



Collibra Data Intelligence Cloud
Data Marketplace

Collibra Data Intelligence Cloud - Data Marketplace

Release date: July 9, 2023

Revision date: July 06, 2023

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

https://productresources.collibra.com/docs/collibra/latest/Content/DataMarketplace/to_dm.htm

Contents

Contents	ii
About Data Marketplace	1
Data Marketplace compatibility	3
Data Marketplace permissions	3
Data Marketplace limitations and guidelines	4
Enable Data Marketplace	6
Before you begin	6
Required permissions	6
Steps	6
What's next?	11
The out-of-the-box Data Marketplace experience	12
Data Marketplace scope	12
Filters	12
Filter tabs	15
Actions	15
Landing page options	16
Search suggestions	16
Configuring Data Marketplace	17
Configure Data Marketplace: Overview	18
Configure the Data Marketplace scope	22
Configure the Data Marketplace landing page	25
Make actions available in Data Marketplace	27
Configure the data basket and search suggestions in Data Marketplace	32

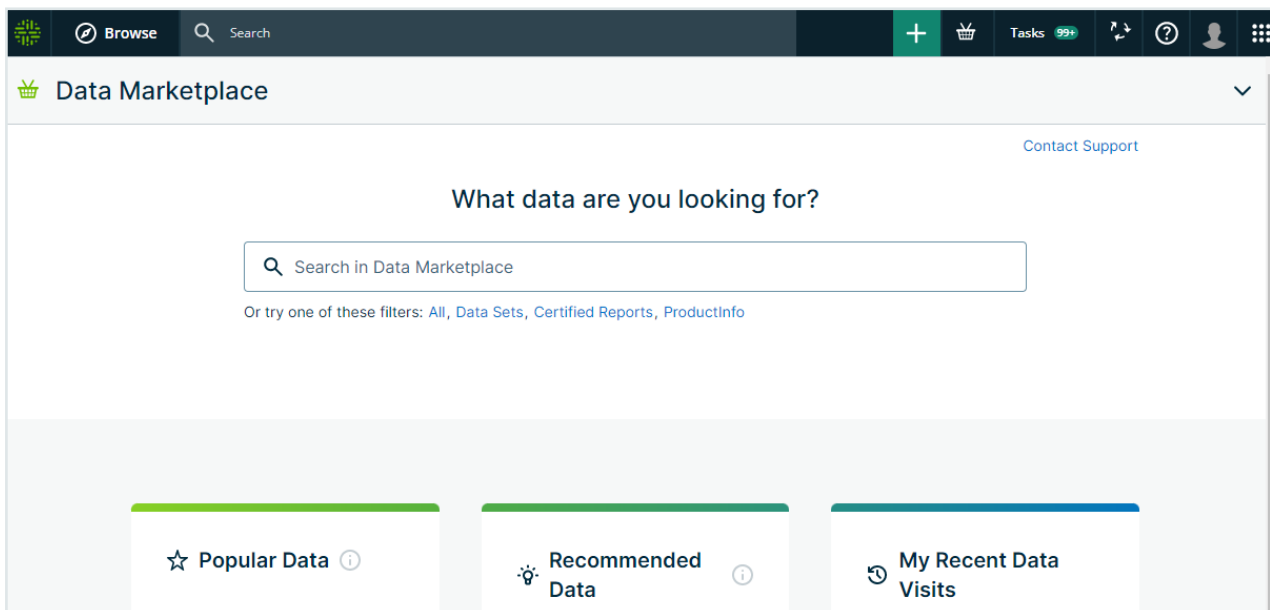
Define who must receive configuration update notifications	33
Configure the filters in Data Marketplace	35
Filtering and searching based on relations in Data Marketplace	36
Define the filter tabs in Data Marketplace	61
Reindex Data Marketplace relations	66
Using Data Marketplace	67
The Data Marketplace landing page	68
Searching in Data Marketplace	73
Previewing assets in Data Marketplace	90
Creating personal and group-specific filters in Data Marketplace (Beta)	98
About saved filters	98
Personal filters in Data Marketplace (Beta)	100
Preconfigured filters for user groups in Data Marketplace (Beta)	104
Troubleshooting Data Marketplace	108
You don't find the asset you are looking for	108
You see fewer or more search results in the All filter tab compared to other out-of-the-box filter tabs	108
You don't see your recent searches or recently visited assets	109
The asset preview doesn't show all columns or report attributes	109
New data consumers don't receive discovery data	109
You don't see a specific filter in the Filters pane	109
You cannot edit the filter tabs	110
You don't see the actions (workflows) in the asset preview after they were enabled in the Data Marketplace settings	110
You don't know where the actions you selected are displayed	110
The workflow does not start	111
You don't find assets based on relations that end with a specific attribute	111

You get an error message when you activate the Data Discovery Modules option	111
You get an error message when you want to add, update or delete a relation index	112
How can you test relations-based search?	112
(Beta) You get an error message when you assign a preconfigured filter to a user group	112

About Data Marketplace

Data Marketplace is a dedicated search portal in Collibra Data Intelligence Cloud that makes data discovery easy for all people in the organization.

- Data consumers, such as analysts, data scientists and data engineers, can use the user-friendly search interface to browse, preview, and request the data they need.
- Administrators can:
 - Make only the relevant and high quality data available for organization-wide use.
 - Create a tailored search experience.
 - Encourage interaction via contextualized workflows.



Data Marketplace allows you to find relevant and high quality data more easily thanks to the following features:

1. Data Marketplace searches only for data within the Data Marketplace scope

Data Marketplace searches only for some specific asset types, such as data sets, reports and tables. Administrators can [extend and refine this scope](#) based on asset type, status and organization (communities and domains).

2. Data Marketplace makes searching for data easier

- Data Marketplace can [search for data based on specific relations between assets](#). For example, when searching for a column name, you can find the data sets to which the column is added.
- [Filters](#) allow you to refine the search results.
- [Filter tabs](#) allow you to quickly apply frequently used filters.
- Data Marketplace can guide you to the information you might be looking for via [search suggestions](#).

3. Data can be opened in preview

The [asset preview](#) shows the asset information such as the details, responsibilities, privacy restrictions, and related assets. The asset preview allows for investigating the data without losing track of the search results. You have quick and easy access to recently visited assets, common actions, and so on to interact with the data. Administrators can [define which actions](#) (workflows) must be available in the various pages in Data Marketplace.

Data Marketplace compatibility


Data Marketplace is available only on Collibra Data Intelligence Cloud, and is not certified for FedRAMP.

[Administrators](#) can enable Data Marketplace from version 2022.08. In environments installed after 2022.11, the main Data Marketplace setting is enabled by default. You can [enable additional settings](#) to activate specific features.

Administrators can [optimize](#) the [out-of-the-box experience](#).

Data Marketplace permissions

In Data Marketplace, you can be a data consumer or an administrator.

	Required global role or permission	Someone with this role or permission can
Data consumer	<p>You have a role with the Data Marketplace global permission, for example the Data Marketplace, Catalog, or Catalog Author global role.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note</p> <ul style="list-style-type: none"> If you have the Data Marketplace global role, you can access only Data Marketplace from the Applications menu. If you have the Catalog role, you can access both Data Marketplace and Catalog from the Applications menu. </div>	<ul style="list-style-type: none"> Access to Data Marketplace from the Applications icon . Search for assets and access the asset preview, if you have view permission on the asset. Start the actions that have been assigned to Data Marketplace by the administrator. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note Classification still requires the Catalog permission. Users with only Data Marketplace permission don't see the classification tags in the Auto-generated abstract or the Column browser in asset preview.</p> </div>

	Required global role or permission	Someone with this role or permission can
Administrator	You need the SysAdmin global role .	<ul style="list-style-type: none"> • Same as Data consumer. • In Collibra, access Data Marketplace-specific settings to configure the scope, filters, actions, landing page, and extra options. • In Data Marketplace, access the configuration of the tabs.

Data Marketplace limitations and guidelines

For data consumers

- It is possible that fewer or more search results appear in the **All** filter tab compared to other filter tabs. For information, go to [Data Marketplace troubleshooting](#).
- In the [asset preview](#), the information in the **Details** tab shows the asset attributes in different order than in Collibra.
- Some asset previews contain a **Columns** or **Report Attributes** tab, which shows a table with available columns or attributes in the asset. The table can show up to 1,000 assets. For more information, go to [Data Marketplace troubleshooting](#).
- The [Filters](#) pane sometimes displays a possible filter option multiple times. Currently, the filter options are grouped based on ID, and not on name.
- It is possible that when you deselect a filter option, the option is duplicated instead.
- If the Data Basket is enabled in Data Marketplace, it is possible that the **Add to Data Basket** button is available in Collibra for the asset but not in Data Marketplace. This is because Data Marketplace does not take child asset page definitions into account. For more information on the data basket, go to [Requesting access to data](#). For more information, go to [Data Basket](#).

For administrators

- [Scopes](#) are not taken into account in Data Marketplace.
- [Workflows](#) that start other workflows will not open the follow-up task automatically in Data Marketplace. You can still access the task from the [Tasks indicator](#) in the top bar.

- Currently, you cannot use workflows created in Workflow Designer (Beta), in Data Marketplace. For information about Workflow Designer, go to [Workflow Designer](#).
- [Relation-based search and filters: Limitations and guidelines](#)

You can also check [Troubleshooting Data Marketplace](#).

Enable Data Marketplace

To start using the out-of-the-box Data Marketplace experience, several settings can be enabled.

In new environments, the main Data Marketplace setting is enabled by default. You can enable additional settings to activate specific features.

Before you begin

- [The Settings landing page is enabled.](#)
- Ensure that the [Frontend enabled](#) setting in the **Beta features** section is enabled.


Required permissions

You have the **ADMIN** or **SUPER** role in Collibra Console.

Steps

1. Open the DGC service settings for editing:
 - a. Open Collibra Console.
 - » Collibra Console opens with the **Infrastructure** page.
 - b. In the tab pane, expand an environment to show its services.
 - c. In the tab pane, click the Data Governance Center service of that environment.
 - d. Click **Configuration**.
 - e. Click **Edit configuration**.

2. In the **Data Marketplace** section, enable the **Data Marketplace** setting:

Setting	Description
Data Marketplace	<ul style="list-style-type: none"> <li data-bbox="499 371 1350 495">○ ✓ True (default): Data Marketplace is enabled. Anyone with the required permissions can use or configure the Data Marketplace application from the Applications icon . <div data-bbox="536 506 1422 703" style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p data-bbox="584 539 1366 674">Note When Data Marketplace is enabled and you reindex Collibra completely, the relations are also reindexed automatically. You don't need to start it manually. However, reindexing the relations will not reindex Collibra completely.</p> </div> <ul style="list-style-type: none"> <li data-bbox="499 741 1075 775">○ ✗ False: Data Marketplace is not enabled. <p data-bbox="491 786 1350 853">After you enable this setting, reindex Data Marketplace relations or reindex Collibra completely.</p> <div data-bbox="496 880 1422 1043" style="background-color: #f0f0f0; padding: 10px; margin: 10px 0;"> <p data-bbox="544 913 1366 1010">Note In new Collibra environments, this setting is enabled by default. In upgraded Collibra environments, the previous status of this setting is retained.</p> </div>

3. Optionally, enable the following settings in **Search index configuration**:

Setting	Description
Relation-based search	<ul style="list-style-type: none"> <li data-bbox="501 371 1428 533">○ ✓ True (default): The Data Marketplace search considers certain assets and relation types between assets. As a result, your search results not only include assets that directly match the search criteria, but also assets that match the criteria through specific relation types. <div data-bbox="533 539 1428 734" style="background-color: #f0f0f0; padding: 5px; margin-top: 5px;"> <p data-bbox="580 568 1374 701">Example A column named Order is included in a data set named Customer. If the relation-based search is enabled and you search for Order in Data Marketplace, then the data set Customer appears in the search results because the data set contains this column.</p> </div> <div data-bbox="533 763 1428 927" style="background-color: #f0f0f0; padding: 5px; margin-top: 5px;"> <p data-bbox="580 792 1353 898">Tip For more information about this feature and the default relation types, go to Filtering and searching based on relations in Data Marketplace.</p> </div> <li data-bbox="501 965 1428 1043">○ ✗ False: The Data Marketplace search results do not consider relations. <p data-bbox="491 1055 1366 1122">After you enable this setting, you must reindex Data Marketplace relations or reindex Collibra completely.</p> <div data-bbox="496 1144 1428 1308" style="background-color: #f0f0f0; padding: 5px; margin-top: 5px;"> <p data-bbox="541 1173 1366 1279">Note In new Collibra environments, this setting is enabled by default. In upgraded Collibra environments, the previous status of this setting is retained.</p> </div>

Setting	Description
Asynchronous indexing	<ul style="list-style-type: none"> <li data-bbox="501 327 1398 488">○ ✓ True (default): Enable asynchronous indexing. The Search service handles changes to your environment in batches. This ensures optimal performance, especially after big changes to your environment, such as importing a lot of assets. <div data-bbox="533 495 1417 728" style="border-left: 2px solid #92D050; padding-left: 10px; margin-top: 10px;"> <p data-bbox="587 528 624 562">Tip</p> <ul style="list-style-type: none"> <li data-bbox="592 562 1358 629">■ If you want to use Automatic relation indexing, this setting must be True. <li data-bbox="592 629 1337 696">■ After you have enabled this setting, stop and restart your environment, and reindex Collibra completely. </div> <ul style="list-style-type: none"> <li data-bbox="501 768 1305 801">○ ✗ False: Changes to your environment are processed immediately. <div data-bbox="496 831 1417 958" style="border-left: 2px solid #D9534F; padding-left: 10px; margin-top: 10px;"> <p data-bbox="544 864 1369 931">Warning This setting has an impact on your entire Collibra environment, not only to Data Marketplace.</p> </div> <div data-bbox="496 992 1417 1151" style="border-left: 2px solid #A9A9A9; padding-left: 10px; margin-top: 10px;"> <p data-bbox="544 1025 1362 1126">Note In new Collibra environments, this setting is enabled by default. In upgraded Collibra environments, the previous status of this setting is retained.</p> </div>

Setting	Description
Automatic relation indexing	<p>This setting is specific to Data Marketplace.</p> <p>This setting keeps Data Marketplace up to date if relations between assets are created, updated, or removed.</p> <div data-bbox="496 472 1418 638" style="background-color: #f0f0f0; padding: 5px;"> <p>Example If the relation between asset A and asset B changes and this relation is used in relation-based filters or relation-based search, then the Data Marketplace search considers this change.</p> </div> <ul style="list-style-type: none"> <li data-bbox="496 674 1418 920">○ ✓ True: Automatically index certain relation type changes between assets so that the relation information remains consistent between Collibra and Data Marketplace. The relation types that are considered are the relation paths used by relation-based search and filters. If such a relation type between assets changes, the change is reflected in the search index after some time. <div data-bbox="536 927 1418 1093" style="background-color: #f0f0f0; padding: 5px;"> <p>Note Collibra does not automatically reindex relations between assets for relation paths that end with an attribute. You need to manually reindex the relations.</p> </div> <div data-bbox="536 1128 1418 1330" style="background-color: #f0f0f0; padding: 5px;"> <p>Warning If you select True, you must also enable the Asynchronous indexing setting because every relation change results in an event that is processed via asynchronous indexation.</p> </div> <div data-bbox="536 1364 1418 1529" style="background-color: #f0f0f0; padding: 5px;"> <p>Tip For more information about this feature and the default relation types, go to Filtering and searching based on relations in Data Marketplace.</p> </div> <ul style="list-style-type: none"> <li data-bbox="496 1570 1418 1727">○ ✗ False (default): Changes to relations are not automatically indexed. This can cause inconsistencies between Collibra and Data Marketplace. You can, however, manually reindex Data Marketplace relations.

4. Optionally, enable the following setting in **Beta Features**:

Data Marketplace Advanced Filter Settings	<p>Enable this setting to try out saving personal filters and preconfigured filters for user groups in Data Marketplace.</p> <ul style="list-style-type: none"> ○ ✓ True: The advanced filters can be used in Data Marketplace. <ul style="list-style-type: none"> ■ Data consumers can save a set of filters that they use frequently as a personal filter. ■ Data Marketplace administrators can save a set of filters and make it available only to a specific user group or to all user groups. ○ ✗ False: (default): The beta feature is not enabled. <ul style="list-style-type: none"> ■ Data consumers cannot create personal saved filters. ■ Data Marketplace administrators can save a set of filters and make it available to all user groups.
---	--

5. Click **Save all**.
6. If you have enabled Asynchronous indexing, stop the environment and start the environment.
7. If you have enabled the Data Marketplace, Asynchronous indexing, or Relation-based search setting, [reindex Data Marketplace relations](#) or [reindex Colibra completely](#).

What's next?

The out-of-the-box Data Marketplace experience
[Optimize Data Marketplace: Overview](#)

The out-of-the-box Data Marketplace experience

After Data Marketplace is [enabled](#), Data Marketplace is ready for use based on the out-of-the-box configuration. This includes the Data Marketplace [scope](#), [filters](#), [filter tabs](#), [actions](#), [landing page data](#), and [search suggestions](#). Optionally, administrators can [optimize](#) the Data Marketplace experience.

Data Marketplace scope

By default, Data Marketplace finds assets of all asset types with any status, anywhere in the organization.

Administrators can [configure the Data Marketplace scope](#).

Filters

By default, Data Marketplace offers the following filters in the **Filters** pane.

Note Some of these filters rely on [relation path indexing](#). If your Collibra environment doesn't use one or more of the indexed relations, the out-of-the-box relation-based filters don't work.



Filter name	Description	Uses relations
Business Asset	<p>Business Asset refers to the business assets that are related to the data, such as <code>Customer Phone Number</code> or <code>Customer Order Number</code>.</p> <p>Tip For a detailed narrative on the differences between business terms, data domains and data concepts, see Conceptual data layer versus the Business Glossary.</p>	Yes
Certified	<p>This filter limits your search results to data that has been certified, meaning approved, endorsed or guaranteed.</p> <p>Tip For complete information on certifying reports, see Trusted Business Reporting.</p>	No
Data Domain	<p>Data Domain refers to a high-level conceptual category to which the data belongs, such as <code>Customer</code> or <code>Order</code>.</p> <p>Assets of this type:</p> <ul style="list-style-type: none"> • Are high-level, theoretical representations of your data. • Represent the structure of concepts in data environments. • Contain all the different nuances of corresponding business terms. <p>Important To benefit from this, your data structure must follow the Data Stewardship metamodel. See Conceptual data layer.</p>	Yes

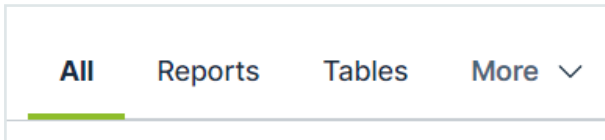
Filter name	Description	Uses relations
Data Concept	<p>Data Concept refers to the lower-level conceptual category to which the data belongs, such as <code>Phone Number</code> or <code>Country</code>.</p> <p>Assets of this type:</p> <ul style="list-style-type: none"> • Are high-level, theoretical representations of your data. • Represent an aspect of one or more data domains. • Define a context-independent representation of the structure of an organization's data. <div style="border-left: 2px solid #FFD700; padding-left: 10px; margin-top: 10px;"> <p>Important To benefit from this, your data structure must follow the Data Stewardship meta model. See Conceptual data layer.</p> </div>	Yes
Source System	Source System refers to the technology asset that stores the data, like HR Cloud. Via this filter, you can limit the search results to assets that exist in specified systems.	Yes
Data Source	Data source limits the search results to assets that exist in specified data sources.	Yes
Rating	Rating is a colleague's perception of the data's usefulness and quality.	No
Tags	Tag is a label that adds extra context to an asset.	No
Status	Status refers to which governance process stage the asset is in, like <code>Approved</code> or <code>Candidate</code> .	No
Asset Type	Asset Type refers to the kind of data you are looking for, like <code>data set</code> , <code>report</code> , or <code>table</code> .	No

Administrators can [configure the filters](#). They can, for example, make the [Organization filter](#) visible, which allows to refine the search results based on the communities and domains in the Data Marketplace scope. Administrators can also [create new relation-based filters](#).

Filter tabs

Data Marketplace shows tabs above the search results.

The tabs allow to apply a saved filter. By default, Data Marketplace shows out-of-the-box preconfigured filters.



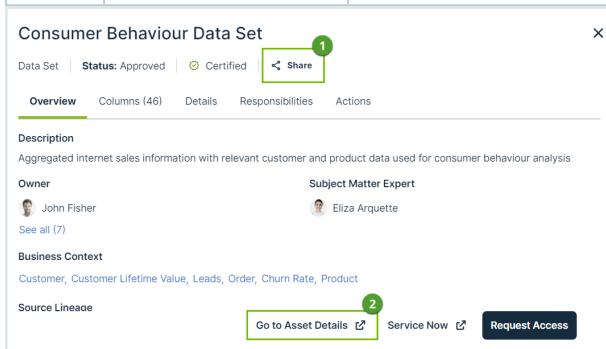
Out-of-the-box preconfigured filter	Description
All	No filters are applied. All search results in the Data Marketplace scope to which you have View permissions are listed. This preconfigured filter can't be changed.
Tables	Only assets of the type Table or an out-of-the-box child asset type of Table are listed in the search results.
Data Sets	Only assets of the type Data Set or an out-of-the-box child asset type of Data Set are listed in the search results.
Reports	Only assets of the type Report or an out-of-the-box child asset type of Report are listed in the search results.

Administrators can [change the out-of-the-box preconfigured filters and add additional ones](#). If the setting [Data Marketplace Advanced Filter Settings \(Beta\)](#) is enabled, administrators can also create preconfigured filters for specific user groups, and data consumers can create their own personal saved filters.

Actions

By default, data consumers can share a link to an asset or open the asset in Collibra from in the [asset preview](#).

Action name	Description
1 Share	This action allows data consumers to get a link to the asset preview.
2 Go to Asset Details	This action allows data consumers to open the asset page of the asset.



