



Collibra Data Intelligence Cloud  
**Data Governance**

Collibra Data Intelligence Cloud - Data Governance

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[https://productresources.collibra.com/docs/collibra/latest/Content/to\\_data-governance.htm](https://productresources.collibra.com/docs/collibra/latest/Content/to_data-governance.htm)

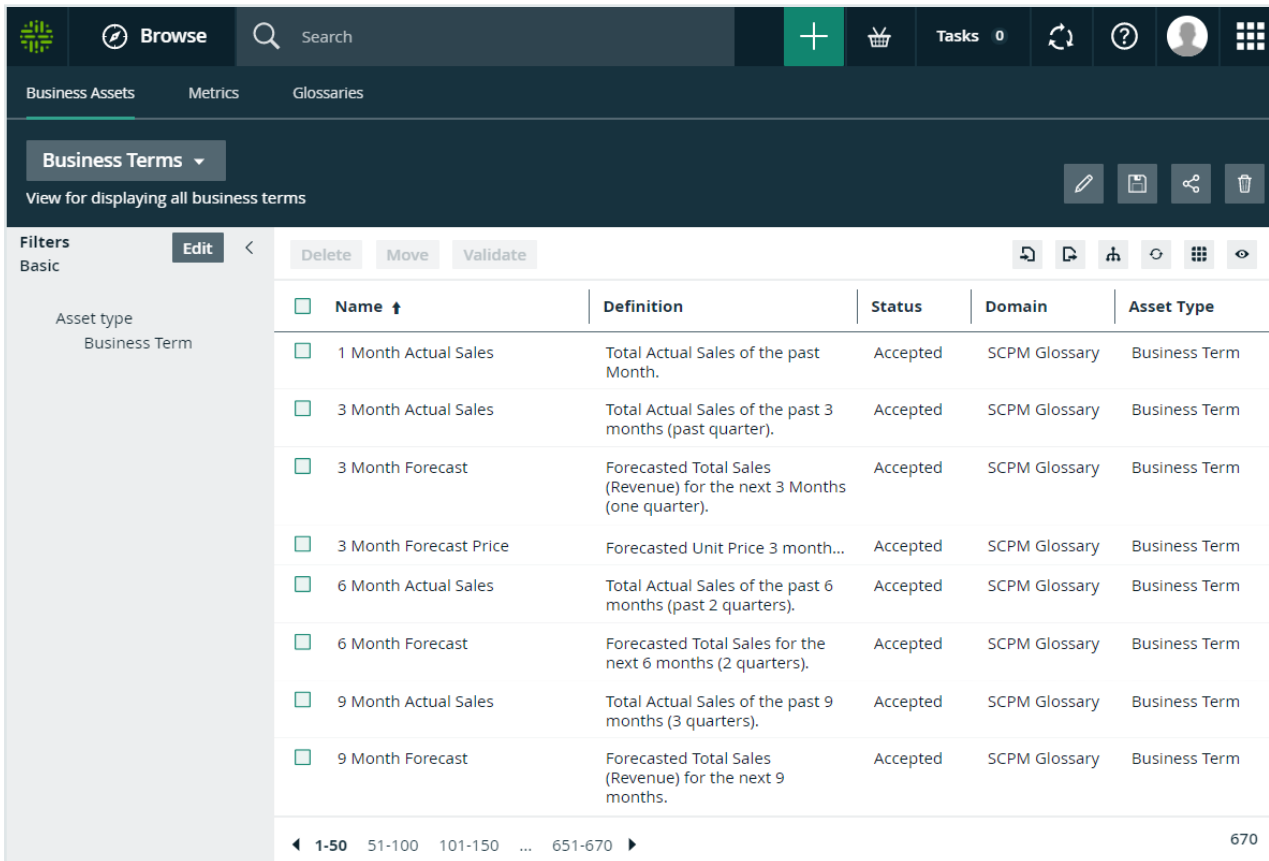
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## Business Glossary

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's core features: reporting, traceability, comments, workflows, and so on.



The screenshot displays the Business Glossary application interface. At the top, there is a navigation bar with 'Browse', 'Search', and 'Tasks 0'. Below this, the 'Business Assets' tab is active, showing 'Business Terms' and a 'View for displaying all business terms' option. A 'Filters' sidebar on the left shows 'Basic' filters for 'Asset type' (Business Term). The main table lists business terms with columns for Name, Definition, Status, Domain, and Asset Type. The table includes 8 rows of data, all with a status of 'Accepted' and domain of 'SCPM Glossary'. A pagination bar at the bottom shows '1-50' and a total of 670 items.

<input type="checkbox"/>	Name ↑	Definition	Status	Domain	Asset Type
<input type="checkbox"/>	1 Month Actual Sales	Total Actual Sales of the past Month.	Accepted	SCPM Glossary	Business Term
<input type="checkbox"/>	3 Month Actual Sales	Total Actual Sales of the past 3 months (past quarter).	Accepted	SCPM Glossary	Business Term
<input type="checkbox"/>	3 Month Forecast	Forecasted Total Sales (Revenue) for the next 3 Months (one quarter).	Accepted	SCPM Glossary	Business Term
<input type="checkbox"/>	3 Month Forecast Price	Forecasted Unit Price 3 month...	Accepted	SCPM Glossary	Business Term
<input type="checkbox"/>	6 Month Actual Sales	Total Actual Sales of the past 6 months (past 2 quarters).	Accepted	SCPM Glossary	Business Term
<input type="checkbox"/>	6 Month Forecast	Forecasted Total Sales for the next 6 months (2 quarters).	Accepted	SCPM Glossary	Business Term
<input type="checkbox"/>	9 Month Actual Sales	Total Actual Sales of the past 9 months (3 quarters).	Accepted	SCPM Glossary	Business Term
<input type="checkbox"/>	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.
<a href="#">Metrics</a>	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

## Packaged metamodel for the Business Glossary

The Business Glossary has specific asset types and domain types.

### Asset types

The table below contains the packaged [asset types](#) that are relevant for the Business Glossary.

### Domain types

The table below contains the packaged [domain types](#) that are relevant for the Business Glossary.

### Workflows

The table below contains the packaged workflows that are relevant for the Business Glossary.

Name	Description
Approval Process	The Approval Process workflow allows you to approve an asset in Collibra Data Intelligence Cloud. This is a more powerful version of the Simple Approval Process.
Assessments	This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset.
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.
Propose New Business Asset	This process facilitates the creation of new Business Assets in the <b>Data Governance Council</b> community.
Propose New Business Term	This process facilitates the creation of new Business Term assets in the <b>Data Governance Council</b> community.
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Data Intelligence Cloud.
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 <a href="#">Approval Process</a>, the <a href="#">Simple Approval</a> or the <a href="#">Issue Management</a> 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>

## Metrics pages

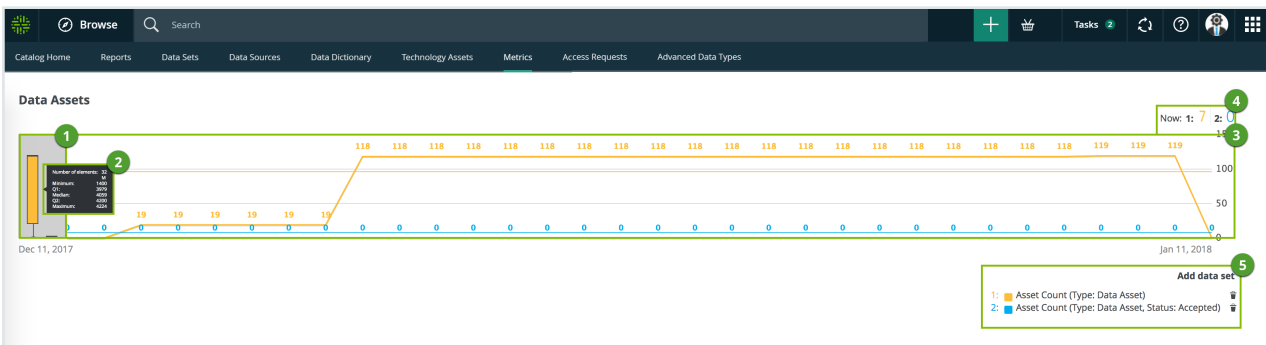
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

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 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

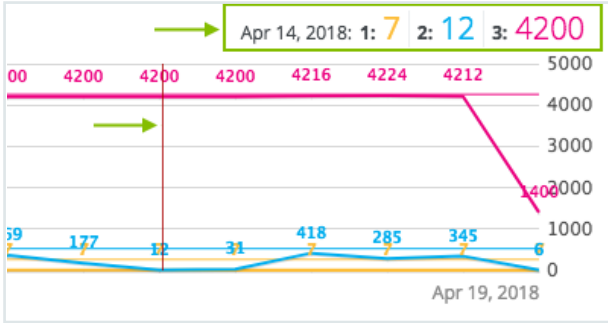
The Metrics page consists of one or more graphs, their legend and some counters.



Number	Element	Description
1	Color-coded bars	<p>The color-coded bars give a quick overview of the graph.</p> <p>The vertical line leading from the color-coded bar indicates the difference between the minimum and maximum values.</p>



Number	Element	Description
2	Data set details	<p>More details about the graph.</p> <p>Hover your pointer over the color-coded bars to the left of each line of graph to view them.</p>
	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	<p>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.</p> <p><b>Tip</b> You can <a href="#">edit</a> the time range of the graph.</p>

Number	Element	Description
4	Counts by day	<p>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.</p> 
5	Legend	<p>The legend of the graph, which also allows you to <a href="#">add</a>, <a href="#">edit</a> and <a href="#">delete</a> the data sets.</p>

## 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 see the metrics, for example 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Product:</b> Limit the results to active users within a specific Collibra Data Intelligence Cloud application.</li> <li>◦ <b>Role:</b> Limit the results to active users that have been assigned a specific role.</li> </ul>
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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Status:</b> Limit the results to assets with a specific status.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>

Filter setting	Description
<p>Changed Task Count</p>	<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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted</b> or <b>Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
<p>Domain Count</p>	<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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>

Filter setting	Description
License Available	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
License Usage	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> </ul>

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed</b>, <b>Deleted</b> or <b>Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> </ul>

5. Click **Save data set**.

## 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.



- » The filter configuration for the data set appears.
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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Product:</b> Limit the results to active users within a specific Collibra Data Intelligence Cloud application.</li> <li>◦ <b>Role:</b> Limit the results to active users that have been assigned a specific role.</li> </ul>

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"> <li>○ <b>Type:</b> Limit the results to a specific type.</li> <li>○ <b>Domain:</b> Limit the results to assets from a specific domain.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Status:</b> Limit the results to assets with a specific status.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> </ul>
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"> <li>○ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>○ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>○ <b>Task:</b> Limit the results to a specific task.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> <li>○ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted or Unfinished</b>).</li> <li>○ <b>User:</b> Limit the results to a specific user.</li> </ul>



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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>
License Available	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
License Usage	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>

Filter setting	Description
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> </ul>
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted or Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> </ul>

5. Click **Save data set**.

» The updated data set is shown in the graph.

