Collibra

Collibra Data Intelligence Cloud

Data Marketplace

Version 2022.11

Collibra

Collibra Data Intelligence Cloud - 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

Contents

Contents ... **ii**

About Data Marketplace ... **1**

Data Marketplace compatibility ... 3

Data Marketplace permissions ... 3

Data Marketplace limitations and guidelines ... 3

Enable Data Marketplace ... **5**

Prerequisites ... 5

Steps ... 5

What's next? ... 10

The out-of-the-box Data Marketplace experience ... **11**

Scope ... 11

Filter tabs ... 11

Filters ... 12

Actions ... 16

Landing page options ... 17

Search suggestions ... 17

Configuring Data Marketplace ... **18**

Configure Data Marketplace: Overview ... 19

Configure the Data Marketplace scope ... 23

Configure the Data Marketplace landing page ... 25

Make actions available in Data Marketplace ... 28

Configure the data basket and search suggestions in Data Marketplace ... 32

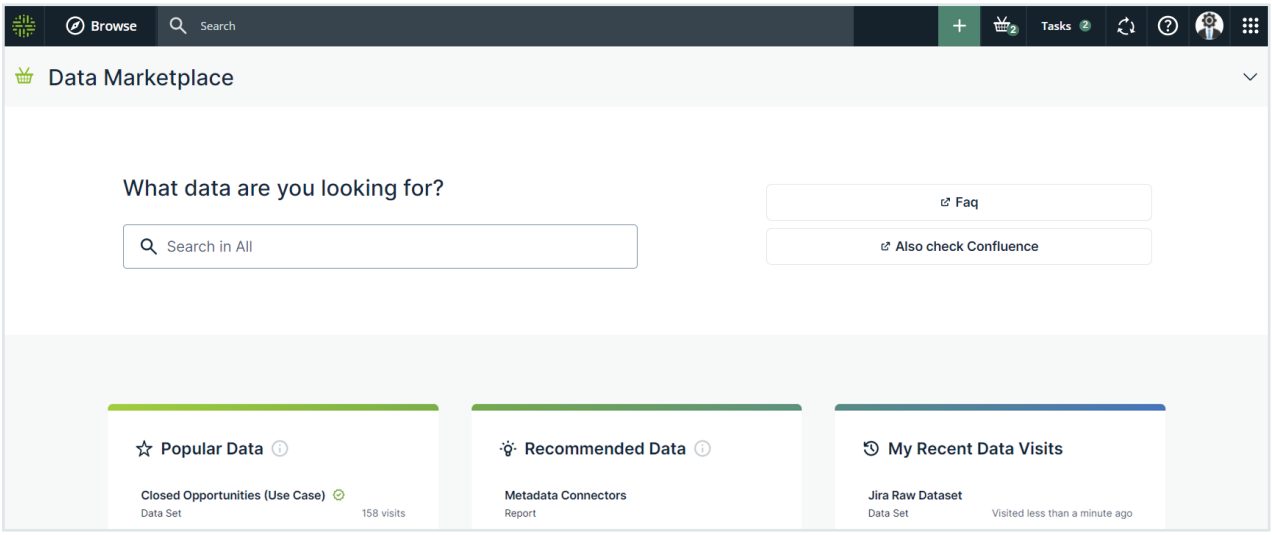
Configure the filters in Data Marketplace ... 33

Filtering and searching based on relations in Data Marketplace 34
Configure the filter tabs in Data Marketplace 57
Reindex Data Marketplace relations 59
Using Data Marketplace 61
The Data Marketplace landing page 62
Searching in Data Marketplace 67
Previewing assets in Data Marketplace 79
Troubleshooting Data Marketplace 87
You don't find the asset you are looking for 87
You see fewer or more search results in the All filter tab compared to other out-of-the-box filter tabs 87
You don't see your recent searches or recently visited assets 88
New data consumers don't receive discovery data 88
You don't see a specific filter in the Filters pane 88
You cannot edit the filter tabs 89
You don't see the actions (workflows) in the asset preview after they were enabled in the Data Marketplace settings 89
You don't know where the actions you selected are displayed 89
The workflow does not start 90
You don't find assets based on relations that end with a specific attribute 90
You get an error message when you activate the Data Discovery Modules option 90
You get an error message when you want to add, update or delete a relation index 91
How can you test relations-based search? 91

About Data Marketplace

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

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



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

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

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

2. Data Marketplace makes searching for data easier

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

3. Data can be opened in preview

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

Data Marketplace compatibility

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

Administrators can enable and configure Data Marketplace from version 2022.08.
In environments installed after 2022.11, Data Marketplace is enabled by default.

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	You need the Catalog or Catalog Author global role.	• Access to Data Marketplace from the Applications icon ⠿. • Search for assets and access the asset preview, if you have view permission on the asset. • Start the actions that have been assigned to Data Marketplace by the administrator.
Administrator	You need the SysAdmin global role.	• Same as Data consumer. • In Collibra, access Data Marketplace-specific settings to configure the scope, filters, actions, landing page, and extra options. • In Data Marketplace, access the configuration of the filter tabs.

Data Marketplace limitations and guidelines

For data consumers

- Data Marketplace is available in English. It does not yet support translation to other languages.
- 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.
- The Filters pane sometimes displays filter options twice.
  It is possible that when you try to deselect a filter option, the option is duplicated instead.
- If the Data Basket is enabled in Data Marketplace, it is possible that the **Add to Data Basket** button is available in Collibra for the asset but not in Data Marketplace. This is because Data Marketplace does not take child asset page definitions into account. For more information, go to Data Basket

For administrators

- Scopes are not taken into account in Data Marketplace.
- Workflows that start other workflows will not open the follow-up task automatically in Data Marketplace. You can still access the task from the Tasks indicator in the top bar.
- Relation-based filters also show the asset type's parent as a filter option after relation reindexing.

  > **Example**
  > You select System as the target of a relation path and show it as a relation-based filter. In that case, Data Marketplace will include the following values as filter options:
  > - the values of asset type System,
  > - the values of the child asset types of System, if any.
  > - the Technology asset (because it is the parent asset type of System).

- When you create a relation index:
  - 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.
  - Currently, we do not prevent that you create and two relation paths that are exactly same.

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, Data Marketplace is enabled by default.

Prerequisites

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	<table><tr><th>Setting</th><th>Description</th></tr><tr><td>Data Marketplace</td><td>◦ ✔ True (default): Data Marketplace is enabled. Anyone with the required permissions can use or configure the Data Marketplace application from the Applications icon ⠿. **Note** When Data Marketplace is enabled and you reindex Collibra completely, the relations are also reindexed automatically. You don't need to start it manually. However, reindexing the relations will not reindex Collibra completely. ◦ ✘ False: Data Marketplace is not enabled. After you enable this setting, reindex Data Marketplace relations or reindex Collibra completely. **Note** In new Collibra environments, this setting is enabled by default. In upgraded Collibra environments, the previous status of this setting is retained.</td></tr></table>

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

Setting	Description
Relation-based search	◦ ✔ True (default): The Data Marketplace search considers certain assets and relation types between assets. As a result, your search results not only include assets that directly match the search criteria, but also assets that match the criteria through specific relation types. **Example** A column named **Order** is included in a data set named **Customer**. If the relation-based search is enabled and you search for **Order** in Data Marketplace, then the data set **Customer** appears in the search results because the data set contains this column. **Tip** For more information about this feature and the default relation types, go to Filtering and searching based on relations in Data Marketplace. ◦ ✖ False: The Data Marketplace search results do not consider relations. After you enable this setting, you must reindex Data Marketplace relations or reindex Collibra completely. **Note** In new Collibra environments, this setting is enabled by default. In upgraded Collibra environments, the previous status of this setting is retained.

Setting	Description
Asynchronous indexing	✓ True: The Search service handles changes to your environment in batches. This ensures optimal performance, especially after big changes to your environment, such as importing a lot of assets. ✕ False: Changes to your environment are processed immediately. This is the default value. **Warning** This setting has an impact on your entire Collibra environment, not only to Data Marketplace. For more information, see Asynchronous indexing. After you have enabled this setting, stop and restart your environment, and reindex Collibra completely.