Administrators can [make more actions \(workflows\) available](#) in various places in Data Marketplace and can [make the shopping basket available](#) from the asset preview.

Landing page options

The [landing page](#) consists of multiple sections.

- By default, the Data Marketplace landing page shows Recent searches, Recent data visits, and What's New. Administrators can make [Popular Data](#), [Recent Data Visits](#), and [Recommended Data](#) available instead.
- Administrators can also change the [introduction text](#) and [add quick links](#) to the landing page.

Search suggestions

By default, no search suggestions are provided when data consumers start entering search terms. Administrators can [enable search suggestions](#).

Configuring Data Marketplace

After [Data Marketplace is enabled](#), Data Marketplace is ready for use based on the [out-of-the-box experience](#).

Optionally, [Data Marketplace administrators](#) can [optimize](#) the Data Marketplace experience.

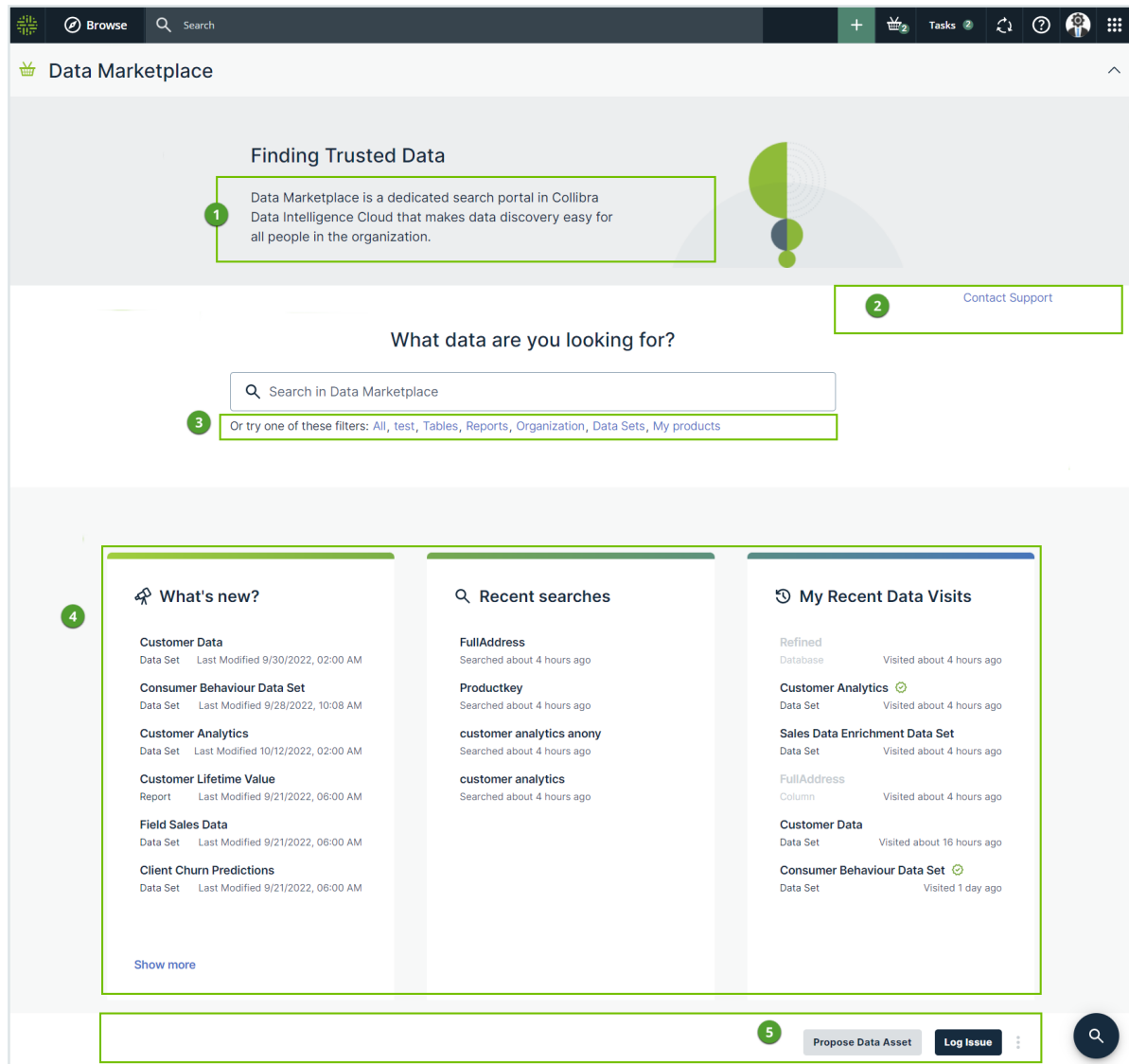
Configure Data Marketplace: Overview	18
Configure the Data Marketplace scope	22
Configure the Data Marketplace landing page	25
Make actions available in Data Marketplace	27
Configure the data basket and search suggestions in Data Marketplace	32
Define who must receive configuration update notifications	33
Configure the filters in Data Marketplace	35
Filtering and searching based on relations in Data Marketplace	36
Define the filter tabs in Data Marketplace	61
Reindex Data Marketplace relations	66



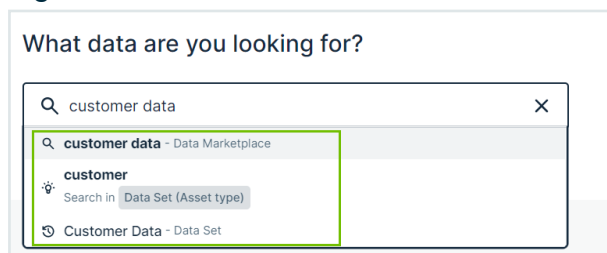
Configure Data Marketplace: Overview

What can you configure?

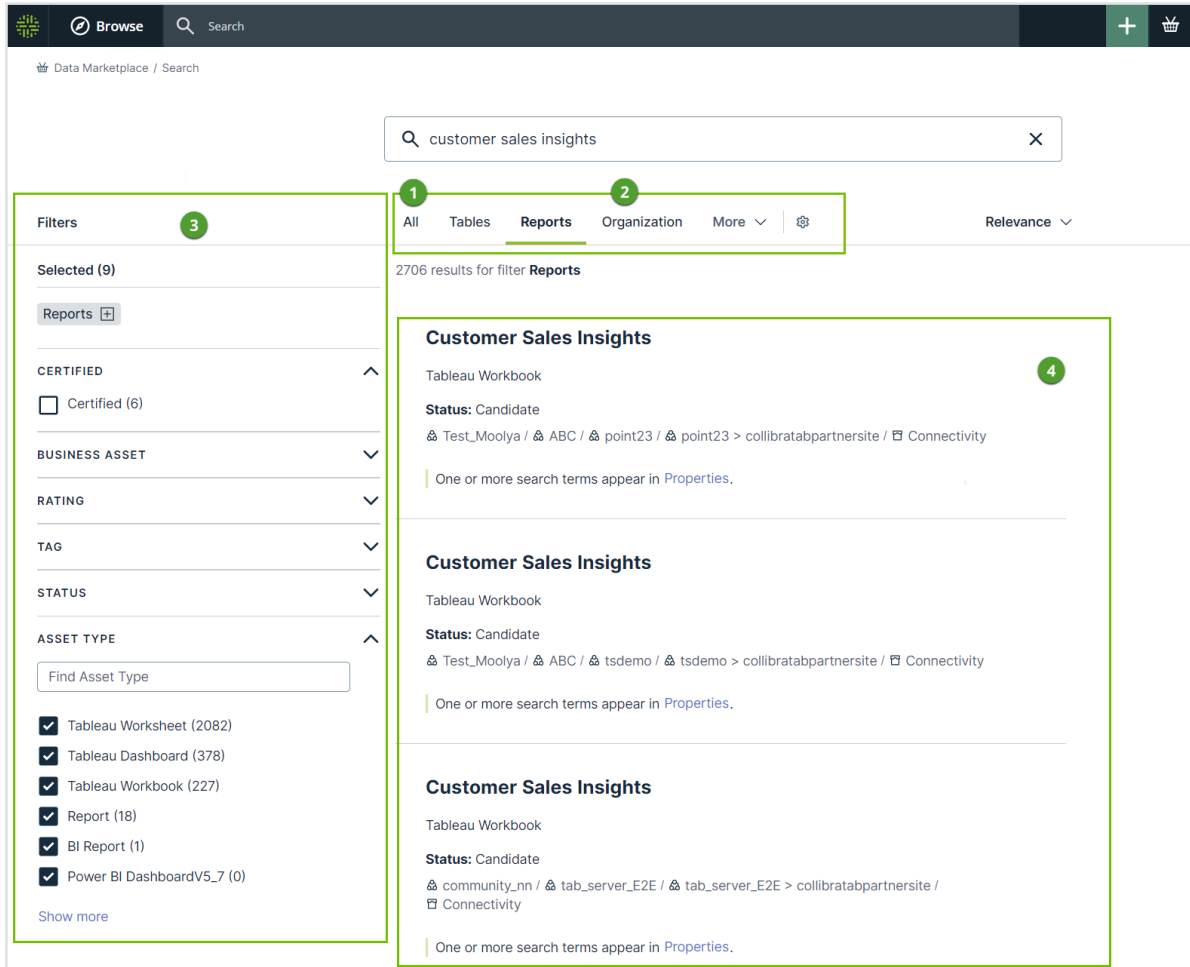
- You can define who has access to Data Marketplace. Go to [Data Marketplace permissions](#).
- In the Data Marketplace landing page, you can configure the [introduction text](#) (1), the [quick links](#) (2), the [links to preconfigured filters](#) (3), whether [discovery data must be available](#) (4), and the [actions](#) (5).



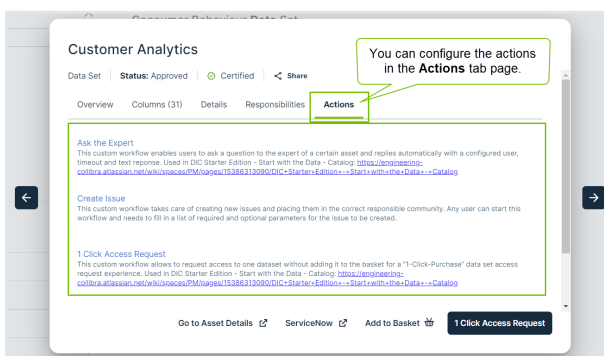
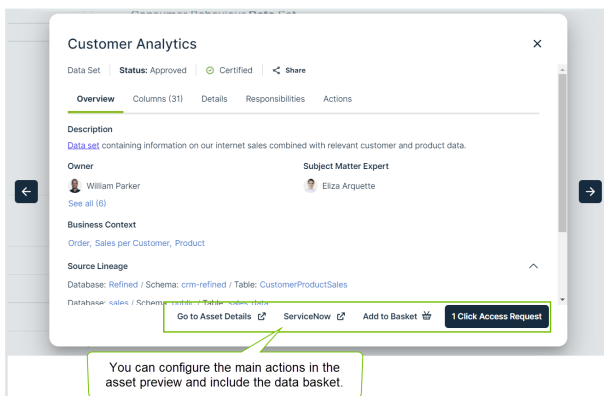
- You can define whether **search suggestions** are provided once people start searching for data.



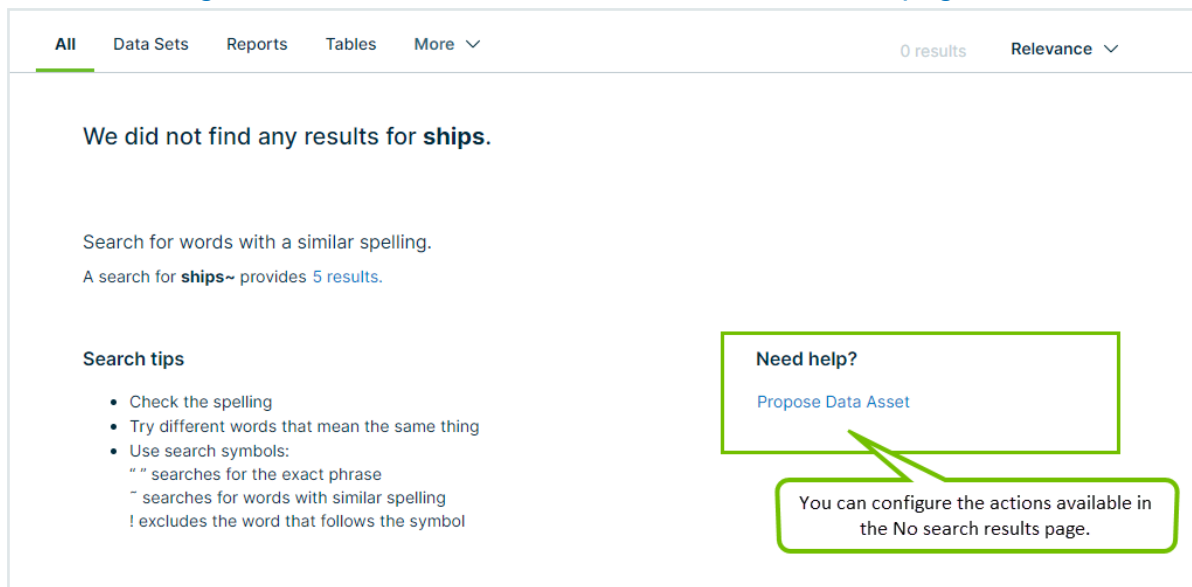
- You can configure the **scope**(1), **filter tabs** (2), **filters** (3) and **search based on relations** (4).



- You can configure the **actions available in the asset preview** and define whether data consumers can **add assets to the data basket** from Data Marketplace.



- You can configure the actions available in the No search results page.



- You can define who needs to receive email notifications about automatic updates to the Data Marketplace configuration.

How do you configure Data Marketplace?

Step	Description
1	Optionally, change the Data Marketplace scope
2	Optionally, change the landing page.
3	Optionally, make actions available in Data Marketplace

Step		Description
4	Optionally, enable the use of the data basket and search suggestions .	You can activate search suggestions and make the shopping basket available for the data consumers.
5	Optionally, configure the filters in Data Marketplace	By default, all out-of-the-box filters that apply to the search results are available to data consumers. You can choose the filters that must be available in the Filters pane. If needed, you can also create custom filters based on relations .
6	Optionally, configure the filter tabs in Data Marketplace	By default, all out-of-the-box filter tabs are available in the search results and on the landing page. You can configure the filter tabs you need.
7	Optionally, define the user group that needs to receive email notifications about automatic updates to the Data Marketplace configuration .	
8	Optionally, optimize the search index.	The Collibra search index settings have an impact on the Data Marketplace experience. You can use these settings to further optimize the experience. Note that changing these settings has an impact on Collibra as a whole, not only on Data Marketplace. For information on the Data Marketplace-specific settings such as relation-based search, go to Enable Data Marketplace in your environment .

Configure the Data Marketplace scope

As an administrator, you can customize the [out-of-the-box scope](#) to expose exactly what makes sense for your data consumers. Which data is relevant? Which data meets your quality or governance standards?

You can configure the scope based on [asset type](#), [status](#), and [organization](#). Data Marketplace takes all three scope definitions into account. If you choose to include only

Reports as asset type, Approved as status and Marketing as organization, you get only results that meet all these conditions.

Examples

Example

In your environment, data consumers must request access on data set and report level. As a result, you want to only show Approved data sets and reports in Data Marketplace.

To do this, you configure the following scope:

- Asset types: Data Set and Report.
- Status: Approved.
- Organization: all

If you also enable [Relation-based search](#), then data consumers can still use column names as search terms. In that case, Data Marketplace shows the related data set and reports in the search results instead of the Column assets.

Example

In your environment, you keep track of approved marketing data in a specific community "Marketing-Approved". As a result, you want to only show data of this community in Data Marketplace.

To do this, you configure the following scope:

- Asset types: all
- Status: all
- Community: Marketing-Approved.

Before you begin

- [Data Marketplace is enabled.](#)
- [The Settings landing page is enabled.](#)



Required permissions

You are an [administrator in Data Marketplace.](#)

Steps

Important

- If you create a new asset type, status, community, or domain in Collibra, and you want it to be found in Data Marketplace, you have to select it in the Data Marketplace scope.
- If you delete an asset type, status, community, or domain in Collibra, and it was part of the Data Marketplace scope, it will no longer be visible in the Data Marketplace scope list but will still be active in Data Marketplace for some time. Data Marketplace checks the configuration against Collibra on a daily basis and updates the configuration if needed at that time. For more information, go to [Automatic configuration updates](#).

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Scope**.
3. If you want to limit the search results to assets of specific asset types, select the required asset types in the **Asset types** tab page.
4. If you want to limit the search results to assets with specific statuses, select the required [statuses](#) in the **Statuses** tab page.

If you don't define a scope, data consumers can find assets with any statuses via Data Marketplace, including Candidate, Pending, and so on.
5. If you want to limit the search results to assets in specific communities and domains, select the required communities and domains in the **Organization** tab page.

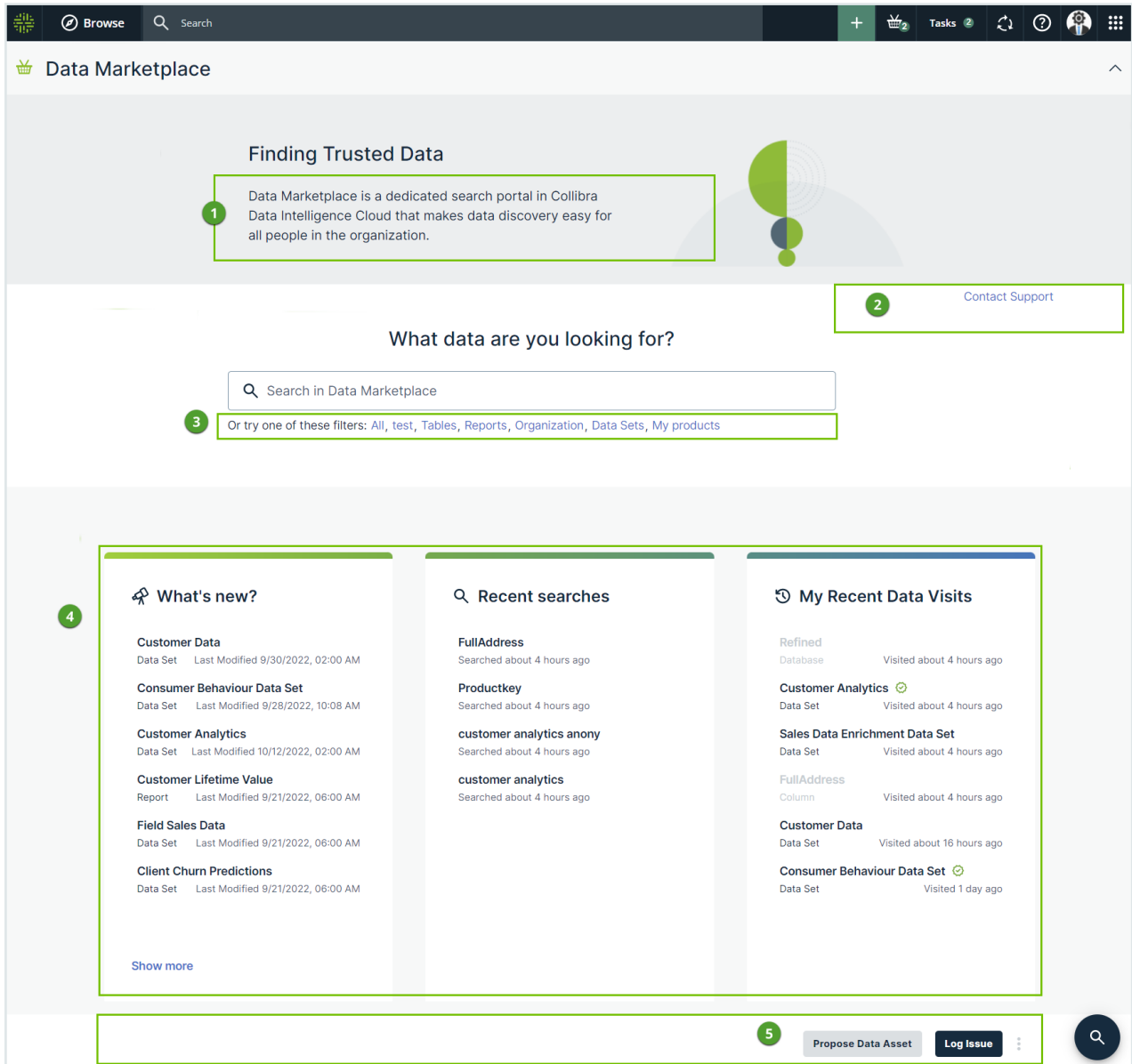
If you don't define a scope, Data Marketplace searches all communities and domains.
6. Click **Save**.

What's next?

[Configure the Data Marketplace landing page](#)

Configure the Data Marketplace landing page

As an administrator, you can optimize the [landing page](#). You can configure the introduction text (1), the quick links (2), the links to preconfigured filters (3), whether discovery data must be available (4), and the actions (5).





Before you begin

- [Data Marketplace is enabled.](#)
- [The Settings landing page is enabled.](#)

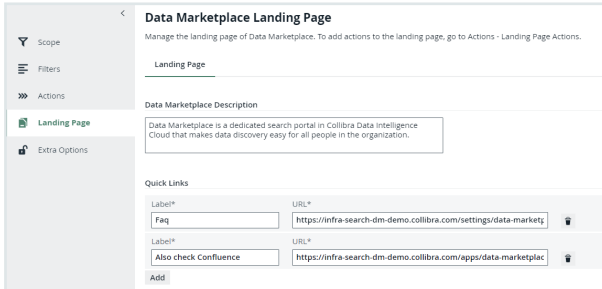
Required permissions

You are an [administrator in Data Marketplace.](#)

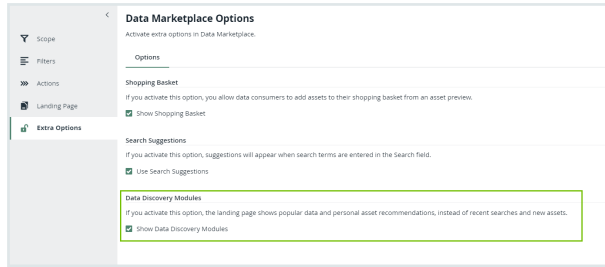
Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. To change the introduction text or add links:
 - a. In the **Data Marketplace** section, click **Landing Page**.
 - b. In **Data Marketplace Description**, change the text.
 - c. In **Quick Links**, add a **Label** and **URL** for the link you want to add.