## Edit the time range of a metrics graph

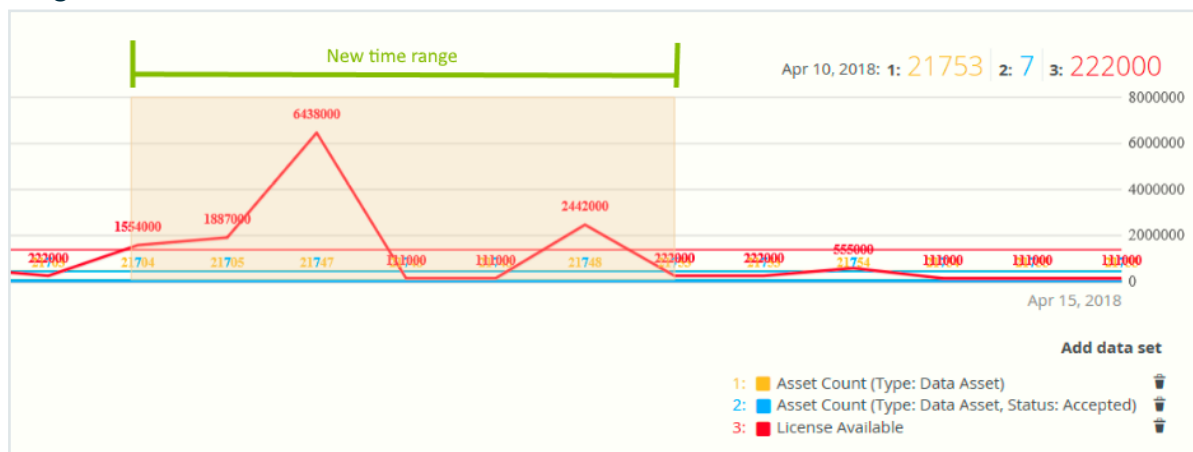
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

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

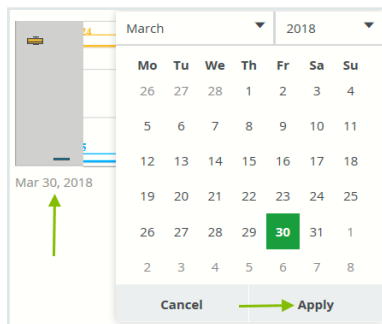
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
  - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. In the relevant graph, click at (or near) the first 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.

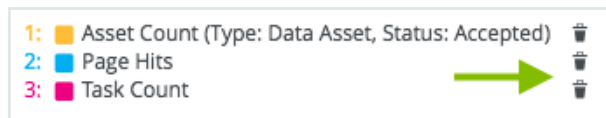
## Remove a data set from a metrics graph

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

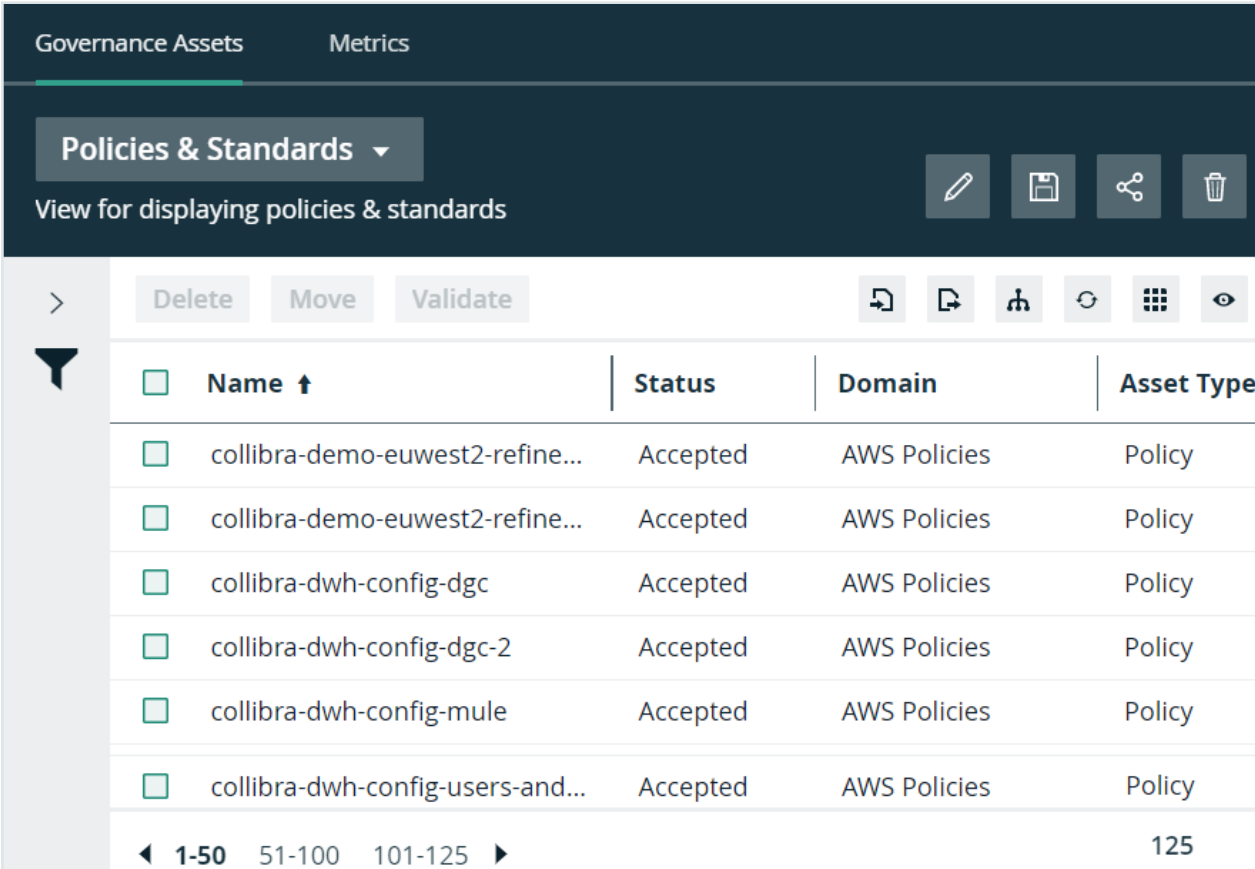
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
  - » The [Metrics page](#) appears.
3. In the legend under the relevant graph, click on  next to the data set you want to delete.



- » The graph is updated.

# Policy Manager

The Policy Manager application provides the key functions to adopt, implement and monitor the digital policies for the enterprise.



The screenshot displays the 'Policy Manager' application interface. At the top, there are tabs for 'Governance Assets' and 'Metrics'. Below this, a dark header bar contains a dropdown menu labeled 'Policies & Standards' and several action icons (edit, save, share, delete). The main content area shows a table with columns for 'Name', 'Status', 'Domain', and 'Asset Type'. The table lists several policies, all with a status of 'Accepted' and a domain of 'AWS Policies'. A pagination bar at the bottom indicates that there are 125 items in total, with the current view showing items 1-50.

<input type="checkbox"/>	Name ↑	Status	Domain	Asset Type
<input type="checkbox"/>	collibra-demo-euwest2-refine...	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-demo-euwest2-refine...	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-dgc	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-dgc-2	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-mule	Accepted	AWS Policies	Policy
<input type="checkbox"/>	collibra-dwh-config-users-and...	Accepted	AWS Policies	Policy

◀ 1-50 51-100 101-125 ▶ 125

With Policy Manager, Collibra Data Intelligence Cloud 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.
<a href="#">Metrics</a>	Contains a variety of statistics related to how the assets of the Policy Manager are used.

## Packaged metamodel for the Policy Manager

The Policy Manager has specific asset types and domain types.

### Asset types

The table below contains the packaged [asset types](#) that are relevant for the Policy Manager.

### Domain types

The table below contains the packaged [domain types](#) that are relevant for the Policy Manager.

## Workflows

The table below contains the packaged workflows that are relevant for the Policy Manager.

Name	Description
Assessments	This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset.
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.
Propose New Governance Asset	This process facilitates the creation of new Governance Assets in the <b>Data Governance Council</b> community.
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Data Intelligence Cloud.
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 <a href="#">Approval Process</a>, the <a href="#">Simple Approval</a> or the <a href="#">Issue Management</a> 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>

## 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.

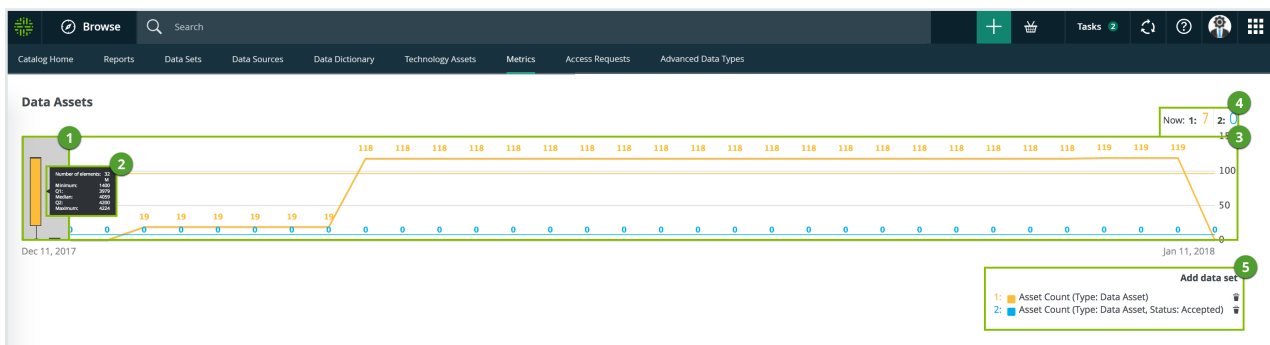
For each graph, you can edit the data set and the time range shown.



**Note** On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with **data 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.

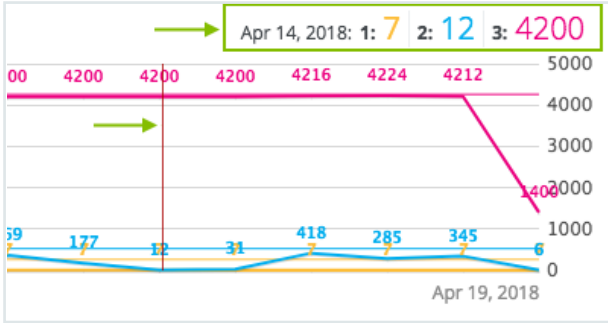
## Components

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.

Number	Element	Description
2	Data set details	<p>More details about the graph.</p> <p>Hover your pointer over the color-coded bars to the left of each line of graph to view them.</p>
	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	<p>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.</p> <p><b>Tip</b> You can <a href="#">edit</a> the time range of the graph.</p>

Number	Element	Description
4	Counts by day	<p>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.</p> 
5	Legend	<p>The legend of the graph, which also allows you to <a href="#">add</a>, <a href="#">edit</a> and <a href="#">delete</a> the data sets.</p>

## 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 see the metrics, for example 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Product:</b> Limit the results to active users within a specific Collibra Data Intelligence Cloud application.</li> <li>◦ <b>Role:</b> Limit the results to active users that have been assigned a specific role.</li> </ul>
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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Status:</b> Limit the results to assets with a specific status.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>

Filter setting	Description
<p>Changed Task Count</p>	<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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted</b> or <b>Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
<p>Domain Count</p>	<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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>

Filter setting	Description
License Available	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
License Usage	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> </ul>

Filter setting	Description
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed</b>, <b>Deleted</b> or <b>Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> </ul>

5. Click **Save data set**.

## 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.



- » The filter configuration for the data set appears.
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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Product:</b> Limit the results to active users within a specific Collibra Data Intelligence Cloud application.</li> <li>◦ <b>Role:</b> Limit the results to active users that have been assigned a specific role.</li> </ul>



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"> <li>○ <b>Type:</b> Limit the results to a specific type.</li> <li>○ <b>Domain:</b> Limit the results to assets from a specific domain.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Status:</b> Limit the results to assets with a specific status.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> </ul>
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"> <li>○ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>○ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>○ <b>Task:</b> Limit the results to a specific task.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> <li>○ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted or Unfinished</b>).</li> <li>○ <b>User:</b> Limit the results to a specific user.</li> </ul>

Filter setting	Description
<p>Domain Count</p>	<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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>
<p>License Available</p>	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
<p>License Usage</p>	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>

Filter setting	Description
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> </ul>
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted</b> or <b>Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> </ul>

5. Click **Save data set**.

» The updated data set is shown in the graph.

