



Collibra Platform Self-Hosted  
**Data Marketplace**

## Collibra Platform Self-Hosted - Data Marketplace

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

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# About Data Marketplace

Data Marketplace is a dedicated search portal in Collibra Data Intelligence Cloud that makes data discovery easy for everyone 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.

Watch a video

This video is created in the classic user interface.



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, meaning 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. All Data Marketplace users can save a set of filters that they use frequently as a personal filter. Data Marketplace administrators can also save a set of filters. To tailor the filter tabs to different user segments in the organization, the filters can be assigned to specific user groups.
- Data Marketplace can guide you to the information you might be looking for via [search suggestions](#).
- You can [collect assets](#) in lists to easily access assets you want to follow up on or need frequently. This feature is in Beta testing.

## 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](#) must be available in the various pages in Data Marketplace and can activate the data basket.

# Data Marketplace compatibility


Data Marketplace is available on Collibra Data Intelligence Cloud, GovCloud (FedRAMP), and Collibra Platform Self-Hosted (CPSH) environments.

**Note** For GovCloud and CPSH environments, the **Popular data** and **Recommended data** sections in the [Data Discovery Module](#), and the [Data Similarity](#) feature are not included.

Administrators can [enable additional settings](#) and [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 <a href="#">global role</a>.</p> <p><b>Note</b></p> <ul style="list-style-type: none"> <li>If you have the Data Marketplace global role, you can access only Data Marketplace from the Applications menu.</li> <li>If you have the Catalog role, you can access both Data Marketplace and Catalog from the Applications menu.</li> </ul>	<ul style="list-style-type: none"> <li>Access to Data Marketplace from the Applications icon .</li> <li>Search for assets and access the asset preview, if you have <a href="#">view permission</a> on the asset.</li> <li>Start the actions that have been assigned to Data Marketplace by the administrator.</li> </ul> <p><b>Note</b> 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 <a href="#">asset preview</a>.</p>

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

## 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.

### 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.
- You cannot use workflows created in Workflow Designer, 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.


## 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> <span data-bbox="501 365 517 387">○</span> <span data-bbox="533 365 549 387">✓</span> True (default): <a href="#">Data Marketplace</a> is enabled. Anyone with the <a href="#">required permissions</a> can use or configure the Data Marketplace application from the Applications icon .                             <div data-bbox="533 495 1420 701" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Note When Data Marketplace is enabled and you <a href="#">reindex Collibra completely</a>, the relations are also reindexed automatically. You don't need to start it manually. However, <a href="#">reindexing the relations</a> will not reindex Collibra completely.</p> </div> </li> <li> <span data-bbox="501 741 517 763">○</span> <span data-bbox="533 741 549 763">✗</span> False: Data Marketplace is not enabled.                             <p>After you enable this setting, <a href="#">reindex Data Marketplace relations</a> or <a href="#">reindex Collibra completely</a>.</p> <div data-bbox="496 875 1420 1048" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>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> </li> </ul>

3. Verify whether you want to enable following settings in **Search index configuration**:

Setting	Description
Relation-based search	<ul style="list-style-type: none"> <li data-bbox="499 365 1414 562">○ ✓ True (default in new environments): The <a href="#">Data Marketplace</a> 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="533 562 1414 804" style="background-color: #f0f0f0; padding: 5px; margin-top: 5px;"> <p data-bbox="580 598 1342 770">Example A column named <b>Order</b> is included in a data set named <b>Customer</b>. If the relation-based search is enabled and you search for <b>Order</b> in Data Marketplace, then the data set <b>Customer</b> appears in the search results because the data set contains this column.</p> </div> <div data-bbox="533 837 1414 1005" style="background-color: #f0f0f0; padding: 5px; margin-top: 5px;"> <p data-bbox="580 871 1378 972">Tip For more information about this feature and the default relation types, go to <a href="#">Filtering and searching based on relations in Data Marketplace</a>.</p> </div> </li> <li data-bbox="499 1043 1370 1122">○ ✗ False: The Data Marketplace search results do not consider relations.</li> </ul> <p data-bbox="491 1128 1402 1200">After you enable this setting, you must <a href="#">reindex Data Marketplace relations</a> or <a href="#">reindex Collibra completely</a>.</p> <div data-bbox="496 1225 1414 1391" style="background-color: #f0f0f0; padding: 5px; margin-top: 5px;"> <p data-bbox="541 1258 1350 1359">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 data-bbox="491 315 1026 349">This setting is specific to Data Marketplace.</p> <p data-bbox="491 376 1409 450">This setting keeps Data Marketplace up to date if relations between assets are created, updated, or removed.</p> <div data-bbox="496 472 1417 645" style="border-left: 2px solid #0070C0; padding-left: 10px; margin: 10px 0;"> <p data-bbox="539 506 1366 611"><b>Example</b> 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 data-bbox="496 678 1409 913" style="list-style-type: none"> <li data-bbox="496 678 1409 913">○ ✓ 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.</li> </ul> <div data-bbox="533 920 1417 1093" style="border-left: 2px solid #92D050; padding-left: 10px; margin: 10px 0;"> <p data-bbox="580 954 1382 1059"><b>Tip</b> For more information about this feature and the default relation types, go to <a href="#">Filtering and searching based on relations in Data Marketplace</a>.</p> </div> <div data-bbox="533 1122 1417 1507" style="border-left: 2px solid #A6A6A6; padding-left: 10px; margin: 10px 0;"> <p data-bbox="580 1155 1370 1261"><b>Note</b> Collibra does not automatically reindex relations between assets for <a href="#">relation paths that end with an attribute</a>. You need to manually reindex the relations.</p> <p data-bbox="580 1267 1374 1473">You, for example, created a path that ends with an attribute: Table A contains Column B with attribute Privacy. If you have a column with attribute Privacy and value "sensitive data", a user searching for "sensitive data" can find Table A based on the relation path. However, changes to the attribute value will not be picked up automatically during automatic reindexing.</p> </div> <ul data-bbox="496 1541 1409 1702" style="list-style-type: none"> <li data-bbox="496 1541 1409 1702">○ ✗ False (default): Changes to relations are not automatically indexed. This can cause inconsistencies between Collibra and Data Marketplace. You can, however, <a href="#">manually reindex Data Marketplace relations</a>.</li> </ul>

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

Collections	<p>Enable this setting to activate the use of <a href="#">collections</a> in Data Marketplace.</p> <ul style="list-style-type: none"><li>○ ✓ True: Collections can be used in Data Marketplace.<ul style="list-style-type: none"><li>▪ Users can add an asset to a collection from an asset preview in Data Marketplace. They can also remove an asset from a collection from the asset preview.</li><li>▪ Users can access and manage all their collections from an overview page via their avatar → <b>Collections</b>.</li></ul></li><li>○ ✗ False: (default): The beta feature is not enabled.<ul style="list-style-type: none"><li>▪ When disabled, collections are not accessible via the UI.</li><li>▪ Existing collections are not removed.</li></ul></li></ul>
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5. Click **Save all**.

6. If you have enabled the Data Marketplace or Relation-based search setting, [reindex Data Marketplace relations](#) or [reindex Collibra 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 won't work.

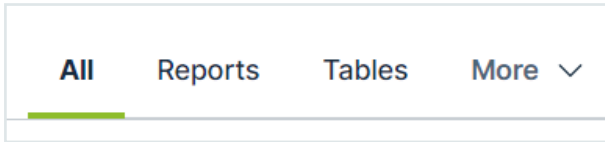
Filter name	Description	Uses relations
Business Asset	<p>Business Asset refers to the business assets that are related to the data, such as <code>Customer Phone Number</code> or <code>Customer Order Number</code>.</p> <p><b>Tip</b> For a detailed narrative on the differences between business terms, data domains, and data concepts, go to <a href="#">Conceptual data layer versus the Business Glossary</a>.</p>	Yes
Certified	<p>This filter limits your search results to data that has been <a href="#">certified</a>, meaning approved, endorsed, or guaranteed.</p> <p><b>Tip</b> For complete information on certifying reports, go to <a href="#">Trusted Business Reporting</a>.</p>	No
<a href="#">Data Domain</a>	<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"> <li>• Are high-level, theoretical representations of your data.</li> <li>• Represent the structure of concepts in data environments.</li> <li>• Contain all the different nuances of corresponding business terms.</li> </ul> <p><b>Important</b> To benefit from this, your data structure must follow the Data Stewardship metamodel. Go to <a href="#">Conceptual data layer</a>.</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"> <li>• Are high-level, theoretical representations of your data.</li> <li>• Represent an aspect of one or more data domains.</li> <li>• Define a context-independent representation of the structure of an organization's data.</li> </ul> <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. Go to <a href="#">Conceptual data layer</a>.</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 you 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 you to apply a saved filter. By default, Data Marketplace shows out-of-the-box preconfigured filters.



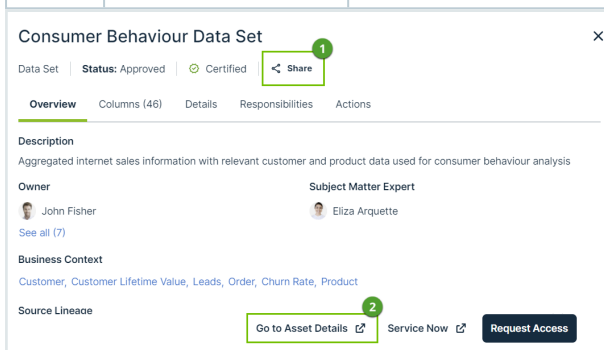
Out-of-the-box preconfigured filter	Description
All	No filters are applied. All search results in the Data Marketplace scope to which you have View permissions are listed.
Tables	Only assets of the type Table and Database View are listed in the search results.
Data Sets	Only assets of the type Data Set and BI Data Set are listed in the search results.
Reports	<p>Only assets of the type Report and some out-of-the-box child asset types of Report are listed in the search results.</p> <p>Show the included out-of-the-box child asset types of Report</p> <ul style="list-style-type: none"> <li>• BI Report</li> <li>• Tableau Workbook</li> <li>• Tableau View</li> <li>• Tableau Worksheet</li> <li>• Tableau Story</li> <li>• Tableau Dashboard</li> <li>• Power BI Dashboard</li> <li>• Power BI Report</li> </ul>

- Administrators can [change the All preconfigured filter by updating the Data Marketplace scope](#), can [change the out-of-the-box preconfigured filters](#) and can [add additional filter tabs for all data consumers or for specific user groups](#).
- Data consumers can [save their own personal filter tabs](#).

# Actions

By default, data consumers can share a link to an asset or open the asset in Collibra from 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.

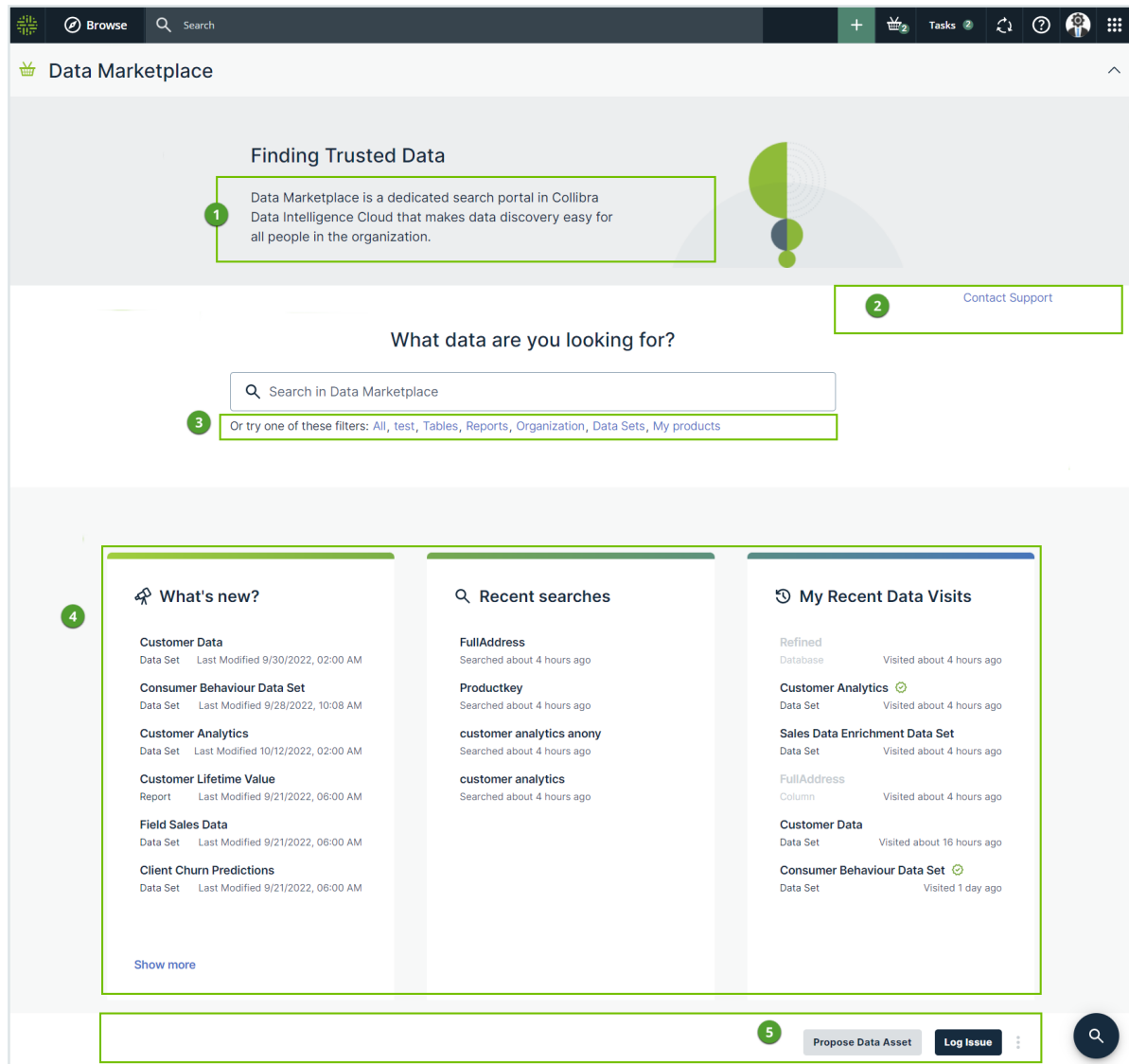
Configure Data Marketplace: Overview .....	18
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Define the filter tabs in Data Marketplace .....	59
Reindex Data Marketplace relations .....	65



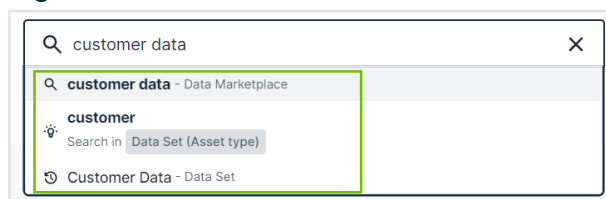
# Configure Data Marketplace: Overview

## What can you configure?

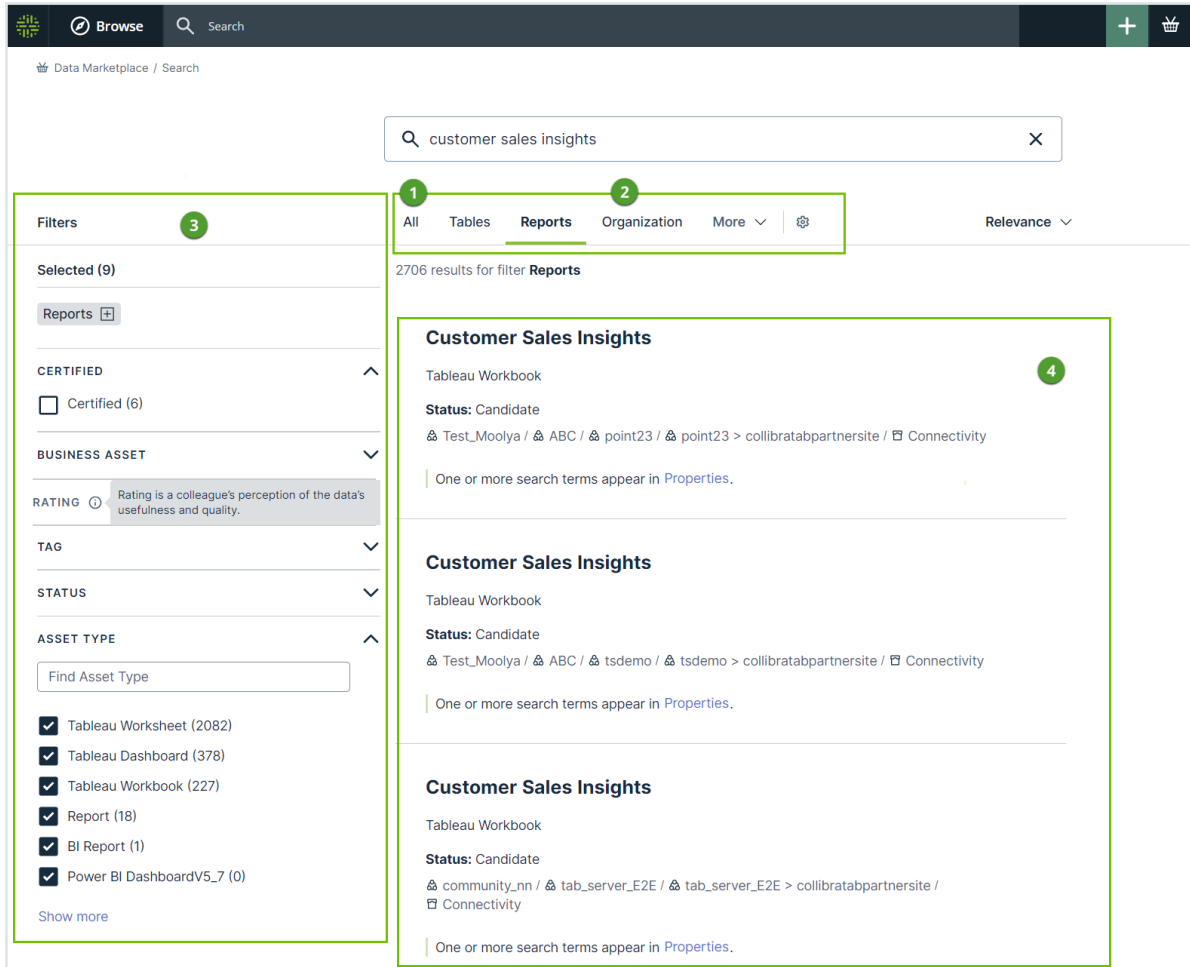
- You can define who has access to Data Marketplace. Go to [Data Marketplace permissions](#).
- In the Data Marketplace landing page, you can configure the [introduction text](#) (1), the [quick links](#) (2), the [links to preconfigured filters](#) (3), whether [discovery data must be available](#)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