You can add a maximum of three links.



- d. Click **Save**.
3. To show Popular Data, Recent Data Visits, and Recommended Data instead of Recent searches, Recent data visits, and What's New on the landing page:
 - a. In the **Data Marketplace** section, click **Extra Options**.
 - b. Select the check box **Show Data Discovery Modules**.



c. Click **Save**.

Note

Setting "Collect Application Usage Data" has an impact on the availability of popular and recommended data. This setting is enabled by default. Because this setting is not accessible in cloud environments, [create a support ticket](#) should you want to change this setting.

4. To add preconfigured filters, go to [Configure filter tabs](#).
5. To add specific actions to the landing page, go to [Make actions available in Data Marketplace](#).

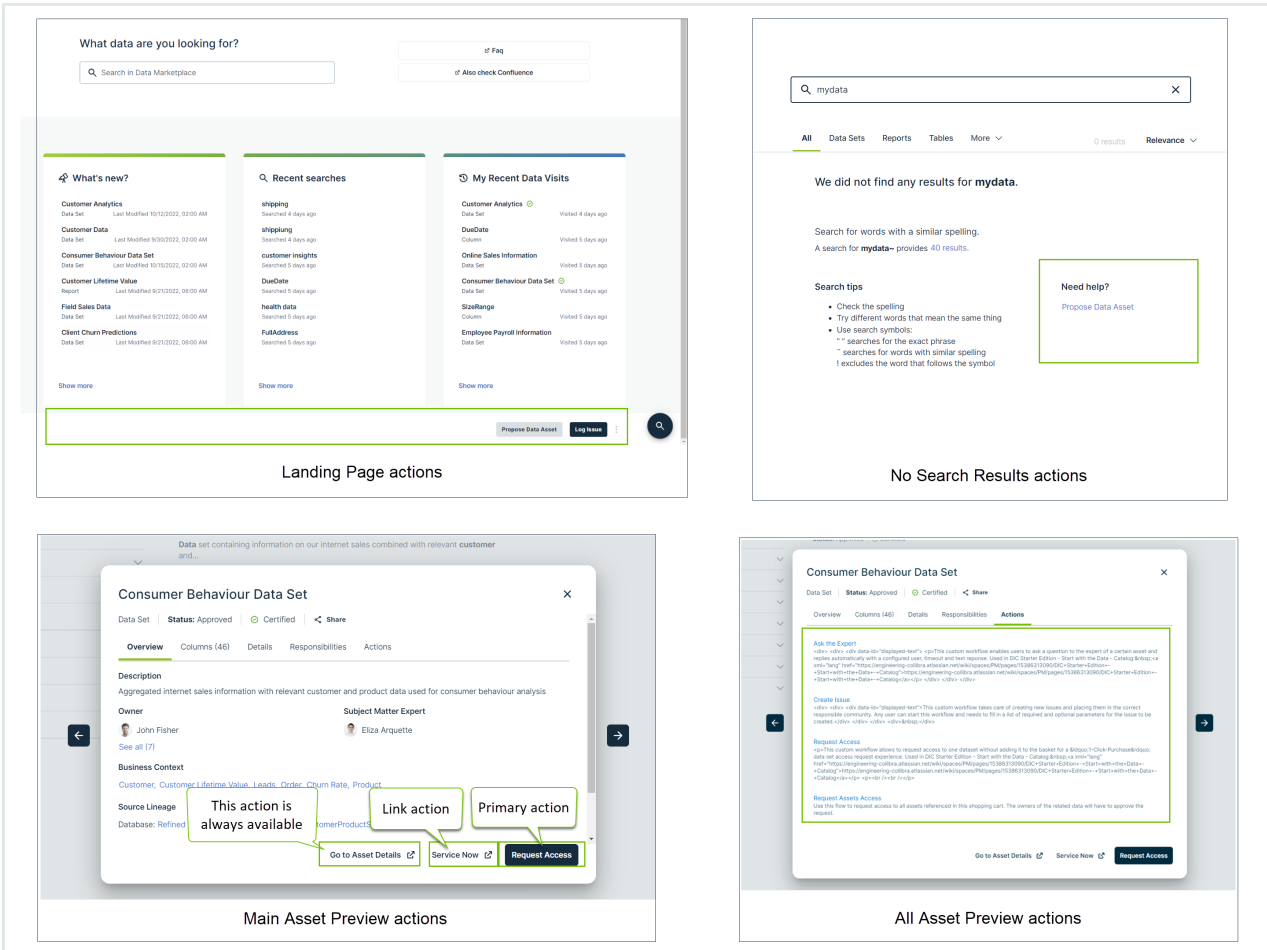
What's next?

- [Configure filter tabs](#)
- [Make actions available in Data Marketplace](#)

Make actions available in Data Marketplace

Administrators can add and remove actions. Actions in Data Marketplace start workflows. They can be made available in the following locations:

- At the bottom of the Data Marketplace [landing page](#).
- In the **Need help?** section if we cannot find any search results.
- In the primary action area, at the bottom of an [asset preview](#).
- In the **Actions** tab page in an [asset preview](#).



Important

- Currently, you cannot use workflows created in Workflow Designer (Beta), in Data Marketplace. For information about Workflow Designer, go to [Workflow Designer](#).
- Data Marketplace shows the **Start Label** of the workflow as the action's button.
- The out-of-the-box Request Access workflow assumes the request starts from the data basket. You cannot use it as a primary action or asset action in Data Marketplace without customizations.
- Only the initial workflow opens in Data Marketplace. If a workflow starts another workflow, the follow-up workflow doesn't open in Data Marketplace.
- Actions are based on workflows and their configuration. Workflows can be configured to only be available for certain asset types or users, and they can be paused. If data consumers don't see a specific action, the workflow configuration may give an indication on the reason.



Before you begin

- [Data Marketplace is enabled.](#)
- [The Settings landing page is enabled.](#)

Required permissions

You are an [administrator in Data Marketplace.](#)

Steps to add actions in the Data Marketplace landing page



1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Actions**.
3. Click **Landing Page Actions**.
4. Select the actions.

Important

You can select only global workflows for which the option **Show in global create** has been selected.

5. Click **Save**.

Steps to add actions in the **Need help?** section when no search results are available

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Actions**.
3. Click **No Search Results Actions**.

4. Select the actions.

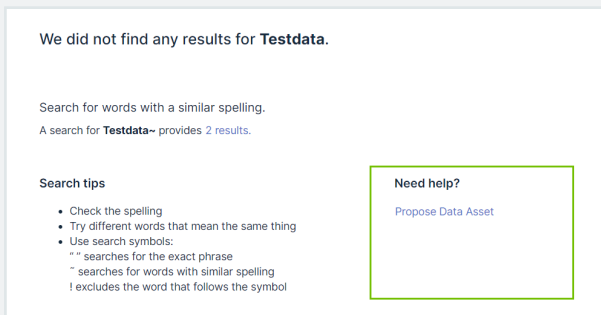
Important

You can select only global workflows for which the option **Show in global create** has been selected.



5. Click **Save**.

Example

In this example, the **Propose new data set** workflow is visible when no search results are found.



Steps to add the main actions in the asset preview

1. On the main menu, click , and then click  **Settings**.
» The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Actions**.
3. Click **Main Asset Preview Actions**.
4. In **Default Primary Action**, select the default workflow to show as primary action in the asset preview.
Select **None** if you don't want to show a primary action.
5. In **Primary Action per Asset Type**, click **Add** to define a specific workflow for a specific asset type.
You can, for example, add a different workflow for asset type Data Set and asset type Report.
6. If you want to add a link to an external system from the asset preview, enter the

Action Label and the **System URL** in the **Link** section.

7. Click **Save**.

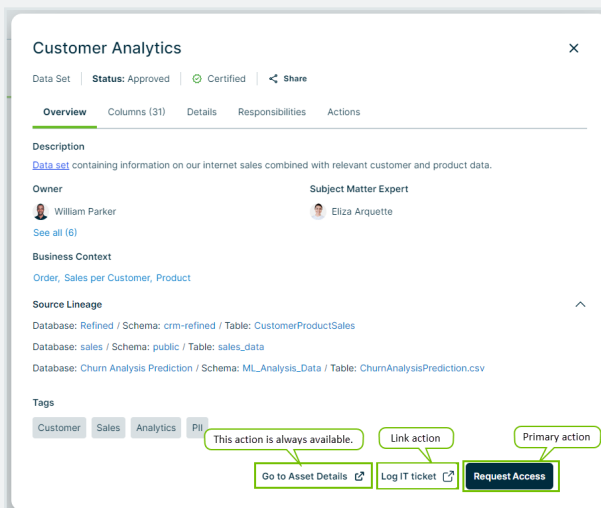
Important

- You can select only workflows that apply to assets.
- If a data consumer doesn't have access to the workflow or the workflow doesn't apply to the asset's asset type, the action will not appear in the asset preview.



Example

In this example, **Request Access** is the primary action and **Log IT ticket** is the link in the [asset preview](#).

You cannot customize the **Go to Asset Details** action.



Steps to add actions in the **Actions** tab page in the asset preview

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Actions**.
3. Click **All Asset Preview Actions**.

4. Select the actions.

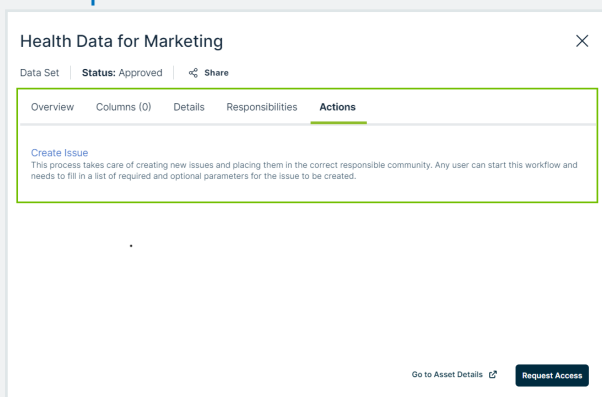
Important

- You can select only workflows that apply to assets.
- If a data consumer doesn't have access to the workflow or the workflow doesn't apply to the asset's asset type, the action will not appear in the asset preview.

5. Click **Save**.

Example

In this example, the Create Issue workflow is available in the **Actions** tab page of an [asset preview](#).



What's next?

[Configure the filters in Data Marketplace](#)

Configure the data basket and search suggestions in Data Marketplace



Before you begin

- [Data Marketplace is enabled.](#)
- [The Settings landing page is enabled.](#)

Required permissions

You are an [administrator in Data Marketplace](#).

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Extra Options**.
3. Select the check box **Show shopping Basket** to include the data basket button at the bottom of the [asset preview](#), in the Main actions section.

Note

If the Data Basket is enabled in Data Marketplace, it is possible that the **Add to Data Basket** button is available in Collibra for the asset but not in Data Marketplace. This is because Data Marketplace does not take child asset page definitions into account. For more information on the data basket, go to [Requesting access to data](#).

4. Select the check box **Search Suggestions** to provide [suggestions](#) when data consumers enter search terms.
5. Click **Save**.

What's next?

[Continue the Data Marketplace configuration](#)

Define who must receive configuration update notifications

About Data Marketplace notifications

On a daily basis, the Data Marketplace configuration is checked against the Collibra configuration and is automatically updated if needed. The daily synchronization looks at changes in the Operating Model and deletions of, for example, workflows, statuses,

communities, and assets in Collibra, and updates the Data Marketplace scope and actions. In a later stage, the daily synchronization will also update the filters.

Administrators can define a user group to receive an email notification about the automatic changes. The email provides an overview of the removed Data Marketplace configuration and includes links to possible Data Marketplace configuration areas to verify.

Example

If a user group has been deleted in Collibra, the daily check will automatically update the Data Marketplace configuration to reflect that change.



Before you begin

- [Data Marketplace is enabled.](#)
- [The Settings landing page is enabled.](#)

Required permissions

You are an [administrator in Data Marketplace.](#)

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Extra Options**.
3. In the **Notifications on Automatic Updates** section, select the user group who needs to receive the notification about the automatic updates to the Data Marketplace configuration.
4. Click **Save**.

What's next?

You can continue the [Data Marketplace configuration](#)

Configure the filters in Data Marketplace

By default, [out-of-the-box filters](#) are available in Data Marketplace.

Administrators can change the filters and the order in which they appear.

Example

By configuring the filters, you can ensure the following filters are displayed and in a specific order:

- Organization: this means communities and domains
- Asset Type
- Certified
- Status
- Data Domain

Tip

Only filters that can apply to the search results will be displayed to data consumers.



Before you start

- [Data Marketplace is enabled.](#)
- [The Settings landing page is enabled.](#)

Required permissions

You are an [administrator in Data Marketplace](#).

Steps

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Filters**.
 - » The **Management** tab page appears and shows the filters that are available in Data Marketplace.
 - The list shows all available filters.
 - The **Filters** pane in Data Marketplace uses the order of this list.

3. To show a filter, select the **Is Visible** checkbox.
To hide a filter, clear the **Is Visible** checkbox.
To move a filter, use the \oplus icon to drag and drop it in the desired location.

Note If you make the [Organization filter](#) visible, data consumers can refine the search results based on communities and domains defined in the Data Marketplace [scope](#) and that are relevant for the search results.

4. Click **Save**.

What's next?

You can add custom filters based on relations. For information, go to [Managing relation indexes](#).

[Configure filter tabs in Data Marketplace](#)

Filtering and searching based on relations in Data Marketplace

Data Marketplace provides a unique search experience that can be based on relations between assets.

- Data Marketplace can find search results if they have a specific relation with the search term.
A data set, for example, can show up in the results if the data set contains a column with a name that matches the searched term.
- Data Marketplace can provide filters to refine your search results based on specific relations.
Next to filters based on asset type, status, tags, creator, modification and creation date, you can also filter based on specific relations.
For example, you can filter the results for a specific data domain.

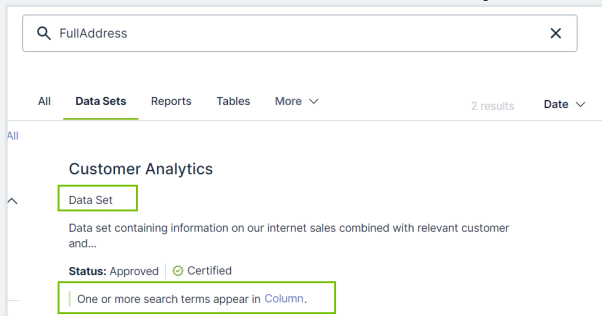
To make filtering and searching based on relations possible, Data Marketplace indexes specific relation paths. The out-of-the-box indexed relation paths are based on the [Guided Stewardship metamodel](#).

How does relation-based search work?

The relation-based search feature is a Data Marketplace-specific feature that allows Data Marketplace to find assets based on specific relations. Search results include assets that have a direct match with the search term, but also assets that are related to the search term via specific relation types and based on the name of the asset.

Example

The "Customer Analytics" data set contains a column with the name "FullAddress'. If relation-based search is enabled and you search for "FullAddress', then the "Customer Analytics" data set appears in the search results because the column name matches the search term and there is a Data set - Column relation between "FullAddress' and "Customer Analytics".



For information on how to enable relation-based search, go to [Enable Data Marketplace](#).

By default, relation-based search uses the following relation paths.

If your Collibra environment does not use one or more of these relation types, the out-of-the-box relation-based search does not work.

Relation paths

Same relation paths as defined for the [relation-based filters](#).

Relation path for Data Set - Column:

- Data Set contains Column

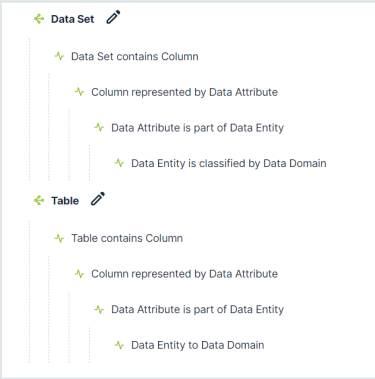
Tip

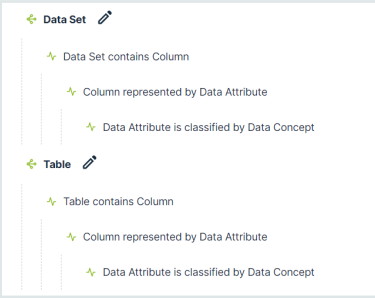
You can create custom relation paths for the relation-based search. For information, go to [Managing relation indexes in Data Marketplace](#).

How do relations in filters work?


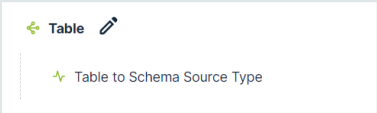
You can refine the search results with filters that can take relations into account. By following a chain of relations, called a relation path, Data Marketplace can find assets that have a direct or indirect relation to a specific asset. For example, the Source system filter restricts the search results to data sets that are stored in a specific system.

The following table shows the relation paths of the out-of-the-box relation-based filters. If your Collibra environment does not use one or more of these relation types, the out-of-the-box relation-based filters do not work.

Filter	Relation paths	
<p>Data Domain</p>	<p>Relation path for Data Domain - Data Set:</p> <ol style="list-style-type: none"> 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain <p>Relation path for Data Domain - Table:</p> <ol style="list-style-type: none"> 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain 	 <pre> graph TD subgraph "Data Set" DS[Data Set] -- contains --> C[Column] C -- represented by --> DA[Data Attribute] DA -- is part of --> DE[Data Entity] DE -- classified by --> DD[Data Domain] end subgraph "Table" T[Table] -- contains --> C2[Column] C2 -- represented by --> DA2[Data Attribute] DA2 -- is part of --> DE2[Data Entity] DE2 -- classified by --> DD2[Data Domain] end </pre>

Filter	Relation paths	
<p>Data Concept</p>	<p>Relation path for Data Concept - Data Set:</p> <ol style="list-style-type: none"> 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept <p>Relation path for Data Concept - Table:</p> <ol style="list-style-type: none"> 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept 	 <p>The diagram illustrates two relation paths. The first path, labeled 'Data Set', shows a sequence of three steps: 'Data Set contains Column', 'Column represented by Data Attribute', and 'Data Attribute is classified by Data Concept'. The second path, labeled 'Table', shows a similar sequence: 'Table contains Column', 'Column represented by Data Attribute', and 'Data Attribute is classified by Data Concept'. Each step is represented by a small icon and text, connected by a vertical line.</p>

Filter	Relation paths	
<p>Business Asset</p>	<p>Relation path for Business Asset - Data Set:</p> <ul style="list-style-type: none"> Data Set is related to Business Asset <p>Relation path for Business Asset - Report:</p> <ul style="list-style-type: none"> Report is related to Business Asset <p>Relation path for Business Asset - Table:</p> <ul style="list-style-type: none"> Table is related to Business Asset <p>Relation path for Business Asset - Table:</p> <ol style="list-style-type: none"> Table contains Column Column is represented by Business Asset 	<div data-bbox="600 322 979 707" style="border: 1px solid #ccc; padding: 10px;"> <ul style="list-style-type: none"> ← Data Set <ul style="list-style-type: none"> ↘ Data Set related to Business Asset ← Report <ul style="list-style-type: none"> ↘ Report related to Business Asset ← Table <ul style="list-style-type: none"> ↘ Table related to Business Asset ← Table <ul style="list-style-type: none"> ↘ Table contains Column <ul style="list-style-type: none"> ↘ Column represented by Business Asset </div>

Filter	Relation paths	
<p>Source System</p>	<p>Relation path for Source System - Data Set:</p> <ul style="list-style-type: none"> Data Set is implemented into Source System <p>Relation path for Source System - Table:</p> <ol style="list-style-type: none"> Table is part of Schema Schema belongs to Technology Asset Technology Asset is grouped by Source System 	
<p>Data Source</p>	<p>Relation path for Data Source - Table:</p> <ul style="list-style-type: none"> Table is part of Schema <p>The data source is an attribute of the Schema asset.</p>	

Tip

You can add custom filters based on relations. For information, go to [Managing relation indexes](#). To watch a video, go to [Example: Create a new relation index for a custom filter](#).

Relation-based search and filters: Limitations and guidelines

- If you don't use the relations of the Stewardship operating model, the out-of-the-box relation indexes used for the relation-based search and out-of-the-box relation-based filters won't work. You will need to create [custom relation indexes](#).
- You can't create more than 20 relation indexes in Data Marketplace.
- When you create a relation index:
 - You can't use special characters like / ? @ [] in the relation index name.
 - You can't add more than four relations to one relation path.
 - Complex relations are not supported as custom relation paths.
 - Only text attributes can be selected as attributes in a relation path.
 - You don't receive a preview of the possible relation path results if the relation path ends with an attribute.
 - HTML-tags are displayed in the preview of the possible relation path results. These HTML-tags may also appear in the filter values.
 - We recommend that you don't create relation indexes with identical relation paths. If they both show up as filters in the **Filters** pane, it will be confusing to your users. Currently, we don't prevent that you create identical relation indexes.
- Relation-based filters also show the asset type's parent as a filter option after relation reindexing.

Example

You select System as the target of a relation path and show it as a relation-based filter. In that case, Data Marketplace will include the following values as filter options:

- the values of asset type System,
- the values of the child asset types of System, if any.
- the Technology asset (because it is the parent asset type of System).