Setting	Description
Automatic relation indexing	This setting is specific to Data Marketplace. This setting keeps Data Marketplace up to date if relations between assets are created, updated, or removed. > **Example** If the relation between asset A and asset B changes and this relation is used in relation-based filters or relation-based search, then the Data Marketplace search considers this change. ◦ ✔ 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. > **Note** Collibra does not automatically reindex relations between assets for relation paths that end with an attribute. You need to manually reindex the relations. > **Warning** If you select **True**, you must also enable the **Asynchronous indexing** setting because every relation change results in an event that is processed via asynchronous indexation. > **Tip** For more information about this feature and the default relation types, go to Filtering and searching based on relations in Data Marketplace. ◦ ✘ False (default): Changes to relations are not automatically indexed. This can cause inconsistencies between Collibra and

Setting	Description
	Data Marketplace. You can, however, manually reindex Data Marketplace relations.

4. Click **Save all**.
5. If you have enabled Asynchronous indexing, stop the environment and start the environment.
6. If you have enabled the Data Marketplace, Asynchronous indexing, 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, filter tabs, filters, actions, landing page data, and search suggestions. Optionally, administrators can optimize the Data Marketplace experience.

Scope

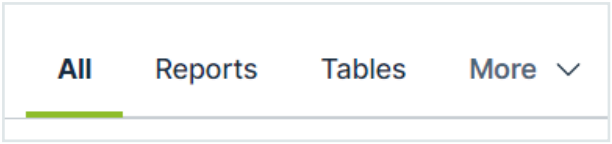
By default, Data Marketplace finds assets of the following asset types with any status, anywhere in the organization.

- Data Set
- Report
- Table
- Column
- Database View
- BI Data Set, BI Report
- Power BI Tile, Power BI Data Model, Power BI Dashboard, Power BI Report
- Tableau Dashboard, Tableau View, Tableau Story, Tableau Workbook, Tableau Worksheet

Administrators can configure the scope.

Filter tabs

Data Marketplace shows the search results in tab pages, called filter tabs.
Filter tabs allow you to quickly apply a filter based on an asset type or on a group of filters that are frequently used.



By default, Data Marketplace provides the following filter tabs:

Filter tab name	Description
All	No filter is applied. All search results in the Data Marketplace scope to which you have View permissions are listed.
Tables	Only assets of the type Table or an out-of-the-box child asset type of Table are listed in the search results.
Data Sets	Only assets of the type Data Set or an out-of-the-box child asset type of Data Set are listed in the search results.
Reports	Only assets of the type Report or an out-of-the-box child asset type of Report are listed in the search results.

Administrators can configure the available filter tabs.

Filters

By default, Data Marketplace provides the filters in the table below.

> **Note** Some of these filters rely on relation path indexing.
> If your Collibra environment does not use one or more of the indexed relations, the out-of-the-box relation-filters do not work.

Filter name	Description	Uses relations
Business Asset	Business Asset refers to the business assets that are related to the data, such as `Customer Phone Number` or `Customer Order Number`. **Tip** For a detailed narrative on the differences between business terms, data domains and data concepts, see Conceptual data layer versus the Business Glossary.	Yes
Certified	This filter limits your search results to data that has been certified, meaning approved, endorsed or guaranteed. **Tip** For complete information on certifying reports, see Trusted Business Reporting.	No

Filter name	Description	Uses relations
Data Domain	Data Domain refers to a high-level conceptual category to which the data belongs, such as `Customer` or `Order`. Assets of this type: • Are high-level, theoretical representations of your data. • Represent the structure of concepts in data environments. • Contain all the different nuances of corresponding business terms. **Important** To benefit from this, your data structure must follow the Data Stewardship metamodel. See Conceptual data layer.	Yes

Filter name	Description	Uses relations
Data Concept	Data Concept refers to the lower-level conceptual category to which the data belongs, such as `Phone Number` or `Country`. Assets of this type: • Are high-level, theoretical representations of your data. • Represent an aspect of one or more data domains. • Define a context-independent representation of the structure of an organization's data. **Important** To benefit from this, your data structure must follow the Data Stewardship metamodel. See Conceptual data layer.	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

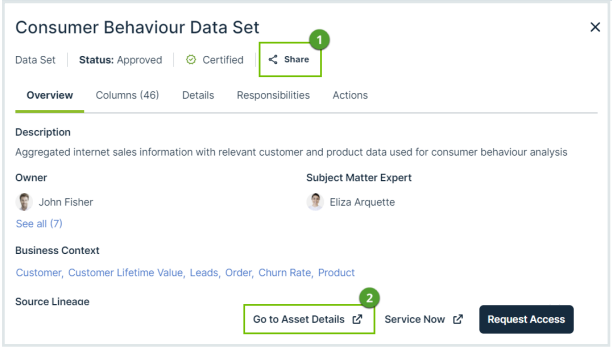
Filter name	Description	Uses relations
Status	Status refers to which governance process stage the asset is in, like Approved or Candidate.	No
Asset Type	Asset Type refers to the kind of data you are looking for, like data set, report, or table.	No

Administrators can configure the filters.

Actions

Data Marketplace provides following actions to the data consumers. The following actions are always available in the asset preview:

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



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

Landing page options

The landing page consists of multiple sections.

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

Search suggestions

By default, no search suggestions are provided when data consumers start entering search terms. Administrators can enable search suggestions.

Chapter 4

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 19

Configure the Data Marketplace scope 23

Configure the Data Marketplace landing page 25

Make actions available in Data Marketplace 28

Configure the data basket and search suggestions in Data Marketplace 32

Configure the filters in Data Marketplace 33

Filtering and searching based on relations in Data Marketplace 34

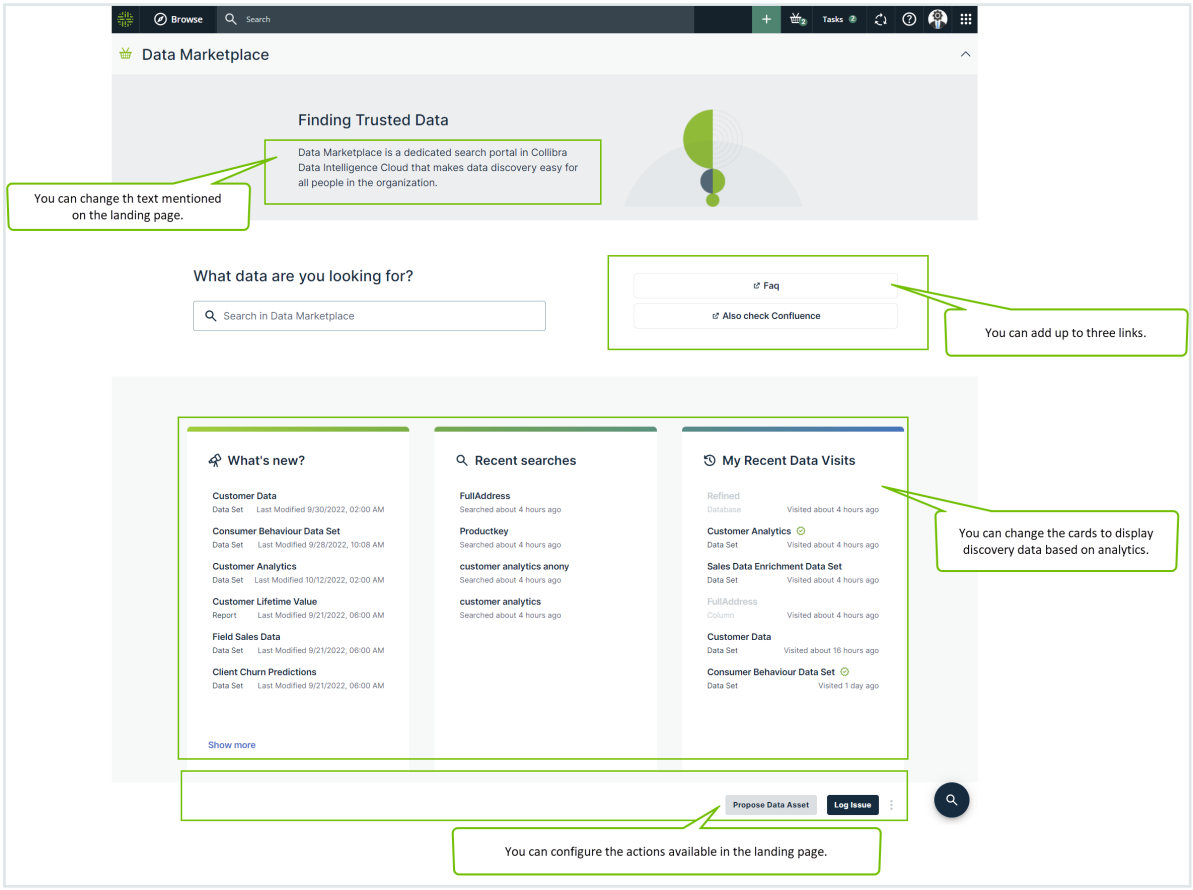
Configure the filter tabs in Data Marketplace 57

