

## How to Create and Use Views in Colibra

Note: The UNCG EDG Team has customized default views to create ease in usability of the catalog. If you have a view you would like added for all users, or a suggestion to a current view that would benefit all users, please email our team.

1. Please go to the UNCG Colibra in your browser (<https://uncg.colibra.com/>).
2. Navigate to the Domain (Glossary, Logical Data Dictionary, etc.) you wish to work and toggle views in.
3. Use the Display Option icon to edit fields in your view by rearranging those already visible or
4. Click in Select fields to add new fields

The top screenshot shows the 'Banner Data Processes' view in the UNCG Colibra interface. The table lists various data processes with columns: Name, Status, Asset Type, Banner Module Area, Description, Job Type, Job Title, and is accessed/run by. The bottom screenshot shows the 'Fields' dialog box open, allowing users to select and rearrange fields. The dialog has a 'Display name' column and a 'Field' column. Fields listed include Name, Status, Asset Type, and Banner Module Area. Buttons for 'Select fields', 'Cancel', and 'Save' are visible.

5. Once you have added necessary fields and they are in order, click Save.
6. Use the Display Option icon to further customize your view with:
  - a. change rows per page
  - b. wrap text, or
  - c. change the display mode

Name	Status	Asset Type	Banner Module Area	Description	Job Type	Job Title
AAPACKN	Candidate	Data Process	Alumni	Membership Acknowledgement Process	Baseline	Membership Acknowledgement Process
AAPADJS	Candidate	Data Process	Alumni	Dues Adjustment Report	Baseline	Dues Adjustment Report
AAPCARD	Candidate	Data Process	Alumni	Membership Card Process	Baseline	Membership Card Process
AAPFEED	Candidate	Data Process	Alumni	Feeds dues payments and adjustments to finance.	Baseline	Advancement Dues Feeds
AAPREMD	Candidate	Data Process	Alumni	Produce Membership Reminders for Current Insultment period or Past...	Baseline	Membership Reminders
AAPRENEW	Candidate	Data Process	Alumni	Membership Renewals for Regular Renewals or Final Renewals	Baseline	Membership Renewal Process
AAPSTAT	Candidate	Data Process	Alumni	Membership Status Update Process and Report	Baseline	Membership Status Update
ADPACT	Candidate	Data Process	Alumni	Telefund cards to support a telethon effort. Telefund cards can be produ...	Baseline	Designation Accounting
ADPCFAC	Candidate	Data Process	Alumni	CHAS Report	Baseline	CHAS Report
ADPFED	Candidate	Data Process	Alumni	Feeds finalized gifts, pledge payments, and adjustments to gifts to BANN...	Baseline	Advancement - Finance Feeds
ADPVSER	Candidate	Data Process	Alumni	Collects and prints data necessary to fill in VSE survey.	Baseline	Voluntary Support of Education
APFCAMR	Candidate	Data Process	Alumni	Campaign History/Results	Baseline	Campaign History/Results
APFDONR	Candidate	Data Process	Alumni	Campaign Donor Report	Baseline	Campaign Donor Report
APFSOLA	Candidate	Data Process	Alumni	Assigns constituents to solicitors based on parameters defined in the Sol...	Baseline	Campaign Solicitor Assignments
APFSOLB	Candidate	Data Process	Alumni	Campaign Unassigned Solicitor Report	Baseline	Campaign Unassigned Solicitors
APFSOLC	Candidate	Data Process	Alumni	Campaign Unassigned Constituent Report	Baseline	Campaign Unassigned Cons.
APFTLF	Candidate	Data Process	Alumni	Telefund cards to support a telethon effort. Telefund cards can be produ...	Baseline	Campaign Telefund Prospects
AGPACT	Candidate	Data Process	Alumni	Statement of Giving Report	Baseline	Statement of Giving
AGPACN	Candidate	Data Process	Alumni	Identifies the gifts and pledges to be acknowledged and matches them t...	Baseline	PledgeGift Acknowledgement