Managing relation indexes in Data Marketplace

The Data Marketplace relation-based search and relation-based custom filters help to optimize the search experience. They allow data consumers to, for example, find data sets by entering business terms. The relation-based search and relation-based filters in Data

Marketplace need indexed relations, meaning that the relations are stored for search purposes. Relations are indexed based on defined relation indexes.

Several **out-of-the-box relation indexes** are available. However, Data Marketplace administrators can **create, update, and delete** relation indexes based on the organization's needs.

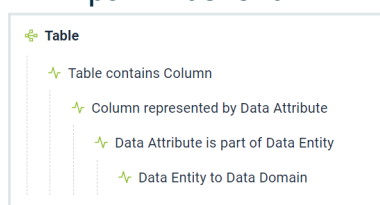
- The relation-based search automatically takes all relation indexes into account.
- To use a relation index as a relation-based custom filter, the administrator must activate the filter in the Data Marketplace **Filters settings**.

Tip To watch a video to understand relation indexes better, go to [Example: Create a new relation index for a custom filter](#).

Elements in a relation index

A relation index consists of a name and one or more relation paths.

- The **name** of the filter can become visible in the **Filters** pane.
 - The name of a relation-based filter cannot be changed.
 - A **_** (underscore) or a space in the name will translate in a space in the Filters pane.
- A **relation path** represents the chain of relations that allows Data Marketplace to find assets that have a direct or indirect relation with each other.
 - A relation path starts from the asset type you want in the search results (root asset type) and ends with the asset type or attribute type you want to filter on.
 - The relation path also takes the asset type children into account.
 - Only asset types that are in the scope of Data Marketplace can be the root asset type in a relation path.
 - A relation path can contain one to four relations.
 - A relation index can contain multiple relation paths. However, each relation path must end with the same asset type.

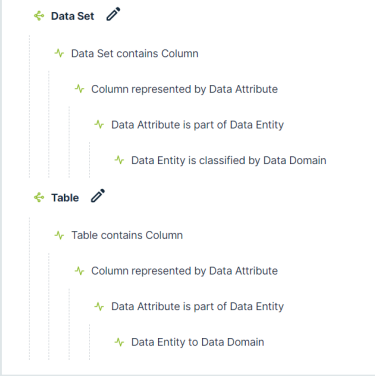


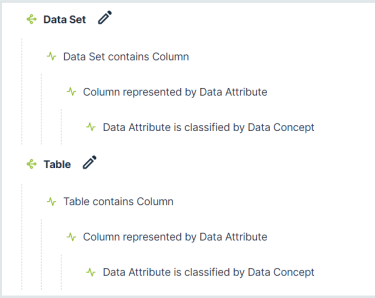
Questions to construct a relation index





Use the following questions to prepare for the [creation of relation indexes](#).

Question	Answer and consequence	Example
Which asset type (and children) or asset types do you want to filter out?	<ul style="list-style-type: none"> • If you identified one asset type, then this asset type is your root asset type, meaning the first asset type in your relation path. • If you identified multiple asset types, you need to create a relation path for each asset type. 	Table
Which asset type or attribute type do you want to filter on? If it is an attribute type, which asset type does it belong to? <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note Only text attributes can be selected as attributes in a relation path.</p> </div>	<ul style="list-style-type: none"> • This asset type is the last asset type in your relation path. • The asset type or attribute type should be reflected in the filter name. 	Data Domain.
In your metamodel, which path do you need to follow to get from the first to last asset type in the relation-based filter?	This is the relation path you will need to use.	To go from Table to Data Domain, we need the following path: Table contains Column, Column is represented by Data Attribute, Data Attribute is part of Data Entity, Data Entity to Data Domain.
Which filter name is meaningful to consumers of the data?		Data Domain

Out-of-the-box relation indexes

Filter	Relation paths	
<p>Data Domain</p>	<p>Relation path for Data Domain - Data Set:</p> <ol style="list-style-type: none"> 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain <p>Relation path for Data Domain - Table:</p> <ol style="list-style-type: none"> 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain 	 <pre> graph TD subgraph "Data Set" DS[Data Set] -- contains --> C[Column] C -- represented by --> DA[Data Attribute] DA -- part of --> DE[Data Entity] DE -- classified by --> DD[Data Domain] end subgraph "Table" T[Table] -- contains --> C2[Column] C2 -- represented by --> DA2[Data Attribute] DA2 -- part of --> DE2[Data Entity] DE2 -- classified by --> DD2[Data Domain] end </pre>

Filter	Relation paths	
<p>Data Concept</p>	<p>Relation path for Data Concept - Data Set:</p> <ol style="list-style-type: none"> 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept <p>Relation path for Data Concept - Table:</p> <ol style="list-style-type: none"> 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept 	 <p>The diagram illustrates two relation paths. The first path, labeled 'Data Set', shows a sequence of three steps: 'Data Set contains Column', 'Column represented by Data Attribute', and 'Data Attribute is classified by Data Concept'. The second path, labeled 'Table', shows a similar sequence: 'Table contains Column', 'Column represented by Data Attribute', and 'Data Attribute is classified by Data Concept'. Each step is represented by a small green arrow pointing right, and the paths are separated by a horizontal dashed line.</p>

Filter	Relation paths	
<p>Business Asset</p>	<p>Relation path for Business Asset - Data Set:</p> <ul style="list-style-type: none"> Data Set is related to Business Asset <p>Relation path for Business Asset - Report:</p> <ul style="list-style-type: none"> Report is related to Business Asset <p>Relation path for Business Asset - Table:</p> <ul style="list-style-type: none"> Table is related to Business Asset <p>Relation path for Business Asset - Table:</p> <ol style="list-style-type: none"> Table contains Column Column is represented by Business Asset 	<div data-bbox="600 322 979 707" style="border: 1px solid #ccc; padding: 10px;"> <ul style="list-style-type: none"> ← Data Set  ↳ Data Set related to Business Asset ← Report  ↳ Report related to Business Asset ← Table  ↳ Table related to Business Asset ← Table  ↳ Table contains Column ↳ Column represented by Business Asset </div>

Filter	Relation paths
<p>Source System</p>	<p>Relation path for Source System - Data Set:</p> <ul style="list-style-type: none"> Data Set is implemented into Source System <p>Relation path for Source System - Table:</p> <ol style="list-style-type: none"> Table is part of Schema Schema belongs to Technology Asset Technology Asset is grouped by Source System
<p>Data Source</p>	<p>Relation path for Data Source - Table:</p> <ul style="list-style-type: none"> Table is part of Schema The data source is an attribute of the Schema asset.

Important The out-of-the-box relation index Data Set - Column, which is specific to relation-based search, is not visible and cannot be updated or removed.

You can reset the Data Marketplace relation-based search and filters back to the out-of-the-box experience, by clicking the **Reset to Default** button. This will remove any custom relation-based indexes that were created and provide only the out-of-the-box relation indexes.

Create a relation index

If the [out-of-the-box relation-based filters and relation-based search](#) don't match the organization's needs, you can create a new [relation index](#).

Newly created relation indexes are automatically used in the [relation-based search](#) if this [feature](#) is enabled.

To use a relation index as a filter in the **Filters** pane of Data Marketplace itself, you need to update the [Filters settings](#).

Tip

- You cannot create more than 20 relation indexes in Data Marketplace
- You cannot use special characters, such as /, ?, @, [, }, <, >, in the relation index name.
- You cannot add more than four relations to one relation path.
- Only text attributes can be selected as attributes in a relation path.
- You cannot use relation types with special characters, such as /, ?, @, [, }, <, >, in the relation type name.
- Complex relations are not supported as custom relation paths.
- We recommend that you don't create relation indexes with identical relation paths. If they both show up as filters in the Filters pane, it will be confusing to your users. Currently, we don't prevent that you create identical relation indexes.
- Also check [Data Marketplace limitations and guidelines](#).



Before you begin

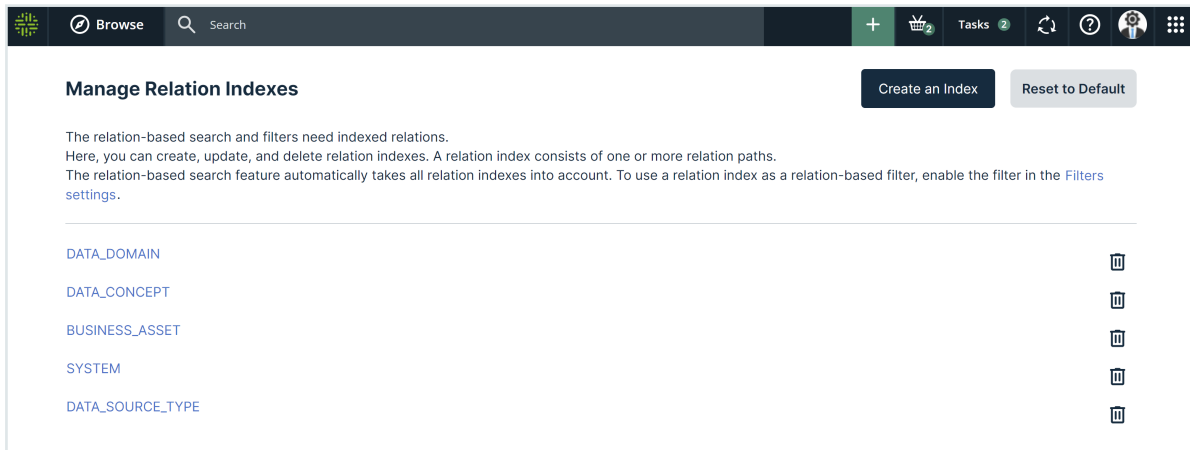
Make sure you identified the relation-paths that you want to use. For information on how to construct relation paths, go to [About relation indexes](#).

Required permissions

You are an [administrator in Data Marketplace](#).

Steps



1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Filters**.
3. Click **Manage Relation-Based Filters**.
 - » The **Manage Relation Indexes** page opens. It provides an overview of all relation indexes in the environment.



4. Click **Create an Index**.
 - » The **Create an Index** page opens.
5. Enter the name of the filter.
 - Provide a clear and meaningful name because this name can be visible in the **Filters** pane in Data Marketplace.
 - A `_` (underscore) or a space in the name will translate in a space in the **Filters** pane.

Important

- Once the relation index is saved, you cannot change its name.
- You cannot use special characters, such as `/`, `?`, `@`, `[`, `]`, `<`, `>`, in the relation index name.

6. Specify the relation path.
 - a. Click  and select the first asset type in your relation path.
 - b. For each relation you want to add, click  and select the relation (relation type and target asset type) you need.
 - » The relation is added as an indent to the previous one.
 - » In the **Preview**, you get an overview of possible results for this index when it

is applied as a filter to your data.

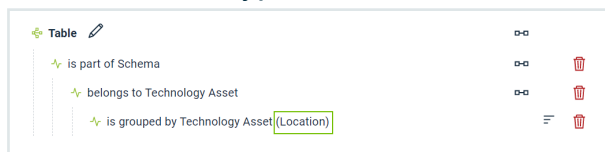
Important

- You cannot add more than four relations to one relation path.
- You cannot use relation types with special characters, such as /, ?, @, [, }, <, >, in the relation type name.

- c. If the end of your relation path is an attribute type, in the last relation click ☰ and select the attribute type you want to link to.

Only text attributes can be selected as attributes in a relation path.

» The attribute type is added between brackets next to the asset type.



7. If required, click + to add another relation path.
8. Click **Create Index**.
 - » The relation index is created.
 - » Data Marketplace starts indexing the relations. This can take some time.
 - » The new relation index is used to [relation-based search](#) if this [feature](#) is enabled.
9. If required, make the relation index visible as a filter in the **Filters** pane of Data Marketplace via the [Filters settings](#).

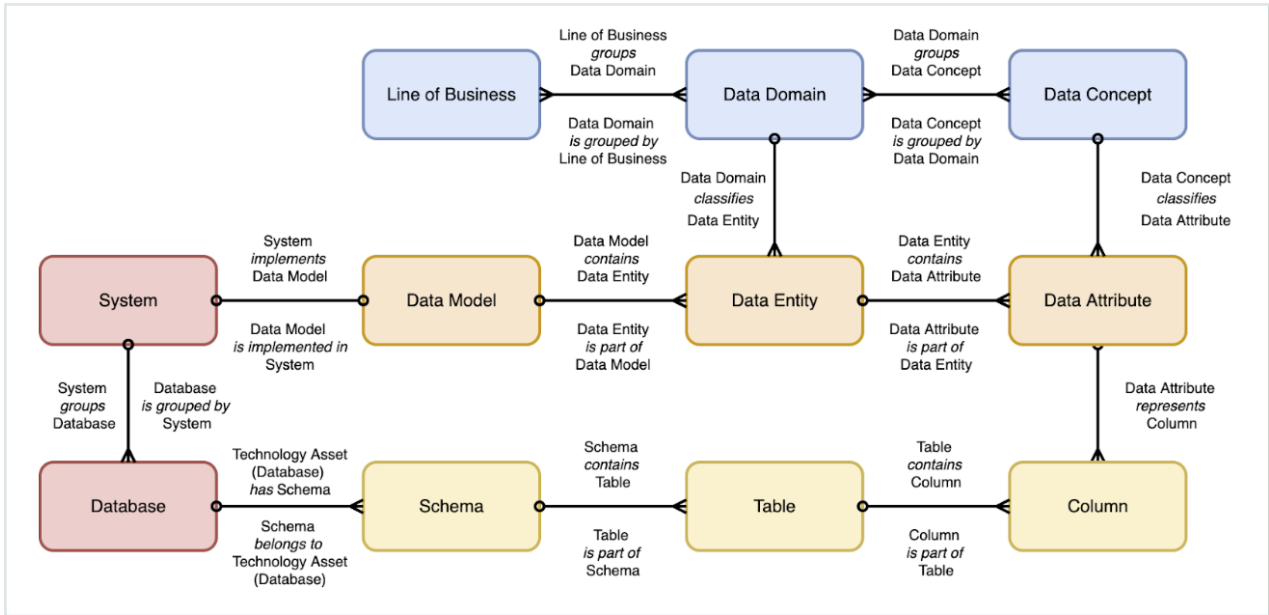
For a full example, go to [Example: Create a relation index](#).

Example: Create a new relation index for a custom filter

Watch a video

Steps

In Data Marketplace, we want a filter that results in tables that belong to a specific system location, Cloud or On Premise. Our metamodel is:





1. Answer the following questions:

Question	Answer	Consequence
Which asset type (and children) or asset types do you want to filter out?	Tables	This means the first asset type in our relation path must be Table.
Which asset type or attribute type do you want to filter on? If it is an attribute type, which asset type does it belong to?	We want to filter on Location, which belongs to asset type System.	This means the last asset type in our relation path must be System.
In your metamodel, which path do you need to follow to get from the first to last asset type in the relation-based filter?	<ul style="list-style-type: none"> a. Table is part of Schema. b. Schema belongs to Technology Asset c. Technology Asset is grouped by Technology Asset, attribute type Location. 	This is the path we will need
Which filter name is meaningful to consumers of the data?		Source Location

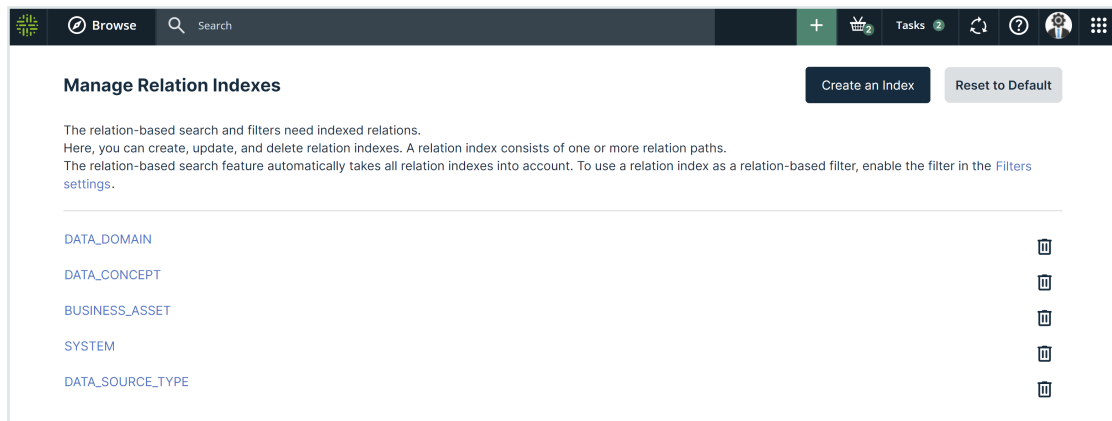
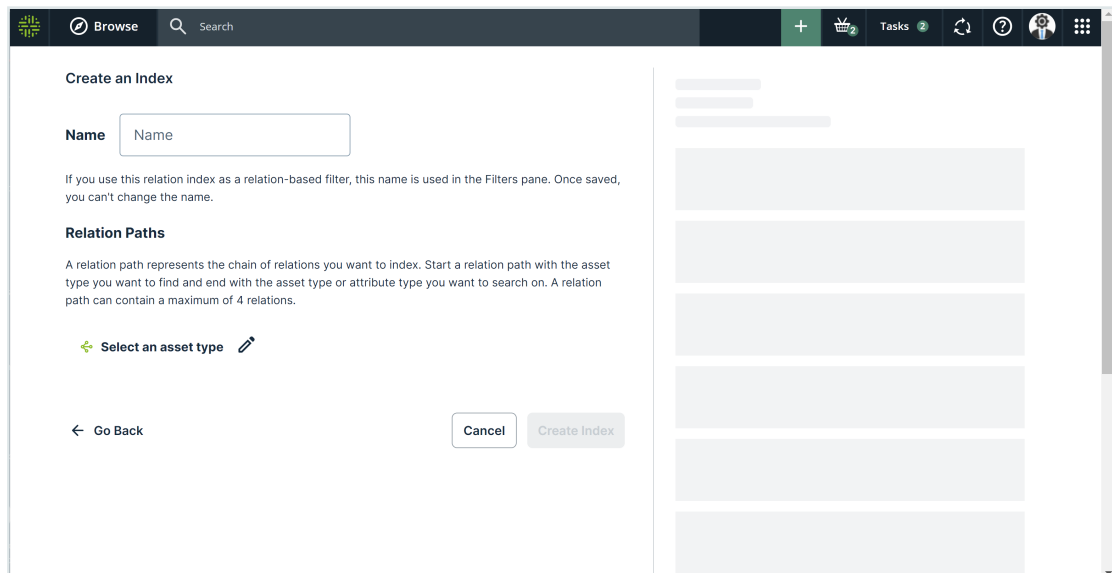
2. Decide the relation index name and path based on the answers:

- Name: Source Location
- Relation path:
 - First asset type: Table
 - Relation 1: belongs to Schema.
 - Relation 2: belongs to Technology Asset.
 - Relation 3: is grouped by Technology Asset.
 - Attribute: Location.

3. Create the relation index.


- a. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
- b. In the **Data Marketplace** section, click **Filters**.
- c. Click **Manage Relation-Based Filters**.
 - » The **Manage Relation Indexes** page opens. It provides an overview of all

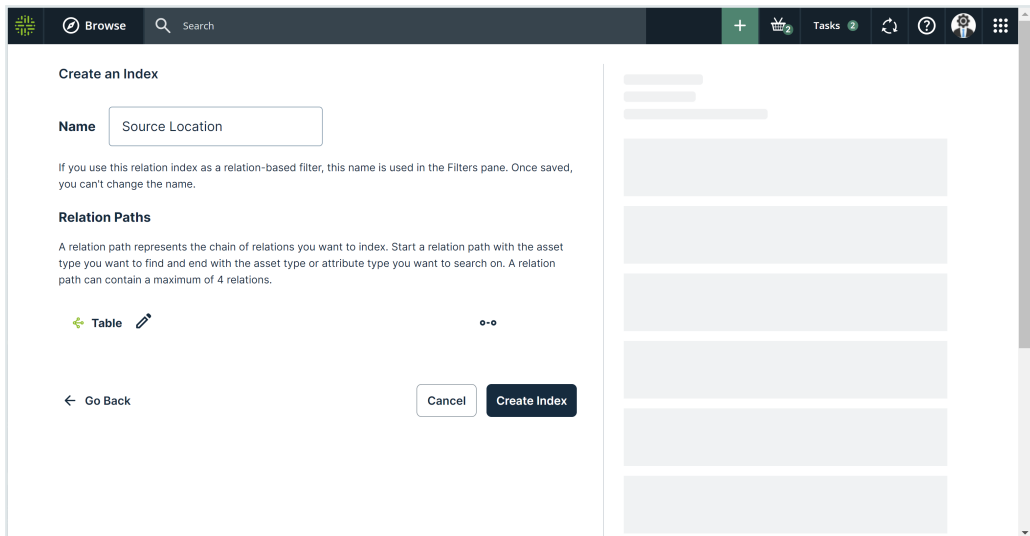
relation indexes in the environment.

d. Click **Create an Index**.

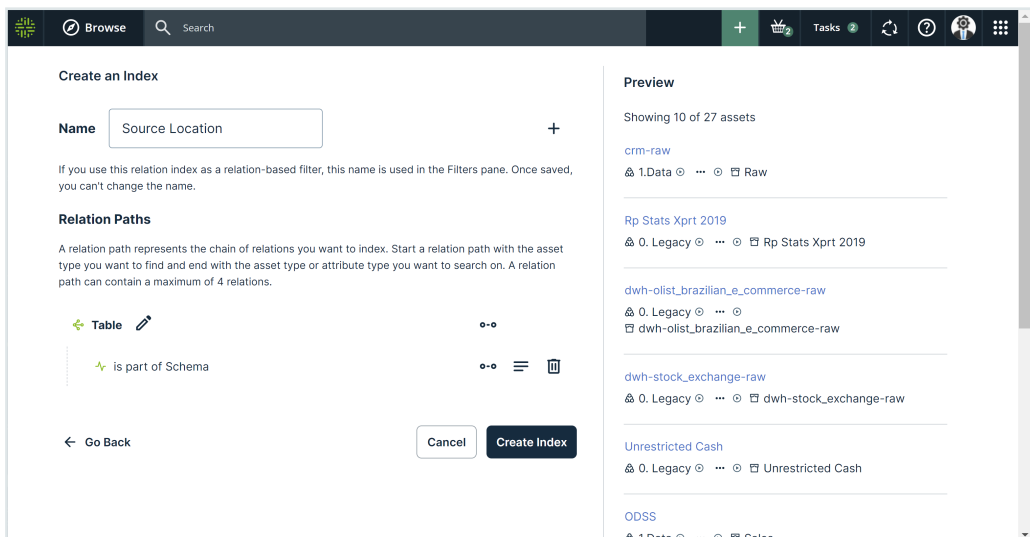
e. Enter the name of the index, Source Location.


f. Specify the relation path.