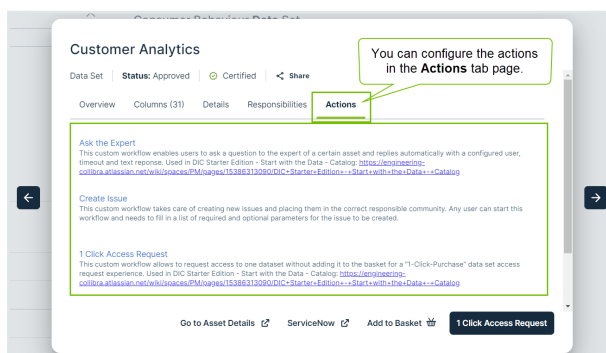
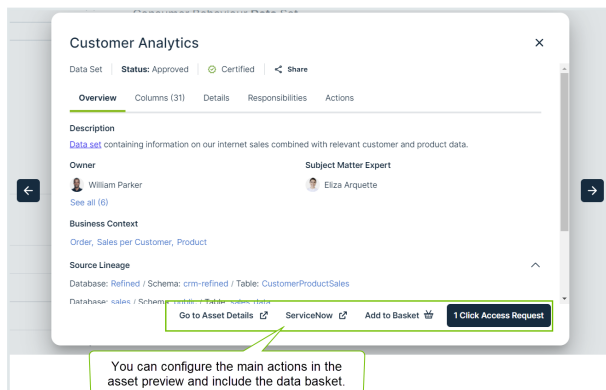
- You can define whether **search suggestions** are provided once people start searching for data.



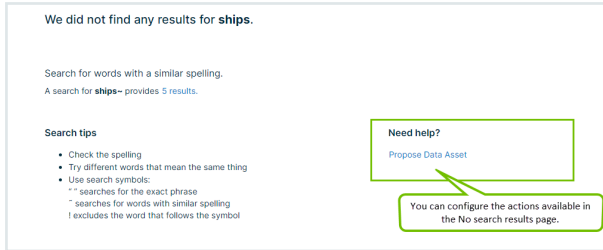
- You can configure the **scope**(1), **filter tabs** (2), **filters** (3) and **search based on relations** (4).



- You can configure the **actions available in the asset preview**.  
To have the **Add to Basket** button available in Data Marketplace, you have to **enable the shopping basket feature**.



- You can configure the actions available in the **Need help** section in the search results page.



- You can define who needs to receive email notifications about automatic updates to the **Data Marketplace configuration**.
- You can define that you want to see **similar data for Table assets**.

## How do you configure Data Marketplace?

Step	Description
1	Optionally, <b>change the Data Marketplace scope</b> . By default, Data Marketplace <b>finds assets of all asset types, with any status, anywhere in your organizations</b> . You can change the scope based on asset type, status, and organization. You can also include custom asset types and statuses in the scope.
2	Optionally, <b>change the landing page</b> . You can change the introduction text of Data Marketplace, add up to three quick links to the landing page, and show discovery data. You can change the filters shown below the search field via the <b>preconfigured filters</b> .
3	Optionally, <b>make actions available in Data Marketplace</b> . By default, an asset can be shared with a colleague and can be opened in Collibra from the asset preview. You can make additional actions available. Actions can be available in the Data Marketplace landing page, the No search results page, and the asset preview. To have the <b>Add to Basket</b> button available in Data Marketplace, you have to <b>enable the shopping basket feature</b> .

Step		Description
4	Optionally, enable <a href="#">additional features</a> , such as search suggestions and email notifications.	You can activate search suggestions, define the user group that needs to receive email notifications about automatic updates to the Data Marketplace configuration, and so on.
5	Optionally, <a href="#">configure the filters in Data Marketplace</a> .	<p>By default, all <a href="#">out-of-the-box filters</a> that apply to the <a href="#">search results</a> are available to data consumers.</p> <p>You can choose the filters that must be available in the <b>Filters</b> pane and define tooltips for your data consumers.</p> <p>If needed, you can also create <a href="#">custom filters based on relations</a>.</p> <div style="background-color: #f0f0f0; padding: 10px; border: 1px solid #ccc;"> <p><b>Note</b> If you want to search based on relations, make sure the <a href="#">Relation-based search</a> setting has been enabled.</p> </div>
6	Optionally, <a href="#">configure the filter tabs in Data Marketplace</a>	By default, all <a href="#">out-of-the-box filter tabs</a> are available in the <a href="#">search results</a> and on the landing page. You can <a href="#">configure the filter tabs</a> you need.
8	Optionally, optimize the search index.	<p>The Collibra <a href="#">search index settings</a> 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.</p> <p>For information on the Data Marketplace-specific settings such as relation-based search, go to <a href="#">Enable Data Marketplace in your environment</a>.</p>

## 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 of 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 daily and updates the configuration as needed. For more information, go to [Automatic configuration updates](#).

1. On the main toolbar, 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.

**Tip** Most enabled asset types are physical data assets, such as tables, composed data assets, such as data sets and products, or report assets.

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.
 

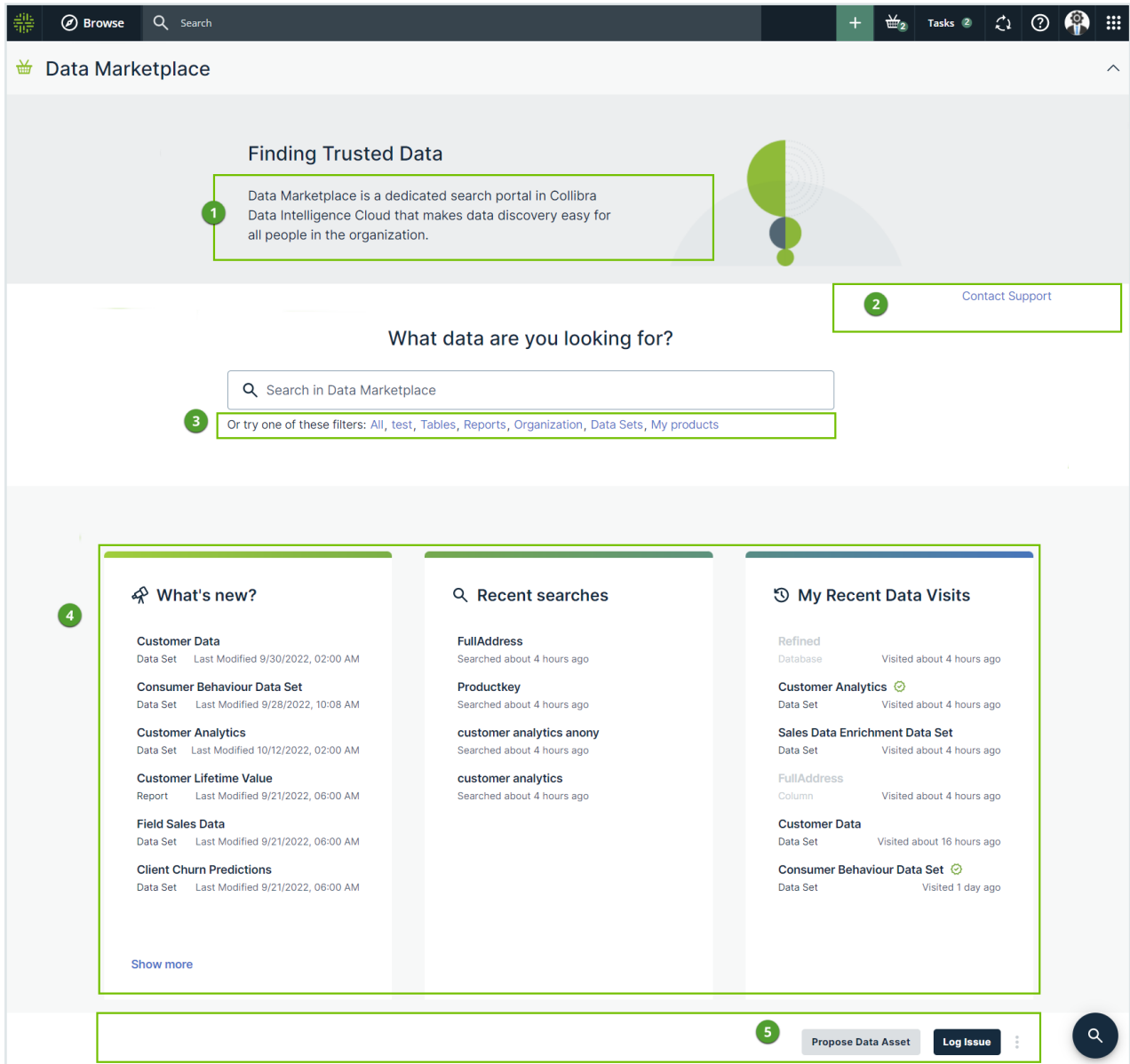
If you don't define a scope, Data Marketplace searches all communities and domains.
6. Click **Save**.

## 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.](#)

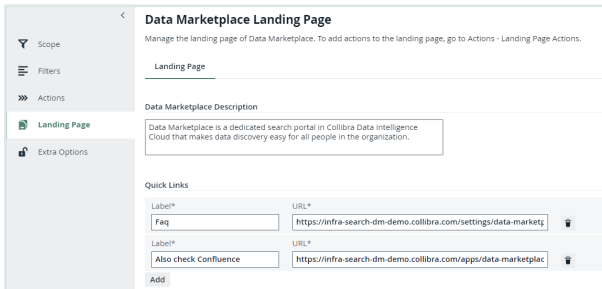
## Required permissions

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

## Steps

1. On the main toolbar, 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 **Show Data Discovery Modules** checkbox.
    - 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 inData 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 in the [search results](#).
- In the primary action area, at the bottom of an [asset preview](#).
- In the **Actions** tab page in an [asset preview](#).



### Important

- You cannot use workflows created in Workflow Designer, 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. To use it as a primary action or asset action in Data Marketplace, make sure to apply 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 toolbar, 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

1. On the main toolbar, 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**

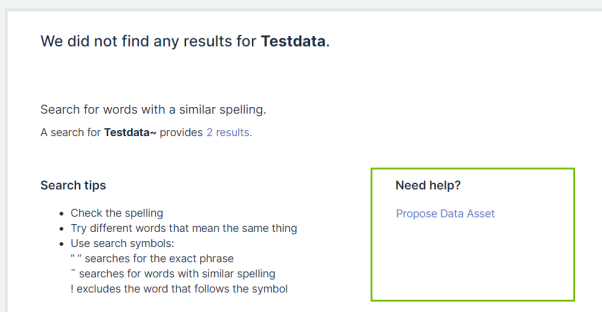
You can select only **global workflows** for which the option **Show in global create** has been selected.

5. Click **Save**.
  - » The selected workflows will be visible in the **Need help?** section in the search results page.

**Tip** Popular action here is 'Propose New Asset'.

### Example

In this example, the 'Propose Data Asset' workflow is visible in the **Need help?** section in the search results.



## Steps to add the main actions in the asset preview

1. On the main toolbar, 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**.

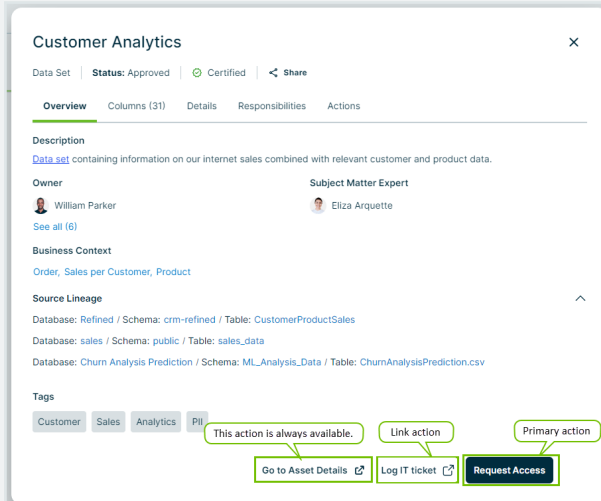
### Important

- You can select only **resource workflows**, 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 toolbar, 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

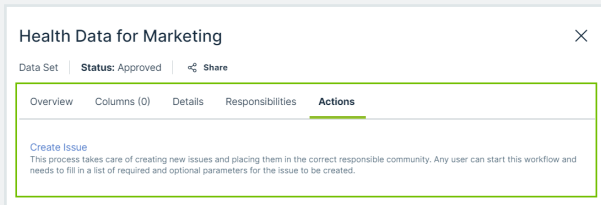
- You can select only **resource workflows**, workflows that apply to assets.
- If a data consumer doesn't have access to the workflow or the workflow doesn't apply to the asset's asset type, the action will not appear in the asset preview.

**Tip** Popular actions here are 'Request access', 'Request documentation', and 'Subscribe to asset'.

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 search suggestions, emails, and other options in Data Marketplace

Data Marketplace offers additional options to configure the Data Marketplace experience.



## 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 toolbar, click , and then click  **Settings**.
  - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Extra Options**.

3. Select the **Use Search Suggestions** checkbox to provide [suggestions](#) when data consumers enter search terms.
4. Select the **Show Data Discovery Modules** checkbox 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. For more information, go to [About the landing page](#).

**Note** This feature should not be selected on Collibra Cloud for Government and Collibra Platform Self-Hosted (CPSH) environments.

5. To show similar data for Table assets, make sure the **Show Similar Data** checkbox is selected.

This checkbox is selected by default for cloud environments, except for Public sector. For more information on this feature, go to [Data similarity](#).

**Note** This feature should not be selected on Collibra Cloud for Government and Collibra Platform Self-Hosted (CPSH) environments.

6. To define who must receive [notifications](#) about the automatic updates to the Data Marketplace configuration, in the **Notifications on Automatic Updates** section, select the user group who needs to receive the notification.
7. Click **Save**.

## What's next?

[Continue the Data Marketplace configuration](#)

## Defining who must receive configuration update 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.

For information on the steps to follow, go to [Configure search suggestions, emails, and other options](#).

## Configure the filters in Data Marketplace

By default, some [out-of-the-box filters](#) are visible to data consumers. As an administrator, you can configure the available filters by:

- Showing or hiding filters for data consumers.
- Changing the display name of filters.
- Defining the order of filters.
- Adding descriptions, which appear as tooltips to data consumers.
- [Creating additional filters based on relations](#).

#### Example

By configuring the filters, an admin 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

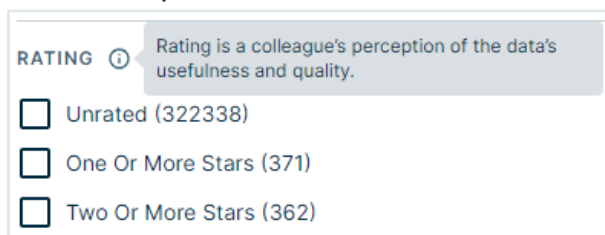
- [Data Marketplace is enabled.](#)
- [The Settings landing page is enabled.](#)


## Required permissions

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

## Steps

1. On the main toolbar, 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. A filter has an ID and a name. The filter name is shown to data consumers
    - The **Filters** pane in Data Marketplace uses the order of this list.
3. Perform one of the following actions:
  - If needed, change the Filter Name.  
This is the name data consumers will see in the **Filters** pane.
  - Where useful, add a description.  
This description will be visible to data consumers as a tooltip or help text.



- To show a filter, select the **Is Visible** checkbox. To hide a filter, clear the **Is Visible** checkbox.
- To always show all filter values for the filter, clear the **Is Collapsed** checkbox.
- To reorder the filters, use the  icon to drag and drop a filter in the desired location.

- To **update a custom relation-based filter**, click **Open Configuration**. The **Open Configuration** link indicates if a filter is based on relation indexes. The link opens the index configuration page.