## Edit the time range of a metrics graph

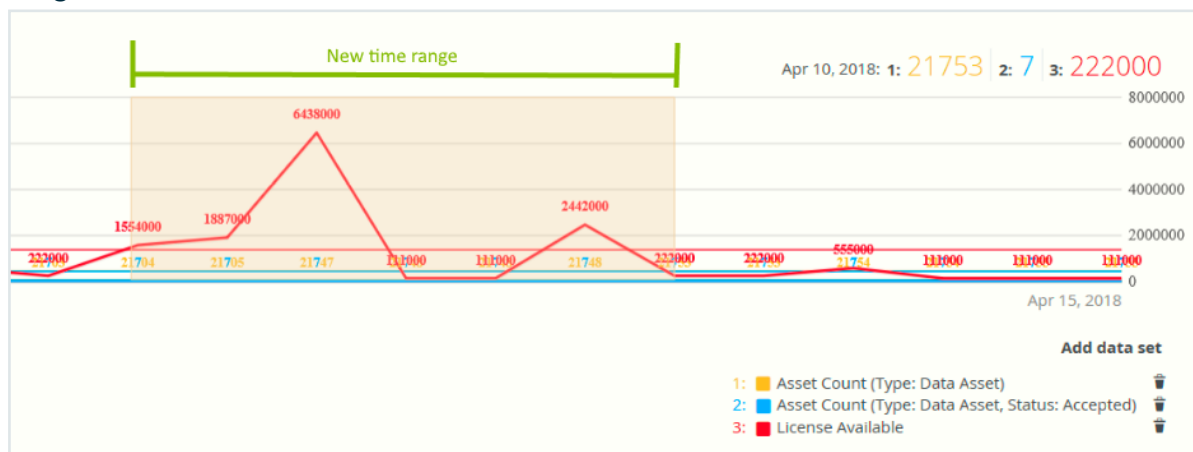
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

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

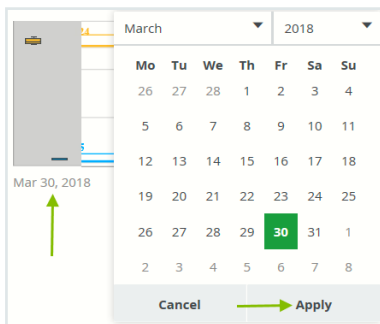
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
  - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. In the relevant graph, click at (or near) the first 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.

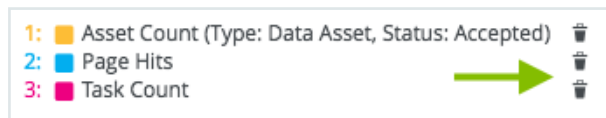
## Remove a data set from a metrics graph

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.



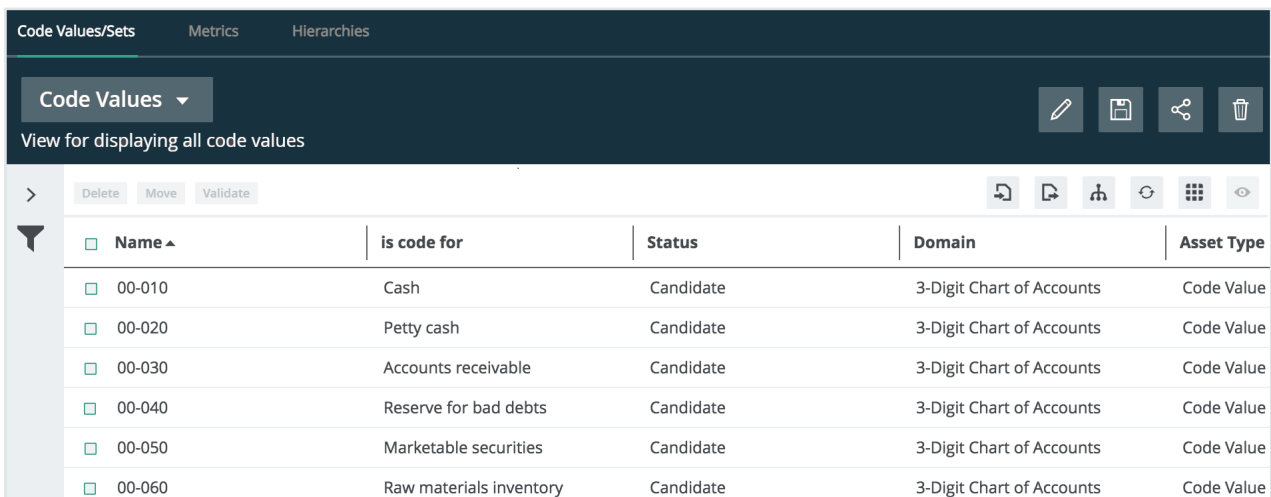
- » The graph is updated.

# Reference data

Reference data is data used to classify or categorize other data. Typically, they are static or slowly changing over time. Examples of reference data include units of measurement and country codes.

## 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.



The screenshot shows the Collibra Reference Data application interface. At the top, there are tabs for 'Code Values/Sets', 'Metrics', and 'Hierarchies'. Below the tabs, there is a dropdown menu for 'Code Values' and a 'View for displaying all code values' option. The main content area displays a table with the following columns: Name, is code for, Status, Domain, and Asset Type. The table contains six rows of data, each representing a code value.

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.
<a href="#">Metrics</a>	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

## Packaged metamodel for the Reference Data application

The Reference Data application has specific asset types and domain types.

### Asset types

The table below contains the packaged [asset types](#) that are relevant for the Reference Data application.

### Domain types

The table below contains the packaged [domain types](#) that are relevant for the Reference Data application.

### Workflows

The table below contains the packaged workflows that are relevant for the Reference Data application.



Name	Description
Assessments	This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset.
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.
Propose New Code Value	This process facilitates the creation of new Code Value assets in the <b>Data Governance Council</b> community.
Propose New Data Asset	This process facilitates the creation of new Data Assets in the <b>Data Governance Council</b> community.
Propose New Governance Asset	This process facilitates the creation of new Governance Assets in the <b>Data Governance Council</b> community.
Simple Approval	The Simple Approval workflow is a single-step process that allows you to approve an asset in Collibra Data Intelligence Cloud.
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 <a href="#">Approval Process</a>, the <a href="#">Simple Approval</a> or the <a href="#">Issue Management</a> 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>

## 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:

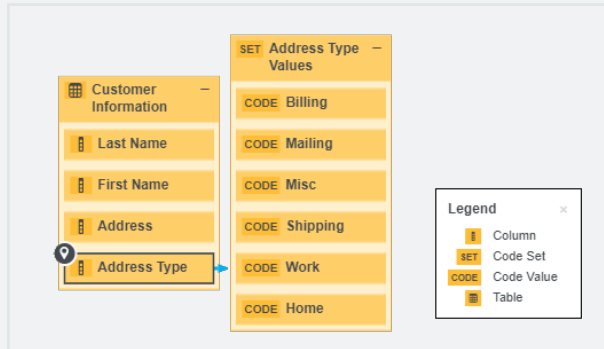
- What version of the ISO country codes is used in each database?
- What is the difference between the version of ISO country codes of last year as compared to the one currently operational internally?
- If I cannot find a code for a specific account or project, whom should I report it to?

## Reference Data in Collibra

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 Intelligence Cloud consists of the following phases:

Phase	Description																
1. Creation	<p data-bbox="427 338 1414 517">Gather all existing reference data content, analyze it and enter the relevant parts in Collibra Data Intelligence Cloud as Code Set and Code Value assets. We recommend that you use a specific Codelist domain for each code set.</p> <div data-bbox="432 551 1417 689" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p data-bbox="480 584 1374 656"><b>Tip</b> You can create the assets manually, but usually it is easier to use the <a href="#">import functionality</a> to enter thousands of assets in one go.</p> </div> <p data-bbox="427 730 1362 857">To fully describe the code set, you can <a href="#">create relations</a> between the Code Set and Code Value assets on the one hand, and other relevant assets on the other:</p> <table border="1" data-bbox="432 891 1417 1816"> <thead> <tr> <th data-bbox="432 891 655 1025">Relation type</th> <th data-bbox="655 891 836 1025">Head assets</th> <th data-bbox="836 891 986 1025">Tail assets</th> <th data-bbox="986 891 1417 1025">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="432 1025 655 1256">Code Value is part of / contains Code Set</td> <td data-bbox="655 1025 836 1256">Code Value assets</td> <td data-bbox="836 1025 986 1256">Code Set asset</td> <td data-bbox="986 1025 1417 1256">Relations of this type link the Code Value assets to the corresponding Code Set asset.</td> </tr> <tr> <td data-bbox="432 1256 655 1585">Business Term has code / is code for Code Value</td> <td data-bbox="655 1256 836 1585">Business Term asset</td> <td data-bbox="836 1256 986 1585">Code Value asset</td> <td data-bbox="986 1256 1417 1585">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-bbox="432 1585 655 1816">Data Element allowed value set / applies to Code Set</td> <td data-bbox="655 1585 836 1816">Column asset</td> <td data-bbox="836 1585 986 1816">Code Set asset</td> <td data-bbox="986 1585 1417 1816">Relations of this type describe which code set is used to restrict the possible values of 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.
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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.														
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Phase	Description								
	<table border="1" data-bbox="432 331 1410 748"> <thead> <tr> <th data-bbox="432 331 655 472">Relation type</th> <th data-bbox="655 331 836 472">Head assets</th> <th data-bbox="836 331 986 472">Tail assets</th> <th data-bbox="986 331 1410 472">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="432 472 655 748">Data Element allowed value / allowed value for Code Value</td> <td data-bbox="655 472 836 748">Column asset</td> <td data-bbox="836 472 986 748">Code Value asset</td> <td data-bbox="986 472 1410 748">Relations of this type describe the actual code values that are used in a column.</td> </tr> </tbody> </table> <p data-bbox="432 779 1410 913">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>	Relation type	Head assets	Tail assets	Description	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.
Relation type	Head assets	Tail assets	Description						
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.						
2. Completion	<p data-bbox="432 958 1410 1048">Create <a href="#">responsibilities</a> by assigning users or user groups to roles for the respective Codelist domains:</p> <ul data-bbox="432 1077 1410 1301" style="list-style-type: none"> <li>• The DataStewards improve the bulk import, and make it ready for review. They also have the final say in the approval process.</li> <li>• Subject Matter Experts review the correctness of the assets.</li> <li>• The Stakeholders comments on the assets and validate the correctness.</li> </ul> <p data-bbox="432 1339 1410 1429">Use the <a href="#">Approval</a> and <a href="#">Simple Approval</a> workflows to update and approve the Code Set and Code Value assets.</p> <p data-bbox="432 1458 1410 1547">The outcome consists of Code Set and Code Value assets with the <b>Approved</b> status.</p>								
3. Mapping	<p data-bbox="432 1592 1410 1771">The DataStewards <a href="#">map code values and crosswalks</a> 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 data-bbox="432 1809 1410 1944">The Crosswalk assets originally also have the Candidate status, so they should also be reviewed and approved via the <a href="#">Approval</a> and <a href="#">Simple Approval</a> workflows.</p>								

Phase	Description
4. Publication and traceability	<p>Once you have created the required assets and added the required relations, you can use <a href="#">diagrams</a> 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"> <li>• You can export them in XLSX or CSV format.</li> <li>• The Collibra API also offers ways to push approved assets to external applications. You can configure this to take place regularly via custom workflows.</li> </ul> <p>To indicate that the code sets are published, you can <a href="#">create</a> a new status, for example <b>Published</b>.</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