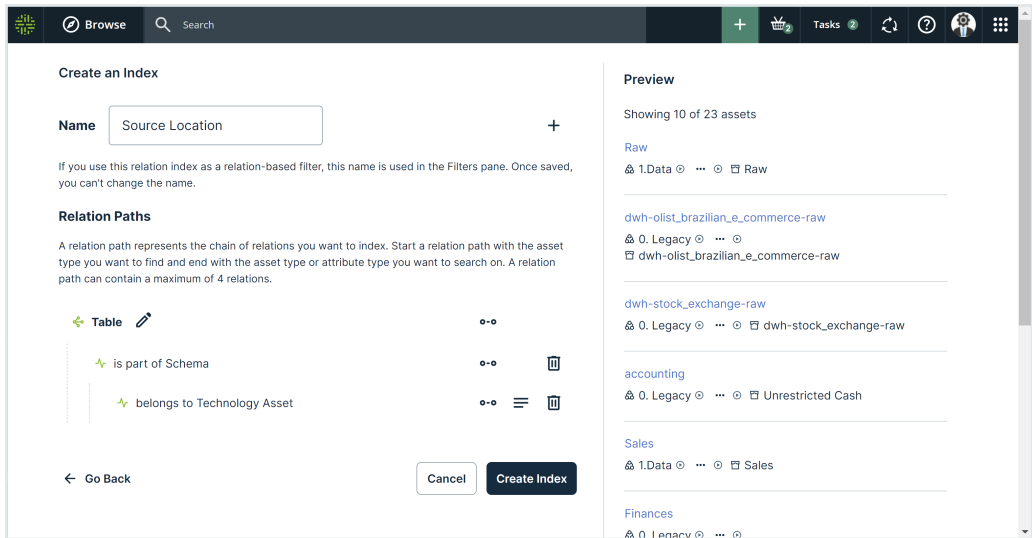
- i. Click  and select the first asset type in your relation path. In our case, Table.




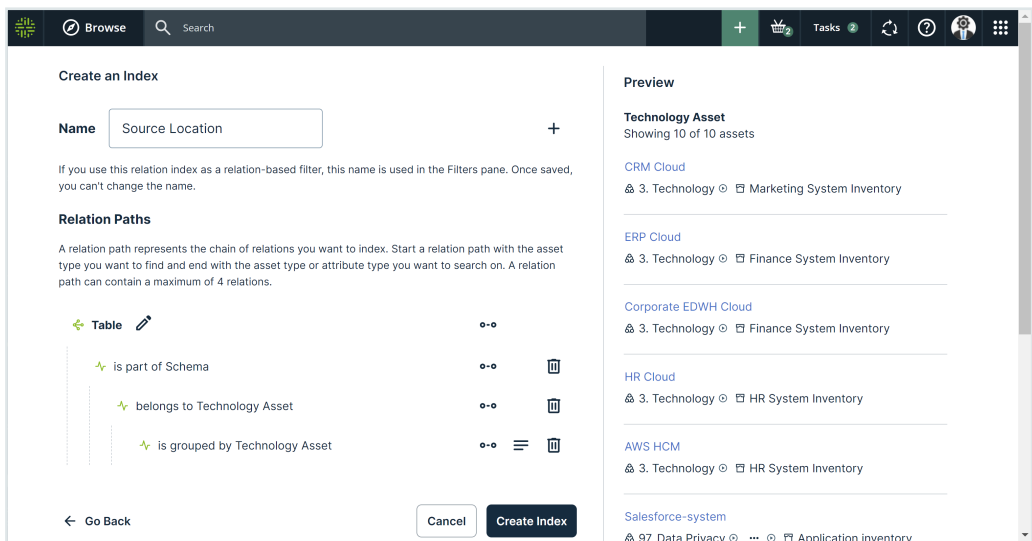
- ii. Click and select the relation (relation type and target asset type) you want to add. In our case, is part of Schema.




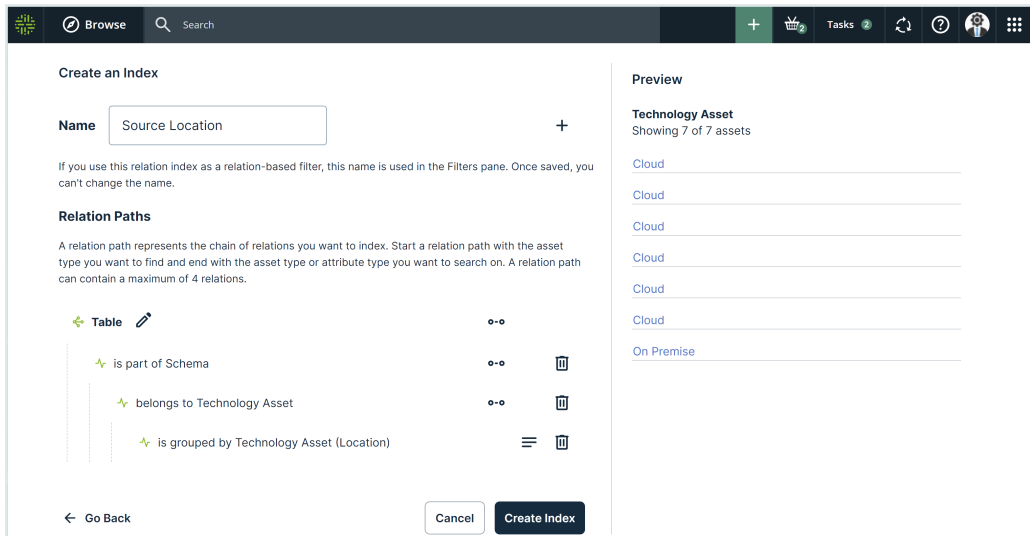
- iii. Click  and select the relation you want to add. In our case, belongs to Technology Asset.



- iv. Click  and select the relation you want to add. In our case, is grouped by Technology Asset.



- v. Click  and select the attribute type you want to link to. In our case, Location.

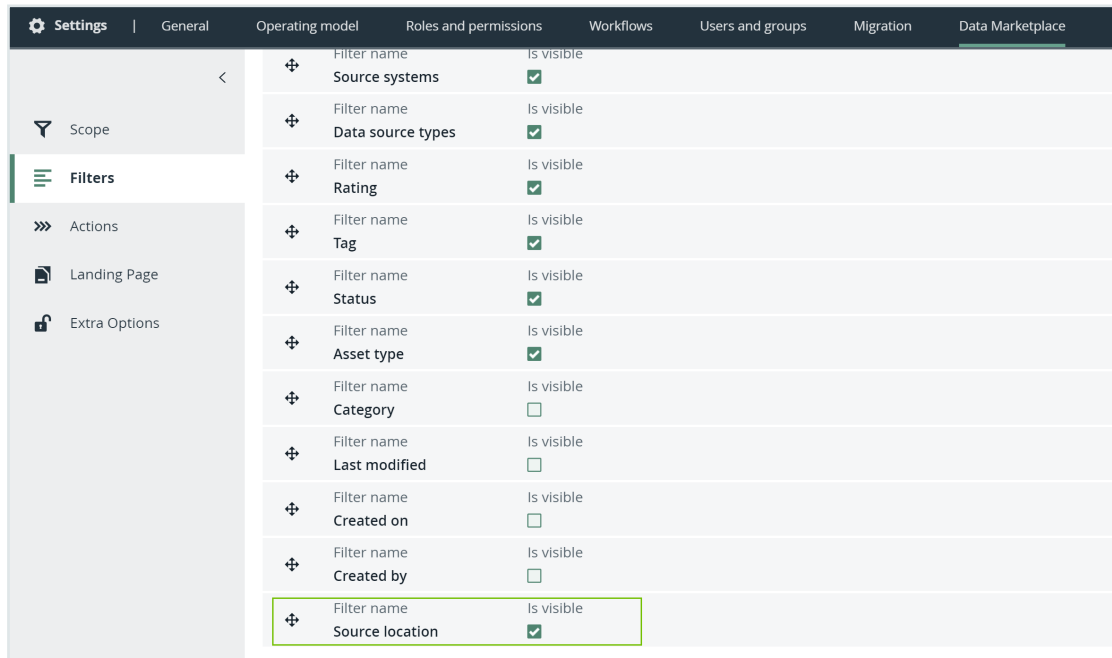


- g. Click **Create Index**.

» The relation index is created and the indexing of the relations starts.

4. Make the relation-based filter visible in the **Filters** pane of Data Marketplace.

- a. Go to the **Filter settings**.
- b. Select the **Is visible** check box for the filter.
- c. Click **Save**.



5. Once the reindexing is completed, the filter works completely. In Data Marketplace, search for *.
 - » The new filter is available in the **Filters** pane.



Update or delete a relation index

You can change the available relation indexes.




- You can delete relation indexes, including the out-of-the-box relation indexes.
- You can change the relation paths of relation indexes, including the relation paths of the out-of-the-box relation indexes.

Important You cannot update the name of relation indexes.










Prerequisites

Investigate which changes you want to make. For information on how to construct relation paths, see [About relation indexes](#).

Delete a relation index

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Filters**.
3. Click **Manage Relation-Based Filters**.
 - » The **Manage Relation Indexes** page opens. It provides an overview of all relation indexes in the environment.
4. Click  for the index you want to remove.
 - » The index is deleted.
 - » Data Marketplace starts a full reindexing. This can take some time.

Update a relation-based filter

1. On the main menu, click , and then click  **Settings**.
 - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Filters**.
3. Click **Manage Relation-Based Filters**.
 - » The **Manage Relation Indexes** page opens. It provides an overview of all relation indexes in the environment.
4. Click the name of the index.
 - » The **Update Index** page opens.
 - To remove a full relation path, click  for the root asset type. You can only do this if there are multiple relation paths available.
 - To remove a relation, click  for the relation.
 - To remove a linked attribute, click  and then  for the attribute.
 - To change the root asset type of a relation path, click  and select the asset type you need.
 - To change a relation, click  and select the relation type you need.
 - To change the linked attribute, click  and select the attribute you need.
5. Click **Update Index**.
 - » The relation index is updated.
 - » Data Marketplace starts a full reindexing. This can take some time.

Reset the relation indexes

You can reset the Data Marketplace relation-based search and filters back to the out-of-the-box experience, by clicking the **Reset to Default** button. This will remove any custom relation-based indexes that were created and provide only the out-of-the-box relation indexes.

Define the filter tabs in Data Marketplace

Data Marketplace shows tabs above the search results.

The tabs allow to apply a saved filter. By default, Data Marketplace shows out-of-the-box preconfigured filters.

As an administrator, you can change the out-of-the-box preconfigured filters and add additional ones.

If the setting [Data Marketplace Advanced Filter Settings \(Beta\)](#) is enabled, an administrator can also create preconfigured filters for specific user groups, and data consumers can create their own personal filters. All these saved filters are displayed as tabs. The tabs can display preconfigured filters for all, preconfigured filters for a specific user group, or personal filters. For information on the Beta feature, go to [Creating personal and group-specific filters \(Beta\)](#).

Important

The [out-of-the-box preconfigured filters](#) Tables, Data Sets and Reports are not impacted by the Data Marketplace [scope configuration](#).

This means that it is possible fewer or more search results appear in the **All** tab compared to other out-of-the-box tabs.



Before you begin

- [Data Marketplace is enabled](#).
- You have defined the Data Marketplace [scope](#) and the [filters](#) that must be available.

Required permissions

You are an [administrator in Data Marketplace](#).

Create a new preconfigured filter

1. In Data Marketplace, select the filters you want to include in the preconfigured filter:
 - a. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
 - b. Click **All** to see all available filters in the search results.
 - » The search results appear and the **All** tab is selected.



- c. Select the filters you want to save in the preconfigured filter.

Tip

The [sorting order](#) of search results is saved in the preconfigured filter, the search terms are not.

- » In the **Selected** area, the selected filters and a tag **Unsaved Changes** appear.
 - » A * appears next to **All** to indicate changes are made which are not saved.
2. Click **Save as New Filter**.
 - » The **Save as New Filter** dialog box appears.
 3. Enter a name for the new preconfigured filter.
 4. Select the option **Preconfigured Filter**.
 - » The **Assign to User Group** field appears.
 5. In **Assign to User Group**, select **All Users**.
 6. Click **Save**.
 - » The filter is saved. A filter tab is available and all data consumers can select it.




Edit the filters applied by a preconfigured filter

1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Select the tab you want to change.
 - » In the **Selected** area, the filters linked to this filter tab appear.
4. Change the filters as needed.
 - » In the **Selected** area, a tag **Unsaved Changes** appears.
 - » A * appears next to the tab name to indicate changes are made which are not saved.
5. In the **Selected** area, click the link **Update Filter**.
 - » The filter is saved.
 - » A notification appears indicating your changes are saved.

Tip

You can't change the **All** preconfigured filter. To influence the results in the **All** tab, change the Data Marketplace [scope](#).




Edit the name of a preconfigured filter

1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Click .
- » The **Manage Filters** page opens.
4. Click the **Preconfigured Filters** tab.
 - » All preconfigured filters are shown.
5. Double click the filter name and make the changes.
6. Press `Enter` or click outside the field.
 - » The filter is saved and the tab name changes.
 - » A notification appears indicating your changes are saved..

Tip

You can't change the **All** tab.

Hide or unhide a preconfigured filter





1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Click .
- » The **Manage Filters** page opens.
4. Click the **Preconfigured Filters** tab.
 - » All preconfigured filters are shown.
5. Double click the Visible icon for the filter and make the changes.

6. Press `Enter` or click outside the field.
 - » The filter is saved and the filter tab is displayed depending on the selection.
 - » A notification appears indicating your changes are saved..

Tip

- You can't hide the **All** tab.
- Currently, you can't rearrange the tabs.

Delete a preconfigured filter

1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Click .
 - » The **Manage Filters** page opens.
4. Click the **Preconfigured Filters** tab.
 - » All preconfigured filters are shown.
5. Click the  for the filter you want to delete.

Warning

The filter is immediately deleted and the filter tab disappears.

Tip

You can't delete the **All** tab.

What's next?

[Continue the Data Marketplace configuration](#)

Reindex Data Marketplace relations

Some relations in Collibra are not automatically reindexed for Data Marketplace. This can cause inconsistencies between Collibra and Data Marketplace.

Therefore, you can reindex the relations manually.



Relations are not indexed automatically if [Automatic relation indexing](#) is not enabled.

For more information, see [Filtering and searching based on relations in Data Marketplace](#).

Prerequisites

You have a [global role](#) that has the **System administration global permission**.

Steps

1. On the main menu, click , and then click  **Settings**.
2. In the **General** section, click **System**.
 - » The **Information** page opens.
3. In the **Relations index** section, click **Rebuild Relations index**.

Using Data Marketplace

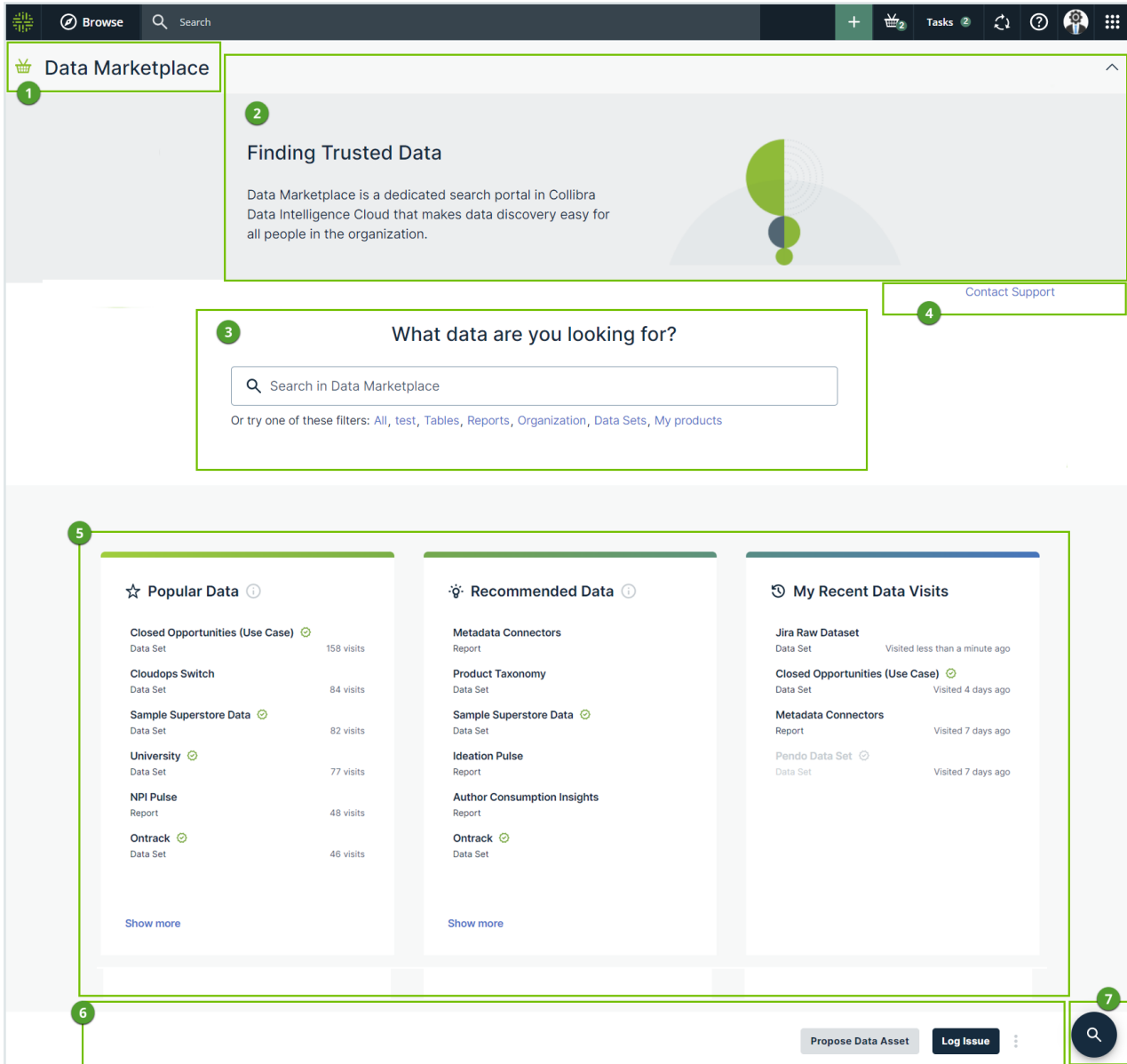
As a data consumer, you can use Data Marketplace to find and access assets.

The Data Marketplace landing page	68
Searching in Data Marketplace	73
Previewing assets in Data Marketplace	90



The Data Marketplace landing page

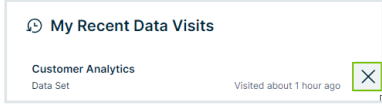
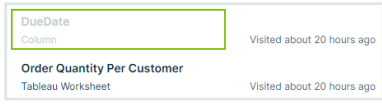
As a data consumer, the Data Marketplace landing page is your starting point for finding the data you need. The page consists of multiple sections.



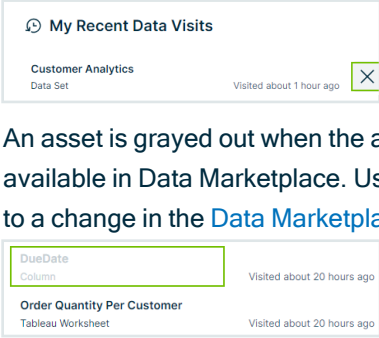
	Section	Description
1	Title	Data Marketplace title

	Section	Description
2	Introduction section	<p>This section provides an introduction to Data Marketplace. You can close this section, by clicking the arrow in the upper right corner of the section.</p> <p>Your Data Marketplace administrator can change the available text.</p>
3	Search	<p>The search field allows you to find any asset within the Data Marketplace scope.</p> <ul style="list-style-type: none"> • If search suggestions are enabled, Data Marketplace provides suggestions while you are typing. Click one of the suggestions to use it or press <code>Enter</code> to ignore the suggestions. • If search suggestions are not enabled, the search starts automatically after a few seconds. <p>You can also click one of the filters below the search field. Depending on the configuration, you see preconfigured and personal saved filters. The order of the filters changes based on the filters you used during your last visit.</p>
4	Quick links	<p>This section can provide quick access to useful information in your organization.</p> <p>Your Data Marketplace administrator can define these quick links.</p>

	Section	Description		
<p style="text-align: center; border: 1px solid green; border-radius: 50%; width: 20px; margin: 0 auto;">5</p>	<p>Cards</p>	<p>Cards allow you to navigate quickly to data that might interest you.</p> <p>The available cards depend on whether data discovery is enabled.</p> <ul style="list-style-type: none"> If data discovery is enabled, you have access to Popular Data, Recent Data Visits, and Recommended Data. Get more information. <div data-bbox="662 638 1273 907" style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> </div> <div data-bbox="662 952 1420 1568" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <table border="0" style="width: 100%;"> <tr> <td style="width: 30%; vertical-align: top;"> <h3>Popular Data</h3> </td> <td style="vertical-align: top;"> <p>This card shows the assets that were visited the most in the last 30 days in Data Marketplace, Collibra, Collibra for Desktop, and Collibra for Mobile, that are in the scope of Data Marketplace and to which you have access.</p> <ul style="list-style-type: none"> Data Marketplace checks the usage data once a day. For more information on these recommendations, go to Asset recommender. Click Show more to view more popular assets. Loading this card can take a few seconds. If you click an asset, the asset preview opens in the Discover page. </td> </tr> </table> </div>	<h3>Popular Data</h3>	<p>This card shows the assets that were visited the most in the last 30 days in Data Marketplace, Collibra, Collibra for Desktop, and Collibra for Mobile, that are in the scope of Data Marketplace and to which you have access.</p> <ul style="list-style-type: none"> Data Marketplace checks the usage data once a day. For more information on these recommendations, go to Asset recommender. Click Show more to view more popular assets. Loading this card can take a few seconds. If you click an asset, the asset preview opens in the Discover page.
<h3>Popular Data</h3>	<p>This card shows the assets that were visited the most in the last 30 days in Data Marketplace, Collibra, Collibra for Desktop, and Collibra for Mobile, that are in the scope of Data Marketplace and to which you have access.</p> <ul style="list-style-type: none"> Data Marketplace checks the usage data once a day. For more information on these recommendations, go to Asset recommender. Click Show more to view more popular assets. Loading this card can take a few seconds. If you click an asset, the asset preview opens in the Discover page. 			