**Tip** 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.

**Important** Data Marketplace searches based on relations only if the **Relation-based search** setting has been enabled.

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](#).

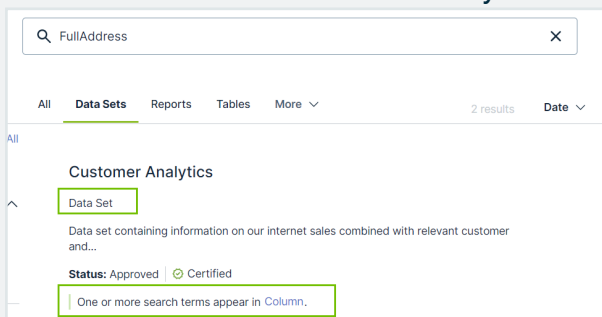
## How does relation-based search work?

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.

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

### 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".



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 paths**

**Relation path for Data Set - Column:**

- Data Set contains Column

**Tip**

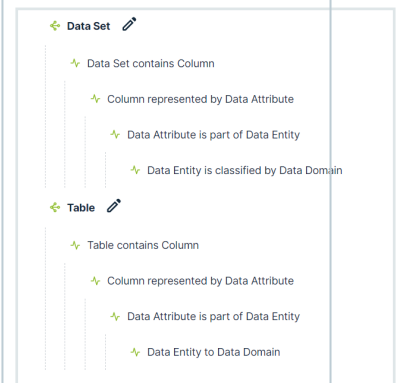
You can create custom relation paths for the relation-based search. For information, go to [Managing relation indexes in Data Marketplace](#).

## 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
Data Domain	<p><b>Relation path for Data Domain - Data Set:</b></p> <ol style="list-style-type: none"> <li>1. Data Set contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is part of Data Entity</li> <li>4. Data Entity is classified by Data Domain</li> </ol> <p><b>Relation path for Data Domain - Table:</b></p> <ol style="list-style-type: none"> <li>1. Table contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is part of Data Entity</li> <li>4. Data Entity is classified by Data Domain</li> </ol>



Filter	Relation paths	
Data Concept	<p><b>Relation path for Data Concept - Data Set:</b></p> <ol style="list-style-type: none"> <li>1. Data Set contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is classified by Data Concept</li> </ol> <p><b>Relation path for Data Concept - Table:</b></p> <ol style="list-style-type: none"> <li>1. Table contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is classified by Data Concept</li> </ol>	
Business Asset	<p><b>Relation path for Business Asset - Data Set:</b></p> <ul style="list-style-type: none"> <li>• Data Set is related to Business Asset</li> </ul> <p><b>Relation path for Business Asset - Report:</b></p> <ul style="list-style-type: none"> <li>• Report is related to Business Asset</li> </ul> <p><b>Relation path for Business Asset - Table:</b></p> <ul style="list-style-type: none"> <li>• Table is related to Business Asset</li> </ul> <p><b>Relation path for Business Asset - Table:</b></p> <ol style="list-style-type: none"> <li>1. Table contains Column</li> <li>2. Column is represented by Business Asset</li> </ol>	
Source System	<p><b>Relation path for Source System - Data Set:</b></p> <ul style="list-style-type: none"> <li>• Data Set is implemented into Source System</li> </ul> <p><b>Relation path for Source System - Table:</b></p> <ol style="list-style-type: none"> <li>1. Table is part of Schema</li> <li>2. Schema belongs to Technology Asset</li> <li>3. Technology Asset is grouped by Source System</li> </ol>	
Data Source	<p><b>Relation path for Data Source - Table:</b></p> <ul style="list-style-type: none"> <li>• Table is part of Schema</li> </ul> <p>The data source is an attribute of the Schema asset.</p>	

Important Data Marketplace searches based on relations only if the [Relation-based search](#) setting has been enabled.

**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

**Note** Data Marketplace searches based on relations only if the [Relation-based search](#) setting has been enabled.

- This feature **isn't available** in the [latest user interface](#) (beta).

**Tip**

To create relation indexes, deactivate the latest UI. After you have defined the indexes, you can enable the latest UI again and continue the configuration of Data Marketplace.

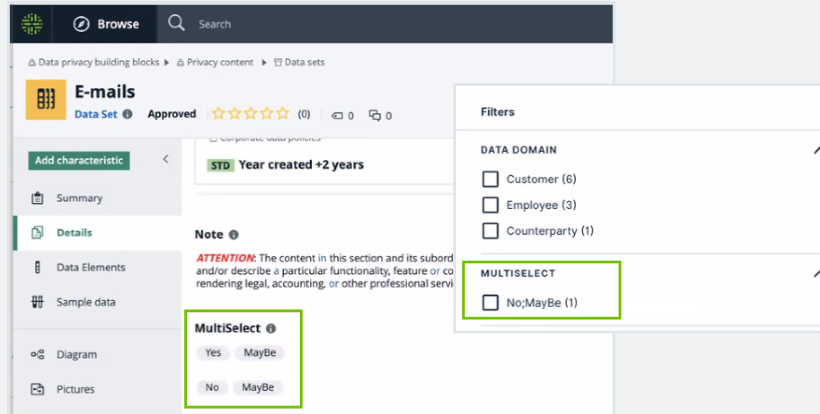
- If you don't use the relations of the Stewardship operating model, the out-of-the-box relation indexes used for the relation-based search and out-of-the-box relation-based filters won't work. You will need to create [custom relation indexes](#).
- You cannot create more than 20 relation indexes in Data Marketplace.
- When you create a relation index:
  - You cannot use special characters, such as /, ?, @, [, }, <, >, and \_ in the relation index name.
    - The maximum number of characters in the relation index name is 50.
  - You cannot add more than four relations to one relation path.
  - Complex relations are not supported as custom relation paths.
  - You can include the following attribute types in a relation path: Text, Selection, Multiple Selection, Numbers, and Boolean (True/False). The attribute types Date and Script are not supported.
    - If the attribute type included in the relation index has a cardinality higher than 1, we only show the first alphabetically sorted occurrence of the attribute as a filter option in the Data Marketplace Filters pane. This limitation applies to

## Selection, Multiple Selection, Numbers, and Text.

## Example

Attribute Multiselect can be added multiple times (cardinality is set to 2).

In Data Marketplace, only the first alphabetically sorted occurrence of the attribute is shown.



- 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 you from creating 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 filter values:

- 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 feature in Data Marketplace needs to be **enabled**, and needs 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](#).

This feature **isn't available** in the **latest user interface** (beta).

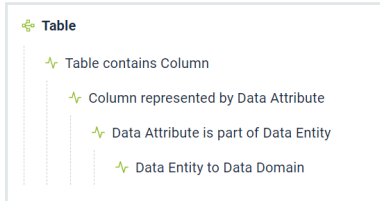
**Tip**  
To create relation indexes, deactivate the latest UI.  
After you have defined the indexes, you can enable the latest UI again and continue the configuration of Data Marketplace.

## 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.
- 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
<p>Which asset type (and children) or asset types do you want to filter out?</p>	<ul style="list-style-type: none"> <li>• If you identified one asset type, then this asset type is your root asset type, meaning the first asset type in your relation path.</li> <li>• If you identified multiple asset types, you need to create a relation path for each asset type.</li> </ul>	<p>Table</p>
<p>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?</p> <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p><b>Note</b> Only Text, Selection, Multiple Selection, Numbers, and Boolean (True/False) attribute types can be selected as attributes in a relation path.</p> </div>	<ul style="list-style-type: none"> <li>• This asset type is the last asset type in your relation path.</li> <li>• The asset type or attribute type should be reflected in the filter name.</li> </ul>	<p>Data Domain.</p>

Question	Answer and consequence	Example
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	
Data Domain	<p><b>Relation path for Data Domain - Data Set:</b></p> <ol style="list-style-type: none"> <li>1. Data Set contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is part of Data Entity</li> <li>4. Data Entity is classified by Data Domain</li> </ol> <p><b>Relation path for Data Domain - Table:</b></p> <ol style="list-style-type: none"> <li>1. Table contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is part of Data Entity</li> <li>4. Data Entity is classified by Data Domain</li> </ol>	
Data Concept	<p><b>Relation path for Data Concept - Data Set:</b></p> <ol style="list-style-type: none"> <li>1. Data Set contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is classified by Data Concept</li> </ol> <p><b>Relation path for Data Concept - Table:</b></p> <ol style="list-style-type: none"> <li>1. Table contains Column</li> <li>2. Column is represented by Data Attribute</li> <li>3. Data Attribute is classified by Data Concept</li> </ol>	

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

**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.

## Create a relation index

This feature **isn't available** in the [latest user interface](#) (beta).

**Tip**  
 To create relation indexes, deactivate the latest UI.  
 After you have defined the indexes, you can enable the latest UI again and continue the configuration of Data Marketplace.

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 /, ?, @, [, }, <, >, and \_ in the relation index name.  
The maximum number of characters in the relation index name is 50.
- You cannot add more than four relations to one relation path.
- You can include the following attribute types in a relation path: Text, Selection, Multiple Selection, Numbers, and Boolean (True/False). The attribute types Date and Script are not supported.
- 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 you from creating identical relation indexes.
- Also, check [Relation-based search limitations](#) and [Data Marketplace limitations and guidelines](#).

## Before you begin

- Ensure that your environment uses the [classic user interface](#).

#### Tip

To create relation indexes, deactivate the latest UI.



After you have defined the indexes, you can enable the latest UI again and continue the configuration of Data Marketplace.

- Make sure you have identified the relation-paths that you want to use. For information on how to construct relation paths, go to [About relation indexes](#).
- Make sure the **Relation-based search** [setting](#) has been enabled. Newly created relation indexes are used in the search only if the relation-based search feature is enabled.

## Required permissions

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






## Steps

1. On the main toolbar, 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.

**Manage Relation Indexes**
+ Create an Index

The relation-based search and filters need indexed relations. Here, you can create, update, and delete relation indexes. A relation index consists of one or more relation paths. The relation-based search feature automatically takes all relation indexes into account. To use a relation index as a relation-based filter, enable the filter in the [Filters settings](#).

---



DATA_DOMAIN (DATA DOMAIN)	
MEASURE (MEASURE)	
DATA_SET (DATA SET)	
DATA_CONCEPT (DATA CONCEPT)	
BUSINESS_ASSET (BUSINESS ASSET)	

4. Click **Create an Index**.
  - » The **Create an Index** page opens.
5. Enter the name of the filter.
  - Provide a clear and meaningful name. This name will be the default name in the **Filters** pane in Data Marketplace. For information on defining filter names, see [Configuring the filters](#).
  - A space in the name will translate as an underscore in the relation index ID.

### Important

- Once the relation index is saved, you cannot change its name. However, you can change the display name in the Data Marketplace [filters settings](#).
- You cannot use special characters, such as /, ?, @, [, }, <, >, and \_ in the relation index name. The maximum number of characters in the relation index name is 50.


## 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.

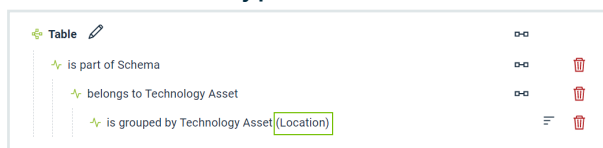
**Note** The preview list doesn't always show all possible results. The list is based on a subset of the assets in Collibra. Sometimes, this can mean you don't see any results at all.

- 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.

You can select the following attribute types in a relation path: Text, Selection, Multiple Selection, Numbers, and Boolean (True/False). The attribute types Date and Script are not supported.

**Note** If the attribute type included in the relation index has a cardinality higher than 1, we only show the first alphabetically sorted occurrence of the attribute as a filter option in the Data Marketplace Filters pane. This limitation applies to Selection, Multiple Selection, Numbers, and Text. For an example, go to [Relation-based search limitations](#).

- » 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 in the [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

This feature **isn't available** in the [latest user interface](#) (beta).

### Tip

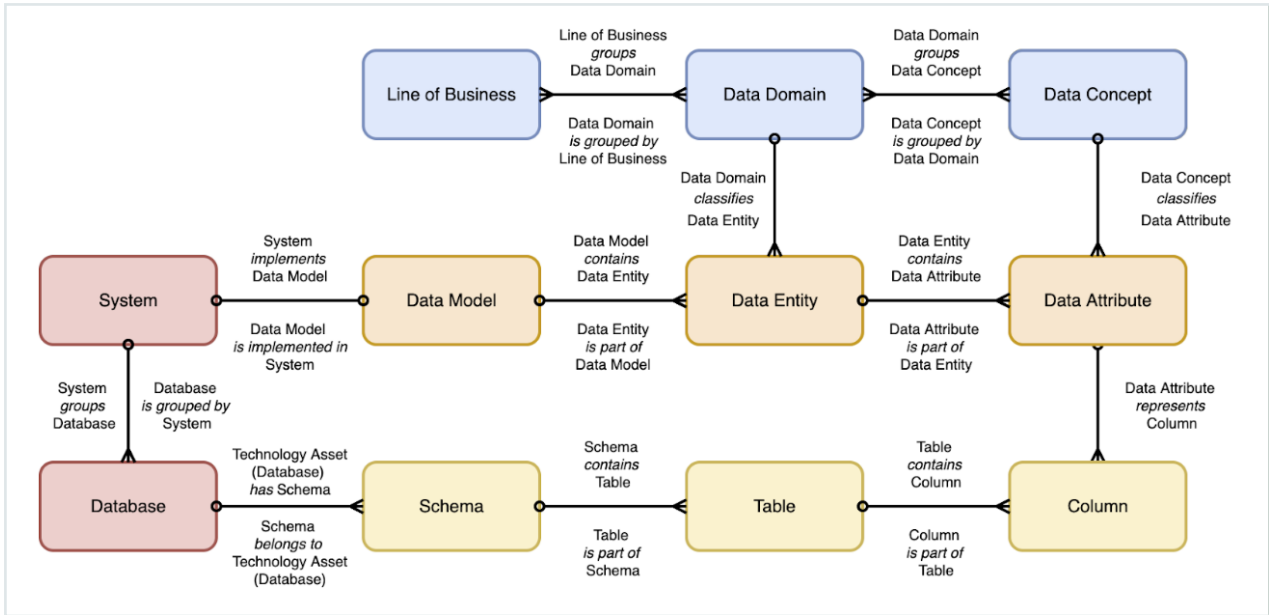
To create relation indexes, deactivate the latest UI.

After you have defined the indexes, you can enable the latest UI again and continue the configuration of Data Marketplace.

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"> <li>a. Table is part of Schema.</li> <li>b. Schema belongs to Technology Asset</li> <li>c. Technology Asset is grouped by Technology Asset, attribute type Location.</li> </ul>	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. Verify that the **Relation-based search setting** has been enabled.

## 4. Create the relation index.

- a. On the main toolbar, 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.

### Manage Relation Indexes + Create an Index

The relation-based search and filters need indexed relations. Here, you can create, update, and delete relation indexes. A relation index consists of one or more relation paths. The relation-based search feature automatically takes all relation indexes into account. To use a relation index as a relation-based filter, enable the filter in the [Filters settings](#).

---

DATA_DOMAIN (DATA DOMAIN)	
MEASURE (MEASURE)	
DATA_SET (DATA SET)	
DATA_CONCEPT (DATA CONCEPT)	
BUSINESS_ASSET (BUSINESS ASSET)	

d. Click **Create an Index**.

#### Create an Index

**Name**

If you use this relation index as a relation-based filter, this name is used in the Filters pane. Once saved, you can't change the name.

**Relation Paths**

A relation path represents the chain of relations you want to index. Start a relation path with the asset type you want to find and end with the asset type or attribute type you want to search on. A relation path can contain a maximum of 4 relations.