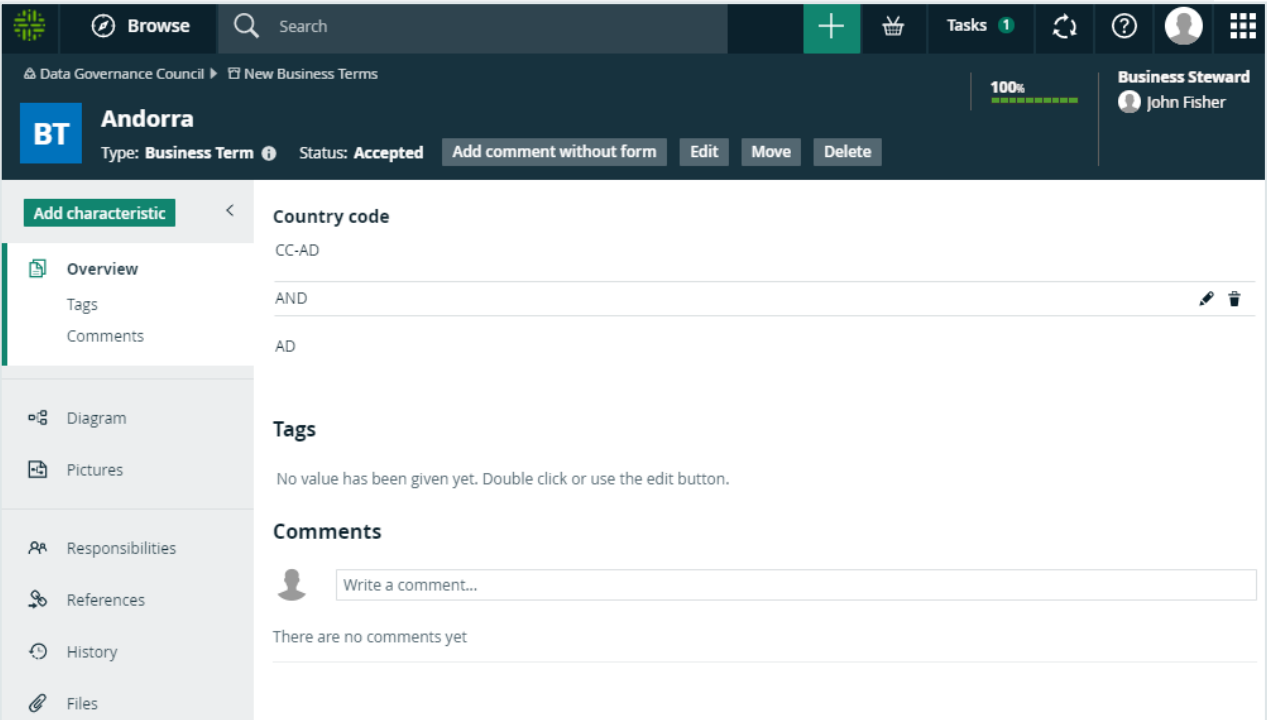
## Prerequisites

- 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**



The screenshot shows a user interface for managing business assets. At the top, there is a navigation bar with 'Browse', 'Search', and a '+ Add' button. Below this, the breadcrumb path is 'Data Governance Council > New Business Terms'. The main header for the asset 'Andorra' (BT) shows its type as 'Business Term', status as 'Accepted', and a progress bar at 100%. Action buttons include 'Add comment without form', 'Edit', 'Move', and 'Delete'. The user is identified as 'Business Steward John Fisher'. The left sidebar contains navigation options: Overview, Tags, Comments, Diagram, Pictures, Responsibilities, References, History, and Files. The main content area is titled 'Country code' and lists three values: 'CC-AD', 'AND', and 'AD'. Below this is a 'Tags' section with the message 'No value has been given yet. Double click or use the edit button.' and a 'Comments' section with a text input field and the message 'There are no comments yet'.

## 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

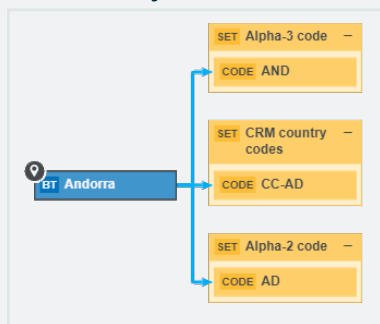
Asset Page:

The screenshot shows the 'Andorra' Business Term asset page. The top navigation bar includes 'Browse', 'Search', and 'Tasks 1'. The asset details show 'Type: Business Term' and 'Status: Accepted'. A table of characteristics is displayed with the following data:

Name	Domain	Definition
AD	Alpha-2 code	
AND	Alpha-3 code	
CC-AD	CRM country codes	

Below the table, there are sections for 'Tags' (with a note: 'No value has been given yet. Double click or use the edit button.') and 'Comments' (with a text input field and the note: 'There are no comments yet').

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?

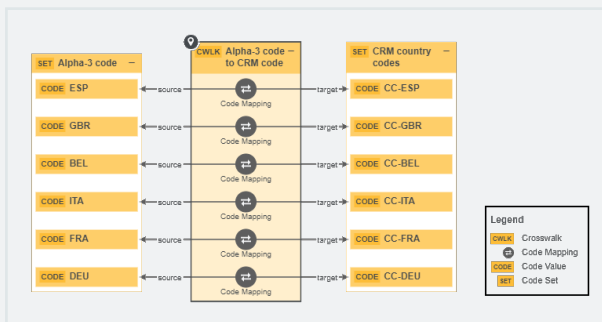
To resolve this challenge, you can map equivalent code values by means of complex relations between the corresponding Code Value assets and a Crosswalk asset, which can represent the transformation logic between the code values.

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 Intelligence Cloud.



## 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**.

## Metrics pages

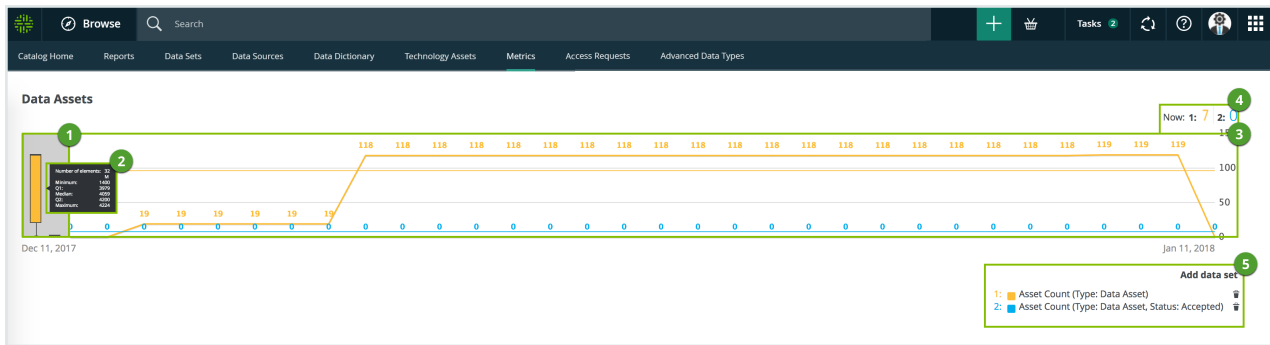
The Metrics pages contain a variety of statistics related to how an application is used. They pages consist of one or more graphs, their legends and some counters.

For each graph, you can edit the data set and the time range shown.

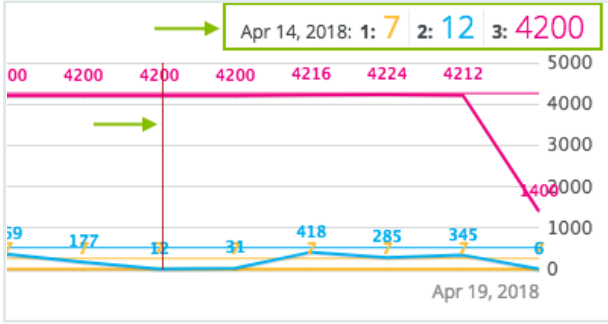
**Note** On the **Metrics** page, the lines that are shown on a given graph are called data sets. Do not confuse these with [data sets](#) in the true context of CollibraData Catalog. On this page, when you click **Add data set**, it simply means that you want to add another line to the graph.

## 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.

Number	Element	Description
3	Graph	<p>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.</p> <div style="border: 1px solid #ccc; background-color: #f9f9f9; padding: 10px; margin-top: 10px;"> <p><b>Tip</b> You can <a href="#">edit</a> the time range of the graph.</p> </div>
4	Counts by day	<p>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.</p> 
5	Legend	<p>The legend of the graph, which also allows you to <a href="#">add</a>, <a href="#">edit</a> and <a href="#">delete</a> the data sets.</p>

## 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 see the metrics, for example 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Product:</b> Limit the results to active users within a specific Collibra Data Intelligence Cloud application.</li> <li>◦ <b>Role:</b> Limit the results to active users that have been assigned a specific role.</li> </ul>

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"> <li>○ <b>Type:</b> Limit the results to a specific type.</li> <li>○ <b>Domain:</b> Limit the results to assets from a specific domain.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Status:</b> Limit the results to assets with a specific status.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> </ul>
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"> <li>○ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>○ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>○ <b>Task:</b> Limit the results to a specific task.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> <li>○ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted or Unfinished</b>).</li> <li>○ <b>User:</b> Limit the results to a specific user.</li> </ul>



Filter setting	Description
<p>Domain Count</p>	<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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>
<p>License Available</p>	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
<p>License Usage</p>	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>

Filter setting	Description
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> </ul>
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted</b> or <b>Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> </ul>

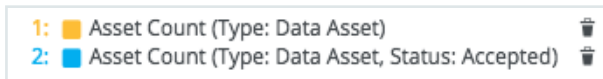
5. Click **Save data set**.

## 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.



- » The filter configuration for the data set appears.
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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Product:</b> Limit the results to active users within a specific Collibra Data Intelligence Cloud application.</li> <li>◦ <b>Role:</b> Limit the results to active users that have been assigned a specific role.</li> </ul>

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"> <li>○ <b>Type:</b> Limit the results to a specific type.</li> <li>○ <b>Domain:</b> Limit the results to assets from a specific domain.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Status:</b> Limit the results to assets with a specific status.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> </ul>
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"> <li>○ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>○ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>○ <b>Task:</b> Limit the results to a specific task.</li> <li>○ <b>Count Operation:</b> 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.</li> <li>○ <b>Community:</b> Limit the results to a specific community.</li> <li>○ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted or Unfinished</b>).</li> <li>○ <b>User:</b> Limit the results to a specific user.</li> </ul>

Filter setting	Description
<p>Domain Count</p>	<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"> <li>◦ <b>Type:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> </ul>
<p>License Available</p>	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to a specific type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>
<p>License Usage</p>	<p>A daily count of Collibra 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"> <li>◦ <b>License:</b> Limit the results to active users with a specific license type.</li> <li>◦ <b>Count Operation:</b> 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.</li> </ul>

Filter setting	Description
Page Hits	<p>A daily count of Collibra asset page hits.</p> <p>You can restrict the count results via the following additional filters:</p> <ul style="list-style-type: none"> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Domain:</b> Limit the results to assets from a specific domain.</li> </ul>
Task Count	<p>A daily count of workflow tasks carried out.</p> <ul style="list-style-type: none"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task Status:</b> Limit the results to tasks that have a specific status (<b>Completed, Deleted or Unfinished</b>).</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> </ul>
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"> <li>◦ <b>Workflow:</b> Limit the results to a task in a specific workflow.</li> <li>◦ <b>Task Type:</b> Limit the results to tasks of a specific type.</li> <li>◦ <b>User:</b> Limit the results to a specific user.</li> <li>◦ <b>Count Operation:</b> 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.</li> <li>◦ <b>Community:</b> Limit the results to a specific community.</li> <li>◦ <b>Task:</b> Limit the results to a specific task.</li> </ul>

5. Click **Save data set**.

» The updated data set is shown in the graph.