Section	Description
	<p>My Recent Data Visits</p> <p>This card shows the assets for which you opened the preview in Data Marketplace.</p> <ul style="list-style-type: none"> Click Show more to view more recently visited assets. Click X to remove the visited asset.  <ul style="list-style-type: none"> An asset is grayed out when the asset is no longer available in Data Marketplace. Usually this is due to a change in the Data Marketplace scope. 
	<p>Recommended Data</p> <p>This card shows data based on the data you search for and visit in Data Marketplace, Collibra, Collibra for Desktop, and Collibra for Mobile and that are in the scope of Data Marketplace.</p> <ul style="list-style-type: none"> Data Marketplace checks the usage data once a day. For more information on these recommendations, go to Asset recommender. Loading this card can take a few seconds. If you click an asset, the asset preview opens in the Discover page.
<p>Tip No recommendations can be given to new users because no data is available yet. Recommendations will be provided after one day.</p>	
<ul style="list-style-type: none"> If data discovery is not enabled, you have access to Recent searches, Recent data visits, and What's new. Get more information. 	

Section	Description
	<div data-bbox="620 320 1233 600" style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> </div> <div data-bbox="620 636 1430 869"> <p>What's new? This card shows all assets that have recently been updated in Data Catalog and that are in scope of Data Marketplace. Click Show more to open the search results page with all updated assets.</p> </div> <div data-bbox="620 875 1430 1350"> <p>Recent searches This card shows the recent searches you performed in Data Marketplace.</p> <ul style="list-style-type: none"> • Click Show more to view more recent search actions. • Click to pin the search action to your list. • Click to remove the recent search action. <div data-bbox="783 1178 1166 1317" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Recent searches</p> <p>customer insights on 7/5/2022, 09:15 AM</p> <div style="display: flex; justify-content: flex-end; gap: 10px;"> </div> </div> </div>


	Section	Description
		<p>My Recent Data Visits This card shows the assets for which you opened the preview in Data Marketplace.</p> <ul style="list-style-type: none"> Click Show more to view more recently visited assets. Click × to remove the visited asset.  <ul style="list-style-type: none"> An asset is grayed out when the asset is no longer available in Data Marketplace. Usually this is due to a change in the Data Marketplace scope.
6	Landing page actions	Your Data Marketplace administrator can make actions available in this section.
7	Go to search	Click this button to go back to the search field.

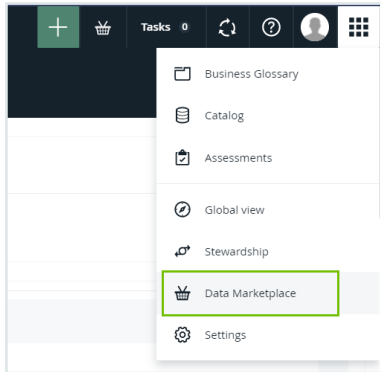
Searching in Data Marketplace


The purpose of Data Marketplace is to search for and interact with the data that is available to you. Searching and refining your search results are therefore the key features.

Search in Data Marketplace

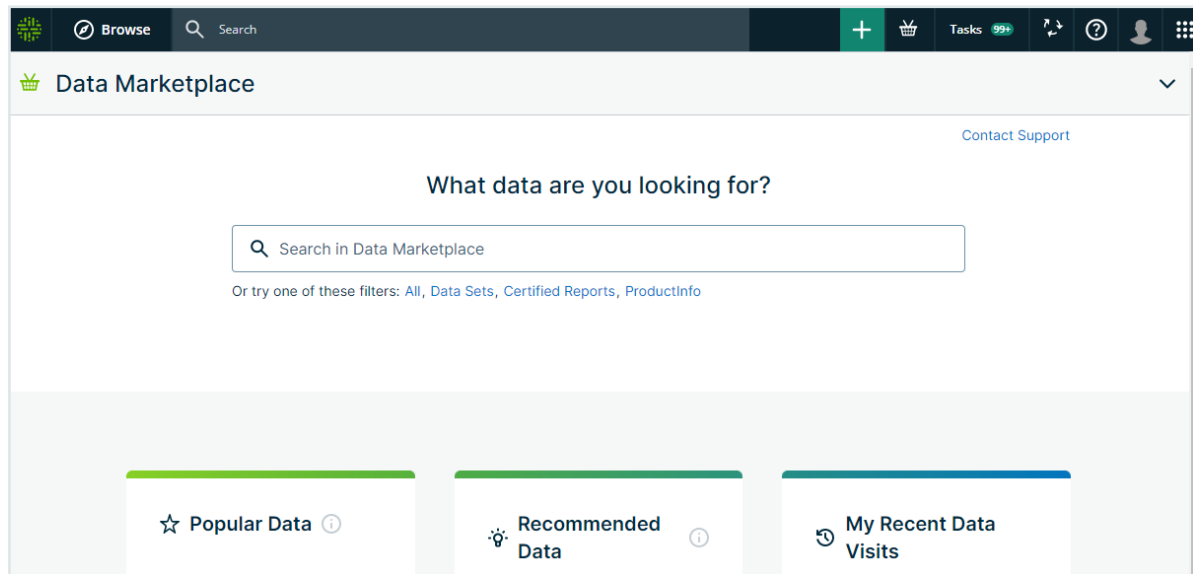
1. Open Data Marketplace from the  icon.

On the main menu, click , and then click  **Data Marketplace**.



If Data Marketplace doesn't appear in the Application menu , the feature may not be enabled or you don't have the [required permissions](#).

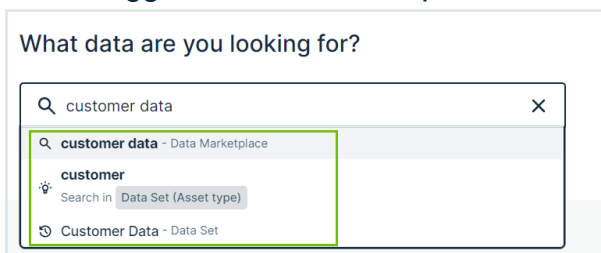
» The [Data Marketplace landing page](#) opens.



2. In the search field, enter your search terms or click one of the filter links below the search field.
 - Optionally, use [wildcards and symbols](#).
 - If you add multiple terms without wildcards and symbols, the OR operator and the * wildcard are used.

Example For search terms 'Address data', the search looks for Address OR data*. This means that the results will include: assets that match the term Address or assets that start with data, such as data, database, and so on.

- If [search suggestions](#) are not enabled, the search starts automatically after a few seconds.
- If search suggestions are enabled, suggestions appear as you type. Click one of the suggestions to use it or press `Enter` to ignore the suggestions.



- If you want to search based on a database structure, start your search with sql: [database].[schema].[table]. Each time you add a [search term], Data Marketplace searches for the value you entered and shows the result as a search suggestion.

Note The sql search only work if the Database, Schema, and Table asset types are part of the Data Marketplace [scope](#).

- Click `×` to remove your search terms.
 - If you click one of the filter links, the saved filter is automatically applied. A saved filter is a set of filters that is used on a regular basis and that can help you navigate quickly to the data you need.
- » The [search results page](#) opens.

Wildcards and symbols for searching in Data Marketplace

In the Data Marketplace search field, you can enter your search terms and use wildcards and symbols.

- If you want to search for all assets, type * in the search field.
- If you want to find something, but are not quite sure of the name, you can use the following wildcards in your search terms:

Wildcard	Description	Example
?	A question mark replaces any single character.	Search term: <i>?ar</i> Possible results: Car, Bar, Tar.
*	An asterisk replaces any string of characters.	Search term: <i>C*r</i> Possible results: Car, Crosshair, and so on.
~	A tilde represents a fuzzy search, words with spelling similar to the text you searched for. Important Add the tilde sign at the end of your search term. If you add it in front of the term, you receive an error message.	Search term: <i>Owi~</i> Possible results: Ozi, Zowie, Bowie, and so on.
!	An exclamation mark excludes words.	Search term: <i>!David Bowie</i> Possible results: Lester Bowie, Joe Bowie, and so on.

- If you want to find a literal piece of text, you can add the terms between double quotation marks.

Don't forget to close the quotation marks. If you add only one, you receive an error message.

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

Important

The following characters are not supported in the [search field](#):

/ slash

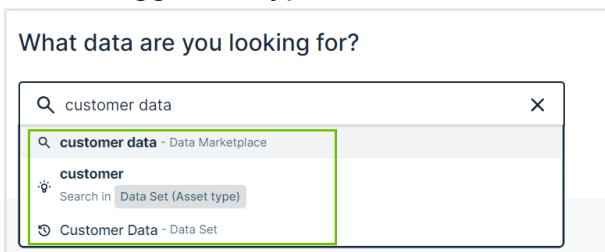
: colon
 ^ circumflex
 () parenthesis
 [] square brackets
 {} curly brackets

About search suggestions in Data Marketplace

Search suggestions guide you to the information you might be looking for.

If [search suggestions are enabled](#), Data Marketplace provides suggestions as you type.


You can click one of the suggestions to use it. The result of clicking a suggestion depends on the suggestion type.



Suggestion types

The icon in front of a suggestion indicates the suggestion type.

Icon	Meaning	Result when you click the suggestion
🔍	Recent search	The suggestion shows a previous search action. Clicking the suggestion launches the suggested search action.
🔄	Recently visited asset	This suggestion shows an asset that you recently previewed. Clicking this suggestion opens the preview of the suggested asset.

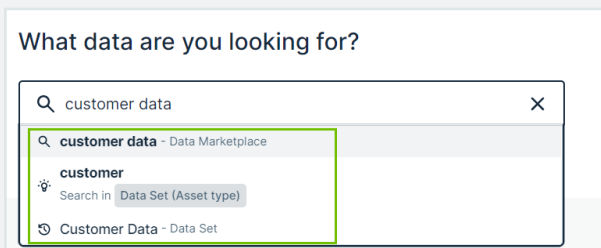
Icon	Meaning	Result when you click the suggestion
	Smart filter	<p>This suggestion provides possible filters you can apply based on your search terms. The smart filter suggestions recognize search terms linked to asset type, system, status, and certification.</p> <p>Clicking this suggestion performs the search and applies all suggested filters.</p> <p>If you want to search based on a database structure, start your search with sql: [database].[schema].[table].</p> <p>Each time you add a .[search term], Data Marketplace searches for the value you entered and shows the result as a search suggestion.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note The sql search only work if the Database, Schema, and Table asset types are part of the Data Marketplace scope.</p> </div>

Examples

Example

The search terms *customer data* result in three suggestions.

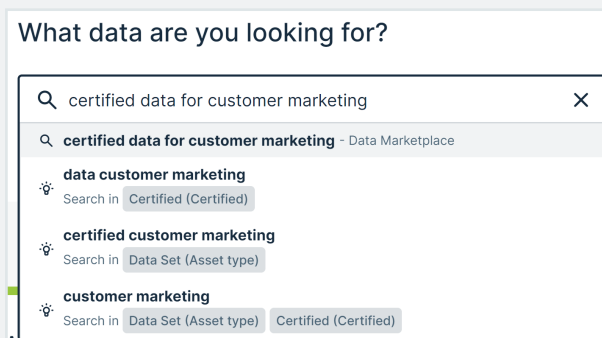
- The first suggestion is based on a recent search action. Clicking this suggestion launches the search for *customer data* in Data Marketplace again.
- The second suggestion provides the possibility to search for the terms *customer* with the filter *Asset Type* set to *Data Attribute*.
- The last suggestion points to the Customer Data data set asset that you previewed before. Clicking the suggestion opens the asset preview again.



Example

The search terms *certified data for customer marketing* result in following suggestions.

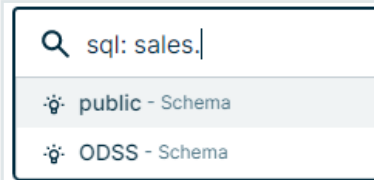
- The first suggestion is based on a recent search action. Clicking this suggestion launches the search for *certified data for customer marketing* in Data Marketplace again.
- The second suggestion provides the possibility to search for the terms *data customer marketing* with the filter *Certified* set to *Certified*.
- The third suggestion provides the possibility to search for the terms *certified customer marketing* with the filter *Asset Type* set to *Data Set*.
- The last suggestion provides the possibility to search for the terms *customer marketing* with the filter *Certified* set to *Certified* and the filter *Asset Type* set to *Data Set*.



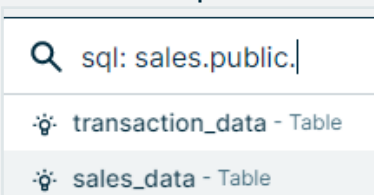
Example

You want to go to a table in the Sales database.

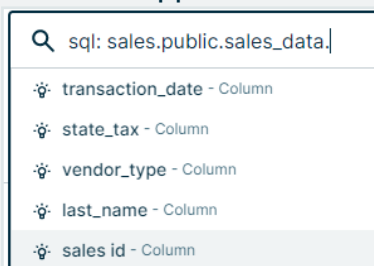
- In Data Marketplace, search for *sql: sales.*. After typing the *.*, Data Marketplace shows the available schemas as search suggestions.



- You need the public schema, so you type *public.*

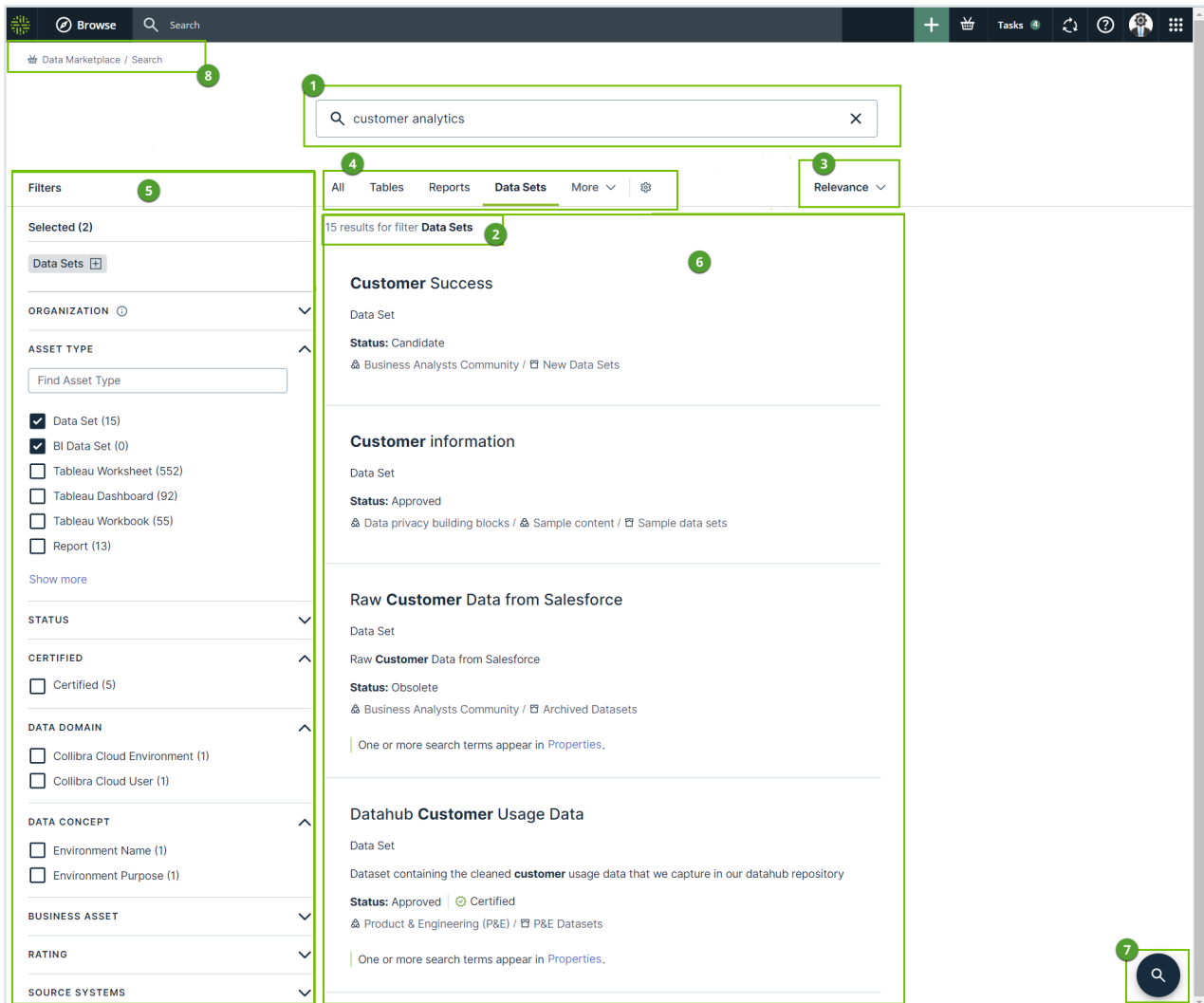


- You want to use the sales_data. If you type *sales_data.*, a list of all columns in that table appears in the search suggestions.



The Data Marketplace search results page

The Data Marketplace search results page consists of the following sections and features.



Section	Description
1	Search The search field contains the search terms you used. You can perform a new search by changing the search terms.
2	Number of search results This section shows the number of results for your search action.
3	Sort options The sort options allow you to sort your search results .
4	Filter tabs Tabs allow you to apply a saved filter, a group of filters, in one action and refine your search results . Depending on the Data Marketplace configuration , the filter tabs refer to preconfigured filters created by the Data Marketplace administrator or personal filters.

Section	Description
5	<p>Filters pane</p> <p>Filters allow you to refine your search results further. The available filters depend on your search results and on how the Data Marketplace administrator has configured the Filters pane.</p>
6	<p>Search results</p> <p>This section shows a list of results that match your search action. For each search result, a summary is available.</p> <p>Click the result to open the details in a preview.</p> <p>The search results depend on multiple factors:</p> <ul style="list-style-type: none"> • The Data Marketplace scope that was configured by the administrator. • Whether you have view permission on the asset. • The selected filter tab and the selected filters.
7	<p>Back to search</p> <p>This icon guides you to the top of the page.</p>
8	<p>Breadcrumb in Data Marketplace</p> <p>The breadcrumb provides information on your location in Data Marketplace.</p> <p>Click the Data Marketplace link to go back to landing page.</p>

Refine your search results

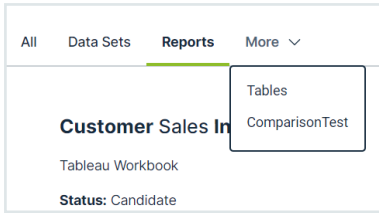
About filter tabs and filters

You can refine your search results [by selecting a filter tab](#) and [via the Filters pane](#).

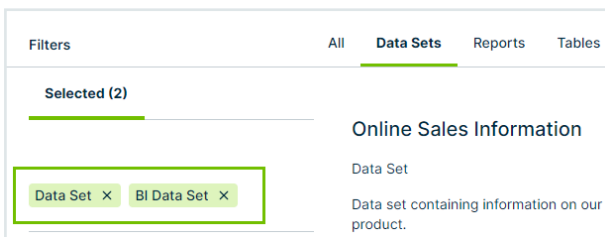
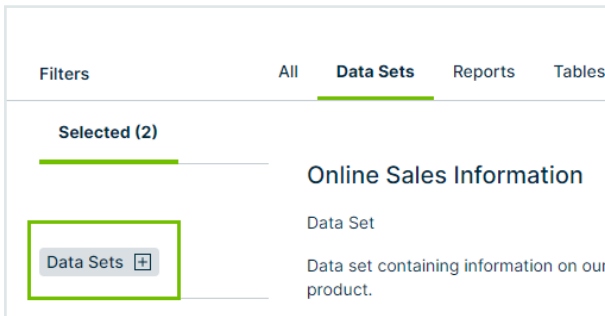
Filter tabs

Data Marketplace shows tabs above the search results.

The tabs allow to apply a saved filter. By default, Data Marketplace shows out-of-the-box preconfigured filters. Via the **More** drop-down list, you have access to additional saved filters.



» The selected filter tab is visible in the **Selected** area in the **Filters** pane. To view the details, expand the group.



Administrators can [configure the filter tabs in Data Marketplace](#).

Filters in the Filters pane

In the **Filters** pane, only filters that are [made visible](#) by the Data Marketplace administrator and that are relevant to the search results are available.

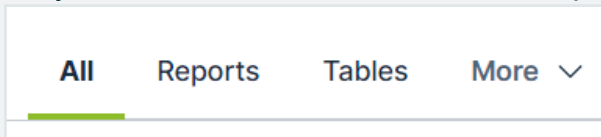
- If you made a selection, the **Filters** pane is automatically updated with the filters that are relevant to the refined search results.
- If a filter doesn't contain any values, the filter is not visible.
- In the **Filters** pane, the Organization filter shows only the top-level communities. To show search results that belong to a specific subcommunity or domain, click **Advanced Filter**. For more information, go to [Using the Organization filter](#).