Reindex Data Marketplace relations 59

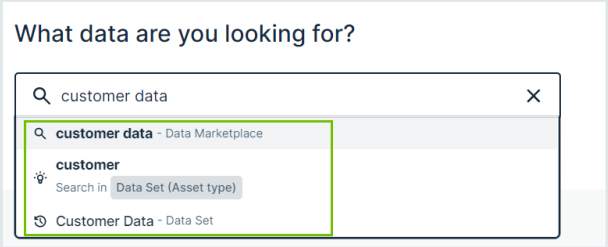
Configure Data Marketplace: Overview

What can you configure?

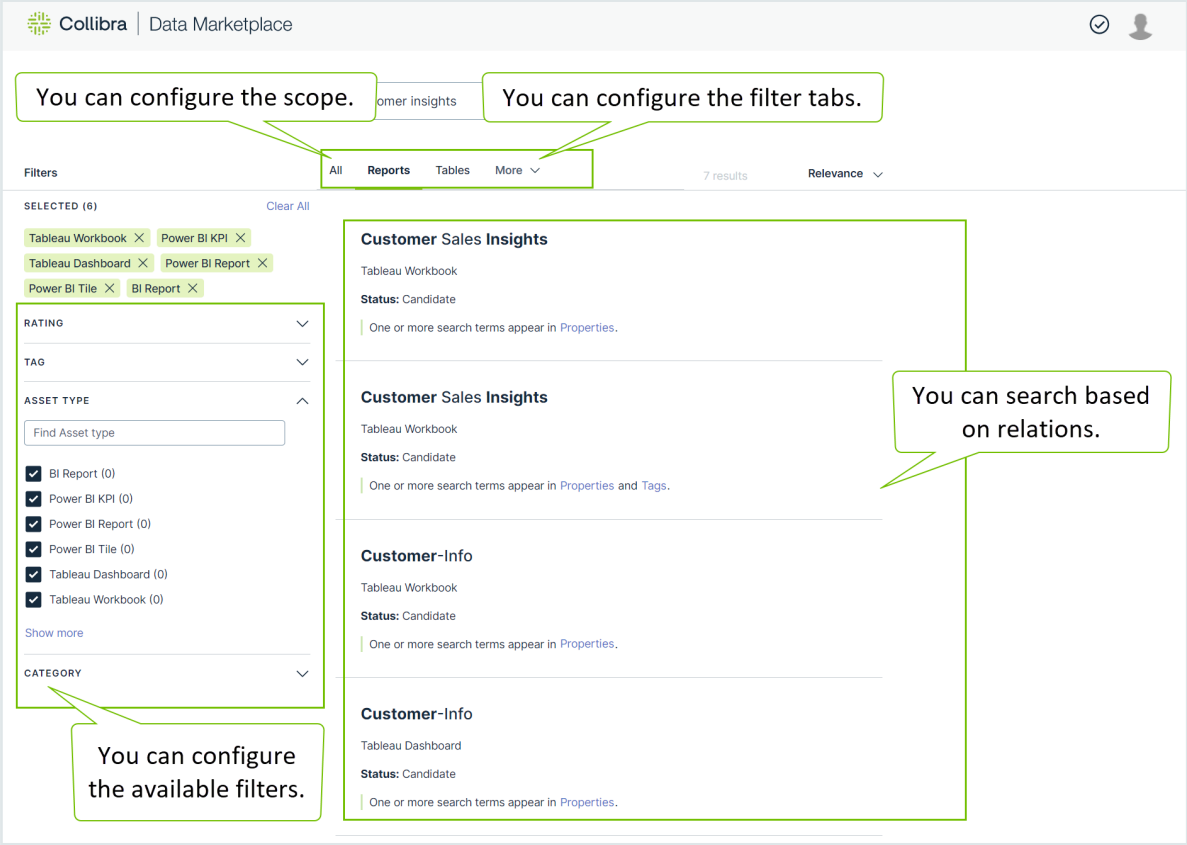
- You can define who has access to Data Marketplace. For information, go to Data Marketplace permissions.
- In the Data Marketplace landing page, you can configure the quick links, introduction text, actions, and define whether discovery data must be available.



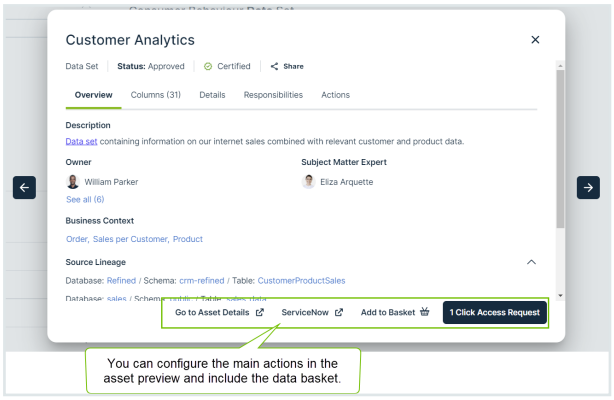
- You can define whether search suggestions are provided once people starts searching for data.

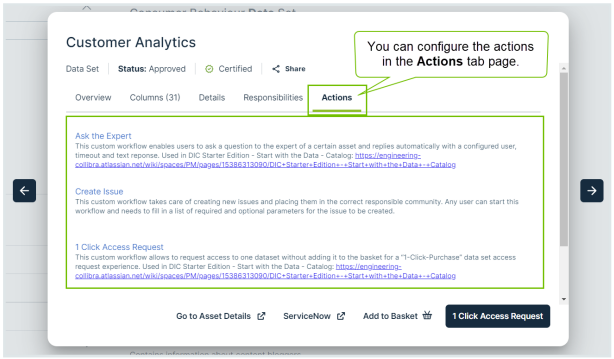


- You can configure the scope, filter tabs, filters and search based on relations.

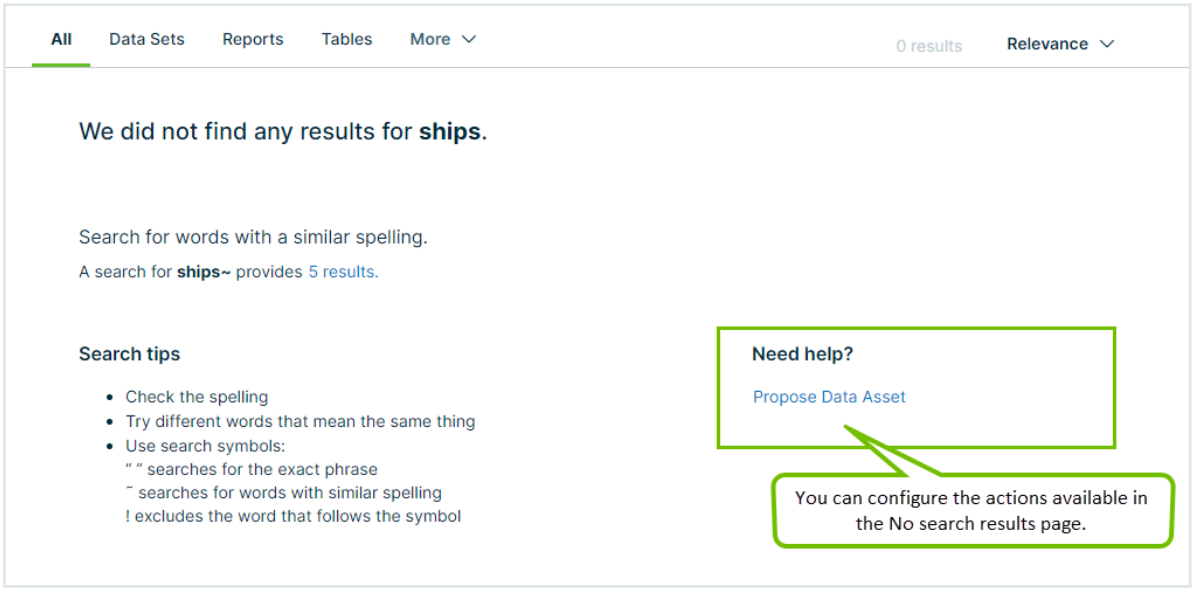


- You can configure the actions available in the asset preview and define whether data consumers can add assets to the data basket from Data Marketplace.