## Edit the time range of a metrics graph

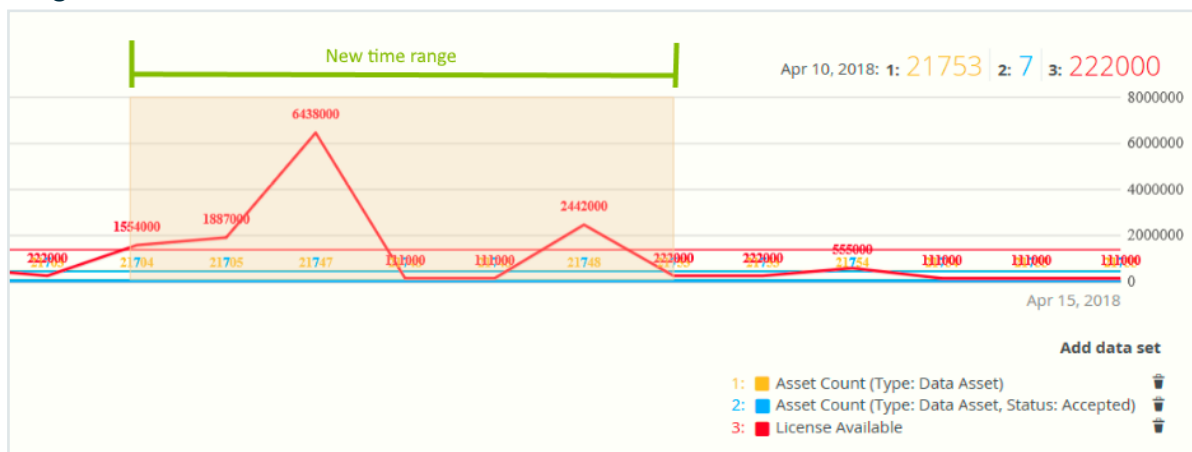
By default, the graphs on the [Metrics pages](#) are shown in daily increments, over a time range of one month. However, you can edit the time range to suit your needs.

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

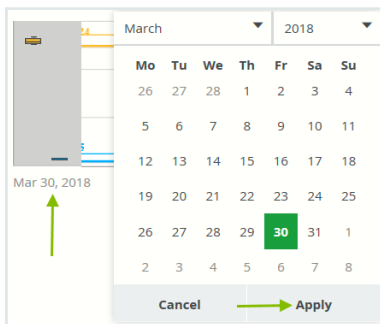
1. Open the product for which you want to create the asset, for example the Business Glossary.
2. In the submenu, click **Metrics**.
  - » The [Metrics page](#) appears.
3. Optionally, [Add a data set to a metrics graph](#) a data set to a graph.
4. In the relevant graph, click at (or near) the first 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.


## Remove a data set from a metrics graph

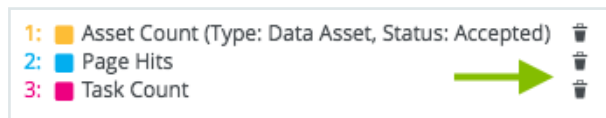
You can remove a data set that is shown in a graph on the [Metrics pages](#) if you don't want to see, for example, if you think there is too much information in a graph.

**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.

# 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.

## Enable or disable Collibra Assessments

Collibra Assessments is packaged with Collibra Data Intelligence Cloud 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, 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

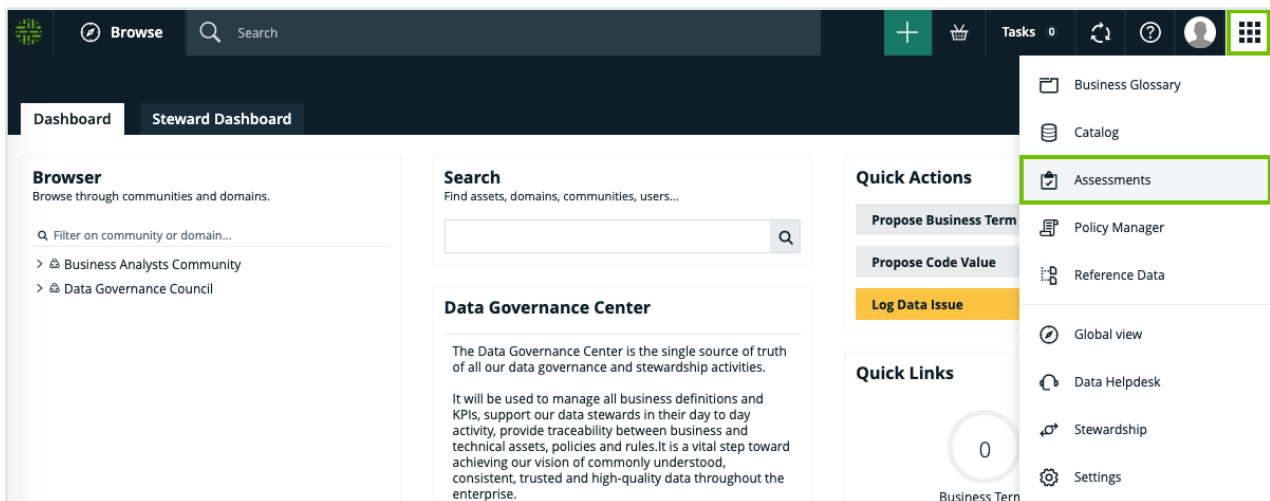
1. Open Collibra Console.
  - » Collibra Console opens with the **Infrastructure** page.
2. In the tab pane, expand an environment to show its services.
3. In the tab pane, click the Data Governance Center service of that environment.
4. Click **Infrastructure configuration**.
5. Click **Edit configuration**.
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 **Save all**.
9. Restart your Collibra environment.

## Open Collibra Assessments

To open Collibra Assessments, you need a [global role](#) that has the Assessments [global permission](#).

On the main menu, click , and then click **Assessments**.



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 Intelligence Cloud 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 Intelligence Cloud, 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.

- Can be selected as the destination for new Assessment Review assets, when submitting assessments.

**Tip** Ensure that the [required responsibilities](#) exist for the New Assessments domain.

## Assessment Review asset type

When you [submit](#) an assessment for review, if the template used had the [Governance option](#) selected, an Assessment Review asset is created in the domain of your choice.

## 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 and permissions

To submit an assessment, you need an Author license and a resource role that has the following resource permissions for the domain you specify when submitting an assessment:

- Asset > add
- Attribute > add

**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, if the template used had the [Governance option](#) selected, an Assessment Review asset is created in your Collibra environment. For the [Assessments Approval workflow](#) to work, a Business Steward (by default) must be assigned to the domain you specify when submitting an assessment. If the workflow was configured for a different resource role, the domain must have a responsibility created for that resource role.

## 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.

Assessments Template Gallery

**Conduct assessments**

Select template

Assesses	Assessment Template	Status	Updated on <sup>▲</sup>
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 custom 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 packaged templates appear in the **Privacy assessment templates** section.
- Custom templates, meaning those that you've created, including copies of the packaged templates, appear in the **Custom templates** section.

Assessments

### Template gallery

#### Privacy assessment templates

- DPIA** v1  
Data Protection Impact Assessment
- DPIA Threshold** v1  
Data Protection Impact Assessment Threshold
- LIA** v1  
Legitimate Interest Assessment

#### Your templates

Create new template

- Acronym template** v1 Published
- asdfaeghqwv1** v1 Published
- Business Asset assessment t...** v1 Draft
- Data Transfer Impact Assess...** v3 Published  
DTIA

Each template is shown as a tile, with the following details:

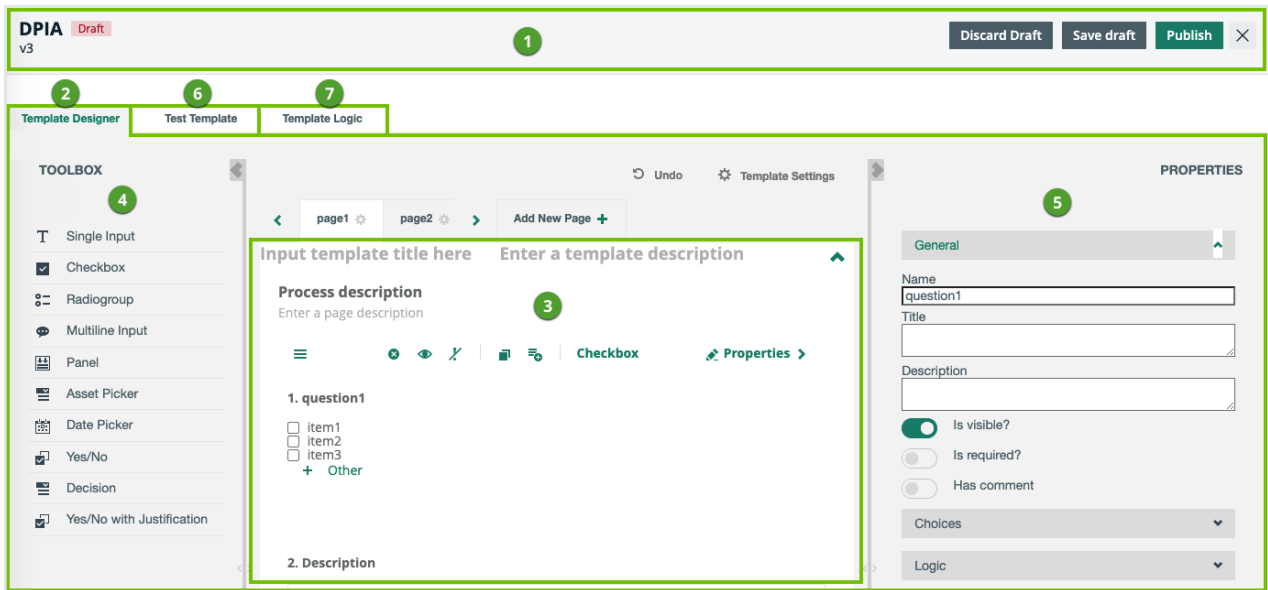
- The title of the template.
- The status of the template, either Draft or Published.
- A description of the template (optional).
- The version of the template.

**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 custom templates.





No.	Part name	Description
1	Action bar	<ul style="list-style-type: none"> <li>• Template title, status and version number</li> <li>• Buttons to copy the template, discard or save drafts, and publish assessments.</li> </ul> <p><b>Note</b> The availability of the buttons depends on the type of template (packaged or customized) and the status of the template.</p>
2	Template Designer tab	<ul style="list-style-type: none"> <li>• The toolbox and properties sections.</li> <li>• Tabs for the various pages in your template.</li> <li>• <b>Undo</b> button, to reverse the last edit you made to the template.</li> <li>• <b>Template Settings</b> button, for quick access to the template title, description and the target asset type to be assessed.</li> </ul>
3	Building area	The body of the <b>Template Designer</b> tab, where you add and <a href="#">work</a> with questions.
4	Toolbox	A set of question types, such as checkbox, comment and date picker.

No.	Part name	Description
5	<a href="#">Properties</a>	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 <b>Template Designer</b> tab. You can respond to your questions to test, for example, how the configured <a href="#">logic</a> will work when conducting an assessment.
7	Template Logic tab	A view on all logic conditions configured in the template. You can also <a href="#">add</a> , <a href="#">edit</a> and <a href="#">delete</a> 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.

### Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

### 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 the [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 **Custom templates** section of the template gallery, as a v1 template with the Draft status.