Steps

1. [Search in Data Marketplace.](#)
 - » The [search results page](#) opens. If the **All** tab is selected, the page shows all the search results to which you have access within the Data Marketplace scope.
2. If you want to apply a saved filter, select another tab.

Tip

Only a few tabs are shown. To see extra possibilities, click **More**.



3. If required, use the **Filters** pane to refine your search results further.

The available filters depend on the search results and the configuration of the filters. For information on the Organization filter, go to [Using the Organization filter](#).

 - » In the **Selected** area in the **Filters** pane, an overview of all the filter options that are applied to the search results is shown. This includes the filters applied via a filter tab as well as the filters applied via the **Filters** pane.

A screenshot of the Data Marketplace search results page. At the top, there is a search bar with a magnifying glass icon and a search icon. Below the search bar, there is a 'Filters' section with tabs: 'All*', 'Tables', 'Reports', 'Data Sets', and 'More'. The 'All*' tab is selected. To the right of the tabs is a 'Relevance' dropdown menu. Below the filters, there is a 'Selected (3)' section with a 'Save as New Filter' button. Under 'Selected (3)', there are three filter tags: 'Accepted', 'Data Set', and 'Business Analysts Community'. Below these tags, there are four filter categories: 'ORGANIZATION', 'ASSET TYPE', 'STATUS', and 'RATING', each with a dropdown arrow. To the right of the filters, there is a list of search results. The first result is 'Movie', which is expanded to show 'Data Set', 'Testing', and 'Status: Accepted'. Below 'Status: Accepted', there is a link to 'Business Analysts Community / New Data Sets'. The second result is 'dataset_002_e2e', which is a 'Data Set' with a 'test' sub-item.

- If required, use the **Selected** area in the **Filters** pane to remove the applied filters. To remove a filter, click **X** next to the applied filter.
- Analyze the remaining search results and click the title of a search result to open the [asset preview](#).

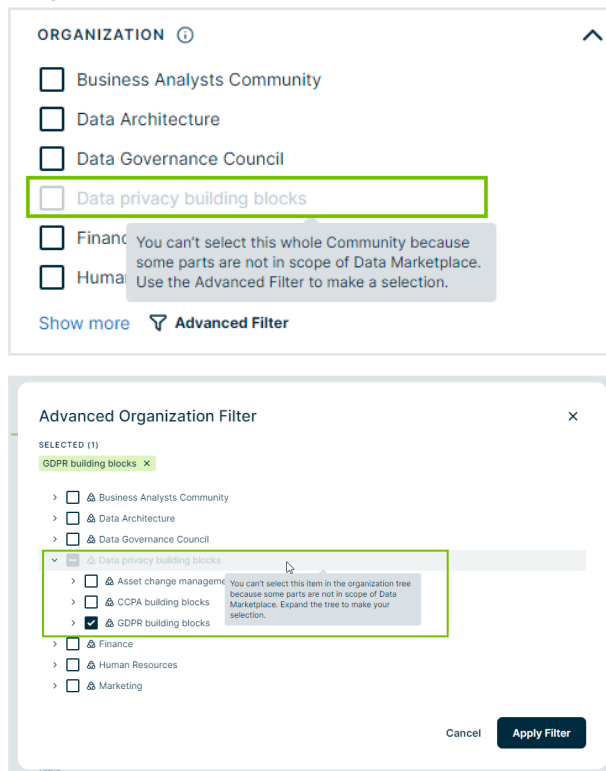
Using the Organization filter

The Organization filter allows you to show only the search results that belong to specific communities and domains in the scope of Data Marketplace.

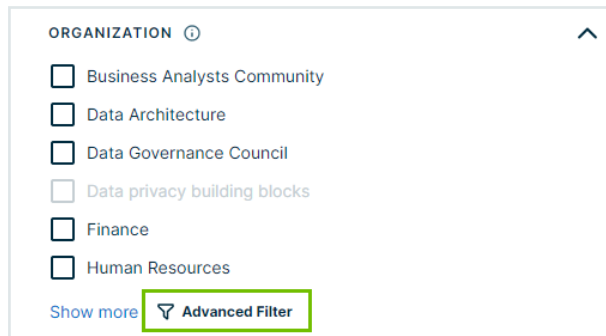
Note The Organization filter is not available by default. A Data Marketplace administrator can [make it visible and change the order of the filters](#).

- You can select only from the communities and domains that are in the [scope of Data Marketplace](#).

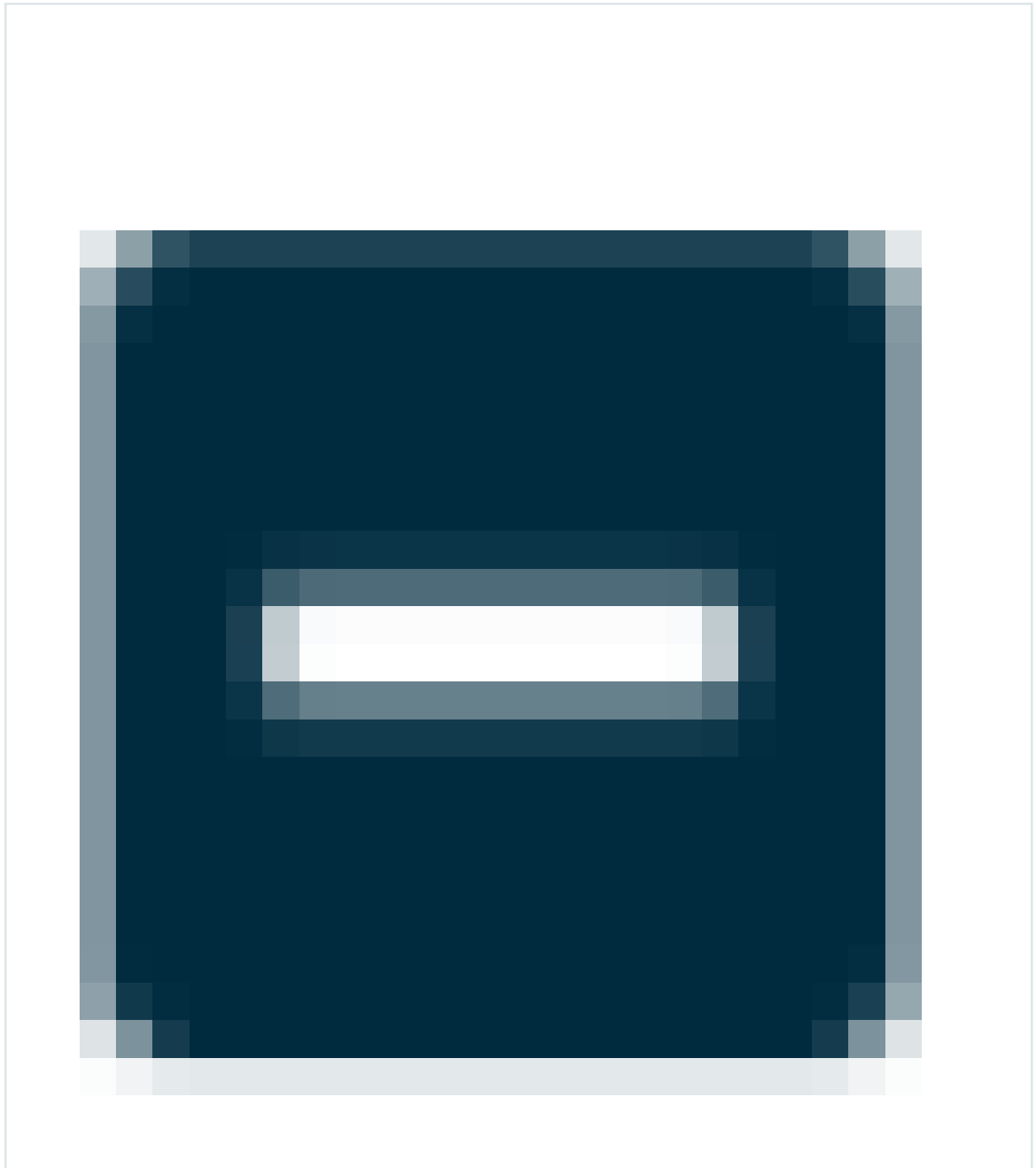
If only part of a community or domain is in the Data Marketplace scope, the item is grayed-out. To make a selection, click **Advanced Filter**, and use the **Advanced Organization Filter** dialog box.



- In the **Filters** pane, the Organization filter shows only the top-level communities. To show search results that belong to a specific subcommunity or domain, click **Advanced Filter**.



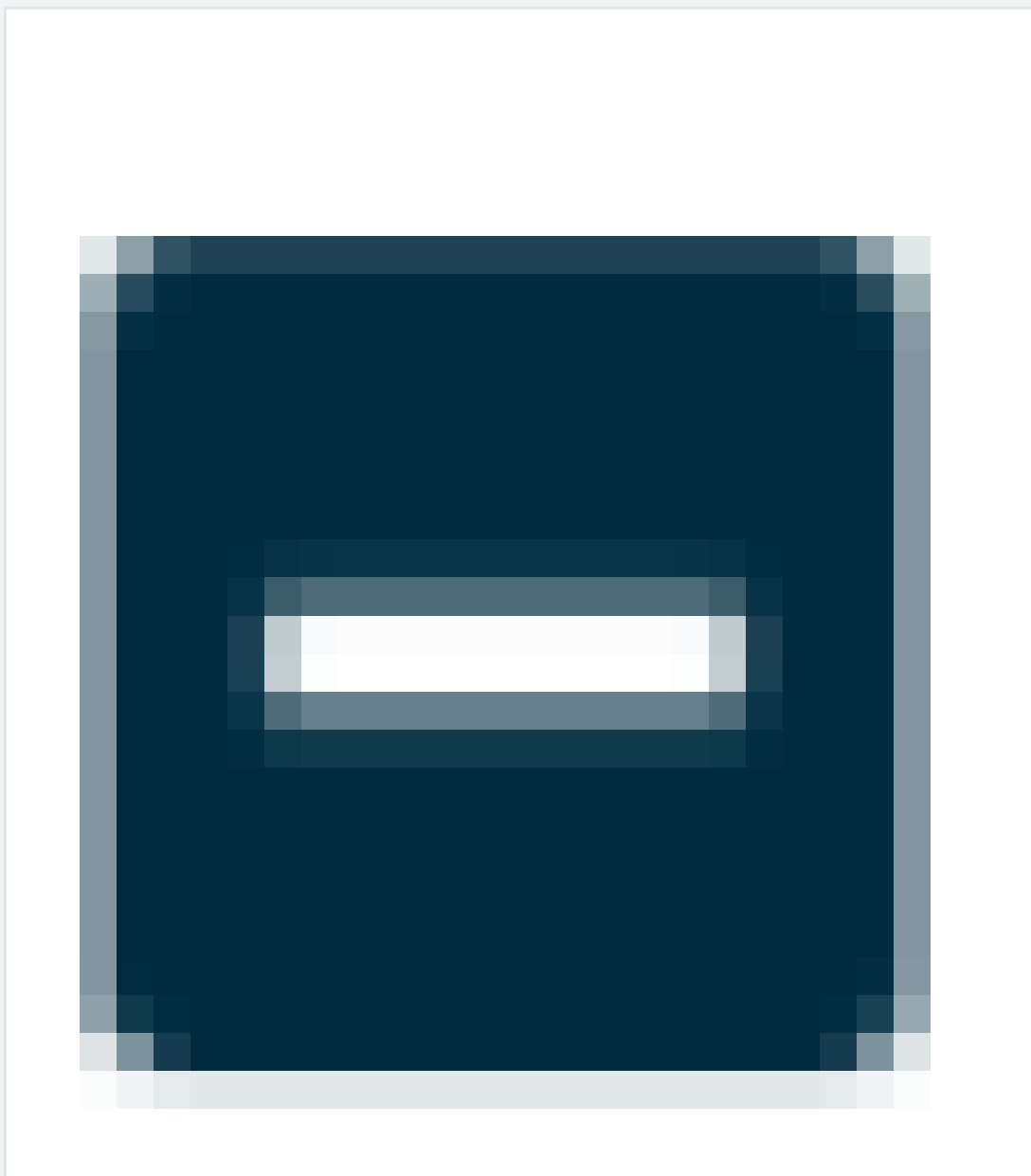
- The selected communities and domains are visible in the **Selected** area.
- If only part of a community or domain is selected, the community or domain is shown in a semi selected state

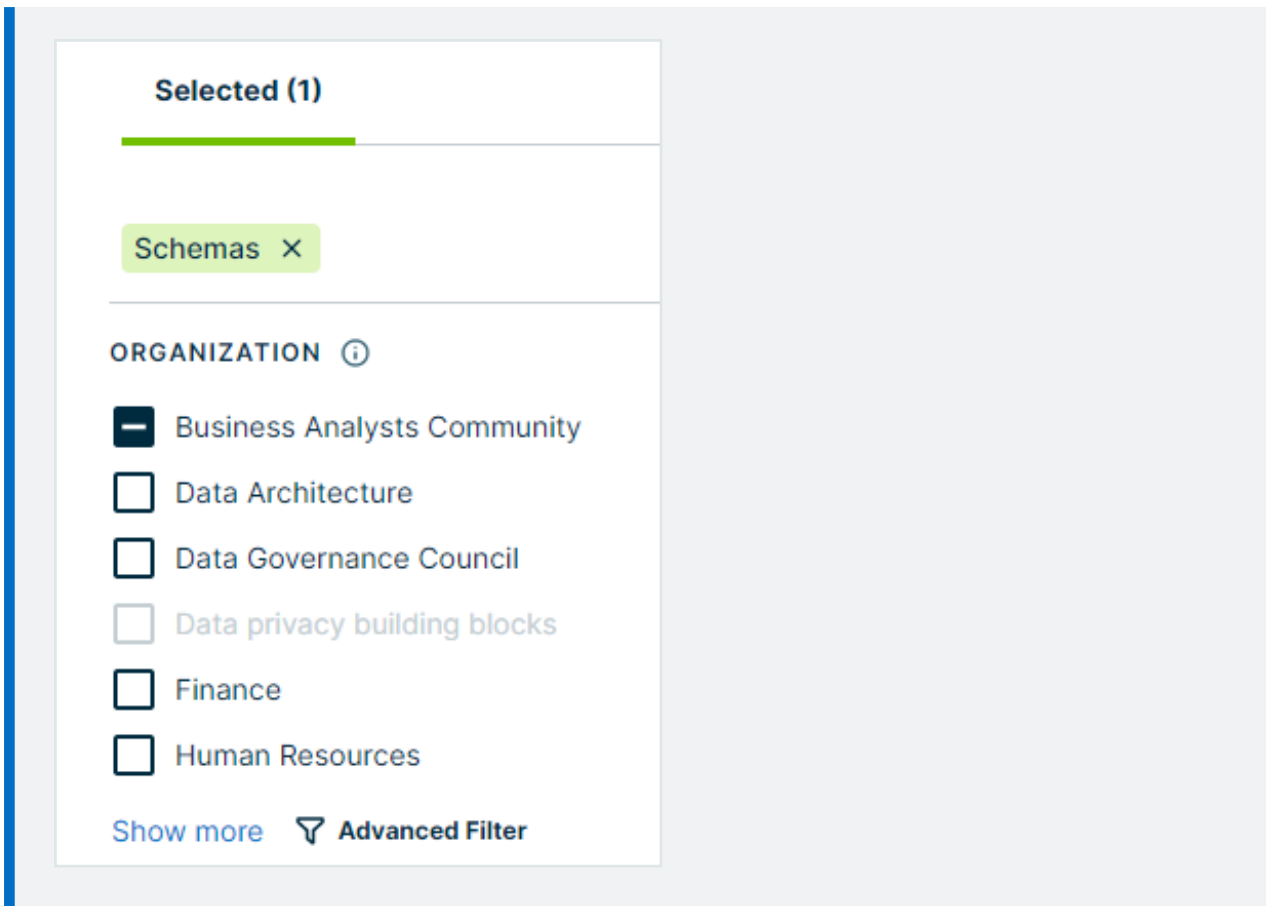


Example

We selected the Schemas community in Business Analytics Community in the **Advanced Filter**. By doing so, only the search results that are part of this community are shown.

- In the Selected area, the Schemas community is visible as the selected community.
- In the Organization filter, the Business Analytics Community is shown in the semi-selected state





Note

The Organization filter does not show the number of search results that belong to each community or domain.

Sort your search results

You can sort search results by the following criteria and in ascending or descending order:

- [Relevance](#).
By default, search results are sorted in order of descending relevance.
- [Date](#).
The search results are sorted based on when the asset was last modified.

Discover data



You can discover more data based on the data that you and your colleagues are visiting.

- **Most Visited Assets** shows the data that your colleagues visited the most in the last 30 days in Data Marketplace, Collibra, Collibra for Desktop, and Collibra for Mobile and that is in the scope of Data Marketplace.
- **Last Updated** shows assets that have recently been updated in Data Catalog and that are in the scope of Data Marketplace.
- **Recommendations** shows assets based on the data you searched for and visited in Data Marketplace, Collibra, Collibra for Desktop, and Collibra for Mobile and that are in the scope of Data Marketplace.

Prerequisites

Data discovery is enabled.

Steps

1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. In **Recommended Data** or **Popular Data**, click an asset.
 - » The **Discover** page opens.
 - » The [asset preview](#) appears.
3. Click the tab you need.
4. Click an asset to open its preview.

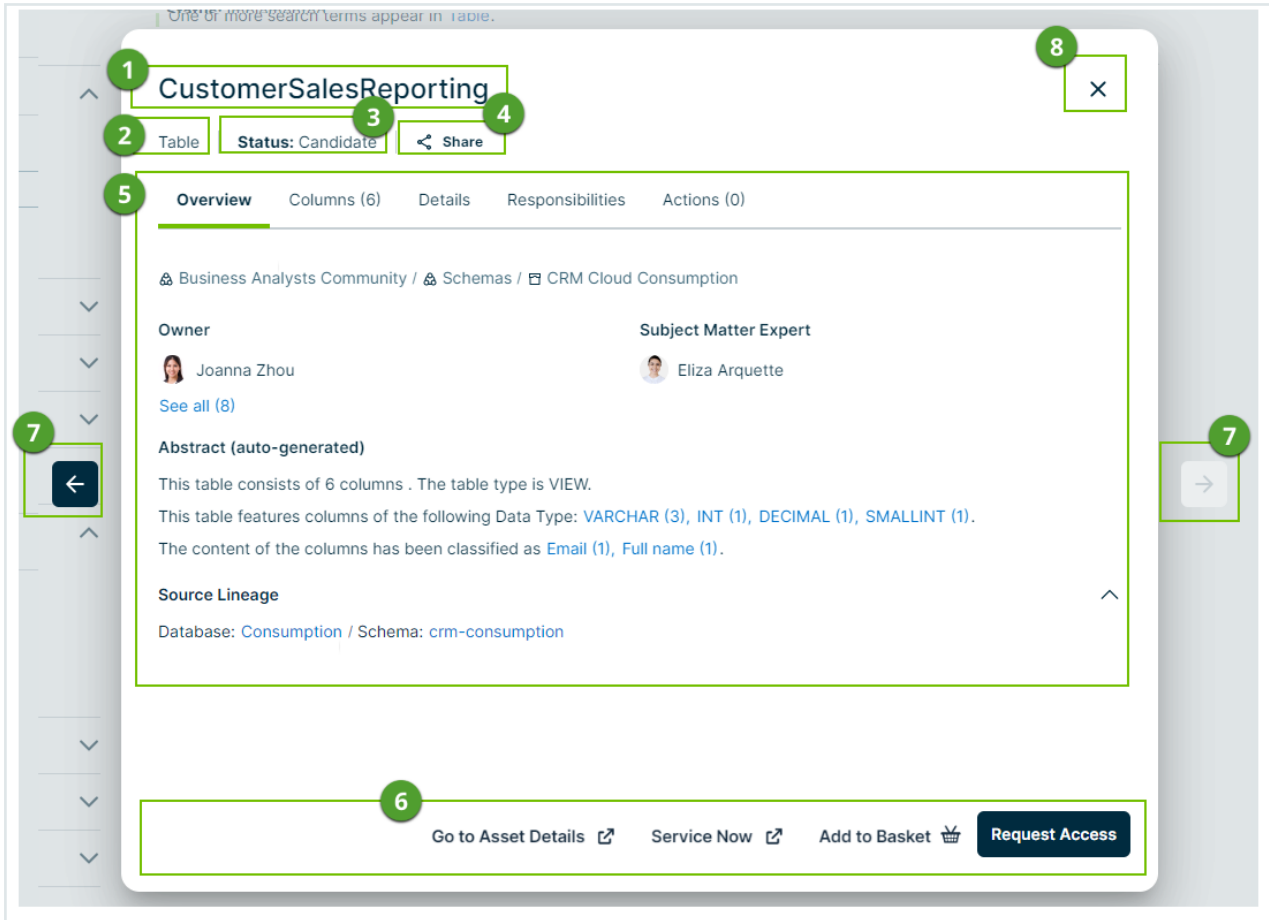
Previewing assets in Data Marketplace

After searching, you analyze the search results to find what you want. When you click a search result, its details open in an asset preview dialog box.

The Data Marketplace asset preview

After searching, you analyze the search results to find what you want. When you click a search result, its details open in an asset preview dialog box.

Asset preview sections



	Section	Description
1	Asset title	The name of the asset.
2	Asset type	The kind of asset you are previewing.
3	Asset status	The status of the asset in your governance cycle.
4	Share	Click Share to collect the URL to the asset and share it with colleagues.