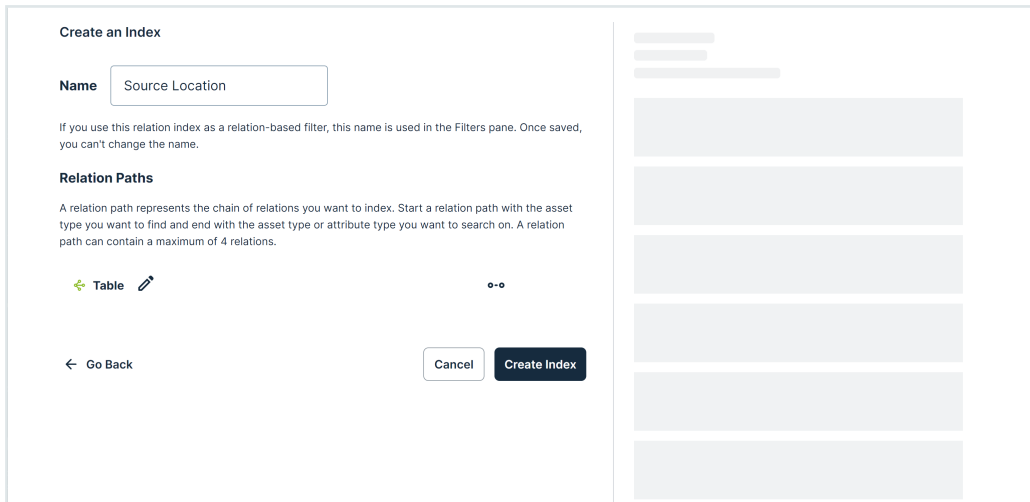
**Select an asset type**

← Go Back
Cancel
Create Index

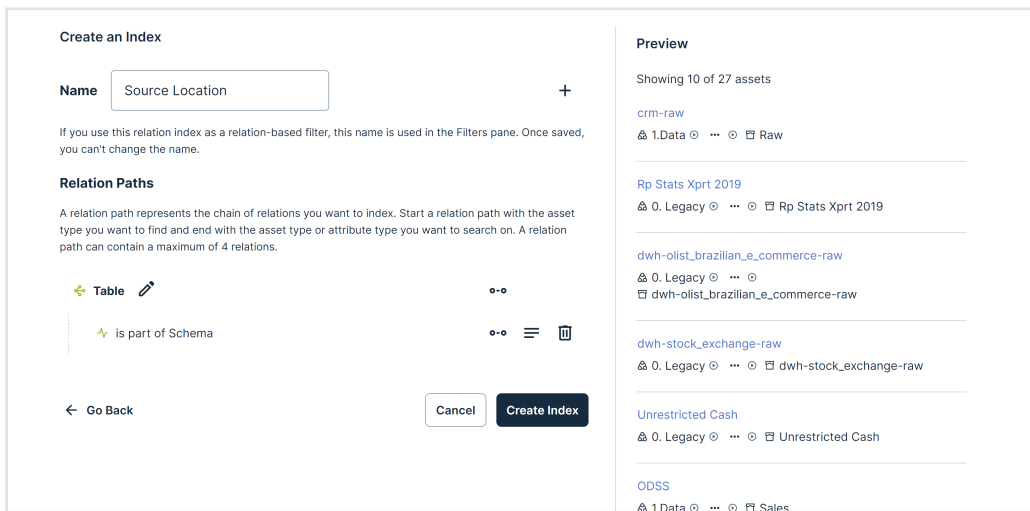
## e. Enter the name of the index, Source Location.


## f. Specify the relation path.

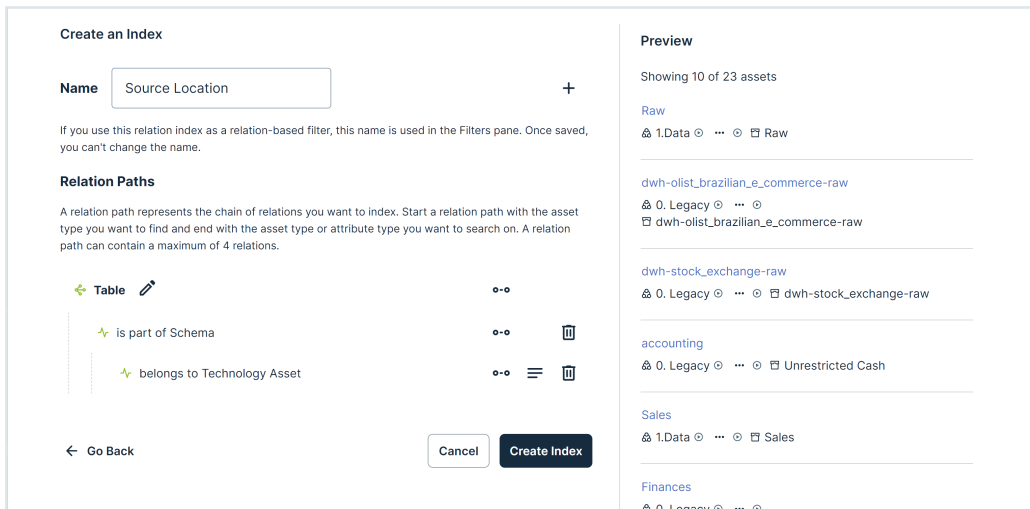
- i. Click and select the first asset type in your relation path. In our case, Table.



- 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.






**Create an Index**

**Name**  +

If you use this relation index as a relation-based filter, this name is used in the Filters pane. Once saved, you can't change the name.

**Relation Paths**

A relation path represents the chain of relations you want to index. Start a relation path with the asset type you want to find and end with the asset type or attribute type you want to search on. A relation path can contain a maximum of 4 relations.



- Table 
  - is part of Schema 
  - belongs to Technology Asset 

← Go Back Cancel Create Index

**Preview**



Showing 10 of 23 assets

Raw

- 1.Data   Raw



---

dwh-olist\_brazilian\_e\_commerce-raw

- 0.Legacy  
- dwh-olist\_brazilian\_e\_commerce-raw



---

dwh-stock\_exchange-raw

- 0.Legacy   dwh-stock\_exchange-raw



---

accounting

- 0.Legacy   Unrestricted Cash



---


Sales

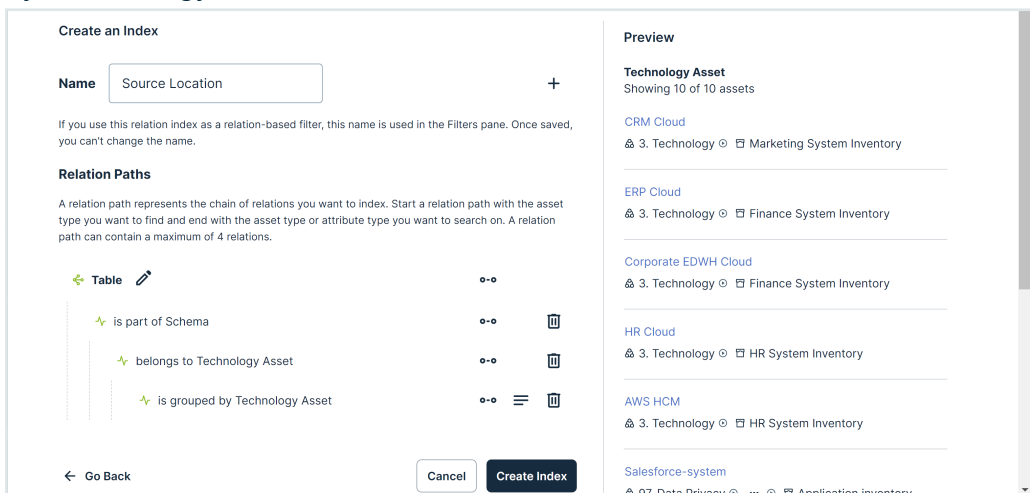
- 1.Data   Sales

---

Finances

- 0.Legacy  

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







**Create an Index**

**Name**  +

If you use this relation index as a relation-based filter, this name is used in the Filters pane. Once saved, you can't change the name.

**Relation Paths**

A relation path represents the chain of relations you want to index. Start a relation path with the asset type you want to find and end with the asset type or attribute type you want to search on. A relation path can contain a maximum of 4 relations.

- Table 
  - is part of Schema 
  - belongs to Technology Asset 
  - is grouped by Technology Asset 


← Go Back Cancel Create Index

**Preview**

**Technology Asset**


Showing 10 of 10 assets

CRM Cloud

- 3. Technology  Marketing System Inventory


---

ERP Cloud

- 3. Technology  Finance System Inventory


---

Corporate EDWH Cloud

- 3. Technology  Finance System Inventory


---

HR Cloud

- 3. Technology  HR System Inventory



---


AWS HCM

- 3. Technology  HR System Inventory

---

Salesforce-system

- 97 Data Privacy   Application inventory

- 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.
- 5. 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**.

Filter Id	Filter Name	Description	Is Visible	Is Collapsed	Open Configuration
LAST_MODIFIED	LAST MODIFIED		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CREATED_ON	CREATED ON		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
CREATED_BY	CREATED BY		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
REPORT	REPORT		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open Configuration
DATA_SET_COLUMN	DATA SET COLUMN		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open Configuration
Report_Measure	Report Measure		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open Configuration
Acronym	Acronym		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open Configuration
test_facet_anusha_2023.11	test facet anusha 2023.11		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Open Configuration
Source_Location	Source Location		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open Configuration

- 6. 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

This feature **isn't available** in the [latest user interface](#) (beta).

### Tip

To create relation indexes, deactivate the latest UI. After you have defined the indexes, you can enable the latest UI again and continue the configuration of Data Marketplace.

You can change the available relation indexes.

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

**Important** You can't update the ID or the name of relation indexes.



## Prerequisites








- Investigate which changes you want to make. For information on how to construct relation paths, go to [About relation indexes](#).
- Ensure that your environment uses the [classic user interface](#).

### Tip




To create relation indexes, deactivate the latest UI. After you have defined the indexes, you can enable the latest UI again and continue the configuration of Data Marketplace.

## Update a relation-based filter

1. On the main toolbar, click , and then click  **Settings**.
  - » The [Collibra settings page](#) opens.
2. In the **Data Marketplace** section, click **Filters**.
3. Click **Manage Relation-Based Filters** or click **Open Configuration** for the relation-based filter that you want to update.

4. If the **Manage Relation Indexes** page opens, click the name of the index you want to update.
  - » 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.

## Delete a relation index

1. On the main toolbar, 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 relation reindexing. This can take some time.

## Define the filter tabs in Data Marketplace

Data Marketplace shows tabs above the search results. The tabs allow you 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 saved filters for all data consumers or for specific user groups. Data consumers can also

save their own personal filters. As a result, the tabs can display preconfigured filters for all, preconfigured filters for a specific user group, or personal filters. For more details, go to [Saved filters](#).

**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 for all or for a specific user group

Watch a video

This video is created in the classic user interface.

1. In Data Marketplace, select the filters you want to include in the preconfigured filter:
  - a. On the main toolbar, 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. In the **Selected** area, 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. To make the preconfigured filter available for all data consumers, in **Assign to User Group**, select **All Users**.  
To make the preconfigured filter available to some user groups only, in **Assign to User Group**, select the user groups to which you want to assign this filter.
  6. Click **Save**.
    - » The filter is saved. A filter tab is available for either all or for the selected user groups.

## Change the preconfigured filters for a user group

1. On the main toolbar, 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. To assign or remove a preconfigured filter for a user group.
  - a. For the preconfigured filter, double click the **User Groups** field.
  - b. Add or remove the user group.

- c. Press `Enter` or click outside the field.
  - » The filter is saved.
  - » A notification appears indicating your changes are saved.




## Edit the filters applied by a preconfigured filter

1. On the main toolbar, 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 toolbar, 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 rename the **All** tab.




## Hide or unhide a preconfigured filter


1. On the main toolbar, 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 toolbar, 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.



**Tip** To allow automatic reindexing, enable the [Automatic relation indexing](#) setting.

**Note** Data Marketplace searches based on relations only if the [Relation-based search](#) setting has been enabled. For more information on this feature, go to [Filtering and searching based on relations in Data Marketplace](#).

## Required permissions

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

## Steps

1. On the main toolbar, 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

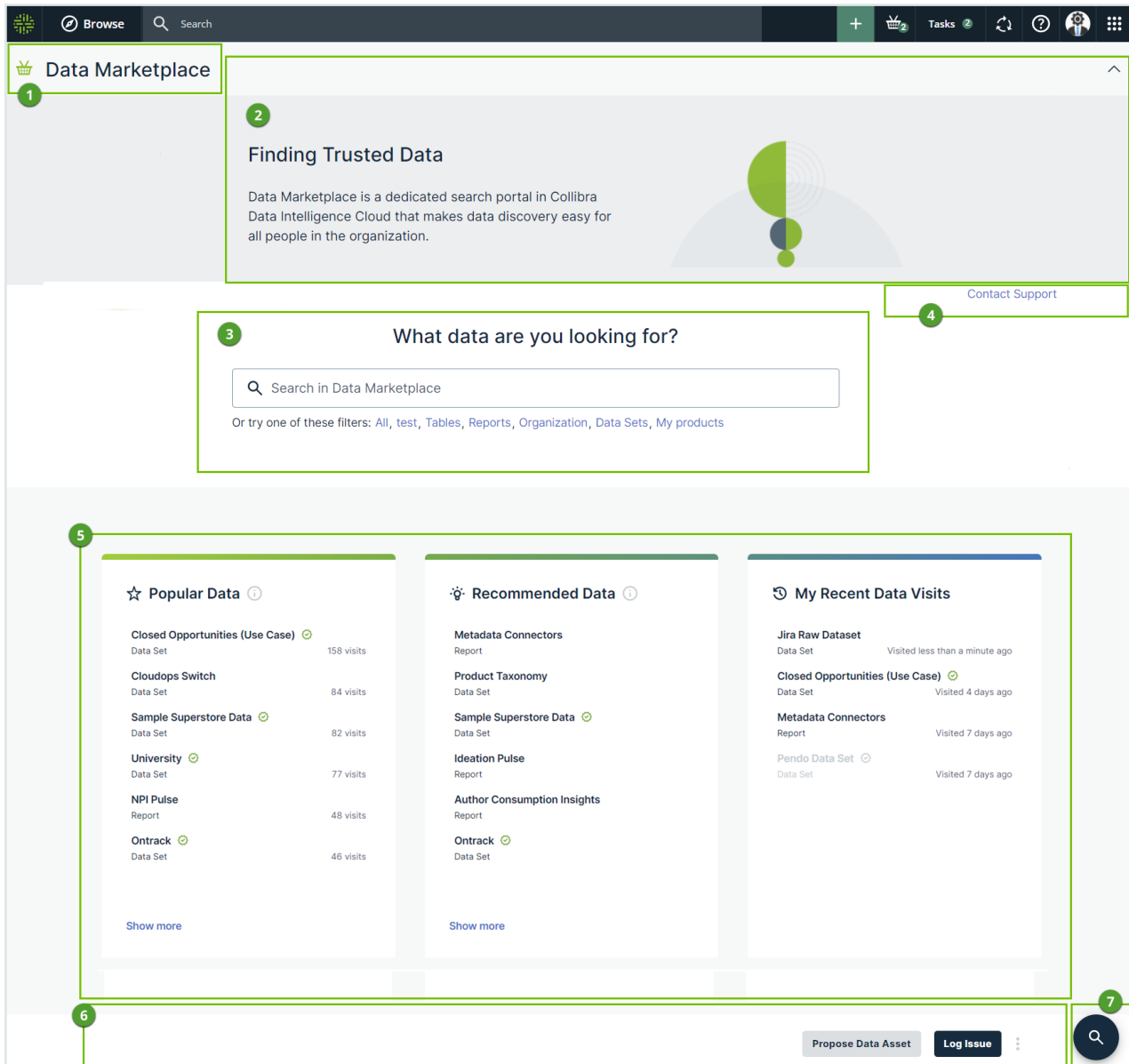
As a data consumer, you can use Data Marketplace to find and access assets.

The Data Marketplace landing page .....	68
Searching in Data Marketplace .....	73
Previewing assets in Data Marketplace .....	89
Defining and applying personal filters in Data Marketplace .....	97



# The Data Marketplace landing page

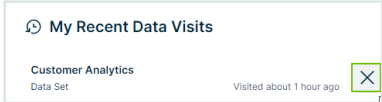
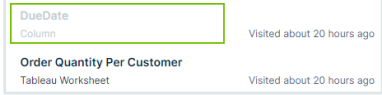
As a data consumer, the Data Marketplace landing page is your starting point for finding the data you need. The page consists of multiple sections.