## What's next?

- [Publish](#) the template.
- [Export](#) the template.

## The action bar

The action bar allows you to control your draft templates and publish them for use throughout your organization.



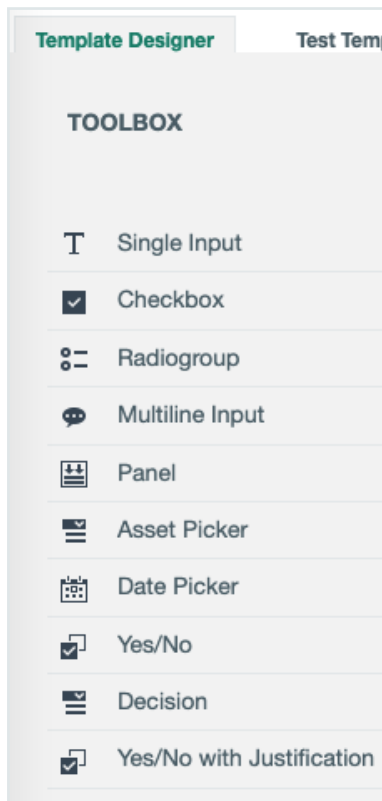
**Note** The availability of the buttons depends on the type of template (packaged or customized) and the status of the template.

Element	Description
Name	The name of the template.
Status	Status of the open template: <b>Draft</b> or <b>Published</b> .

Element	Description
Discard draft	<p><a href="#">Revert</a> 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 style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• The packaged templates can be <a href="#">copied</a>, but not edited. Therefore, they are always v1 and always have the Published status. They cannot be deleted.</li> </ul> </div>
Save draft	<p>Save any changes you've made to the template.</p> <ul style="list-style-type: none"> <li>• If the status of the template was Draft, the status and the version number are unchanged.</li> <li>• 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.</li> </ul>
Publish	<p>Set the status of the template to Published.</p> <ul style="list-style-type: none"> <li>• If the status of the template was Draft, the status becomes Published and the version number is unchanged.</li> <li>• 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.</li> </ul>
Copy template	<p>Make a copy of a packaged template. The copy is added to <b>Custom templates</b> section, as a v1 with the Draft status.</p>
✕	<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.

Question type	Allows you to...
Multiline Input	Enter multiple lines of text.
Panel	<p>Frame two or more questions, typically in reference to another question.</p> <div style="border: 1px solid #ccc; padding: 10px; background-color: #f9f9f9;"> <p><b>Tip</b> 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"> <li>• Follow this question with a Panel that contains three additional Controller-specific questions.</li> <li>• <a href="#">Configure</a> a logic condition so that the Panel and the three questions it frames appear if the response to the Radiogroup question is "No".</li> </ul> </div>
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 <a href="#">Working with scores and decisions</a>.</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 Intelligence Cloud environment.

You can specify an asset type for a template when you:

- [Copy](#) a packaged template.
- [Create](#) a new template.
- [Edit](#) a custom template.

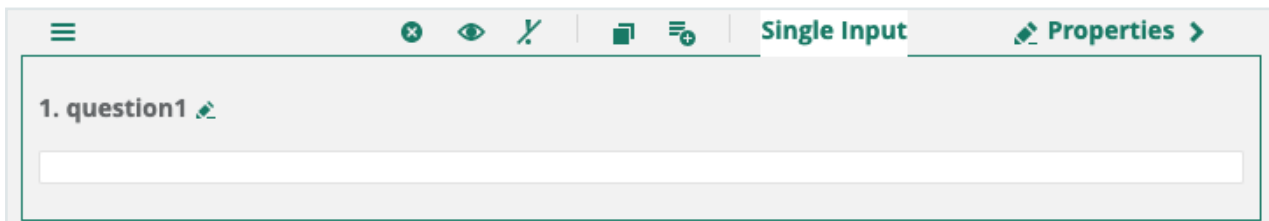
**Important** If you don't specify an asset type for a template, you will not be able to select an asset to assess, when conducting the assessment. Instead, you will enter a short description of what you want to assess and then [conduct the assessment without an underlying asset](#). When you submit 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
	<p>Edit the title.</p> <p>The edit icon appears when you hover over the question title. Alternatively, you can provide a title in the <a href="#">Properties</a>.</p>

Icon button	Description
	<p>Click and drag the question to a different location on the page.</p> <p><b>Tip</b> To move a question to another page, you can:</p> <ol style="list-style-type: none"> <li>1. Click  to add the question to the toolbox.</li> <li>2. Go to the page on which you want to add the question.</li> <li>3. Drag the question from the toolbox to the page.</li> </ol>
	<p>Delete the question from the building area.</p> <p><b>Tip</b> If you think you might want to use the question at a later time, or add it to another page, you can click , to <a href="#">add</a> the question to the toolbox. Deleting a question from the building area does not delete it from the toolbox.</p>
	<p>Specify whether or not the question title is visible.</p>
 	<p>Specify 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><b>Note</b> 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 	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"> <li>• If the question type is Single input, you can click this button to change it to a Comment, and vice versa.</li> <li>• If the question type is Checkbox, you can click this button to change it to a Radiogroup, and vice versa.</li> </ul>
	Click to show the question properties in the <b>Properties</b> .
	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.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## 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 a radiogroup questions

You can configure the values for checkbox and radiogroup [questions](#).

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## 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:
  - Click  next to a value, to edit the label.
  - Click  next to a value and drag to reorder it among the other values.
  - Click  next to a value, to delete it.
  - Click  to add another value.
  - 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](#).

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## 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><b>Example</b> "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><b>Note</b> 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><b>Example</b> "Is a DPIA required for the Business Process asset?"</p>
Score threshold	<p>The limit at, or beyond, which the Decision question returns the value "Yes".</p>

Property	Description
Assessment template	<p>The assessment that should be conducted if the scoring threshold is met.</p> <div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p><b>Note</b> When the assessment is submitted for review, the <a href="#">assessment details page</a> includes a button to launch the assessment you specify here.</p> </div>

## 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 <a href="#">Working with scores and decisions</a>.</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.

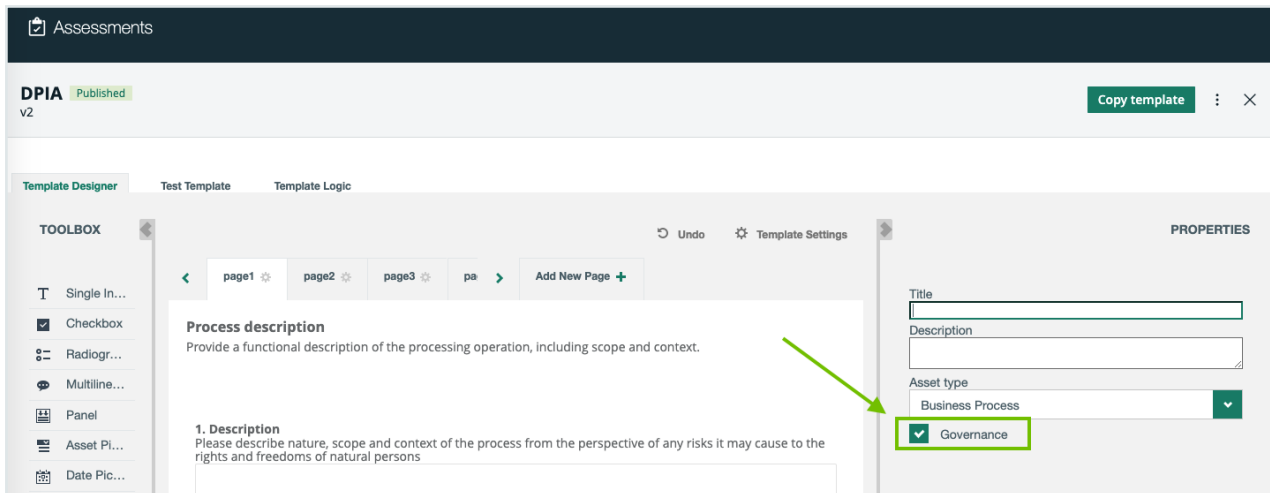
Property	Description
Governance	The Governance option determines whether or not an assessment conducted from a specific template will create an asset in your Collibra environment and trigger the Assessments Approval workflow. See <a href="#">Governance for assessments</a> .
Auto number questions	Determines whether or not the questions in your template are automatically numbered in the order they are arranged in the building area.
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.
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 is property is used in conjunction with the "Score" and "Assessment template" properties described in this table.</p> <p>For more information, see <a href="#">Working with scores and decisions</a>.</p>

Property	Description
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 is property is used in conjunction with the "Score" and "Score threshold" properties described in this table.</p> <p>For more information, see <a href="#">Working with scores and decisions</a>.</p>
Choice	
Has other Item	Allows you to select the value "Other" and add free-text clarification.
Logic	<p>Allows you to define the logic for the selected question.</p> <p>See:</p> <ul style="list-style-type: none"> <li>• <a href="#">Logic settings in the Template Designer tab</a></li> <li>• <a href="#">Logic settings in the Template Logic tab</a></li> </ul>

## Governance for assessments

The Governance option determines whether or not an assessment conducted from a specific template will create an asset in your Collibra environment and trigger the Assessments Approval workflow. The Governance option 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 <b>Submit</b> button is available.</p> <p>When you click <b>Submit</b>:</p> <ul style="list-style-type: none"> <li>• The status of the assessment changes from Draft to Submitted.</li> <li>• An Assessment Review asset with the Under Review status is created in the domain of your choice, in your Collibra environment.</li> <li>• The <a href="#">Assessments Approval</a> workflow is triggered and a task is assigned to the Business Steward.</li> </ul> <div style="border-left: 2px solid green; padding-left: 10px; margin-top: 10px;"> <p><b>Tip</b> You can <a href="#">configure</a> the Assessments Approval workflow so that the task is assigned to a different resource role.</p> </div>

Selected/Cleared	Description
Cleared	<p>When you conduct an assessment that uses the template, the <b>Complete</b> button is available.</p> <p>When you click <b>Complete</b>:</p> <ul style="list-style-type: none"> <li>• The status of the assessment changes from Draft to Completed.</li> <li>• No asset is created in your Collibra environment.</li> <li>• The Assessments Approval workflow is not triggered.</li> </ul>

## 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.

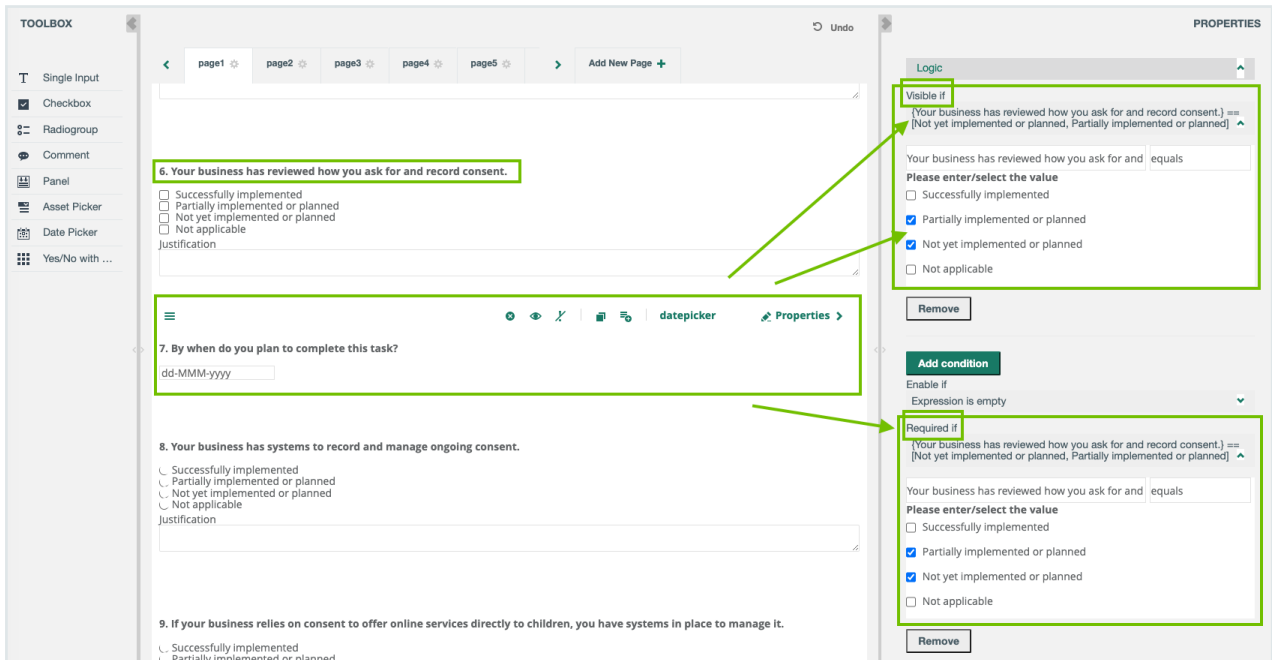
## Example

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 "Net 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.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## 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.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).