Section	Description
5	<p>5 Tabs and tab content area</p> <p>The available tabs depend on the asset type. The most common tabs are:</p> <ul style="list-style-type: none"> • Overview: this tab page includes, for example: <ul style="list-style-type: none"> ◦ A breadcrumb to the community and domain the asset belongs to. ◦ The description of the asset. ◦ All tags applied to the asset. ◦ All responsibilities configured for the asset. • Details: this tab page includes, for example ratings and reviews of the asset. • Responsibilities: this tab page includes the roles assigned to the asset. Inherited responsibilities are not shown in Data Marketplace. • Actions: this tab pages includes all actions you can perform from this asset. They are the secondary actions. Secondary actions are selected by the administrator.
6	<p>6 Main actions</p> <p>This section shows the actions that administrator configured to be the most important actions in the asset preview. The section can also show the Add to Basket button, if the data basket feature has been enabled and if the feature applies to the asset type. By default, you can always open the asset page in Collibra via Go to Asset Details.</p>
7	<p>7 Navigation area</p> <p>Click the arrows to navigate to the previous or to the next search result.</p>
8	<p>8 Close</p> <p>Click Close to closes the asset preview.</p>

Preview content

- The asset preview content depends on the asset type.
Most asset types use the same layout, but some asset types follow a specific asset type template.

Information for a Data Set asset:

Customer Analytics ✕

Data Set | **Status:** Accepted | Certified | Share

Overview Columns (84) Details Responsibilities Actions (0)

Description

Data set containing information on our internet sales combined with relevant customer and product data.

Marketing / Marketing Analytics Data Sets

Owner

Subject Matter Expert

Joanna Zhou Eliza Arquette

[See all \(4\)](#)

Business Context

[Customer](#), [Customer Lifetime Value](#), [Leads](#), [Order](#), [Customer Churn](#), [Product](#)

Source Lineage ^

Database: [Refined](#) / Schema: [crm-refined](#) / Table: [CustomerProductSales](#)

Tags

[Analytics](#) [CRM](#)

[Go to Asset Details](#)

Information for a Column asset:

DueDate ✕

Column | **Status:** Candidate | [Share](#)

Overview | Details | Responsibilities | Actions (0)

[Business Analysts Community](#) / [Schemas](#) / [CRM Cloud Refined](#)

Owner **Subject Matter Expert**

Joanna Zhou Eliza Arquette

[See all \(8\)](#)

Abstract (auto-generated)

The column's data type is **TIMESTAMP**. It consists of 60398 Rows, of which 0% are empty. The column contains 1124 distinct values.

Source Lineage ^

Database: [Refined](#) / Schema: [crm-refined](#) / Table: [CustomerProductSales](#)

Related Datasets v

[← Go Back](#) [Go to Asset Details](#)

Note

If, in the asset type template, a field is defined but the information is not available for the selected asset, the field isn't displayed in the preview. This means you never see empty fields in the preview. For example: If the data has not been profiled, no profiling details are visible.

- Some asset previews contain a **Columns** or **Report Attributes** tab. This tab page shows the available columns or attributes in the asset. The columns and attributes are displayed in a table in which you can search. The table can show up to 1,000 assets.

Data Set					
Status: Accepted	Certified	Share			
Overview	Columns (104)	Details	Responsibilities	Actions	
<input type="text" value="Search"/>	Data type <input type="text"/>	Classification <input type="text"/>			
Name	Data type	Distinct values	Empty values	Classification	Table
country_of_birth_reference	Text	116	17%	Country code	workday-hrm.c
Suffix	VARCHAR	1	100%		CustomerProd
NumberChildrenAtHome	TINYINT	6	0%		CustomerProd
EnglishProductCategoryName	VARCHAR	3	0%		CustomerProd
country_of_birth	Text	123	2%	Country	workday-hrm.c
WeightUnitMeasureCode	VARCHAR	1	75%		CustomerProd
AddressLine2	VARCHAR	166	98%		CustomerProd
social_security_number	Text	831	17%	SSN	workday-hrm.c
Class	VARCHAR	3	64%		CustomerProd

- Column and Table assets show an **Abstract (auto-generated)**. This is a summary of the asset information that is generated by Data Marketplace based on the available asset details.

For a table, for example, Data Marketplace identifies: the number of columns, number of rows, the primary key names, the table type, the description from the source, the data type of the columns, and the classification of each column.

Abstract (auto-generated)

This table consists of 95 columns. The table type is TABLE.

This table features columns of the following Data Type: VARCHAR (50), SMALLINT (3), INT (12), TIMESTAMP (5), TINYINT (5), BINARY (1), REAL (3), BIT (3), DATE (2), DECIMAL (11).

The content of the columns has been classified as US state code (1), Country code (1), Date time (5), Full name (1), Date (2), Address (1), Country (1), Gender (1), IP address (1), Email (1).

For a table, Data Marketplace identifies: the data type, the number of rows, the number of unique values, the number of empty rows, and the data classification.

Actions

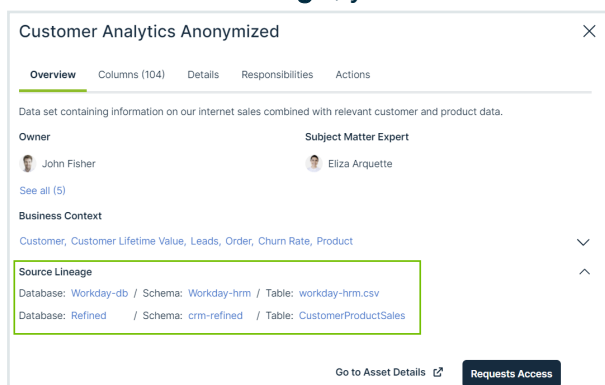
- Main actions:
 - Main actions are located at the bottom of the asset preview.
 - By default, the **Go to Asset Details** button is available. This opens the asset page in Collibra.
 - The Data Marketplace administrator can [add more actions to this section](#).
 - The Data Marketplace administrator can make the [data basket button](#) available in this section.
- Secondary actions:
 - Secondary actions are all grouped in the **Actions** tab page of the asset preview.
 - The Data Marketplace administrator [configures the secondary actions](#).
- From the title bar section in the preview, you can share an asset link with someone else.

Find the source of a data set or report

You can find the data that was used to source a data set or report.

Steps

1. Search for an asset and click it.
 - » Its details appear in the [asset preview](#).
2. In the asset preview, click the **Overview** tab.
3. Under **Source Lineage**, you can see the related data sources.



4. Click the source system name.
 - » The source system details open in the [asset preview](#).

Using the data basket in Data Marketplace

If the [data basket feature is enabled](#) for Data Marketplace, data consumers can add some assets to their data basket from the asset preview. For more information on the data basket and the assets it is available for, go to [Requesting access to data](#).

If you open an asset preview and see the button **Add to Data Basket**, you can use the button to add the asset to your data basket. Once you added several assets to the basket, you can check out the basket and request access to the assets in your basket in one action.

Creating personal and group-specific filters in Data Marketplace (Beta)

If the setting [Data Marketplace Advanced Filter Settings](#) is active:

- All Data Marketplace users can save a set of filters that they use frequently as a personal filter.
- Data Marketplace administrators can save a set of filters and make it available only to one or more user groups.


Note This feature is in [Beta testing](#).

About saved filters	98
Personal filters in Data Marketplace (Beta)	100
Preconfigured filters for user groups in Data Marketplace (Beta)	104

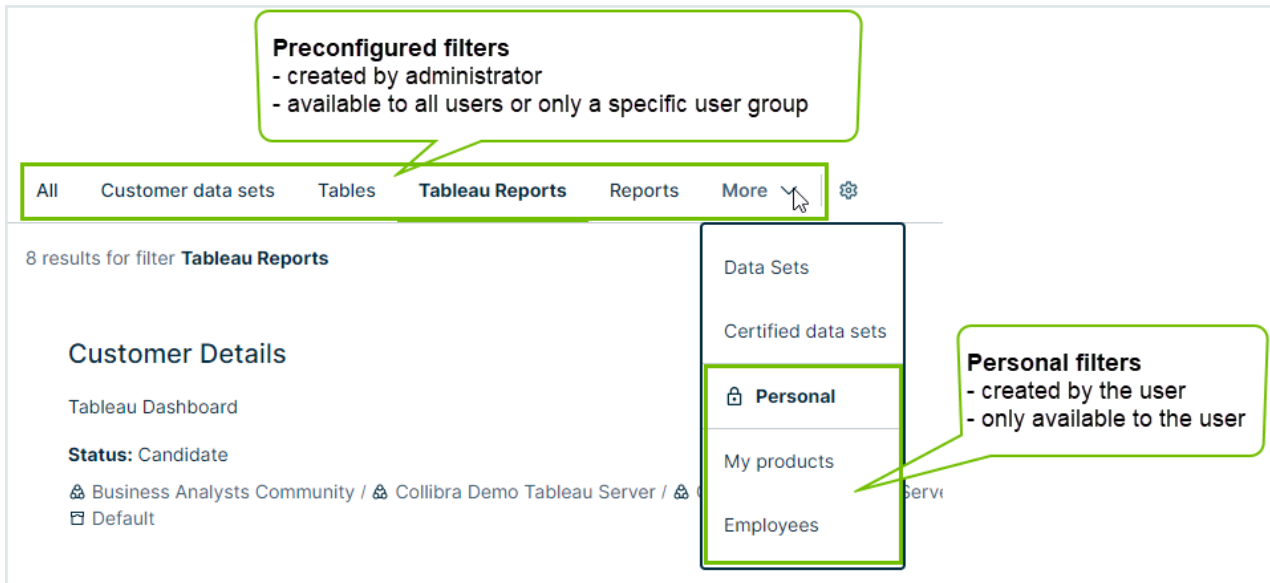
About saved filters

A saved filter is a set of filters that is defined and saved by a user or by a Data Marketplace administrator.

The following types are available:

- A personal filter is a set of filters saved by a user. A personal filter is available only to the user who created the filter and is indicated by a lock icon .
- A preconfigured filter is a set of filters saved and assigned to all users or to one or more user groups by a Data Marketplace administrator.

Saved filters are available as links in the landing page and as filter tabs in the Search results page.



Note Creating personal filters and preconfigured filters for a specific user group is only possible if the setting [Data Marketplace Advanced Filter Settings](#) is active.


Watch a video

What's next?

- [Learn more about personal filters](#)
- [Learn more about preconfigured filters for user groups](#)

Personal filters in Data Marketplace (Beta)

If the setting [Data Marketplace Advanced Filter Settings \(Beta\)](#) is enabled, all users can create personal filters. A personal filter is a set of filters saved by a user. A personal filter is

available only to the user who created the filter and is indicated by a lock icon . To watch a video that explains saved filters, go to [About saved filters](#).

Apply a saved filter

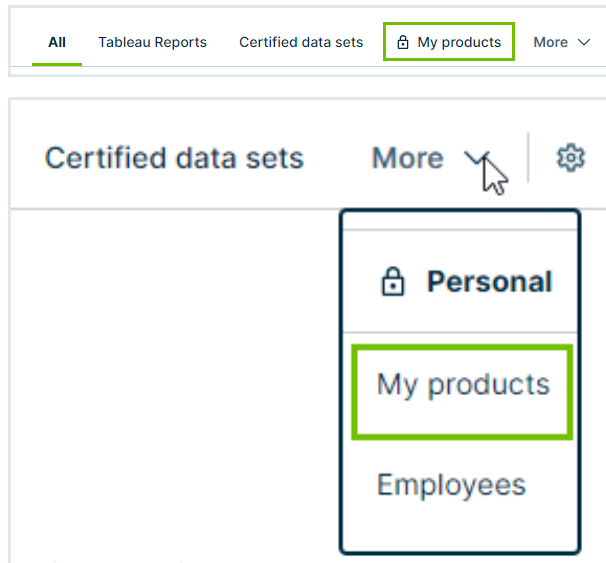
1. [Search in Data Marketplace](#).
 - » The [search results page](#) opens. If the **All** tab is selected, the page shows all the search results to which you have access within the Data Marketplace scope.
 - » The filter tabs show the [saved filters](#) to which you have access. The list includes the preconfigured filters recommended to you based on the user groups you belong to, the preconfigured filters that are available to all users, and your personal filters.
2. Click the tab of the filter that you want to apply.

The filter may be available from the **More** drop-down list.



 - » In the results area, the number of search results and the name of the applied saved filter are displayed.
 - » The selected saved filter is visible in the **Selected** area in the **Filters** pane. To show the details, expand the group.

Create a personal filter




1. [Search in Data Marketplace](#).
 - » The [search results page](#) opens. If the **All** tab is selected, the page shows all the search results to which you have access within the Data Marketplace scope.
2. Use filters in the **Filters** pane to refine your search results.
 - » The selected filters are visible in the **Selected** area in the **Filters** pane.
3. Click **Save as New Filter**.
 - » The **Save as New Filter** dialog box appears.
4. Enter a name for the new filter.
5. Select the option **Personal Filter**.
6. Click **Save**.
 - » The filter is saved and a filter tab is available. It is possible your filter is accessible only from the **More** drop-down list.



Edit the filters applied by a personal filter

1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Select the tab of the personal filter you want to change.
 - » In the **Selected** area, the filters linked to the personal filter appear.
4. Change the filters as needed.
 - » In the **Selected** area, a tag **Unsaved Changes** appears.
 - » A * appears next to the tab name to indicate changes are made which are not saved.
5. In the **Selected** area, click the link **Update Filter**.
 - » The filter is saved.
 - » A notification appears indicating your changes are saved.




Edit a personal filter


1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Click .
 - » The **Manage Filters** page opens.
4. Click the **Personal Filters** tab.
 - » All personal filters are shown.
5. To change the name of a filter:
 - a. Double click the filter name and make the changes.
 - b. Press `Enter` or click outside the field.
 - » The filter is saved and the tab name changes.
 - » A notification appears indicating your changes are saved..
6. To hide or unhide a filter:
 - a. Double click the Visible icon for the filter and make the changes.
 - b. Press `Enter` or click outside the field.
 - » The filter is saved and the tab is displayed depending on the selection.
 - » A notification appears indicating your changes are saved..

Tip

Currently, you can't rearrange the tabs. By default, you first see the All filter. Then you see the dedicated preconfigured filters for the groups you belong to and the preconfigured filters that are available to all users. Finally, you see your personal saved filters.

Delete a personal filter

1. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Click .
 - » The **Manage Filters** page opens.

4. Click the **Personal Filters** tab.
 - » All personal filters are shown.
5. Click the  for the filter you want to delete.

Warning
The filter is immediately deleted and the related filter tab disappears.

Tip You can delete only your own personal filters.

More information

- For general information on how to filter search results, go to [Refine your search results](#).
- For information on the creation of preconfigured filters for specific user groups, go to [Preconfigured filters for user groups \(Beta\)](#).



Preconfigured filters for user groups in Data Marketplace (Beta)

If the setting [Data Marketplace Advanced Filter Settings \(Beta\)](#) is enabled, administrators can create preconfigured filters for specific user groups. For more details on what they are, go to [Saved filters](#).

Important Each user group can have only one dedicated preconfigured filter.

Create a preconfigured filter for a specific user group

Watch a video

1. Select the filters you want to include in the preconfigured filter:
 - a. On the main menu, click , and then click  **Data Marketplace**.
 - » The [Data Marketplace landing page](#) opens.
 - b. Click **All** to see all available filters in the search results.
 - » The [search results page](#) opens. If the **All** tab is selected, the page shows all the search results to which you have access within the Data Marketplace scope.

- c. Select the filters you want to save.




Tip

The **sorting order** of the search results is saved in the preconfigured filter, the search terms are not.

- » In the **Selected** area, the selected filters and a tag **Unsaved Changes** appear.
 - » A * appears next to **All** to indicate changes are made which are not saved.
2. Click **Save as New Filter**.
 - » The **Save as New Filter** dialog box appears.
 3. Enter a name for the new filter.
 4. Select the option **Preconfigured Filter**.
 - » The **Assign to User Group** field appears.
 5. In **Assign to User Group**, select one or more user groups to which you want to assign this filter.
 6. Click **Save**.
 - » The filter is saved and the users who are part of the selected user groups have access to the filter.

Important A user group can have only one dedicated preconfigured filter.

Change the preconfigured filter for a user group

1. On the main menu, click , and then click  **Data Marketplace**.
 - » The **Data Marketplace landing page** opens.
2. Click **All** to see all available filters in the search results.
 - » The search results appear.
3. Click .
 - » The **Manage Filters** page opens.
4. Click the **Preconfigured Filters** tab.
 - » All preconfigured filters are shown.

5. Remove the assigned preconfigured filter for the user group.
 - a. In the assigned user group filter, double click the **User Groups** field and remove the user group.
 - b. Press `Enter` or click outside the field.
 - » The filter is saved.
 - » A notification appears indicating your changes are saved.
6. Assign the correct preconfigured filter.
 - a. In the filter you want to assign, double click the **User Groups** field and add the user group.
 - b. Press `Enter` or click outside the field.
 - » The filter is saved.
 - » A notification appears indicating your changes are saved.

Edit and Delete a preconfigured filter

Go to [Configure the filter tabs](#) in Data Marketplace.

Troubleshooting Data Marketplace

For an overview of the limitations and guidelines, go to [Data Marketplace limitations and guidelines](#).

You don't find the asset you are looking for

The possible reasons are:

- The asset you are looking for is not part of the Data Marketplace [scope](#) (status, asset type, organization)
- You don't have the required permissions to access the asset.

You see fewer or more search results in the **All** filter tab compared to other out-of-the-box filter tabs

The [out-of-the-box preconfigured filters](#) Tables, Data Sets and Reports are not impacted by the Data Marketplace [scope configuration](#).

This means that it is possible fewer or more search results appear in the **All** tab compared to other out-of-the-box tabs.

Administrators can [configure the available filter tabs](#).



You don't see your recent searches or recently visited assets

Your recent searches and recently visited assets information is stored in your browser's local storage.

This means that when you use another browser or another machine to search in Data Marketplace, the recent searches and recently visited assets information is not available.

The asset preview doesn't show all columns or report attributes

Issue: In the [asset preview](#), you don't see all columns or attributes in the **Columns** or **Report Attributes** tab.

Reason: The table can show up to 1,000 assets. This is because the table is using the Output Module.

Solution: In the asset preview, click **Go to Asset Details** to open the asset page.

New data consumers don't receive discovery data

Issue: New data consumers don't see **Popular Data** and **Recommended Data** in their [landing page](#).

Reason: The recommended data engine compares the browsing history of the current user with the history of other users. If there is no history, there are no recommendations at that point in time.

Solution: Recommendations and popular data will be provided after one day.

You don't see a specific filter in the Filters pane

The possible reasons are:

- The search reindexing is still running. The filter may appear once reindexing is completed.
- The filter may be [set to invisible](#).
- The filter may not apply to your search results or not contain any values based on your search results.

You cannot edit the filter tabs

Issue: When you open the **Manage Filters** page , you do not have any options to change the **All** filter tab.

Reason: You can't rename or delete this filter tab. You can however change the other [out-of-the-box filter tabs](#).

Solution: To change the assets that appear when users select the **All** filter tab, change the Data Marketplace [scope](#).

You don't see the actions (workflows) in the asset preview after they were enabled in the Data Marketplace settings

[Actions](#) are based on workflows and their configuration. Workflows can be configured to only be available for certain asset types or users, and they can be paused. If you don't see a specific action, the workflow configuration may give you an indication on the reason.

Also consider the current [limitations](#).

You don't know where the actions you selected are displayed

[Actions](#) can be made available in Data Marketplace:

- At the bottom of the Data Marketplace [landing page](#).
These are the actions the administrators selected in the **Landing Page Actions** tab page.

- In the **Need help?** section if the search did not return any results.
These are the actions the administrators selected in the **No Search Results Actions** tab page.
- At the bottom of an [asset preview](#).
These are the actions the administrators defined in the **Main Asset Preview Actions** tab page.
- In the **Actions** tab page in an [asset preview](#).
These are the actions the administrators selected in the **All Asset Preview Actions** tab page.

The workflow does not start

[Workflows](#) that start other workflows will not open the follow-up task automatically in Data Marketplace. You can still access the task from the [Tasks indicator](#) in the top bar.

You don't find assets based on relations that end with a specific attribute

Issue: You have created a relation-based index that ends with an asset type attribute so data consumers can search for the attribute and find specific related asset types. You now add the attribute to an asset type's assignment because it was not there before.

You expect that this asset type is taken into account when Data Marketplace searches based on the relations, but the search does not seem to work.

Reason: When you add an attribute to an asset type and you want to apply an existing relation-based index, you need to [reindex the relations](#).

You get an error message when you activate the Data Discovery Modules option

Issue: In the Data Marketplace settings, the extra option [Data Discovery Modules](#) has been selected. You expect that the landing page shows **Popular Data**, **Recent Data Visits**, and **Recommended Data**, but you receive the following message instead: `We are not able to show most visited assets because usage data is not available.`

Reason: The setting "Collect Application Usage Data" has an impact on the availability of popular and recommended data. This setting is enabled by default in most environments and is not accessible in Cloud environments.

If you receive this message, [create a support ticket](#) to change the "Collect Application Usage Data" setting.

You get an error message when you want to add, update or delete a relation index

Issue: When you add, update or delete a relation index, you receive one of the following messages:

```
Maximum number of supported trails is 4, but relation path has 5.  
Maximum number of facets is 20, but current configuration has 21.
```

Reason: You might have requested the creation of custom relation-based filters before release 2022.11. With release 2022.11, you can [manage these yourself](#) and [validations](#) have been added.

Solution: It is best to recreate the custom made relation-based filters via the [user interface](#). You can reset your environment to the default out-of-the-box relation indexes (used in relation-based search and filters) via the [Reset to default](#) button.

How can you test relations-based search?

Go to [How does relation-based search work?](#) for information.

(Beta) You get an error message when you assign a preconfigured filter to a user group

Issue: When you assign a user group to a preconfigured filter, you receive the following message:

```
A user group can only have one preconfigured filter.
```

Reason: One of the user groups to which you want to assign the preconfigured filter already has a preconfigured filter assigned to them. Currently, each user group can have

only one preconfigured filter, next to the preconfigured filters which are available to all users.

Solution: Remove the existing preconfigured filter from the group and try again. [Go to more information.](#)