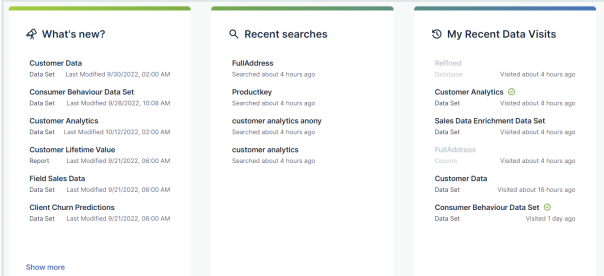


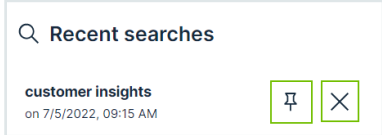


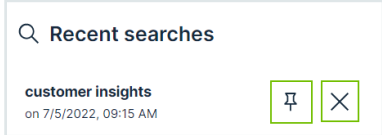


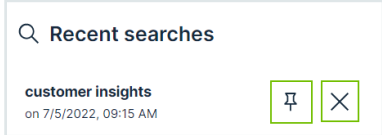


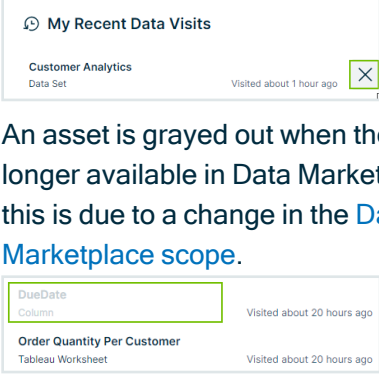
	Section	Description
1	Title	Data Marketplace title

	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 <a href="#">change the available text</a>.</p>
3	Search	<p>The search field allows you to find any asset within the <a href="#">Data Marketplace scope</a>.</p> <ul style="list-style-type: none"> <li>• If <a href="#">search suggestions</a> 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.</li> <li>• If search suggestions are not enabled, the search starts automatically after a few seconds.</li> </ul> <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 <a href="#">define these quick links</a>.</p>

	Section	Description		
<p style="text-align: center; background-color: #2e7d32; color: white; border-radius: 50%; width: 30px; 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 <a href="#">data discovery is enabled</a>.</p> <ul style="list-style-type: none"> <li>If data discovery is enabled, you have access to <b>Popular Data</b>, <b>Recent Data Visits</b>, and <b>Recommended Data</b>. Get more information.</li> </ul> <div data-bbox="657 611 1267 884" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>The screenshot shows three side-by-side cards. The 'Popular Data' card lists items like 'Closed Opportunities (Use Case)' with 158 visits, 'Cloudops Switch' with 84 visits, 'Sample Superstore Data' with 82 visits, 'University' with 77 visits, 'NPI Pulse' with 68 visits, and 'Ontrack' with 65 visits. The 'Recommended Data' card lists 'Metadata Connectors', 'Product Taxonomy', 'Sample Superstore Data', 'Location Pulse', 'Author Consumption Insights', and 'Ontrack'. The 'My Recent Data Visits' card lists 'Jira Row Dataset', 'Closed Opportunities (Use Case)', and 'Metadata Connectors'.</p> </div> <div data-bbox="657 920 1417 1688" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <table border="0"> <tr> <td style="vertical-align: top; width: 30%;"><b>Popular Data</b></td> <td> <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"> <li>Data Marketplace checks the usage data once a day. For more information on these recommendations, go to <a href="#">Asset recommender</a>.</li> <li>Click <b>Show more</b> to view more popular assets.</li> <li>Loading this card can take a few seconds.</li> <li>If you click an asset, the <a href="#">asset preview</a> opens in the <a href="#">Discover page</a>.</li> </ul> </td> </tr> </table> </div>	<b>Popular Data</b>	<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"> <li>Data Marketplace checks the usage data once a day. For more information on these recommendations, go to <a href="#">Asset recommender</a>.</li> <li>Click <b>Show more</b> to view more popular assets.</li> <li>Loading this card can take a few seconds.</li> <li>If you click an asset, the <a href="#">asset preview</a> opens in the <a href="#">Discover page</a>.</li> </ul>
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	Section	Description
		<p><b>My Recent Data Visits</b></p> <p>This card shows the assets for which you opened the preview in Data Marketplace.</p> <ul style="list-style-type: none"> <li>Click <b>Show more</b> to view more recently visited assets.</li> <li>Click <b>×</b> to remove the visited asset.</li> </ul>  <ul style="list-style-type: none"> <li>An asset is grayed out when the asset is no longer available in Data Marketplace. Usually this is due to a change in the <a href="#">Data Marketplace scope</a>.</li> </ul> 
		<p><b>Recommended Data</b></p> <p>This card shows data based on the data you and your colleagues searched for and visited 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"> <li>Data Marketplace checks the usage data once a day. For more information on these recommendations, go to <a href="#">Asset recommender</a>.</li> <li>Loading this card can take a few seconds.</li> <li>If you click an asset, the <a href="#">asset preview</a> opens in the <a href="#">Discover page</a>.</li> </ul> <p><b>Tip</b> 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"> <li>If data discovery is not enabled, you have access to <b>Recent</b></li> </ul>

	Section	Description									
		<p><b>searches, Recent data visits, and What's new.</b> Get more information.</p>  <table border="1" data-bbox="619 728 1417 1438"> <tr> <td data-bbox="619 728 790 958"> <p><b>What's new?</b></p> <p>Customer Data Data Set Last Modified 9/30/2022, 02:00 AM</p> <p>Consumer Behaviour Data Set Data Set Last Modified 9/28/2022, 10:08 AM</p> <p>Customer Analytics Data Set Last Modified 10/12/2022, 02:00 AM</p> <p>Customer Lifetime Value Report Last Modified 9/21/2022, 08:00 AM</p> <p>Field Sales Data Data Set Last Modified 9/21/2022, 08:00 AM</p> <p>Client Churn Predictions Data Set Last Modified 9/21/2022, 08:00 AM</p> <p>Show more</p> </td> <td data-bbox="790 728 1013 958"> <p><b>Recent searches</b></p> <p>FullAddress Searched about 4 hours ago</p> <p>Productkey Searched about 4 hours ago</p> <p>customer analytics anony Searched about 4 hours ago</p> <p>customer analytics Searched about 4 hours ago</p> </td> <td data-bbox="1013 728 1417 958"> <p><b>My Recent Data Visits</b></p> <p>Refined Database Visited about 4 hours ago</p> <p>Customer Analytics Data Set Visited about 4 hours ago</p> <p>Sales Data Enrichment Data Set Data Set Visited about 4 hours ago</p> <p>FullAddress Cubes Visited about 4 hours ago</p> <p>Customer Data Data Set Visited about 16 hours ago</p> <p>Consumer Behaviour Data Set Data Set Visited 1 day ago</p> </td> </tr> <tr> <td data-bbox="619 958 790 1438"> <p><b>What's new?</b></p> </td> <td colspan="2" data-bbox="790 958 1417 1438"> <p>This card shows all assets that have recently been updated in Data Catalog and that are in scope of Data Marketplace. Click <b>Show more</b> to open the search results page with all updated assets.</p> </td> </tr> <tr> <td data-bbox="619 1438 790 1456"> <p><b>Recent searches</b></p> </td> <td colspan="2" data-bbox="790 1438 1417 1456"> <p>This card shows the recent searches you performed in Data Marketplace.</p> <ul style="list-style-type: none"> <li>• Click <b>Show more</b> to view more recent search actions.</li> <li>• Click  to pin the search action to your list.</li> <li>• Click  to remove the recent search action.</li> </ul>  </td> </tr> </table>	<p><b>What's new?</b></p> <p>Customer Data Data Set Last Modified 9/30/2022, 02:00 AM</p> <p>Consumer Behaviour Data Set Data Set Last Modified 9/28/2022, 10:08 AM</p> <p>Customer Analytics Data Set Last Modified 10/12/2022, 02:00 AM</p> <p>Customer Lifetime Value Report Last Modified 9/21/2022, 08:00 AM</p> <p>Field Sales Data Data Set Last Modified 9/21/2022, 08:00 AM</p> <p>Client Churn Predictions Data Set Last Modified 9/21/2022, 08:00 AM</p> <p>Show more</p>	<p><b>Recent searches</b></p> <p>FullAddress Searched about 4 hours ago</p> <p>Productkey Searched about 4 hours ago</p> <p>customer analytics anony Searched about 4 hours ago</p> <p>customer analytics Searched about 4 hours ago</p>	<p><b>My Recent Data Visits</b></p> <p>Refined Database Visited about 4 hours ago</p> <p>Customer Analytics Data Set Visited about 4 hours ago</p> <p>Sales Data Enrichment Data Set Data Set Visited about 4 hours ago</p> <p>FullAddress Cubes Visited about 4 hours ago</p> <p>Customer Data Data Set Visited about 16 hours ago</p> <p>Consumer Behaviour Data Set Data Set Visited 1 day ago</p>	<p><b>What's new?</b></p>	<p>This card shows all assets that have recently been updated in Data Catalog and that are in scope of Data Marketplace. Click <b>Show more</b> to open the search results page with all updated assets.</p>		<p><b>Recent searches</b></p>	<p>This card shows the recent searches you performed in Data Marketplace.</p> <ul style="list-style-type: none"> <li>• Click <b>Show more</b> to view more recent search actions.</li> <li>• Click  to pin the search action to your list.</li> <li>• Click  to remove the recent search action.</li> </ul> 	
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	Section	Description
		<p><b>My Recent Data Visits</b></p> <p>This card shows the assets for which you opened the <a href="#">preview</a> in Data Marketplace.</p> <ul style="list-style-type: none"> <li>Click <b>Show more</b> to view more recently visited assets.</li> <li>Click <b>×</b> to remove the visited asset.</li> </ul>  <ul style="list-style-type: none"> <li>An asset is grayed out when the asset is no longer available in Data Marketplace. Usually this is due to a change in the <a href="#">Data Marketplace scope</a>.</li> </ul>
6	Landing page actions	Your Data Marketplace administrator can <a href="#">make actions available</a> 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.

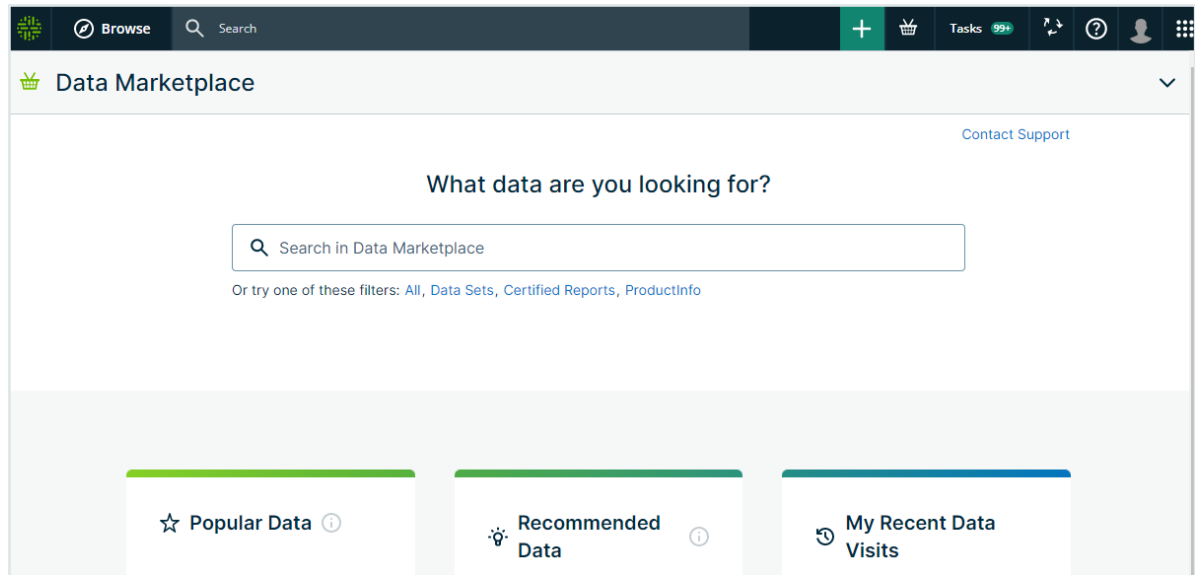
### Search in Data Marketplace

1. Open Data Marketplace from the  icon.

On the main toolbar, 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](#).

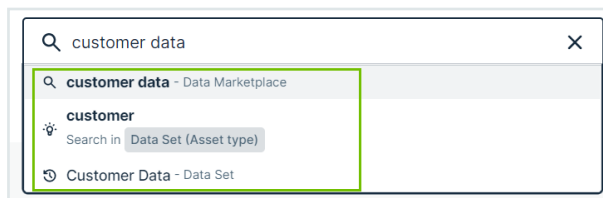
» The **Data Marketplace** landing page opens.



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.

Wildcard	Description	Example
~	<p>A tilde represents a fuzzy search, words with spelling similar to the text you searched for.</p> <p><b>Important</b> 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.</p>	<p>Search term: <i>Owi~</i></p> <p>Possible results: Ozi, Zowie, Bowie, and so on.</p>
!	An exclamation mark excludes words.	<p>Search term: <i>!David Bowie</i></p> <p>Possible results: Lester Bowie, Joe Bowie, and so on.</p>

- 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. This also applies to brackets [], {}, and ().

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

- 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](#).

#### Important

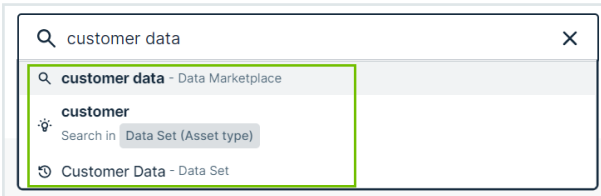
- You can't add the ^ circumflex in the [search field](#).
- You can't include an uneven number of / slashes in your search.
- You can't start your search with a : colon.

# 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.

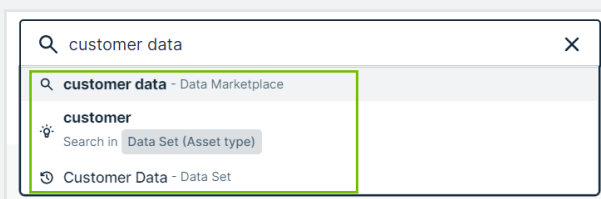
Icon	Meaning	Result when you click the suggestion
🔍	Recent search	The suggestion shows a previous search action. Clicking the suggestion launches the suggested search action.
🕒	Recently visited asset	This suggestion shows an asset that you recently previewed. Clicking this suggestion opens the preview of the suggested asset.
💡	Smart filter	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. Clicking this suggestion performs the search and applies all suggested filters. 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.  <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9;"> <p><b>Note</b> The sql search only work if the Database, Schema, and Table asset types are part of the Data Marketplace <a href="#">scope</a>.</p> </div>

## Examples

### Example

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

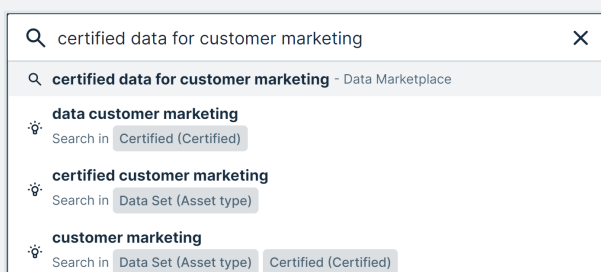
- The first suggestion is based on a recent search action. Clicking this suggestion launches the search for *customer data* in Data Marketplace again.
- The second suggestion provides the possibility to search for the terms *customer* with the filter *Asset Type* set to *Data Attribute*.
- The last suggestion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

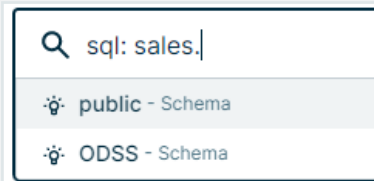
- The first suggestion is based on a recent search action. Clicking this suggestion launches the search for *certified data for customer marketing* in Data Marketplace again.
- The second suggestion provides the possibility to search for the terms *data customer marketing* with the filter *Certified*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



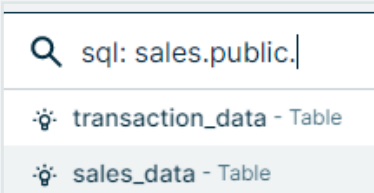
### Example

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

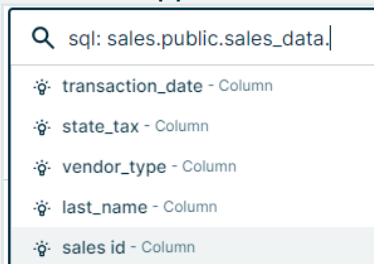
- In Data Marketplace, search for *sql: sales.*. After typing the *.*, Data Marketplace shows the available schemas as search suggestions.



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

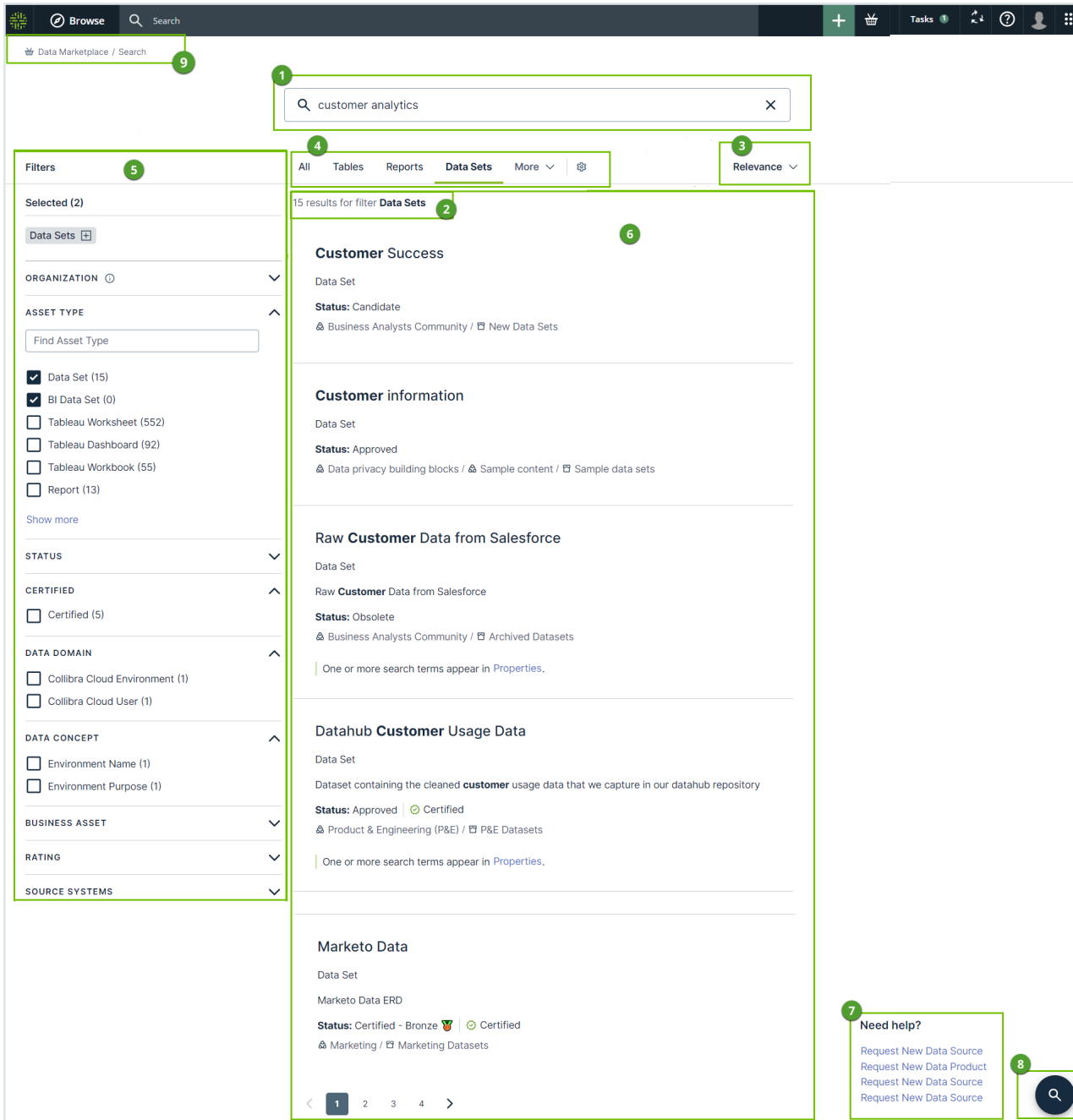


- You want to use the sales\_data. If you type *sales\_data.*, a list of all columns in that table appears in the search suggestions.