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



How do you configure Data Marketplace?

	Step	Description
1	Optionally, change the Data Marketplace scope	By default, Data Marketplace finds assets of specific asset types, with any status, anywhere in your organizations. You can change the scope based on asset type, organization and status. You can also include custom asset types and statuses in the scope.
2	Optionally, change the landing page.	You can change the introduction text of Data Marketplace, add up to three quick links to the landing page, and show discovery data.
3	Optionally, make actions available in Data Marketplace	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.
4	Optionally, enable the use of the data basket and search suggestions.	You can activate search suggestions and make the shopping basket available for the data consumers.
5	Optionally, configure the filters in Data Marketplace	By default, all out-of-the-box filters that apply to the search results are available to data consumers. You can choose the filters that must be available in the **Filters** pane. If needed, you can also create custom filters based on relations.

	Step	Description
6	Optionally, configure the filter tabs in Data Marketplace	By default, all out-of-the-box filter tabs are available in the search results. You can configure the filter tabs you need.
7	Optionally, optimize the search index	The Collibra search index settings have an impact on the Data Marketplace experience. You can use these settings to further optimize the experience. Note that changing these settings has an impact on Collibra as a whole, not only on Data Marketplace. For information on the Data Marketplace-specific settings such as relation-based search, go to Enable Data Marketplace in your environment.

Configure the Data Marketplace scope

As an administrator, you can customize the out-of-the-box scope to expose exactly what makes sense for your data consumers. Which data is relevant? Which data meets your quality or governance standards?
You can configure the scope based on asset type, status and organization. Data Marketplace takes all three scope definitions into account. If you choose to only include Reports as asset type, Approved as status and Marketing as organization, you only get results that meet all these conditions.

Examples

Example
In your environment, data consumers must request access on data set and report level. As a result, you only want to 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 Search over relations, 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 only want to show data of this community in Data Marketplace.
To do this you configure the following scope:

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

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.
  Before deleting an asset type, status, community, or domain, remove it from the scope in Data Marketplace.

Prerequisites

- Data Marketplace is enabled.
- The Settings landing page is enabled.
- You are an administrator in Data Marketplace.

Steps

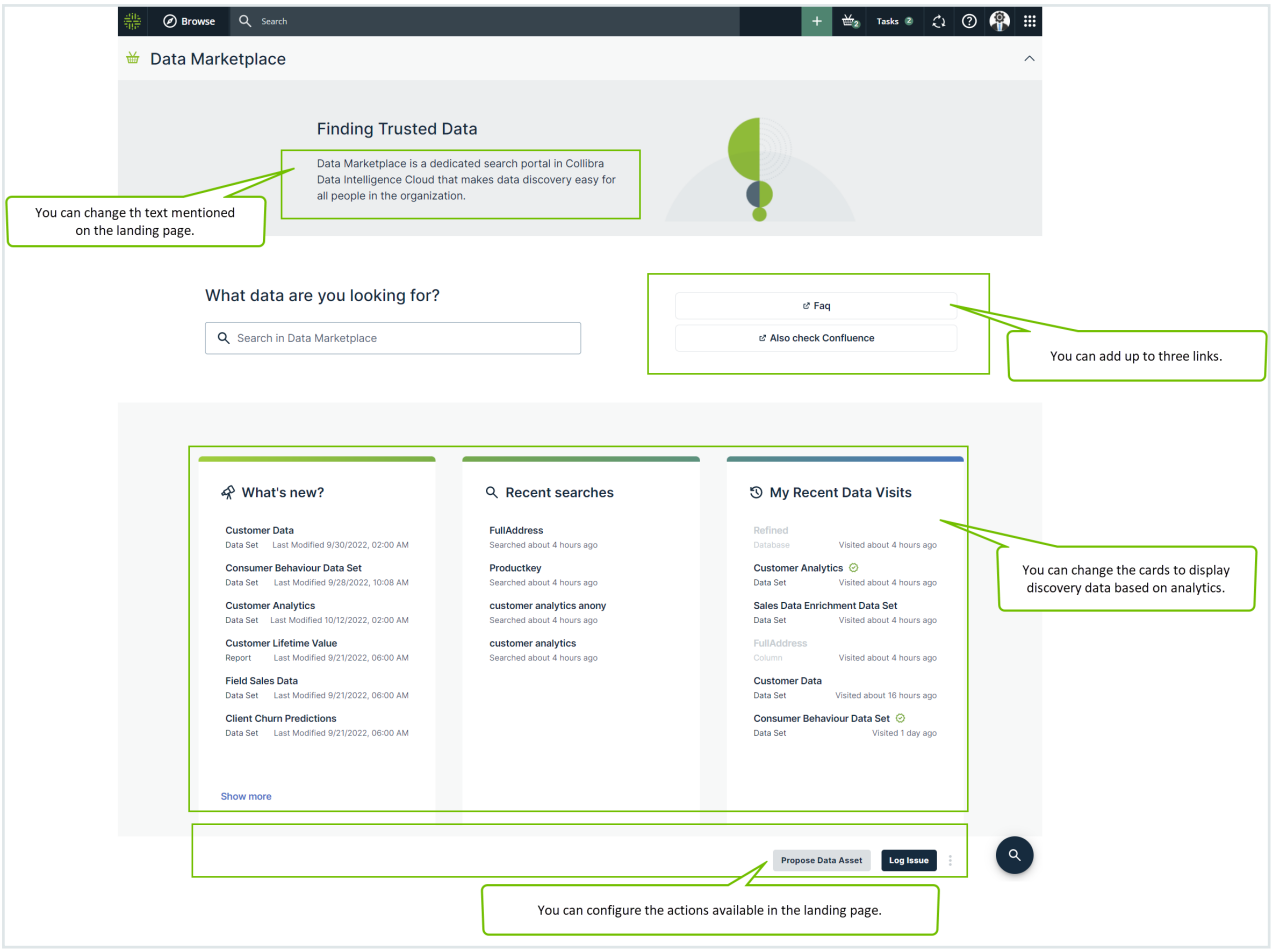
1. On the main menu, click , and then click **Settings**.
   » The Collibra settings page opens.
2. In the **Data Marketplace** section, click **Scope**.
3. If you want to limit the search results to assets of specific asset types, select the required asset types in the **Asset types** tab page.
4. If you want to limit the search results to assets with specific statuses, select the required statuses in the **Statuses** tab page.
   If you do not 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 do not 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 quick links, introduction text, actions, and define whether discovery data must be available.



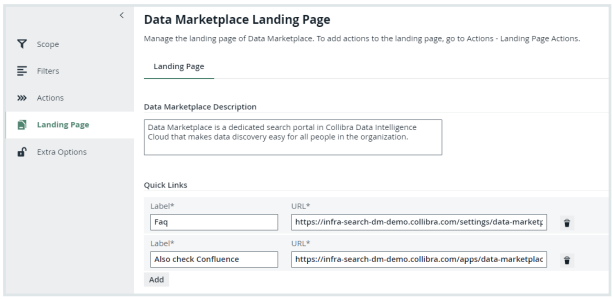
Prerequisites

- Data Marketplace is enabled.
- The Settings landing page is enabled.
- You are an administrator in Data Marketplace.