## 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.

## Prerequisites


You have a [global role](#) that has the Assessments [global permission](#).

### 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**.

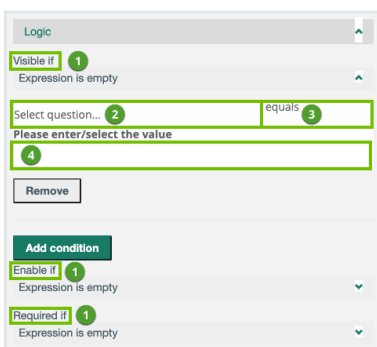
### Via the Template Logic tab

**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.



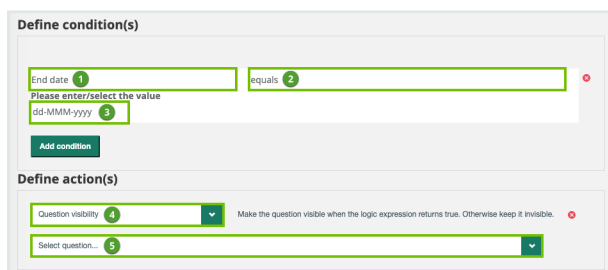
Number	Setting	Description
1	Visible if	<ul style="list-style-type: none"> <li>• If the conditions are met, the question is shown in the assessment and you can respond to it.</li> <li>• If the conditions are not met, the question is not shown in the assessment.</li> </ul> <p><b>Note</b> This logic condition overrides the <b>Is visible?</b> setting in the <b>General</b> section in <b>Properties</b>.</p>
	Enable if	<ul style="list-style-type: none"> <li>• If the conditions are met, the question is enabled, meaning you can respond to it.</li> <li>• If the conditions are not met, the question is disabled, meaning you cannot respond to it.</li> </ul>
	Required if	<ul style="list-style-type: none"> <li>• 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.</li> <li>• If the conditions are not met, the question is optional. You can submit the assessment for review without having responded to optional questions.</li> </ul> <p><b>Note</b> This logic condition overrides the <b>Is required?</b> setting in the <b>General</b> section in <b>Properties</b>.</p>
2	Select question...	The question that determines whether or not the action will happen.



Number	Setting	Description
3	Logical operator	All or some of the following, based on the question type of the selected question. <ul style="list-style-type: none"> <li>• is empty</li> <li>• is not empty</li> <li>• equals (default)</li> <li>• not equals</li> <li>• any of</li> <li>• all of</li> </ul>
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.



Number	Field	Description
1	Select question...	The question that determines whether or not the action will occur. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Note</b> In the previous example image, the "End date" question has been selected in order to show the <b>Please enter/select the value</b> field, which only appears once a question is selected.</p> </div>

Number	Field	Description
2	Logical operator	All or some of the following, based on the question type of the selected question. <ul style="list-style-type: none"> <li>• is empty</li> <li>• is not empty</li> <li>• equals (default)</li> <li>• not equals</li> <li>• any of</li> <li>• all of</li> </ul>
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...	The action that occurs if the conditions are met. <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Note</b> In the previous example image, the "Question visibility" action has been selected in order to show the <b>Select question...</b> field, which only appears once an action is selected.</p> </div>
5	Select question...	The question that is subject to the action.

## Copy a packaged template

You can copy any of the packaged [templates](#).

### Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

### 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 **Custom templates** section of the template gallery, as a version 1, with the Draft status.

## What's next?

- [Edit](#) the template.
- [Publish](#) the template.
- [Export](#) the template.

## Edit a template

You can edit any of your custom [templates](#).

**Tip** You cannot edit the packaged templates, but you can [copy](#) them and edit the new templates.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## 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.

## Discard a draft version of a template

If one of your custom 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.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## 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.

## Delete a template

You can delete any of your custom [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.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## Steps

1. Go to the [template gallery](#) and open the custom template that you want to delete.
2. In the upper-right corner, click , and then click **Delete**.
  - » The **Confirm delete** dialog box appears.
3. Click **Delete** to confirm.

## 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.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## 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.

## Export a template

You can export any of the custom templates in the [template gallery](#). You can then [import](#) the templates to another Collibra environment. This is particularly useful for importing/exporting templates from a testing environment to a production environment.


**Note** You can only export templates that have the Published status.

**Tip** You can't export the packaged templates, but you can [copy](#) them and then export the copies.

### Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

### Steps

1. Go to the [template gallery](#) and open the custom template that you want to export.
2. In the upper-right corner, click , and then click **Export**.
  - » The template is exported to your hard drive as a JSON file.

### What's next?

[Import](#) the template to another Collibra environment.


## Import a template

You can import the custom templates that you've [exported](#). This is particularly useful for importing/exporting templates from a testing environment to a production environment.

### Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- You've exported a custom template (JSON file) to your hard drive.

## Steps

1. Go to the [template gallery](#).
2. In the **Custom templates** section, click , and then click **Import template**.
  - » The **Import template** dialog box appears.
3. Do one of the following:
  - a. In the **Import template** dialog box, click **Upload template**, and then select the template you want to upload.
  - b. Find and drag the template you want to upload into the **Import template** dialog box.
4. If a template of the same name already exists in your environment, you are prompted enter a new name for the template you're importing.
5. Click **Import**.
  - » The template is added to the template gallery. It retains its Published status.

**Important** Version control when importing and exporting templates is currently not supported. As such, no matter the version of an exported template, all imported templates are v1.

## 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 Business Steward (by default) then reviews and approves or rejects the assessment.

**Tip** You can [configure](#) the Assessments Approval workflow so that the task is assigned to a different resource role.

## Conduct an assessment

You can conduct [assessments](#) of the assets in your Collibra Data Intelligence Cloud environment.

## Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- To submit an assessment, by which an Assessment Review asset is created in your Collibra Data Intelligence Cloud environment, you need a [global role](#) that has the Policy Manager [global permission](#). This does not apply if you complete the assessment, as no Assessment Review asset is created in your 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 Intelligence Cloud 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 Colibra 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.

## Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- To submit an assessment, by which an Assessment Review asset is created in your Colibra Data Intelligence Cloud environment, you need a [global role](#) that has the Policy Manager [global permission](#). This does not apply if you complete the assessment, as no Assessment Review asset is created in your environment.

## 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.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to edit.
  - » The [assessment details page](#) opens.
3. Click **Edit Draft**.
4. Edit the responses to the assessment questions. You can also edit the name of the assessment.
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.

**Note** You can only copy an assessment if the template used is still the latest version of the template. If a new version of a template is created, regardless of its status, you can no longer copy an assessment that was started with the previous version.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that 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 or not an Assessment Review asset is created in your Collibra environment. It also determines whether the **Submit** button or the **Complete** button is available when you are conducting an assessment.

## Prerequisites

- You have a [global role](#) that has the Assessments [global permission](#).
- To submit an assessment, by which an Assessment Review asset is created in your Collibra Data Intelligence Cloud environment, you need a [global role](#) that has the Policy Manager [global permission](#). This does not apply if you complete the assessment, as no Assessment Review asset is created in your environment.

## Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to submitmark obsolete.
  - » 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.

**Note** If you delete a submitted assessment, the linked Assessment Review asset will not be deleted. You need to manually [delete](#) it in your Collibra Data Intelligence Cloud environment.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that 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.

**Tip** If you are deleting a submitted assessment, you can click the link in the dialog box to open the Assessment Review asset in your Collibra environment. There, you can delete the asset.

4. Click **Delete** to confirm.
  - » The assessment is deleted from the DGC database and removed from the list of assessments on the landing page.

## Mark an assessment obsolete

You can mark obsolete any [assessment](#) that has the Submitted status.


- The status of the Assessment Review asset that was created in your Collibra environment also becomes Obsolete.
- Obsolete assessments remain in the list of assessments on the landing page.

**Note** Currently, you cannot [delete](#) assessments that have the Obsolete status.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## Steps

1. Go to the Collibra Assessments [landing page](#).
2. Click the assessment that you want to mark obsolete.
  - » The [assessment details page](#) opens.
3. Click  in the upper-right corner, and then click **Mark as obsolete**.
  - » The **Mark as obsolete** dialog box appears.
4. Click **Mark** to confirm.

# What happens when you save, complete or submit an assessment?

This section addresses the interaction between Collibra Assessments and your Collibra Data Intelligence Cloud 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 or not an Assessment Review asset is created in your Collibra environment. It also 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 Intelligence Cloud environment; an Assessment Review asset is only created when you submit an 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](#).

- 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 Intelligence Cloud 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.
- 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** Click the assessment to open the [details page](#).

**Tip** On the assessment details page, click **View submission** to open the Assessment Review asset page in your Collibra environment.

- The [Assessments Approval workflow](#) is triggered. The workflow notifies the Business Steward (by default) that an assessment is ready for review.

**Note** If the Business Steward (default) responsibility does not exist for the domain, the Assessment Review is still created, but the Assessments Approval workflow is not triggered. You can configure the workflow so that the task is assigned to a different resource role.



## 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 or Completed statuses.

- Includes, for assessments that have the Draft status, an **Edit draft** button.
- Includes, for assessments that have the Published status:
  - A button to 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 submission** button, to access the Assessment Review asset page in your Collibra Data Intelligence Cloud environment.

**Note** If, by chance, the Assessment Review asset was deleted from your Collibra environment:

- The status of the assessment remains Submitted.
- Clicking the **View submission** button will result in a "Entity not found" error.

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.

Assessments

**DPIA Threshold** Submitted

Let's see how this works

View assessment asset page ×

<p><b>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?</b></p> <p>✓ Yes</p>	<p><b>Is the processing activity very similar to another one with similar high risks, for which a DPIA has already been performed?</b></p> <p>Not specified</p>	<p><b>Created on</b> 05-Feb-2021 10:32</p> <p><b>Last updated on</b> 05-Feb-2021 10:32</p>
<p><b>Is the processing activity included in the list published by the regulator that exempts the process from a DPIA?</b></p> <p>Not specified</p>	<p><b>Does the processing have a legal basis in the European Union, and was a DPIA performed in the context of this legal basis?</b></p> <p>Not specified</p>	

**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](#).

### Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

### 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 Intelligence Cloud environment.

The Business Steward (by default) 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.

**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 environment and no workflow is triggered.

**Tip** You can [configure](#) the Assessments Approval workflow so that the task is assigned to a different resource role.

**Note** Neither the Assessment Review asset nor the submitted assessment can be edited.

## Prerequisites

You have a [global role](#) that has the Assessments [global permission](#).