## 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.

	Section	Description
3	Sort options	The sort options allow you to <a href="#">sort your search results</a> .
4	Filter tabs	Tabs allow you to apply a saved filter and <a href="#">refine your search results</a> . The saved filters can be <a href="#">preconfigured filters</a> , created by the Data Marketplace administrator, or <a href="#">personal filters</a> .
5	Filters pane	Filters allow you to <a href="#">refine your search results</a> further. The available filters depend on your search results and on how the Data Marketplace administrator has <a href="#">configured the Filters pane</a> .
6	Search results	This section shows a list of results that match your search action. For each search result, a summary is available.  Click the result to open the details in a <a href="#">preview</a> . The search results depend on multiple factors: <ul style="list-style-type: none"> <li>• The Data Marketplace <a href="#">scope</a> that was configured by the administrator.</li> <li>• Whether you have view permissions on the asset.</li> <li>• The selected filter tab and the selected filters.</li> </ul>
7	Need help?	Your Data Marketplace administrator can <a href="#">make actions available</a> for you in this section, for example "Propose new asset".
8	Back to search	This icon guides you to the top of the page.
9	Breadcrumb in Data Marketplace	The breadcrumb provides information on your location in Data Marketplace. Click the Data Marketplace link to go back to the <a href="#">landing page</a> .

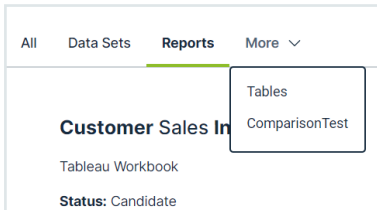
## Refine your search results

### About filter tabs and filters

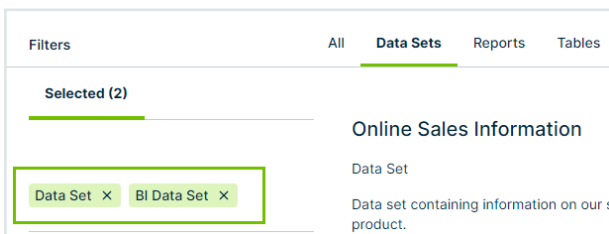
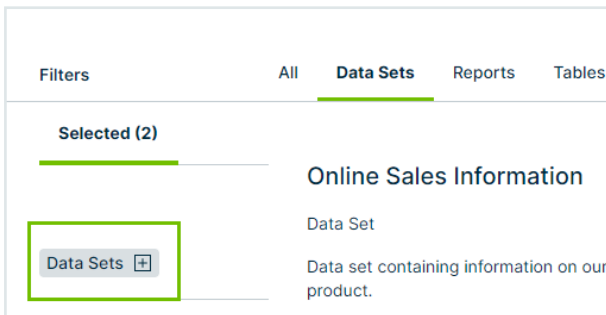
You can refine your search results [by selecting a filter tab](#) and [via the Filters pane](#).

## Filter tabs

Data Marketplace shows tabs above the search results. The tabs allow you to apply a saved filter. 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](#).

**Tip** You can also create your own [personal filter tab](#).

## 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.

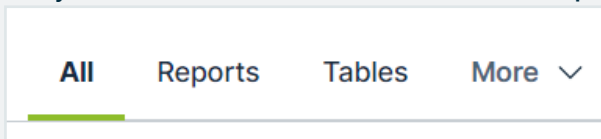
- If you made a selection, the **Filters** pane is automatically updated with the filters that are relevant to the refined search results.
- If a filter doesn't contain any values, the filter is not visible.
- In the **Filters** pane, the Organization filter shows only the top-level communities. To show 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.

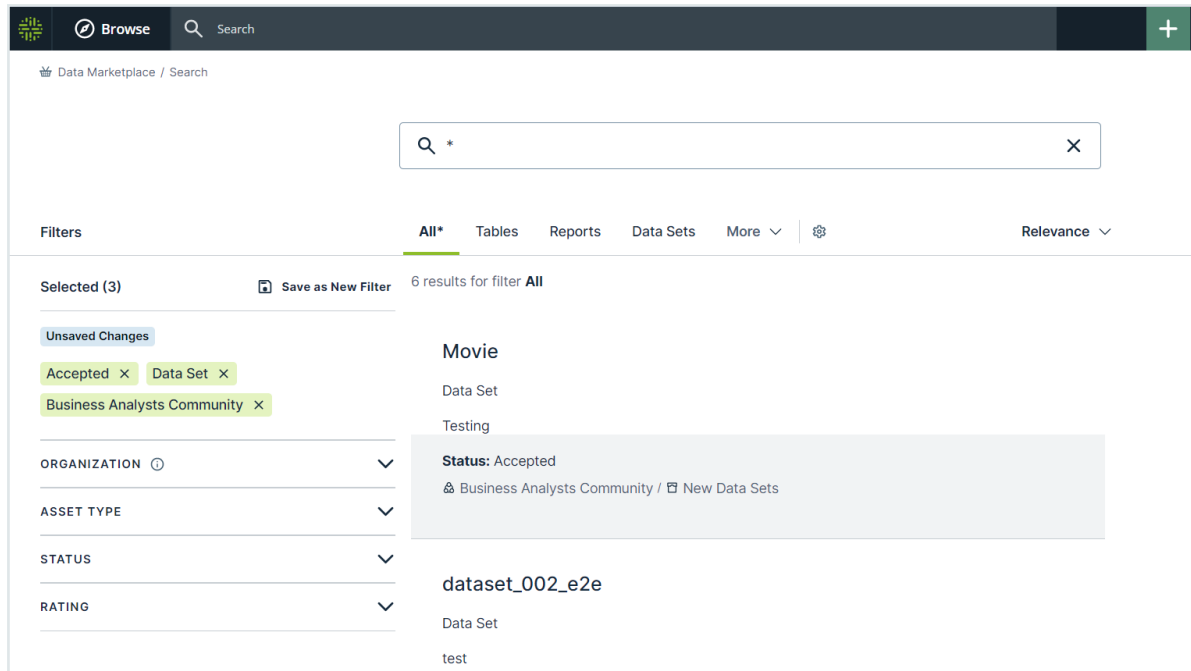
### Tip

Only a few tabs are shown. To see other 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.



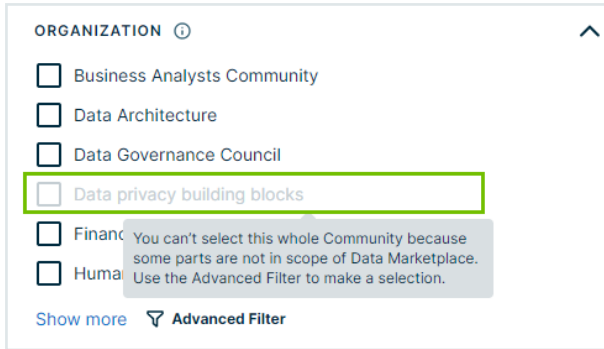
4. If required, use the **Selected** area in the **Filters** pane to remove the applied filters. To remove a filter, click **×** next to the applied filter.
5. Analyze the remaining search results and click the title of a search result to open the [asset preview](#).

## Using the Organization filter

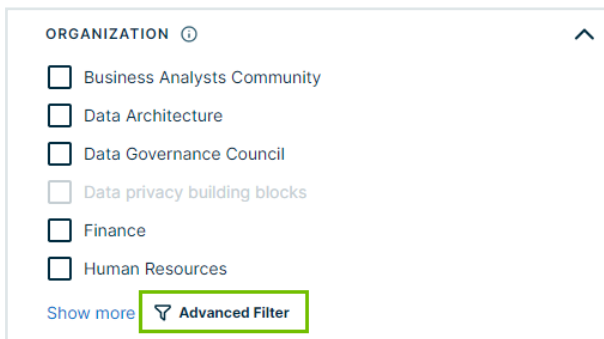
The Organization filter allows you to show only the search results that belong to specific communities and domains in the scope of Data Marketplace.

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

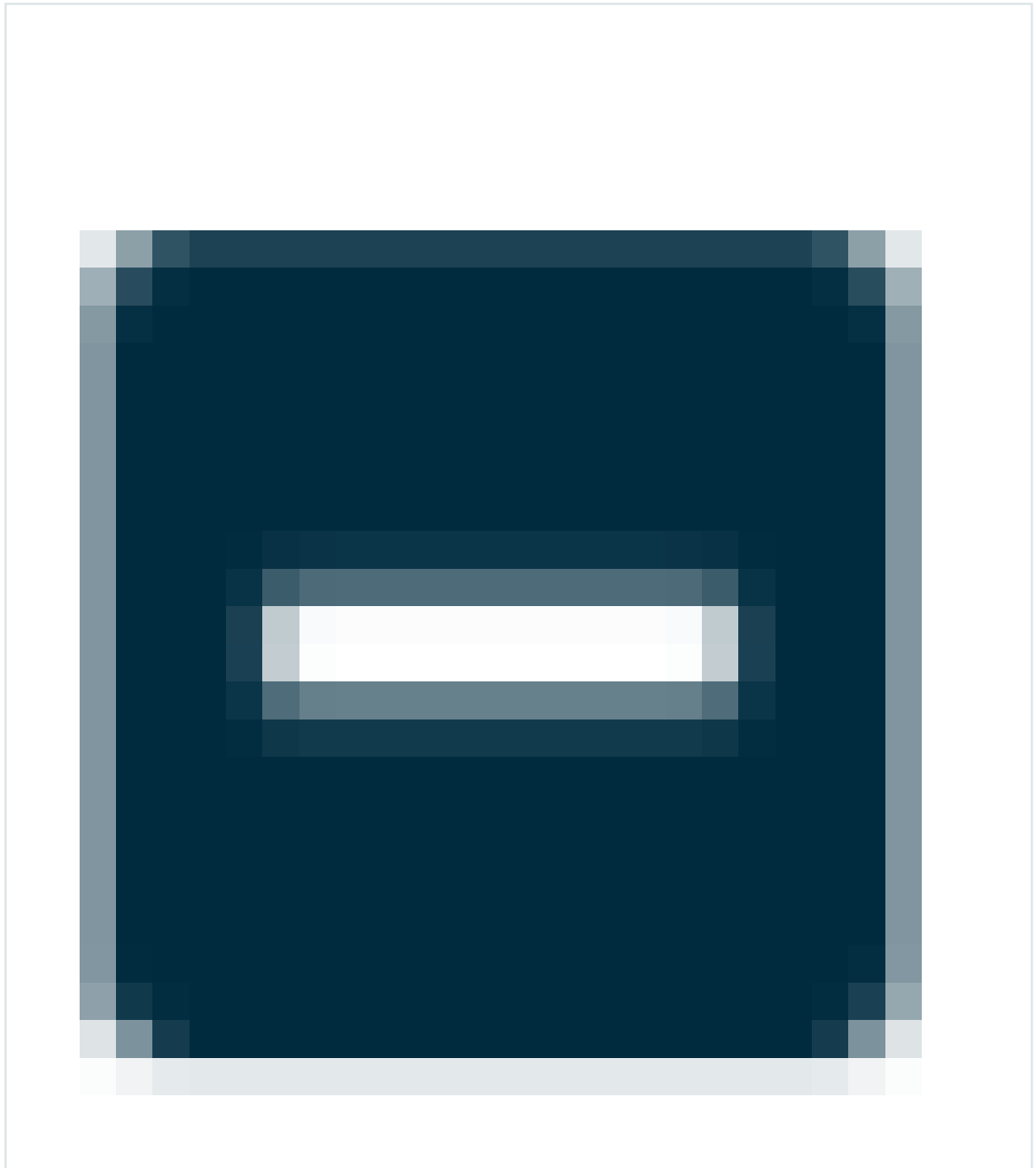
- You can select only from the communities and domains that are in the [scope of Data Marketplace](#).  
If only part of a community or domain is in the Data Marketplace scope, the item is grayed-out. To make a selection, click **Advanced Filter**, and use the **Advanced Organization Filter** dialog 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**.



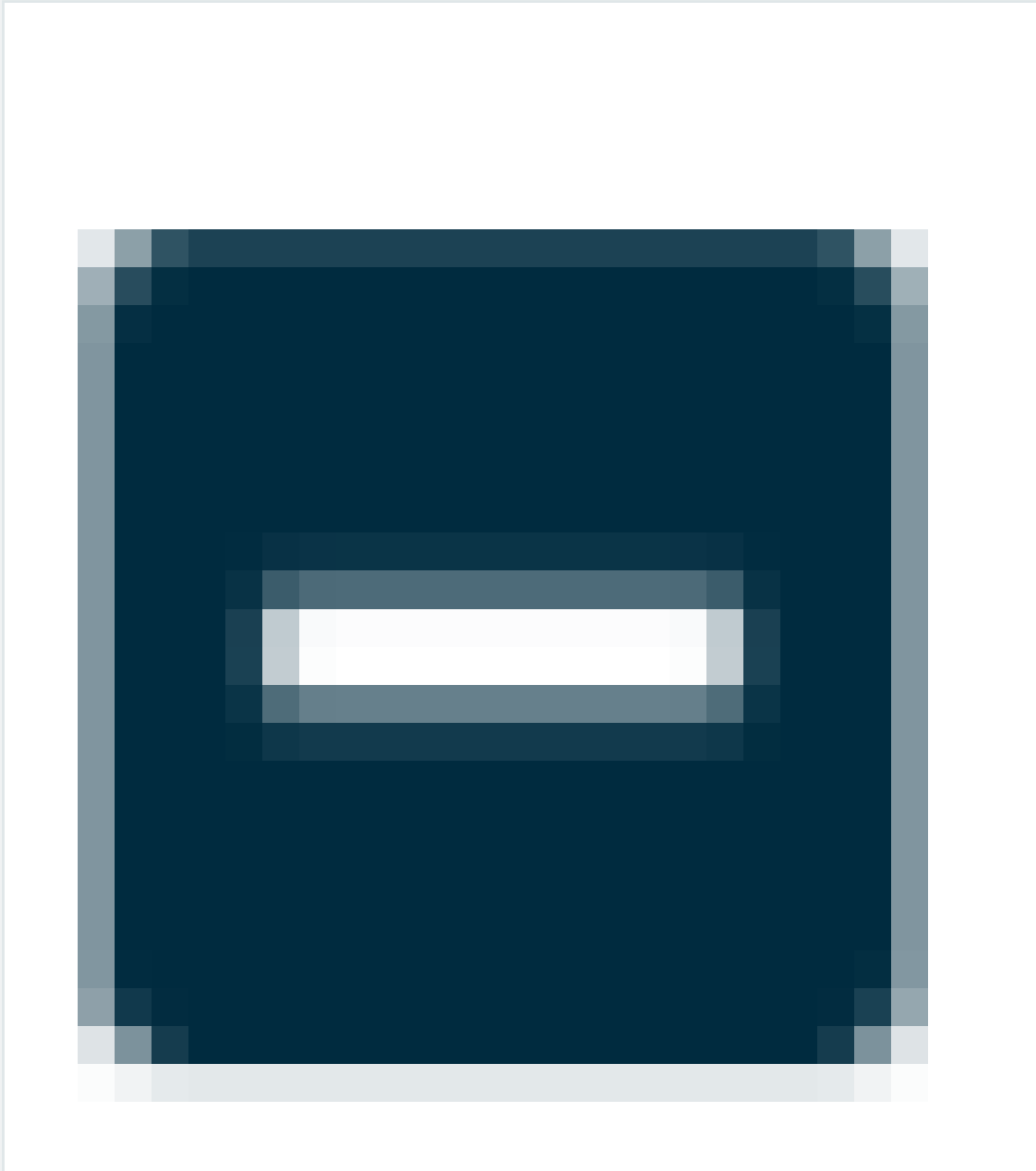
- The selected communities and domains are visible in the **Selected** area.
- If only part of a community or domain is selected, the community or domain is shown in a semi selected state