Steps

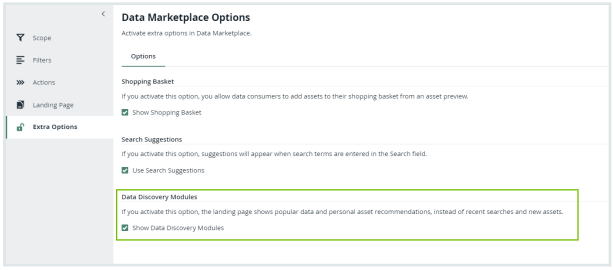
1. On the main menu, click , and then click **Settings**.
   » The Collibra settings page opens.
2. To change the introduction text or add links:
   a. In the **Data Marketplace** section, click **Landing Page**.
   b. In **Data Marketplace Description**, change the text.

c. In **Quick Links**, add a **Label** and **URL** for the link you want to add.
You can add a maximum of three links.



d. Click **Save**.

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



   c. Click **Save**.

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

4. To add specific actions to the landing page, go to Make actions available in Data Marketplace.

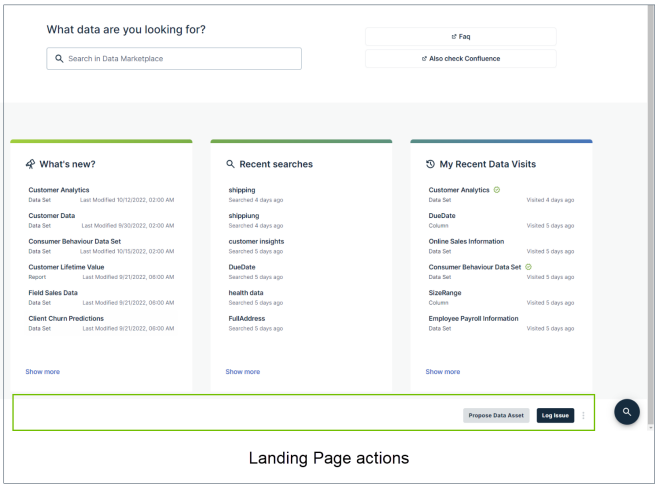
What's next?

Make actions available in Data Marketplace

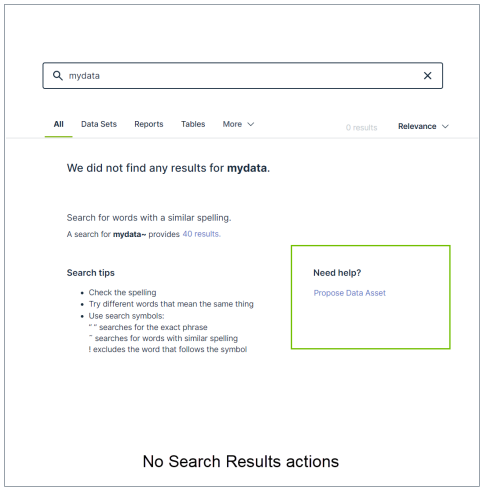
Make actions available in Data Marketplace

Data Marketplace provides some out-of-the-box actions to the data consumers.
As an administrator, you can add actions to and remove them from Data Marketplace. These actions start workflows. Actions can be made available:

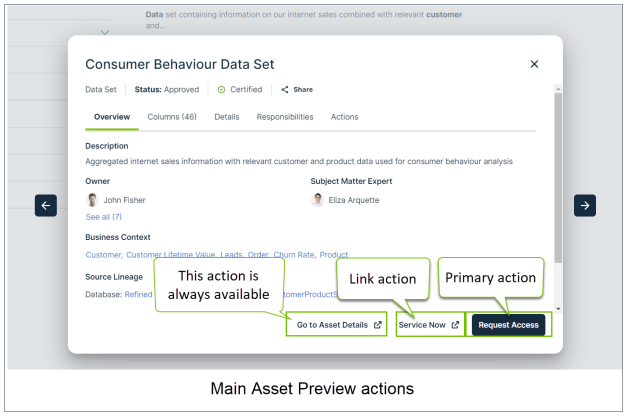
- At the bottom of the Data Marketplace landing page.
- In the **Need help?** section if the search did not return any results.
- At the bottom of an asset preview.
- In the **Actions** tab page in an asset preview.



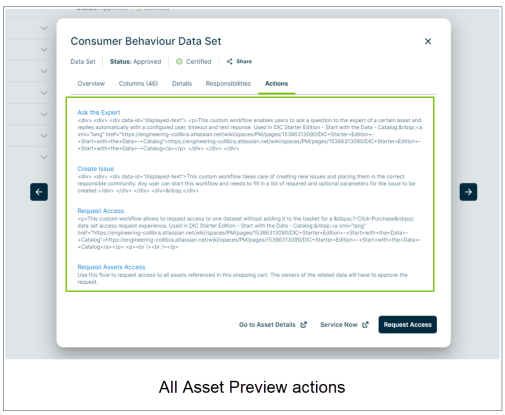
Landing Page actions



No Search Results actions



Main Asset Preview actions



All Asset Preview actions

Important

- Data Marketplace shows the **Start Label** of the workflow as the action's button.

- The out-of-the-box Request Access workflow assumes the request starts from the data basket. You cannot use it as a primary action or asset action in Data Marketplace without customizations.
- Workflows that start other workflows will not open in Data Marketplace.
- If a data consumer does not have access to a workflow, the action will not appear in Data Marketplace.

Prerequisites

- Data Marketplace is enabled.
- The Settings landing page is enabled.
- You are an administrator in Data Marketplace.

Steps

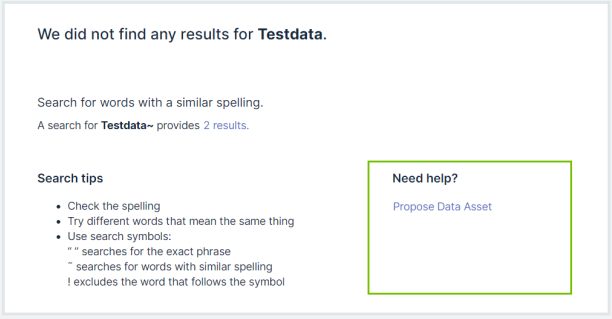
1. On the main menu, click , and then click **Settings**.
   » The Collibra settings page opens.
2. In the **Data Marketplace** section, click **Actions**.
3. In the **Landing Page Actions** tab page, select the actions that must appear at the bottom of the landing page.

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

4. In the **No Search Results Actions** tab page, select the actions that must appear in the **Need help?** section if the search did not return any results.

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

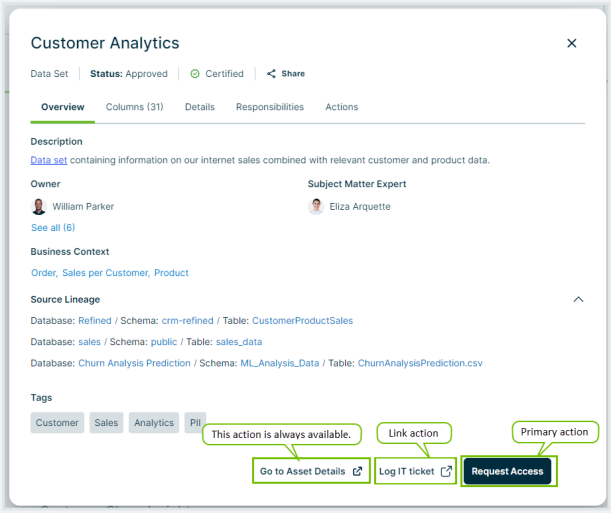
Example
In this example, the Propose new data set workflow available in the No search results page.



5. In the **Main Asset Preview Actions** tab page, select the actions that must appear in the asset preview.
   a. In **Primary Action**, select the workflow that must start when the primary action button is clicked in the asset preview.
      Select **None** if you don't want to show a primary action.
   b. 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 Action** section.

Important
- You can only select workflows that apply to assets.
- If a data consumer does not have access to the workflow or the workflow does not apply to the asset type, the action will not appear.

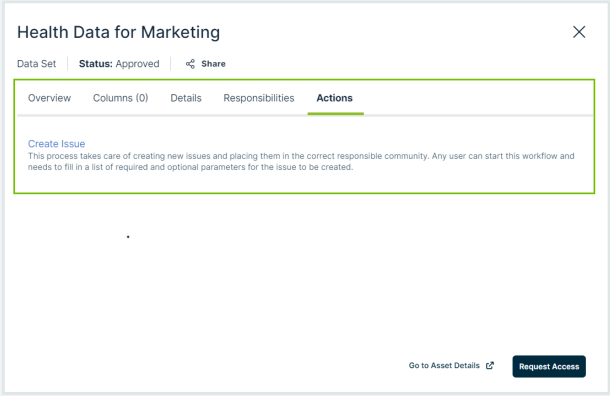
Example
In the below example, **Request Access** is the primary action and **Log IT ticket** is the link action. You cannot customize the **Go to Asset Details** action.