## Steps

1. In your Collibra 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 Collibra Assessments remains Submitted, regardless of whether the assessment is approved or rejected.

## The Assessments Approval workflow

This process notifies the Business Steward (by default) that an Assessment Review asset is ready for review and prompts the Business Steward to approve or reject the asset. You can [configure](#) the workflow to work with a resource role other than the Business Steward.

**Warning** For the Assessments Approval workflow to work, a Business Steward (by default) must be assigned to the domain you specify when submitting an assessment. If the workflow was configured for a different resource role, the domain must have a responsibility created for that resource role.

**Important** The Assessments Approval workflow is relevant and triggered only if the [Governance option](#) is selected in the template that was used for your assessment.

## 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 Approval workflow is triggered. The workflow notifies the Business Steward (by default) that an assessment is ready for review.

**Note** Neither the Assessment Review asset nor the submitted assessment can be edited.

**Important** The Assessments Approval 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
Business Steward (by default)	<ul style="list-style-type: none"> <li>• Review assessment</li> <li>• Approve or reject assessment</li> </ul>	Yes

## Workflow initiator

The workflow starts when you submit an assessment for review.

## Status progression of the Assessment Review asset in your Collibra environment

Status	Description
Under Review	The initial status of the Assessment Review asset.
Approved	The assessment is approved.

Status	Description
Rejected	The assessment is rejected.

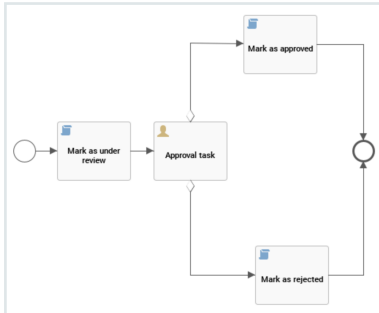
**Note** Once the Assessment Review asset is approved or rejected, it cannot be edited.

## Status progression of the assessment in Collibra Assessments

Condition	Status
Any user starts an assessment.	Draft
Any user submits an assessment for review.  <b>Note</b> The <b>Submit</b> button is available if the Governance option is selected in the template used for the assessment.	Submitted
Any user completes an assessment.  <b>Note</b> The <b>Complete</b> button is available if the Governance option is cleared in the template used for the assessment.	Completed
The Assessment Review asset in your Collibra environment is approved.	Submitted
The Assessment Review asset in your Collibra 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 Approval workflow is triggered.

In Collibra Assessments, click **View submission**, to open the Assessment Review asset page in your Collibra environment.

### Review the assessment

Any user can:

- Review the Assessment Review asset and its attributes, in your Collibra 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

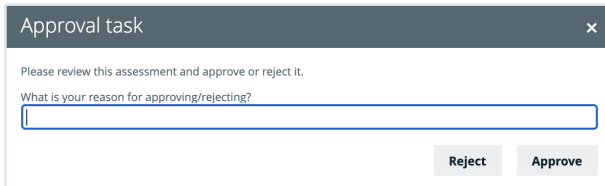
As the Business Steward (by default), when you open the Assessment Review asset page, a workflow task prompts you to approve the assessment.



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 Business Steward (by default) 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 Approval workflow configuration

Access the workflow configuration via **Settings** → **Workflows** → **Definitions** → **Assessments Approval**.

<p><b>Description</b> <span style="float: right;"><a href="#">Edit</a></span></p> <p>Notifies the Business Steward that an Assessment Review asset is ready for review, and prompts the Business Steward to approve or reject the asset.</p> <p><b>Applies To</b> <span style="float: right;"><a href="#">Add Rules</a> <a href="#">Edit</a></span></p> <p>Asset</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Asset type</th> <th>With status</th> <th>In community/domain</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Assessment Review</td> <td>New</td> <td></td> <td style="text-align: center;">🗑️</td> </tr> </tbody> </table> <p style="text-align: right;">1 Rule</p> <p><b>Variables</b> <span style="float: right;"><a href="#">Edit</a></span></p> <p>These variables are accessible in the workflow.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>assessmentAssignee</td> <td>Assessment Assignee</td> <td>role(Busi...</td> </tr> <tr> <td>statusId_underReview</td> <td>Please provide the id of the status that indicates the assessment n...</td> <td>0000000...</td> </tr> <tr> <td>statusId_approved</td> <td>Please provide the id of the status that indicates the asset has bee...</td> <td>0000000...</td> </tr> <tr> <td>statusId_rejected</td> <td>Please provide the id of the status that indicates the asset has bee...</td> <td>0000000...</td> </tr> <tr> <td>attrTypeId_approvalDate</td> <td>Please provide the id of the attribute type that indicates when an ...</td> <td>0000000...</td> </tr> <tr> <td>approvalTaskDueDate</td> <td>The due date expressed in duration for task 'approvalTask'.</td> <td>B1M</td> </tr> <tr> <td>approvalTaskTaskNotificationEnabled</td> <td>Send notification emails for task 'approvalTask'.</td> <td>true</td> </tr> </tbody> </table>	Asset type	With status	In community/domain	Actions	Assessment Review	New		🗑️	Name	Description	Value	assessmentAssignee	Assessment Assignee	role(Busi...	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...	approvalTaskDueDate	The due date expressed in duration for task 'approvalTask'.	B1M	approvalTaskTaskNotificationEnabled	Send notification emails for task 'approvalTask'.	true	<p><b>Start Label</b> <span style="float: right;"><a href="#">Edit</a></span></p> <p>Assessments Approval</p> <p><b>Start Events</b> <span style="float: right;"><a href="#">Edit</a></span></p> <p><b>Asset Added</b> An asset was added to the glossary.</p> <p><b>Roles</b> <span style="float: right;"><a href="#">Edit</a></span></p> <p><b>Start workflow</b> There are no roles selected.</p> <p><b>Stop workflow</b> There are no roles selected.</p> <p><b>Reassign tasks</b> There are no roles selected.</p> <p><b>Other</b></p> <p><input type="checkbox"/> Any signed in user can start the workflow. Any signed in user can start a workflow, independent of the role that user has.</p> <p><input checked="" type="checkbox"/> Perform candidate user check on workflow start. Workflow will fail to initialize if it contains a task without any candidate user.</p> <p><input checked="" type="checkbox"/> This workflow can only run once at the same time on a specific resource.</p> <p><input type="checkbox"/> Lock resource This workflow cannot run with other workflows on the same resource simultaneously.</p> <p><input type="checkbox"/> Show in global create.</p>
Asset type	With status	In community/domain	Actions																														
Assessment Review	New		🗑️																														
Name	Description	Value																															
assessmentAssignee	Assessment Assignee	role(Busi...																															
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approvalTaskDueDate	The due date expressed in duration for task 'approvalTask'.	B1M																															
approvalTaskTaskNotificationEnabled	Send notification emails for task 'approvalTask'.	true																															




## 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
assessmentAssignee	<p>The resource role to which the task is assigned when the workflow is triggered.</p> <div style="border-left: 2px solid red; padding-left: 10px; margin-top: 10px;"> <p><b>Warning</b> For the workflow to work, the resource role specified here must be present as a responsibility in the domain specified when submitting an assessment.</p> </div>	role(Business Steward)

Variable	Description	Default value
statusId_underReview	The UUID of the status that indicates the assessment needs to be reviewed before approval.	00000000-0000-0000-0000-00000005020
statusId_approved	The UUID of the status that indicates the asset has been approved.	00000000-0000-0000-0000-00000005025
statusId_rejected	The UUID of the status that indicates the asset has been rejected.	00000000-0000-0000-0000-00000005010
attrTypeId_approvalDate	The UUID of the attribute type that indicates when an assessment review was approved.	00000000-0000-0000-0000-00000000272
approvalTaskDueDate	The due date expressed in duration for task 'approvalTask'.	B1M
approvalTaskTaskNotificationEnabled	Send notification emails for task 'approvalTask'.	True
approvalTaskEscalationDuration	The escalation time duration for task 'approvalTask'.	B1M
approvalTaskEscalationType	The escalation type for task 'approvalTask'.	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 Approval

Click **Edit** 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.

By default, this workflow is configured to start when an asset is added. Specifically, the workflow starts when an assessment is submitted and the Assessment Review asset is created in your Collibra environment.

## 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 <sup>1</sup>	There are no roles selected.
Stop workflow <sup>2</sup>	There are no roles selected.
Reassign tasks <sup>3</sup>	There are no roles selected.

---

<sup>1</sup>The button with the start label is available to users with these roles.

<sup>2</sup>The option to cancel the workflow is available to users with these roles.

<sup>3</sup>The 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.	No
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

## Configure the resource role for the Assessments Approval workflow

By default, the [Assessments Approval workflow](#) is configured to work with the Business Steward resource role. You can configure it to work with any resource role.

**Warning** For the Assessments Approval workflow to work, the resource role that you configure here must be assigned to the domain you specify when submitting an assessment.




## Steps

1. On the main menu, click , and then click  **Settings**.
  - » The [Collibra settings page](#) opens.
2. Click **Workflows**.
  - » The [Workflows](#) settings page appears on the **Definitions** tab page.
3. Click the Assessments Approval workflow.
4. In the **Variables** section, click **Edit**.
  - » The **Variables** dialog box appears.
5. In the variable **Assessment Assignee** field, enter the resource role to which the review task should be assigned, for example: *role(Privacy Steward)*.
6. Scroll to the bottom of the **Variables** dialog box, and then click **Submit**.

## Customize the Assessments Approval workflow

You can customize the Assessments Approval workflow. Follow this procedure to ensure that your customizations are not overridden if we need to update the packaged workflows.

## Steps

1. On the main menu, click , and then click  **Settings**.
  - » The [Collibra settings page](#) opens.
2. Click **Workflows**.
  - » The [Workflows](#) settings page appears on the **Definitions** tab page.
3. Click **Assessments Approval**.
4. In the top-right corner of the page, click , to disable the workflow.
5. In the tab pane, click **Flow**.
6. Copy all of the code of the workflow definition.
7. Paste the code into the text editor of your choice, and then edit the code to suit your needs.

**Warning** You must edit the process id and the process name. They must both be unique.

```
<?xml version="1.0" encoding="UTF-8"?>
<definitions xmlns="http://www.omg.org/spec/BPMN/20100524/MODEL" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instan
xmlns:flowable="http://flowable.org/bpmn" xmlns:bpmndi="http://www.omg.org/spec/BPMN/20100524/DI" xmlns:omgdc="http
xmlns:omgdi="http://www.omg.org/spec/DD/20100524/DI" xmlns:design="http://flowable.org/design" typeLanguage="http:/
expressionLanguage="http://www.w3.org/1999/XPath" targetNamespace="http://www.collibra.com/apiv2" design:palette="f
<process id="assessmentsWorkflow" name="Assessments Approval" isExecutable="true" flowable:candidateStarterGroups
<documentation>Notifies the Business Steward that an Assessment Review asset is ready for review, and prompts t
<extensionElements>
  <design:stencilid><![CDATA[BPMNDiagram]]></design:stencilid>
  <design:language><![CDATA[English]]></design:language>
  <design:creationdate><![CDATA[2020-12-08T14:11:49.406Z]]></design:creationdate>
```

8. Save your text file with the file extension BPMN.
9. Go back to the Workflows settings page and the **Definitions** tab, which shows the full list of workflows in your Collibra environment.
10. Near the top of the page, click **Upload a file**, to search for your workflow BPMN file, or drag and drop your file into the upload box.
  - » Your workflow is uploaded to the Workflows settings page.
11. In the table row with your uploaded workflow, click ►, to enable the workflow.

**Tip** After you've uploaded your customized workflow, you can edit the start event, the resource roles associated with the workflow and configure other settings to suit your needs.