Name	Status	Asset Type	Banner Module Area	Description	Job Type	Job Title	is accessed/run by
AAPACKN	Candidate	Data Process	Alumni	Membership Acknowledgement Process	Baseline	Membership Acknowledgement Process	A.ADVALUMN,C, A.ADVSPER...
AAPADJS	Candidate	Data Process	Alumni	Dues Adjustment Report	Baseline	Dues Adjustment Report	Z.IT'S_DEVELOPERS,BA, BAN...
AAPCARD	Candidate	Data Process	Alumni	Membership Card Process	Baseline	Membership Card Process	BAN,ALUMN,C, BAN,STUVO...
AAPFEED	Candidate	Data Process	Alumni	Feeds dues payments and adjustments to finance.	Baseline	Advancement Dues Finance Feeds	A.ADVGIFT,C, A.ADVSPER,C...
AAPREMD	Candidate	Data Process	Alumni	Produce Membership Reminders for Current Insultment period or Paid...	Baseline	Membership Reminders Process	A.ADVSPER,C, BAN,STUVO...
AAPRENEW	Candidate	Data Process	Alumni	Membership Renewals for Regular Renewals or Final Renewals	Baseline	Membership Renewal Process	BAN,DEVELOPERS,Q,C, BAN...
AAPSTAT	Candidate	Data Process	Alumni	Membership Status Update Process and Report	Baseline	Membership Status Update	BAN,STUVOICT,C, BAN,ADV...
ADPACT	Candidate	Data Process	Alumni	Telefund cards to support a telethon effort. Telefund cards can be produ...	Baseline	Designation Accounting Report	BAN,DEVELOPERS,Q,C, BAN...
ADPCFAC	Candidate	Data Process	Alumni	CHAS Report	Baseline	CHAS Report	A.ADVSPER,C, A.ADVGIFT,C...
ADPFED	Candidate	Data Process	Alumni	Feeds finalized gifts, pledge payments, and adjustments to gifts to BANN...	Baseline	Advancement - Finance Feeds	Z.IT'S_DEVELOPERS,BA, BAN...
ADPVSER	Candidate	Data Process	Alumni	Collects and prints data necessary to fill in VSE survey.	Baseline	Voluntary Support of Education	BAN,STUVOICT,C, BAN,ADV...
APFCAMR	Candidate	Data Process	Alumni	Campaign History/Results	Baseline	Campaign History/Results	BAN,STUVOICT,C, BAN,DEV...
APFDONR	Candidate	Data Process	Alumni	Campaign Donor Report	Baseline	Campaign Donor Report	BAN,ALUMN,C, Z.IT'S_DEVE...
APFSOLA	Candidate	Data Process	Alumni	Assigns constituents to solicitors based on parameters defined in the Sol...	Baseline	Campaign Solicitor Assignments	BAN,DEVELOPERS,Q,C, Z.IT...
APFSOLB	Candidate	Data Process	Alumni	Campaign Unassigned Solicitor Report	Baseline	Campaign Unassigned Solicitors	BAN,DEVELOPERS,Q,C, Z.IT...
APFSOLC	Candidate	Data Process	Alumni	Campaign Unassigned Constituent Report	Baseline	Campaign Unassigned Cons.	Z.IT'S_DEVELOPERS,BA, BAN...
APFTLF	Candidate	Data Process	Alumni	Telefund cards to support a telethon effort. Telefund cards can be produ...	Baseline	Campaign Telefund Prospects	BAN,ALUMN,C, BAN,DEVELO...
AGPACT	Candidate	Data Process	Alumni	Statement of Giving Report	Baseline	Statement of Giving	BAN,ALUMN,C, Z.IT'S_DEVE...
AGPACN	Candidate	Data Process	Alumni	Identifies the gifts and pledges to be acknowledged and matches them t...	Baseline	PledgeGift Acknowledgement	Z.IT'S_DEVELOPERS,BA, BAN...

7. If your view is to your liking, click Save As View to Name and Describe your view.

8. Sharing Options include (Screenshot of correct Save As criteria shown below):

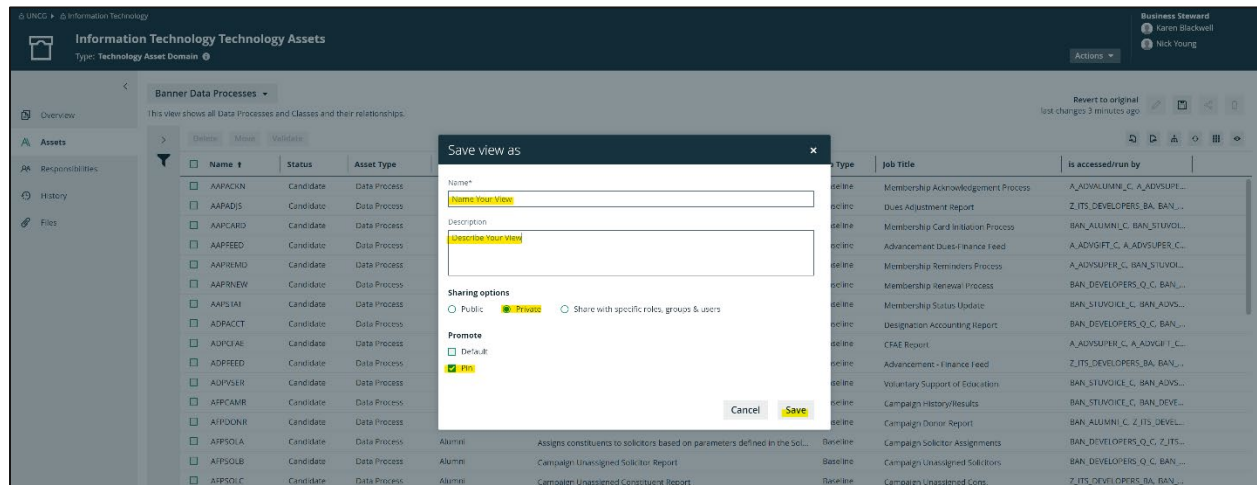
- Public- everyone on the catalog can see and use your view.
- Private- only you can see and use your view** (your recommendation per UNCG EDG Team).
- Share with specific roles, groups, & users.

9. Promote Item options include:

- Default- View will default for all users who navigate to this domain.

- b. **Pin- View will stay in your drop-down Views List** (your recommendation per UNCG EDG Team).

## 10. Click Save



For more information on Creating or Using Views in Collibra, visit [Collibra Documentation](#).