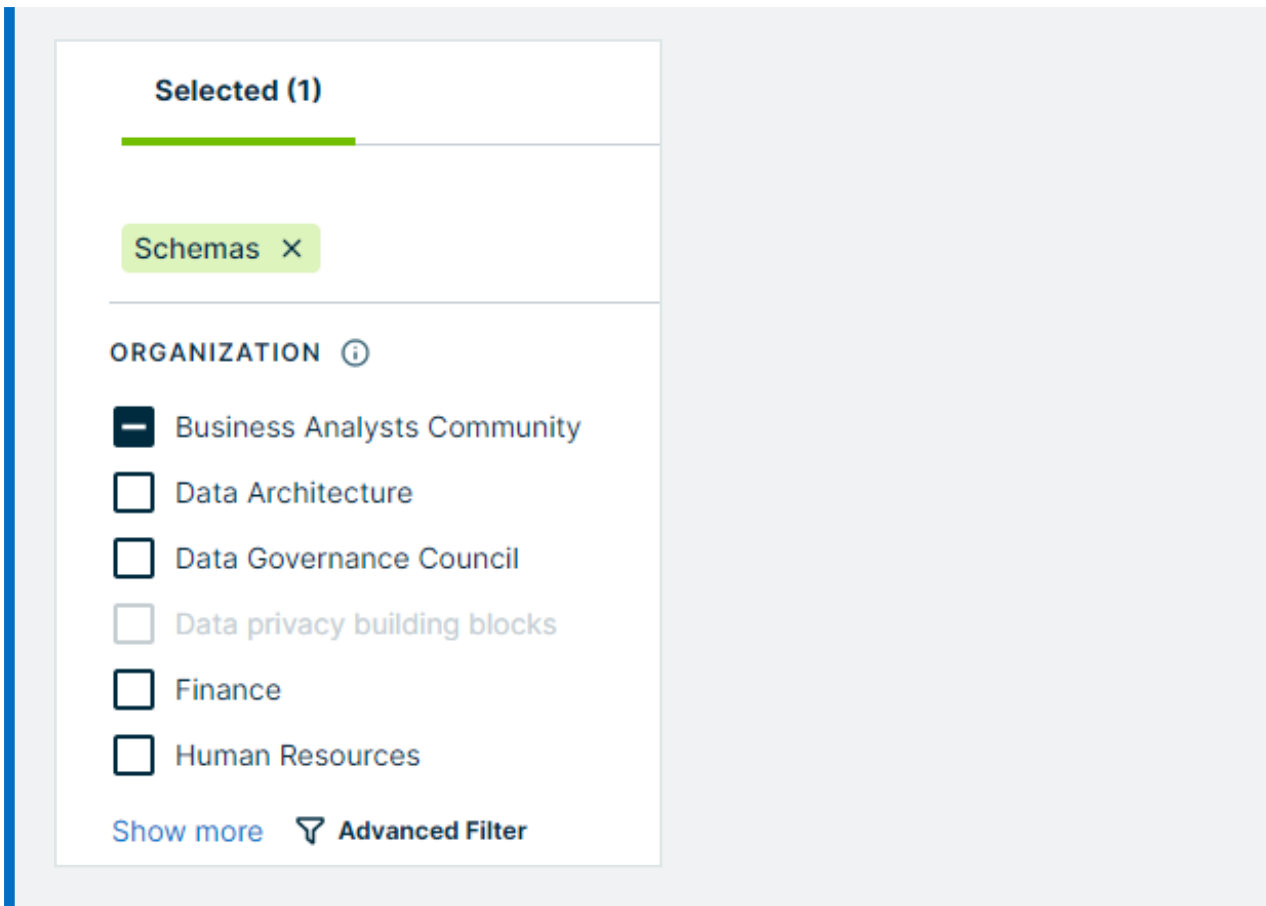


### Example

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, the 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 useful data based on the assets that you and your colleagues are visiting.

- **Popular Data** 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.
- **Recommended Data** are suggested assets based on the browsing history of users with a similar behavior. For more information, go to [Asset recommender](#).

## Before you begin

[Data discovery is enabled.](#)

## Steps

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

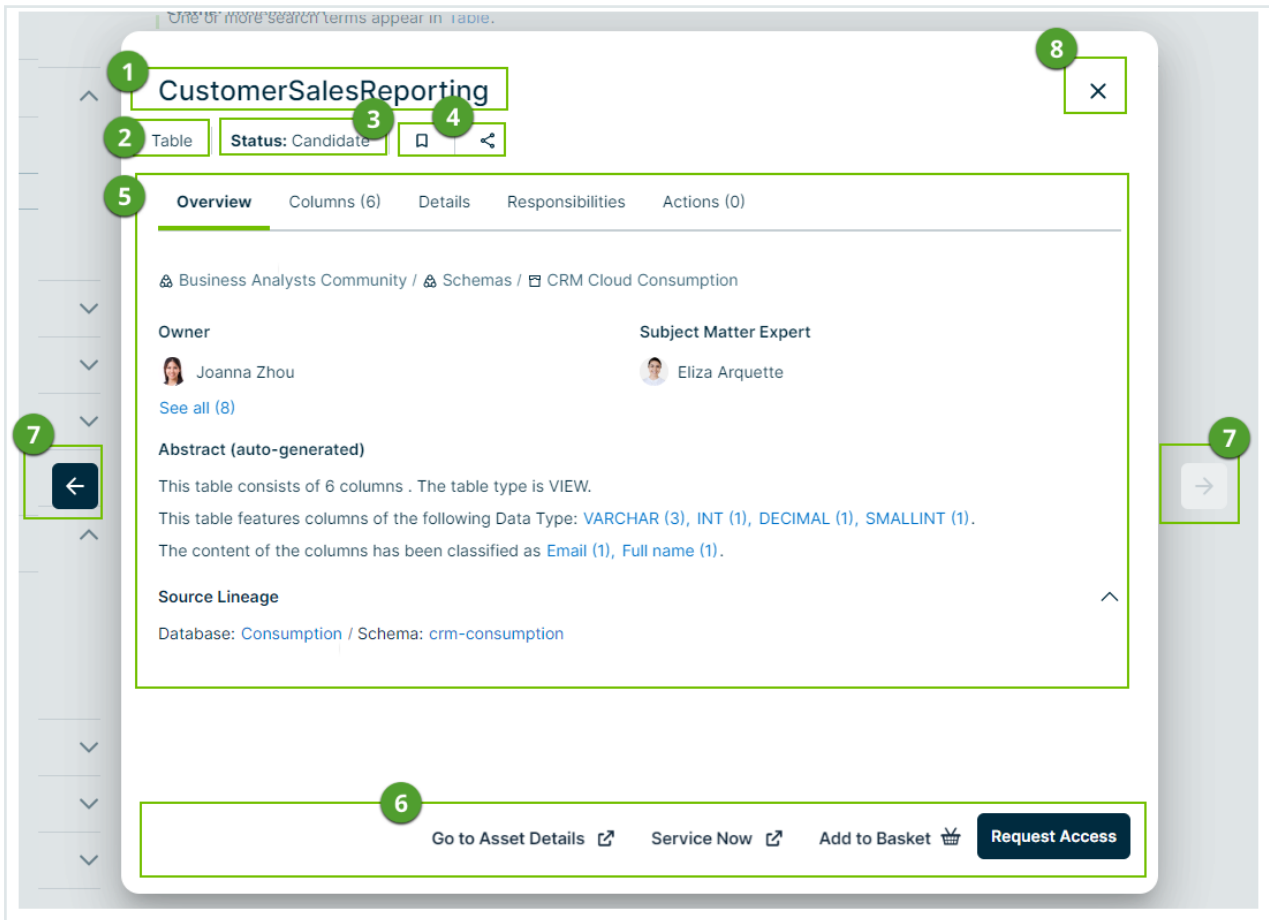
## Previewing assets in Data Marketplace

After searching, 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, 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. Extra information that can be displayed includes whether the asset is certified and whether <a href="#">policies</a> apply.

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

Joanna Zhou | Eliza Arquette  
[See all \(4\)](#)

### Subject Matter Expert

Eliza Arquette

### 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.

In Table assets, columns in the **Columns** tab are sorted based on their column position. In other tabs, such as **Details** and in Data Set assets, columns are sorted alphabetically.

To see the full description, hover over the description.

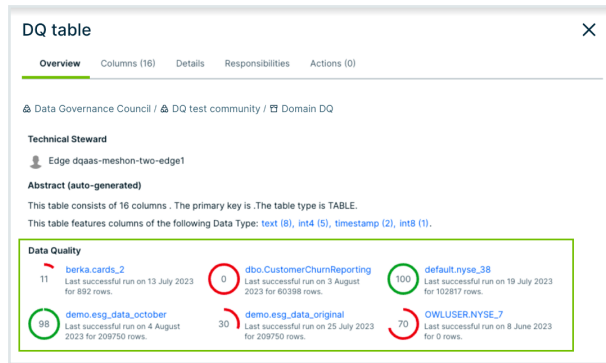
Name ↑	Data type	Description	Table	Database
adt_count	INT		customer_success	master
analyticsenabled	BIT	The field indicates if "Enable Usag...	customer_success	master
api_logins	INT		customer_success	master

- Column, Table, and Data Set asset previews can show the **Policies** tab. This tab displays the data access standards and rules applicable for the asset. If policies apply, you also see the Protect icon . The tab appears only if you have access to Protect and if policies apply to the asset that run successfully.

Overview	Columns (30)	Details	Policies (5)	Responsibilities	Actions (1)
DATA PROTECTION STANDARDS					
 <b>default standard</b> For the Group ACCOUNTADMIN, HR, and MARKETING protect Title with Default masking					
 <b>Hashing Employer ID</b> For the Group MARKETING protect Rating with Hashing					
 <b>Show last</b> For the Group MARKETING protect ECOMMERCE_PRODUCTS (Data Category) with Show last 3					
DATA ACCESS RULES					
 <b>No Masking data category ecommerce</b>					

- Table asset previews can show the **Data Quality** section.

For the **Data Quality** section to show, Collibra DQ must be [integrated](#) in Collibra. The section includes data quality global scores of DQ Jobs. For each DQ Job, we show the name, the score, when the job last ran successfully, and the number of rows that were checked. A visual also indicates whether the run passed or failed based on the scoring threshold.



- Column and Table asset previews 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)**

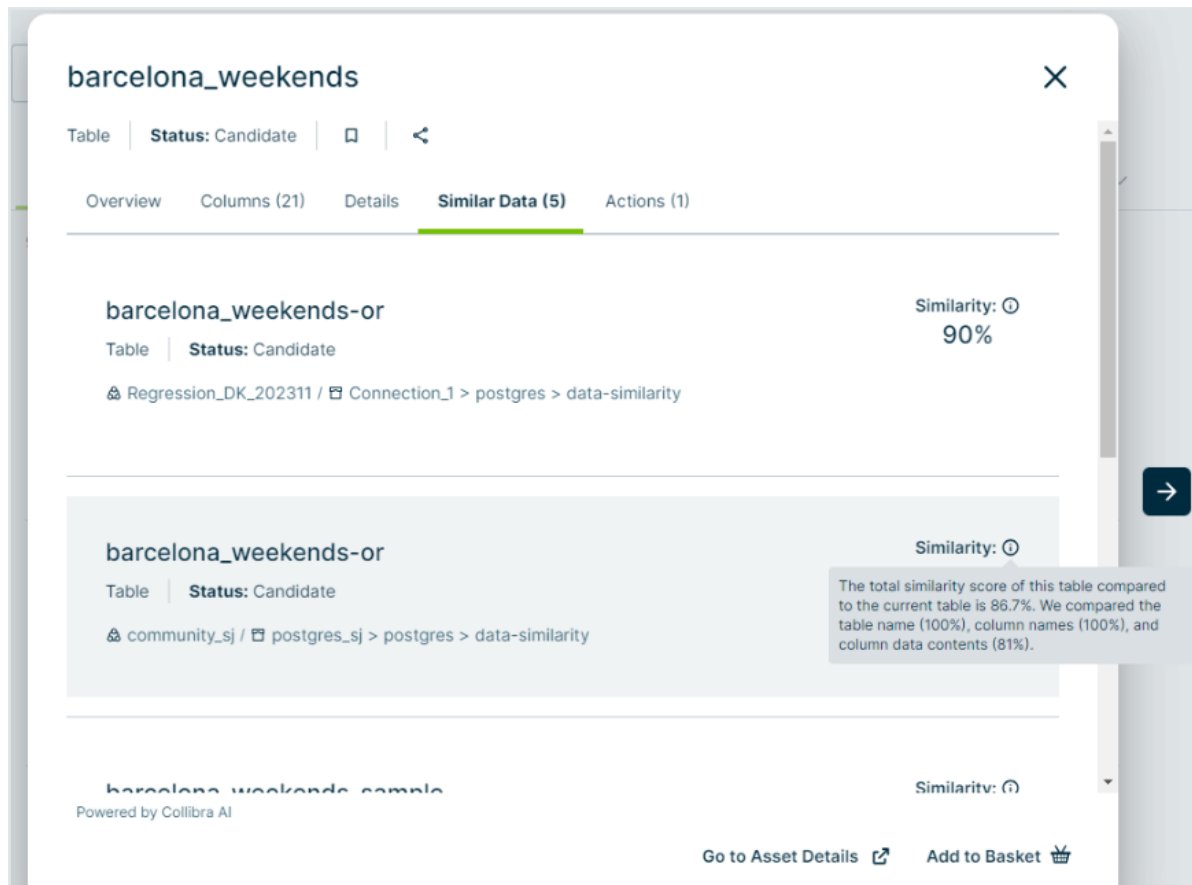
This table consists of 95 columns. The table type is TABLE.

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.

- If the [Data similarity feature](#) is enabled in your environment, the **Similar Data** tab is shown in Table asset previews. The tab is shown only if tables with a similarity score higher than the defined threshold exist for the table. Up to five Table assets are shown. To learn more about data similarity, go to [About data similarity](#).



## Actions

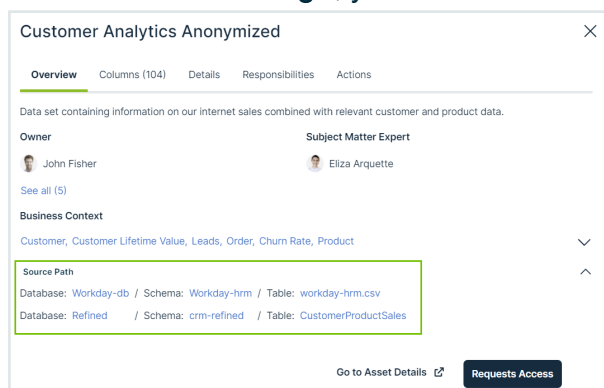
- Main actions:
  - Main actions are located at the bottom of the asset preview.
  - By default, the **Go to Asset Details** button is available. This opens the asset page in Collibra.
  - The Data Marketplace administrator can [add more actions to this section](#).
  - The Data Marketplace administrator 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](#), 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 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, requesting access to the assets in your basket in one action.

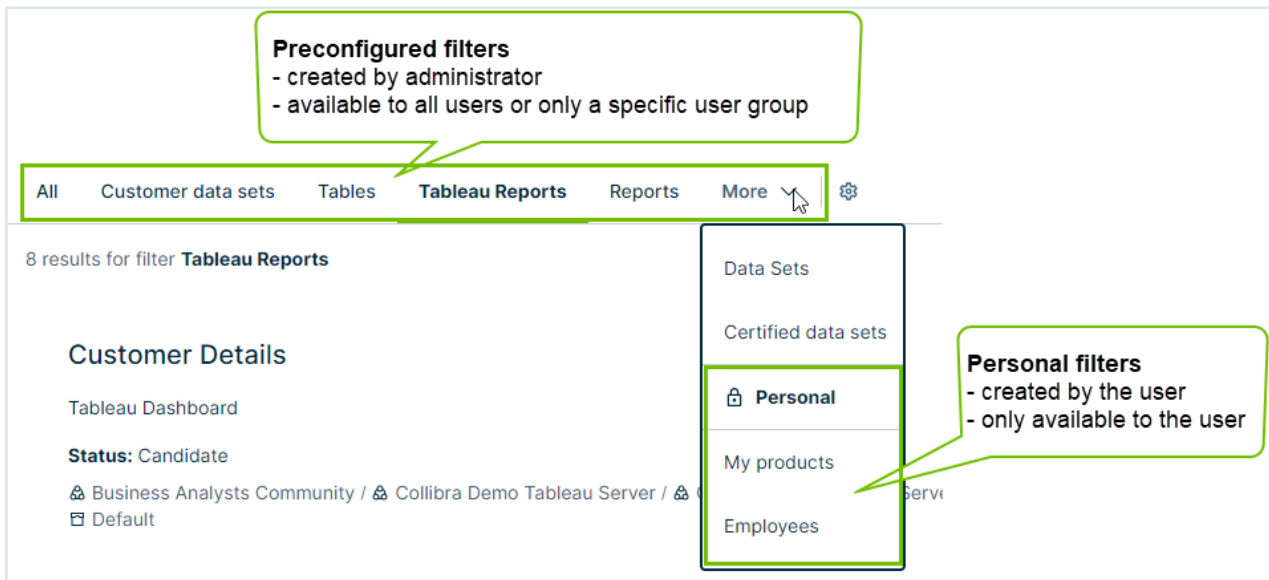
## Defining and applying personal filters in Data Marketplace

## About saved filters

A saved filter is a set of filters created by a user or by a Data Marketplace administrator. The following types are available:

- A personal filter is a set of filters created 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 created 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.