6. In the **All Asset Preview Actions** tab page, select the actions that must appear in the **Actions** tab page in the asset preview.

Important
You can only select workflows that apply to assets.

Example
In this example, the Create Issue workflow is available in the **Actions** tab page of an asset preview.



7. Click **Save**.

What's next?

Configure the filters in Data Marketplace

Configure the data basket and search suggestions in Data Marketplace

Prerequisites

- Data Marketplace is enabled.
- You are an administrator in Data Marketplace.

Steps

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

   > **Note**
   > If the Data Basket is enabled in Data Marketplace, it is possible that the **Add to Data Basket** button is available in Collibra for the asset but not in Data Marketplace. This is because Data Marketplace does not take child asset page definitions into account.

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

What's next?

Continue the Data Marketplace configuration

Configure the filters in Data Marketplace

By default, out-of-the-box filters are available in Data Marketplace.
However, administrators can change the filters and the order in which the filters appear.

> **Example**
> You can ensure the following filters are displayed in this specific order:
>
> - Asset Type
> - Certified
> - Status
> - Data Domain

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

Prerequisites

- Data Marketplace is enabled.
- The Settings landing page is enabled.
- You are an administrator in Data Marketplace.

Steps

1. On the main menu, click , and then click **Settings**.
   » The Collibra settings page opens.
2. In the **Data Marketplace** section, click **Filters**.
   » The **Management** tab page appears and shows the filters that are available in Data Marketplace.
   - The list shows all available filters.
   - The **Filters** pane in Data Marketplace uses the order of this list.
3. To show a filter, select the **Is Visible** checkbox.
   To hide a filter, clear the **Is Visible** checkbox.
   To move a filter, use the icon to drag and drop it in the desired location.
4. Click **Save**.

> **Tip** You can add custom filters based on relations. For information, go to Managing relation indexes in Data Marketplace.

What's next?

Configure filter tabs in Data Marketplace

Filtering and searching based on relations in Data Marketplace

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

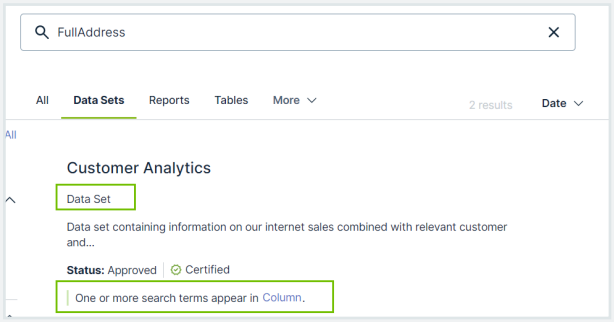
- Data Marketplace can find search results if they have a specific relation with the search term.
  A data set, for example, can show up in the results if the data set contains a column with a name that matches the searched term.
- Data Marketplace can provide filters to refine your search results based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

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

How does relation-based search work?

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

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



For information on how to enable relation-based search, go to Enable Data Marketplace.

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

Relation paths
Same relation paths as defined for the relation-based filters.
Relation path for Data Set - Column: • Data Set contains Column

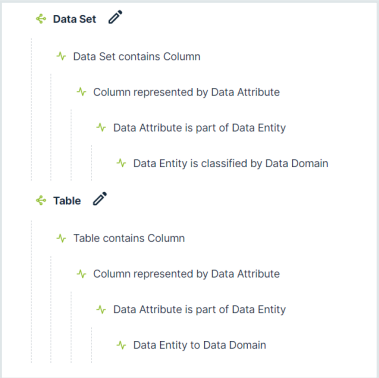
Tip
You can create custom relation paths for the relation-based search. For information, go to Managing relation indexes in Data Marketplace.

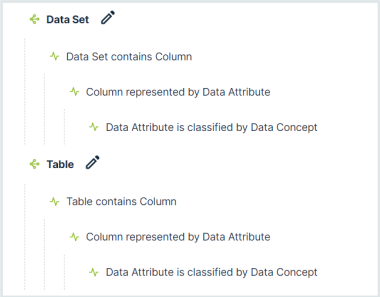
How do relations in filters work?

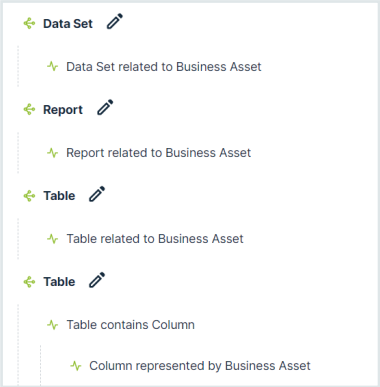
You can refine the search results with filters that can take relations into account. By following a chain of relations, called a relation path, Data Marketplace can find assets that have a direct or

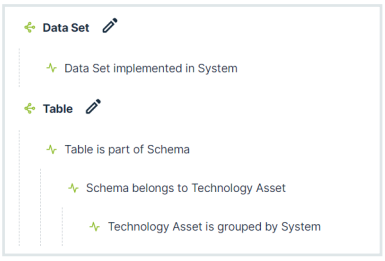
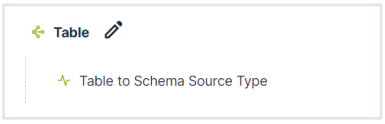
indirect relation to a specific asset. For example, the Source system filter restricts the search results to data sets that are stored in a specific system.

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

Filter	Relation paths	
Data Domain	**Relation path for Data Domain - Data Set:** 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain **Relation path for Data Domain - Table:** 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain	

Filter	Relation paths	
Data Concept	**Relation path for Data Concept - Data Set:** 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept **Relation path for Data Concept - Table:** 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept	

Filter	Relation paths	
Business Asset	**Relation path for Business Asset - Data Set:** • Data Set is related to Business Asset **Relation path for Business Asset - Report:** • Report is related to Business Asset **Relation path for Business Asset - Table:** • Table is related to Business Asset **Relation path for Business Asset - Table:** 1. Table contains Column 2. Column is represented by Business Asset	

Filter	Relation paths	
Source System	**Relation path for Source System - Data Set:** • Data Set is implemented into Source System **Relation path for Source System - Table:** 1. Table is part of Schema 2. Schema belongs to Technology Asset 3. Technology Asset is grouped by Source System	
Data Source	**Relation path for Data Source - Table:** • Table is part of Schema The data source is an attribute of the Schema asset.	

> **Tip**
> You can add custom filters based on relations. For information, go to Managing relation indexes in Data Marketplace.

Managing relation indexes in Data Marketplace

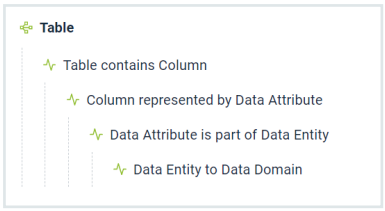
The Data Marketplace relation-based search and relation-based custom filters help to optimize the search experience. They allow data consumers to, for example, find data sets by entering business terms. The relation-based search and relation-based filters in Data Marketplace need indexed relations, meaning that the relations are stored for search purposes. Relations are indexed based on defined relation indexes.
Several Out-of-the-box relation indexes are available. However, Data Marketplace administrators can create, update, and delete relation indexes based on the organization's needs.

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

Elements in a relation index

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

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



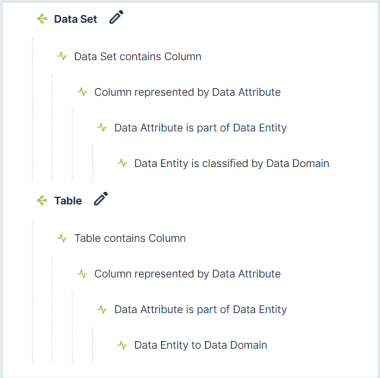
Questions to construct a relation index

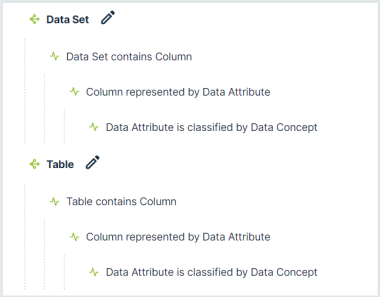
Use the following questions to prepare for the creation of relation indexes.

