Click  to open the legend of the colors.
5. In the **Configure asset preview** row, click **+**.
6. In the **Add additional data** window, select the data that you want to show in the asset preview, for example, **Data Source Type** in the **Database** section.



Tip At the bottom of the window, you can edit the label. By default, the label is the selected attribute. If the attribute can be confusing, for example if you add descriptions for databases, tables and columns, you can add the asset type to the label, for example *Database description:*.

7. Click **Save**.
8. Repeat steps 5 to 7 for any additional data. For this use case, we'll add the database's security level.



9. When you have added all desired data, you can edit the order of appearance of this data by clicking **▲** or **▼** to move respectively the data up or down.
10. Go to the **Grid** page to see the result.