Watch a video

This video is created in the classic user interface.

## What's next?

- [Learn more about personal filters.](#)
- [Learn more about preconfigured filters for all or for specific user groups. \(for administrators\)](#)

# Define and apply a personal filter in Data Marketplace

A personal filter is a set of filters created 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.

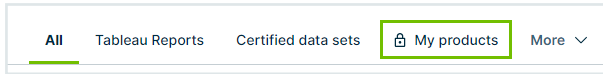
  - » In the results area, the number of search results and the name of the applied saved filter are displayed.
  - » The selected saved filter is visible in the **Selected** area in the **Filters** pane. To show the details, expand the group.

## Create a personal filter

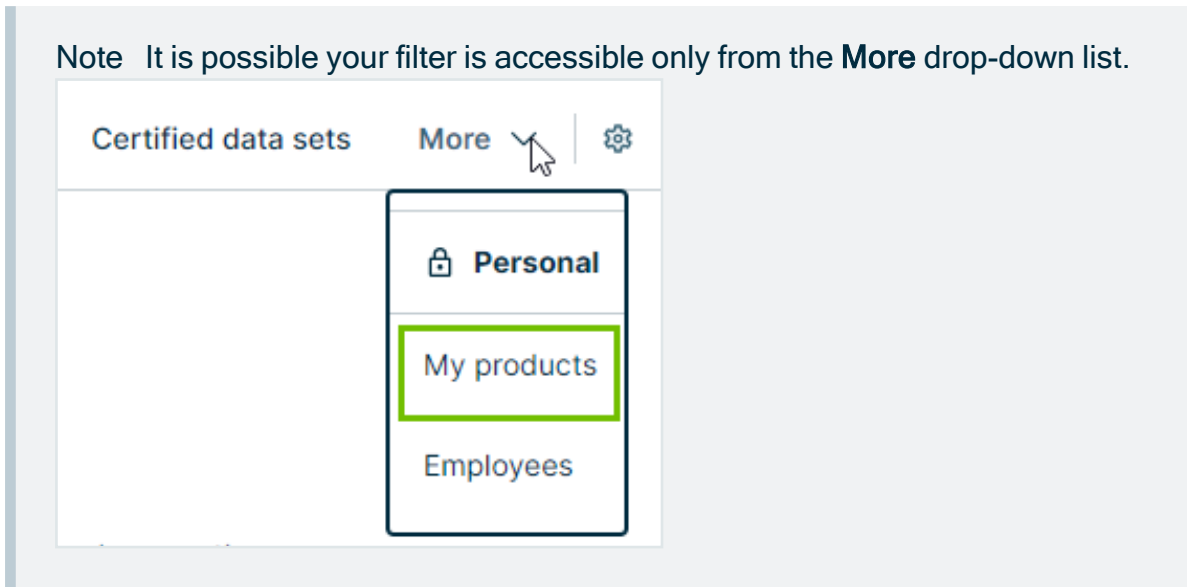
1. [Search in Data Marketplace](#).
  - » The [search results page](#) opens. If the **All** tab is selected, the page shows all the search results to which you have access within the Data Marketplace scope.
2. Use filters in the **Filters** pane to refine your search results.
  - » The selected filters 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.






**Note** 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 toolbar, 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 toolbar, 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 of 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 cannot rearrange the tabs. By default, you see the All filter first. 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 toolbar, 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 all or for specific user groups, go to [Define the filter tabs](#) (Admin).

# Getting started with collections (beta)

**Note** This feature is in [beta testing](#) and is available only in a Data Marketplace context. We consider extending its availability in the future if the Beta goes well.

To work with collections, both the **Data Marketplace** and **Collections** features must be enabled. For more details, go to [Enable Data Marketplace](#).

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Create a collection and add an asset to a collection (beta) .....	106
Open an asset you collected (beta) .....	107
Manage collections (beta) .....	108
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## What are collections in Data Marketplace? (beta)

Collections allow you to group assets in organized lists.

They help you be more efficient in what you do because they give easy access to assets you need. You can, for example, create collections with your favorite assets, assets you need in the context of projects, assets you want to follow up on, and so on.

To work with collections, both the **Data Marketplace** and **Collections** features must be enabled. For more details, go to [Enable Data Marketplace](#).

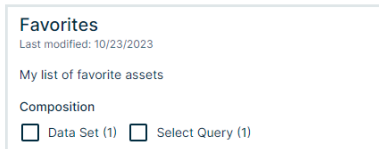
### Note

- The collections feature is in [Beta testing](#) and is available only in a Data Marketplace context. We consider extending its availability in the future if the Beta goes well.
- All users can create collections when the feature is enabled. You don't need other specific permissions.

Once the feature is enabled, users can create collections, add assets to their collections, manage their collections, and [share](#) collections.

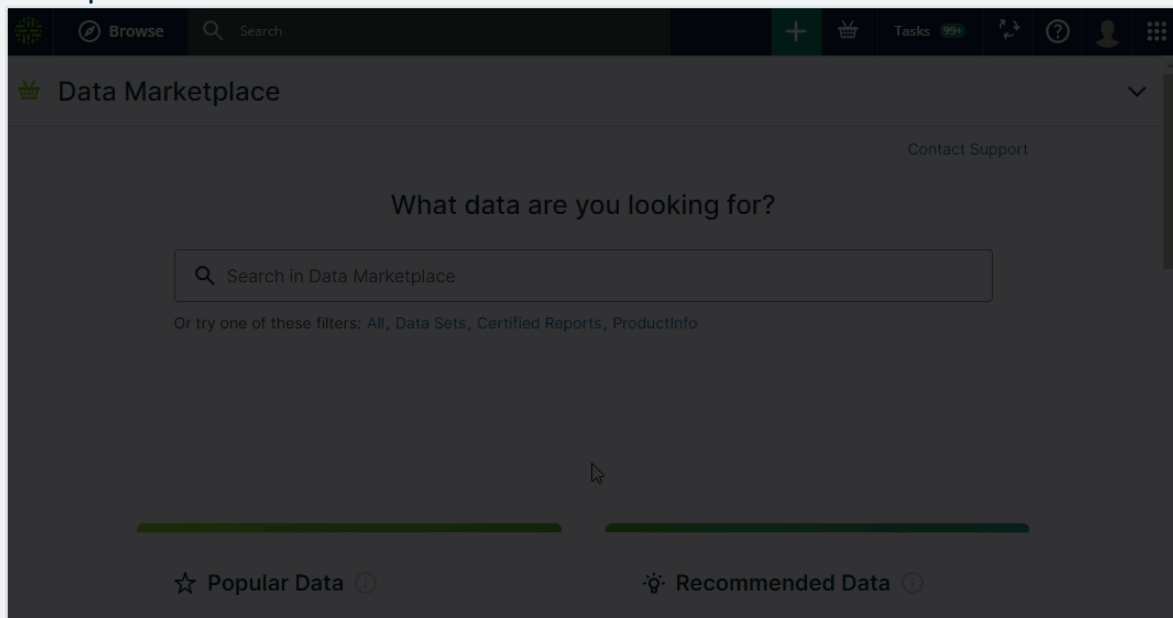
- Each user can create up to 100 collections and add up to 200 assets in one collection.
- The **Favorites** collection is available by default. It is an out-of-the-box collection and cannot be removed or renamed.
- Assets can be added to a collection from the Data Marketplace asset preview. For more information, go to [Create a collection and add an asset \(beta\)](#).
- All collections can be accessed via the avatar → **Collections**. For more information, go to [Manage collections \(beta\)](#).

For a collection, you can see the assets in the collection, a collection description, when the collection was last updated and also the composition. The composition shows the asset types of the assets in the collection.



- Collected assets open in Collibra in the same Browser tab. For more information, go to [Open an asset you collected \(Beta\)](#).

## Example




# Create a collection and add an asset to a collection (beta)

Assets can be added to a [collection](#) or removed from a collection via the asset preview in Data Marketplace.

## Before you begin

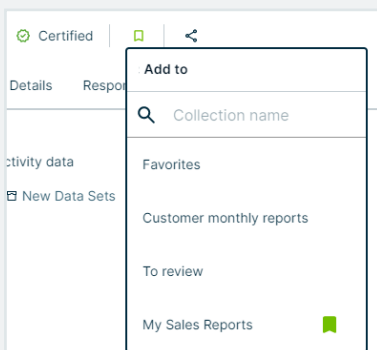
[Data Marketplace and Collections are enabled.](#)

## Steps

1. Open Data Marketplace.
2. Search for the asset that you want to add to your collection and click the title of the asset.  
The [asset preview](#) dialog opens.
3. Click .  
» The **Add To** list appears.

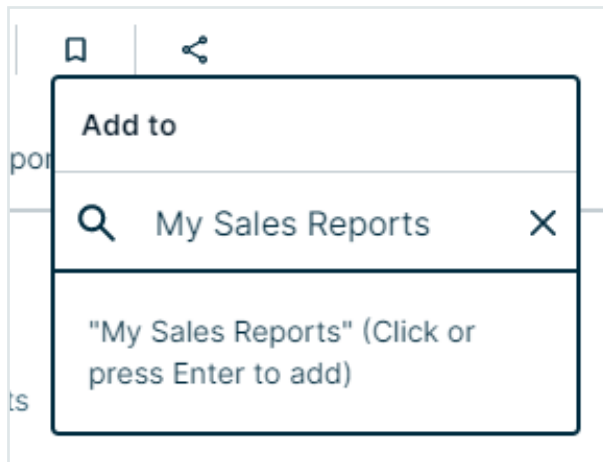
### Tip

A colored bookmark icon in the **Add To** list indicates that the asset has been added to that collection already. You can remove the asset from a collection by clicking the colored bookmark icon.



4. Perform one of the following actions:
  - To add the asset to an existing collection, select the name of the collection.  
» The asset has been added.

- To create a new collection and add the asset to it:
  - i. Type the name of your new collection.  
For example: My Sales Reports.



- ii. Press *Enter*.
  - » The new collection has been created and the asset has been added.
  - » To access your collection, click your avatar → **Collections**. For more information, go to [Manage collections \(Beta\)](#).

## What's Next?

- [Open an asset you collected \(beta\)](#)
- [Manage collections \(beta\)](#)

## Open an asset you collected (beta)

You open a collected asset from the **Collections** page. For general information on collections, go to [Collections](#).

## Before you begin

[Data Marketplace and Collections are enabled.](#)

## Steps

1. Click your avatar → **Collections**.
  - » The **Collections** page opens.
2. Click the name of a collection.
3. Right-click the asset and select **Open in New Tab**.

Note If you click the asset, the asset page opens in the same Browser tab.

## What's Next?

- [Manage collections \(beta\)](#)
- [Create a collection and add an asset \(beta\)](#)

## Manage collections (beta)

Once you have created and used [collections](#), you may ask the following questions:

- How do I remove an asset from a collection?
- How do I change the name of a collection?
- How do I delete a collection?
- How do I share a collection with others?


You can do all of this via the **Collections** page.

For general information on collections, go to [Collections](#).

## Before you begin

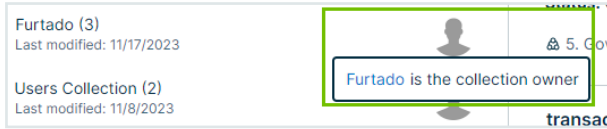
[Data Marketplace and Collections](#) are enabled.

## Steps

1. Click your avatar → **Collections**.
  - » The **Collections** page opens. On the left-hand side, all collections you have access to are shown. 

- You can search for a specific collection and sort the collections based on name, when the collection was created, or when the collection was last updated.

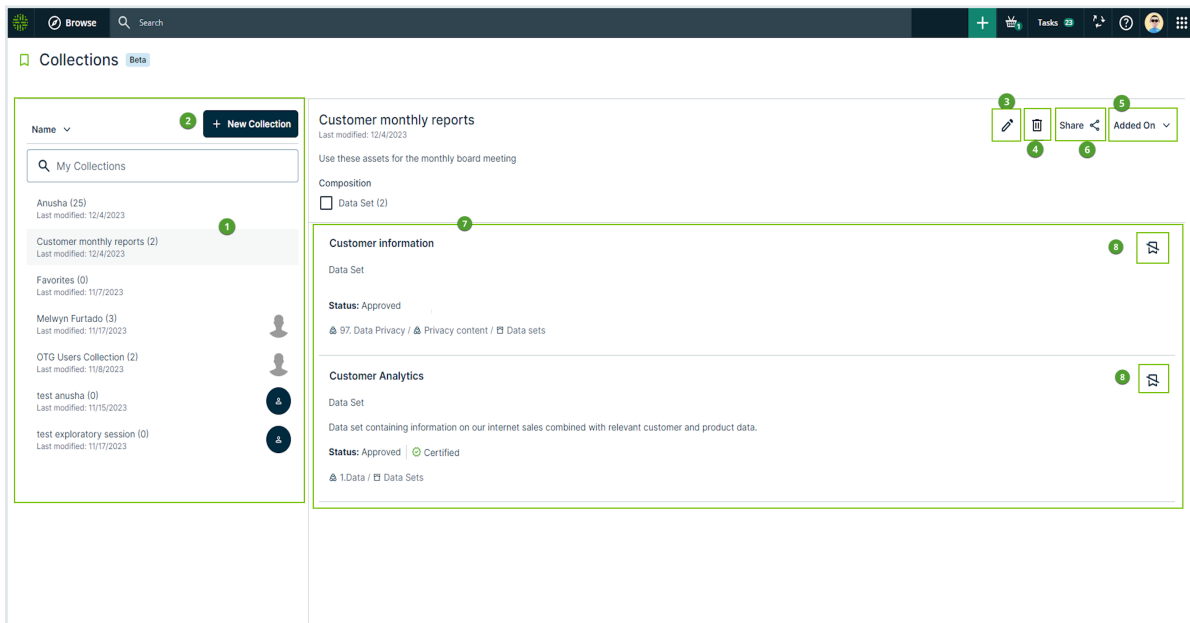
For collections that have been shared with you, you see the avatar of the owner. Click the avatar to see the full name of the owner.



**Note** Only 100 collections are displayed. It's possible, however, that the total number of collections you have access to is more than 100. In that case, use the search to retrieve the collection.

- When you click a collection name, the assets in a collection are shown on the right-hand side. **7**



Via the **Added On** drop-down list **5**, you can change the order of the assets in the collection. You can sort based on the asset name or on the date the asset was added to the collection.



2. Perform one of the following actions.



- To create a new collection, click **+ New Collection**. 2

**Tip** You can also create a collection from an asset preview. For more information, go to [Create a collection and add an asset from the Asset Preview \(Beta\)](#).

- To change a collection name or description, click . 3
- To delete a collection, click . 4

**Note**

- Only the collection owner can delete the collection.
- The **Favorites** collection can't be deleted nor renamed.

- To share a collection with others, click . 6  
For more information, go to [Share a collection](#).
- To remove an asset from a collection, click . 8
- To open an asset, click the asset name or right-click and select **Open in New Tab**.  
For more information, go to [Open an asset you collected \(Beta\)](#).

## Share collections (beta)

By sharing a collection, you give others access rights to your collection. You can give the following access rights:

Access right	What can a user do?
Viewer	View the assets in a collection.
Editor	<ul style="list-style-type: none"> <li>• View the assets in a collection.</li> <li>• Add assets to and remove assets from the collection.</li> <li>• Update the collection description.</li> <li>• Share the collection with others.</li> </ul>

**Tip** The person who creates the collection is the owner of the collection. In addition to the actions an editor can perform, the owner can update the collection name and delete the collection. The collection owner can't be changed.

## Requesting access to a collection

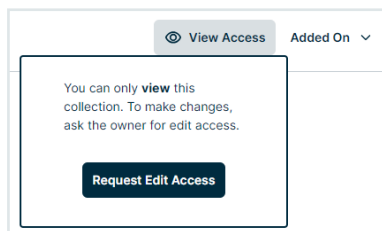
You can request access to a [collection](#) and ask an owner to give you access rights.

- If you receive a link to a collection to which you don't have access, you receive a message.

Click **Request Access** to send an email to the owner.

- If you have Viewer access to a collection, you see a **View Access** tag in the collection.

To ask the owner for Editor access, click the tag and then **Request Edit Access**.



## Give and remove access to a collection

As the owner or editor of a collection, you can share a collection via the **Collections** page.

### Before you begin


[Data Marketplace and Collections are enabled.](#)

### Steps

1. Open the collection you want to share.
  - a. Click your avatar → **Collections**.
    - » The **Collections** page opens.

- b. Select the collection you want to share.

**Tip** As an owner, you may also have received an email indicating that someone requested access to a collection. In the email, click **Manage access for this collection**, to open the collection.

2. Click .
- » The **Share** dialog box opens.
3. If the colleague you want to change the collection with doesn't have access yet to the collection, start typing the colleague's name in the **Add users** field and select the colleague from the drop-down list.- » The colleague is added to the **People with Access** list. The default access right is **Viewer**.
4. To change the access rights, open the drop-down list next to the colleague's name and select the desired access right: **Viewer** or **Editor**.  
If you select the option **Remove Access**, the colleague will no longer have access to the collection.
5. Click **Save**.- » An email is sent to the colleague informing the colleague about the access change.

# 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 in the [search 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.

## How can you test relations-based search?

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