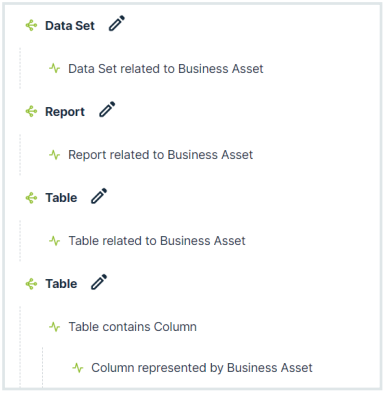
Question	Answer and consequence	Example
Which asset type (and children) or asset types do you want to filter out?	• If you identified one asset type, then this asset type is your root asset type, meaning the first asset type in your relation path. • If you identified multiple asset types, you need to create a relation path for each asset type.	Table
Which asset type or attribute type do you want to filter on? If it is an attribute type, which asset type does it belong to? **Note** Only text attributes can be selected as attributes in a relation path.	• This asset type is the last asset type in your relation path. • The asset type or attribute type should be reflected in the filter name.	Data Domain.
In your metamodel, which path do you need to follow to get from the first to last asset type in the relation-based filter?	This is the relation path you will need to use.	To go from Table to Data Domain, we need the following path: Table contains Column, Column is represented by Data Attribute, Data Attribute is part of Data Entity, Data Entity to Data Domain.

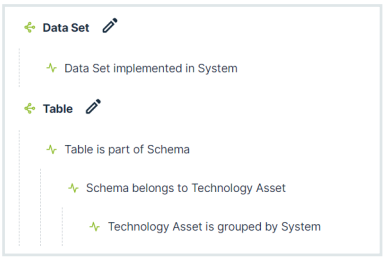
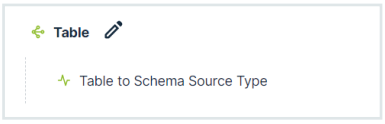
Question	Answer and consequence	Example
Which filter name is meaningful to consumers of the data?		Data Domain

Out-of-the-box relation indexes

Filter	Relation paths	
Data Domain	**Relation path for Data Domain - Data Set:** 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain **Relation path for Data Domain - Table:** 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is part of Data Entity 4. Data Entity is classified by Data Domain	

Filter	Relation paths	
Data Concept	**Relation path for Data Concept - Data Set:** 1. Data Set contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept **Relation path for Data Concept - Table:** 1. Table contains Column 2. Column is represented by Data Attribute 3. Data Attribute is classified by Data Concept	

Filter	Relation paths	
Business Asset	**Relation path for Business Asset - Data Set:** • Data Set is related to Business Asset **Relation path for Business Asset - Report:** • Report is related to Business Asset **Relation path for Business Asset - Table:** • Table is related to Business Asset **Relation path for Business Asset - Table:** 1. Table contains Column 2. Column is represented by Business Asset	

Filter	Relation paths	
Source System	**Relation path for Source System - Data Set:** • Data Set is implemented into Source System **Relation path for Source System - Table:** 1. Table is part of Schema 2. Schema belongs to Technology Asset 3. Technology Asset is grouped by Source System	
Data Source	**Relation path for Data Source - Table:** • Table is part of Schema The data source is an attribute of the Schema asset.	

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

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

Create a relation index

If the out-of-the-box relation-based filters and relation-based search do not 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
> - Do not create indexes that search for the same asset type because they can both show up as filters in the **Filters** pane.
> - You cannot use special characters like / ? @ [} in the relation index name.
> - You cannot add more than four relations to one relation path.
> - Only text attributes can be selected as attributes in a relation path.
> - Complex relations are not supported as custom relation paths.
> - Also check Data Marketplace limitations and guidelines.

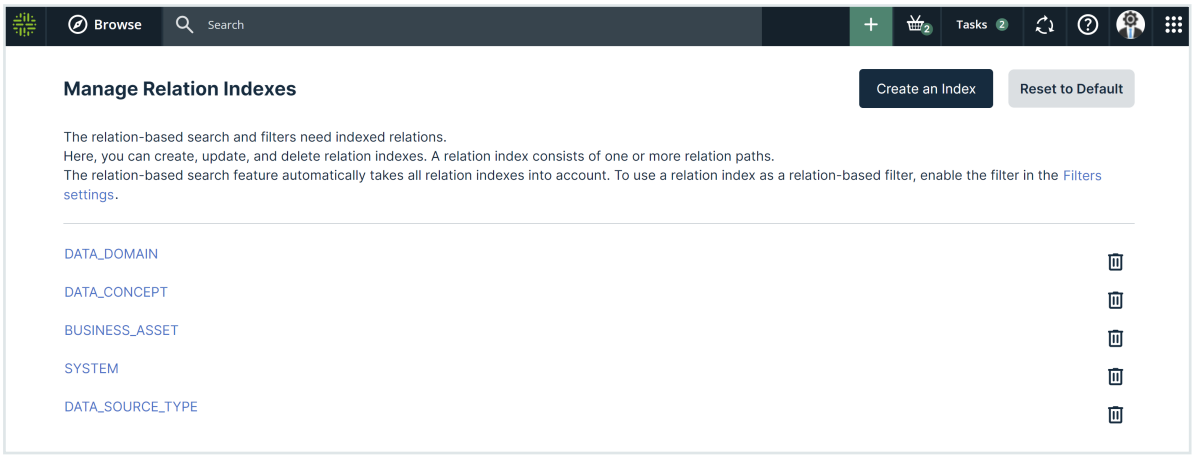
Prerequisites

- Make sure you identified the relation-paths that you want to use. For information on how to construct relation paths, see About relation indexes.
- You are an administrator in Data Marketplace.

Steps

1. On the main menu, click , and then click **Settings**.
   » The Collibra settings page opens.

2. In the **Data Marketplace** section, click **Filters**.
3. Click **Manage Relation-Based Filters**.
   » The **Manage Relation Indexes** page opens. It provides an overview of all relation indexes in the environment.



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

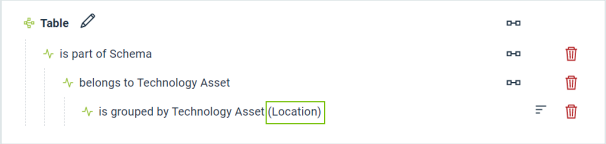
> **Important** Once the relation index is saved, you cannot change its name.

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.

   c. If the end of your relation path is an attribute type, in the last relation click ☰ and select the attribute type you want to link to.
      Only text attributes can be selected as attributes in a relation path.

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

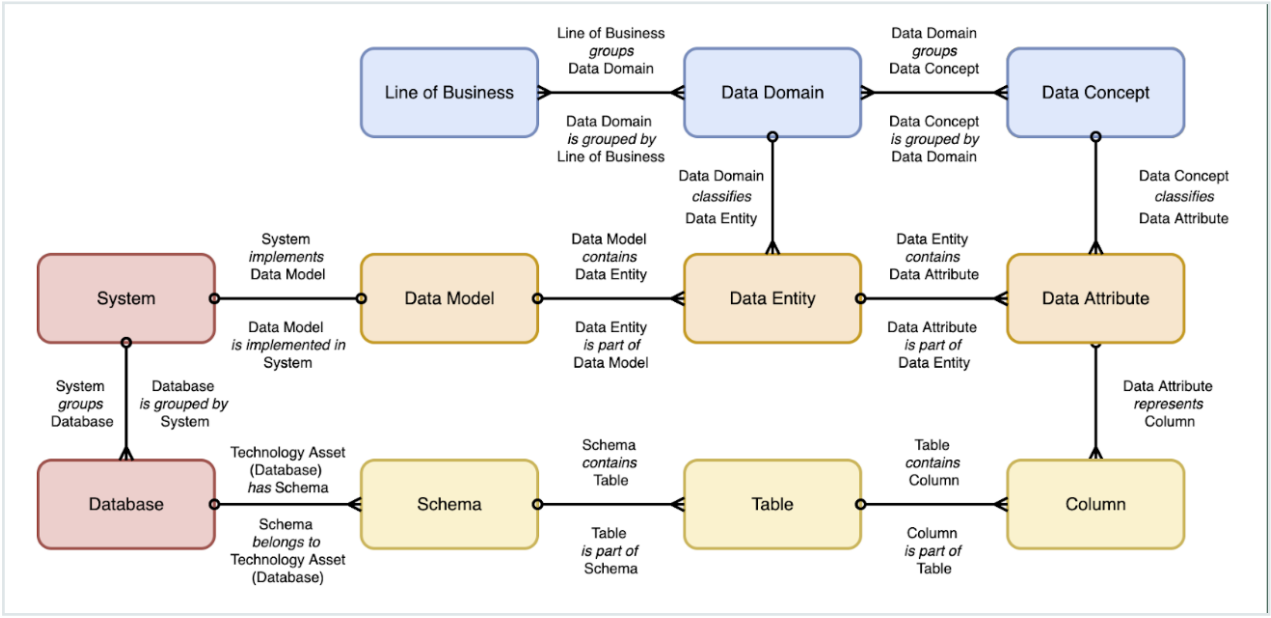


7. If required, click + to add another relation path.
8. Click **Create Index**.
   » The relation index is created.
   » Data Marketplace starts indexing the relations. This can take some time.
   » The new relation index is used to relation-based search if this feature is enabled.
9. If required, make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

For a full example, see Example: Create a relation index.

Example: Create a new relation index for a custom filter

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:



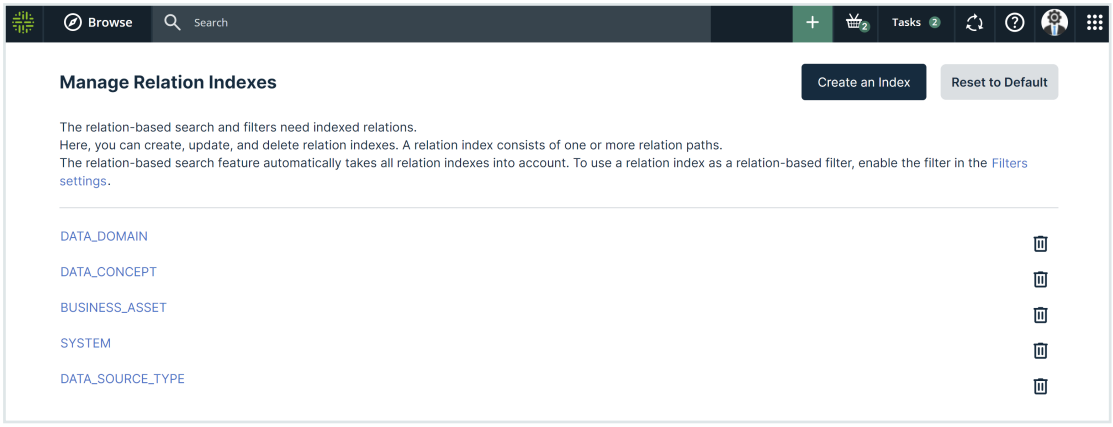
Steps

1. Answer the following questions:

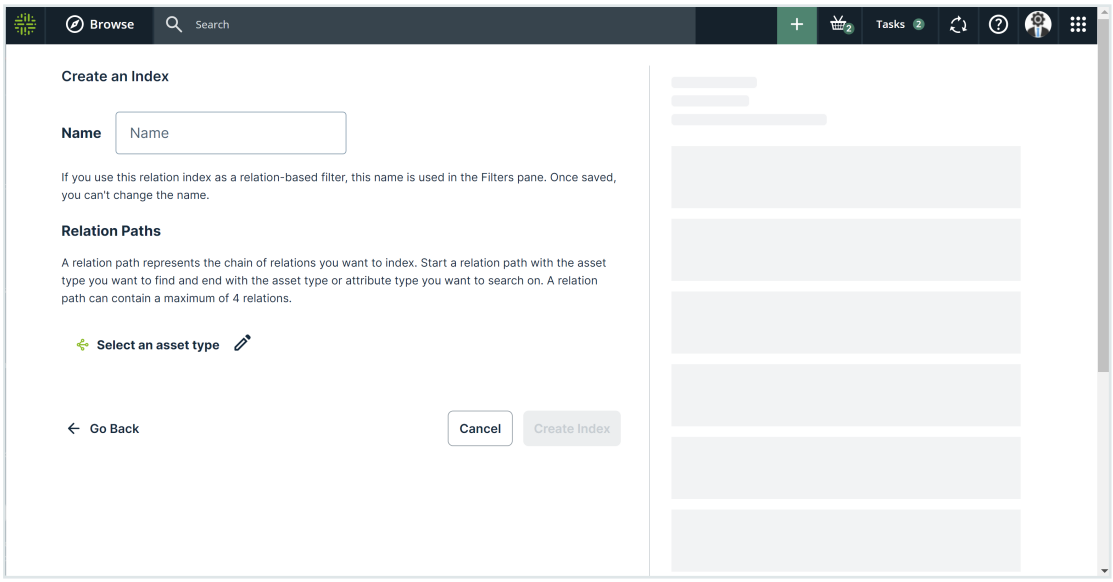
Question	Answer	Consequence
Which asset type (and children) or asset types do you want to filter out?	Tables	This means the first asset type in our relation path must be Table.
Which asset type or attribute type do you want to filter on? If it is an attribute type, which asset type does it belong to?	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?	a. Table is part of Schema. b. Schema belongs to Technology Asset c. Technology Asset is grouped by Technology Asset, attribute type Location.	This is the path we will need
Which filter name is meaningful to consumers of the data?		Source Location

2. Decide the relation index name and path based on the answers:
    - Name: Source Location
    - Relation path:
        - First asset type: Table
        - Relation 1: belongs to Schema.
        - Relation 2: belongs to Technology Asset.
        - Relation 3: is grouped by Technology Asset.
        - Attribute: Location.
3. Create the relation index.
    a. On the main menu, click ⠿, and then click ⚙ **Settings**.
        » The Collibra settings page opens.
    b. In the **Data Marketplace** section, click **Filters**.
    c. Click **Manage Relation-Based Filters**.
        » The **Manage Relation Indexes** page opens. It provides an overview of all relation

indexes in the environment.



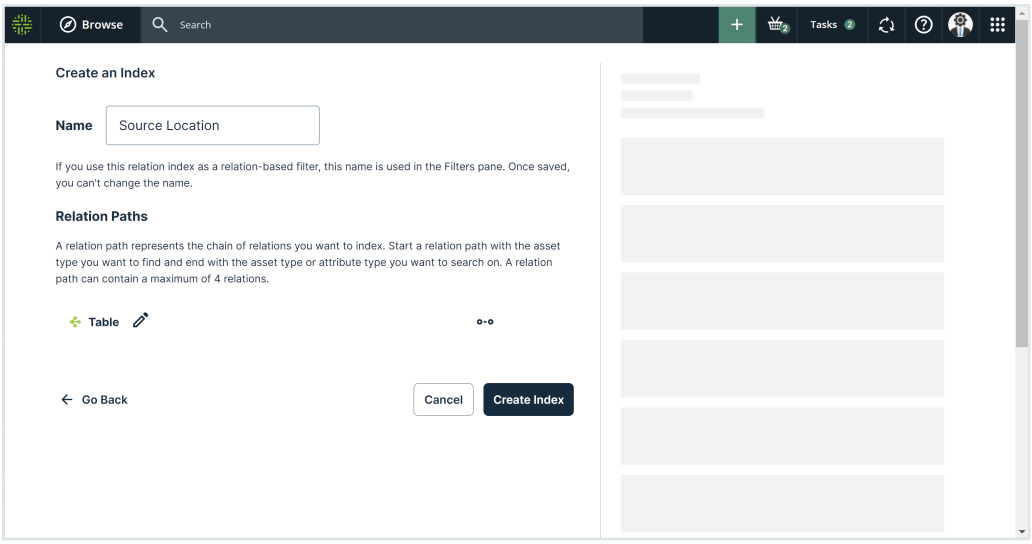
d. Click **Create an Index**.



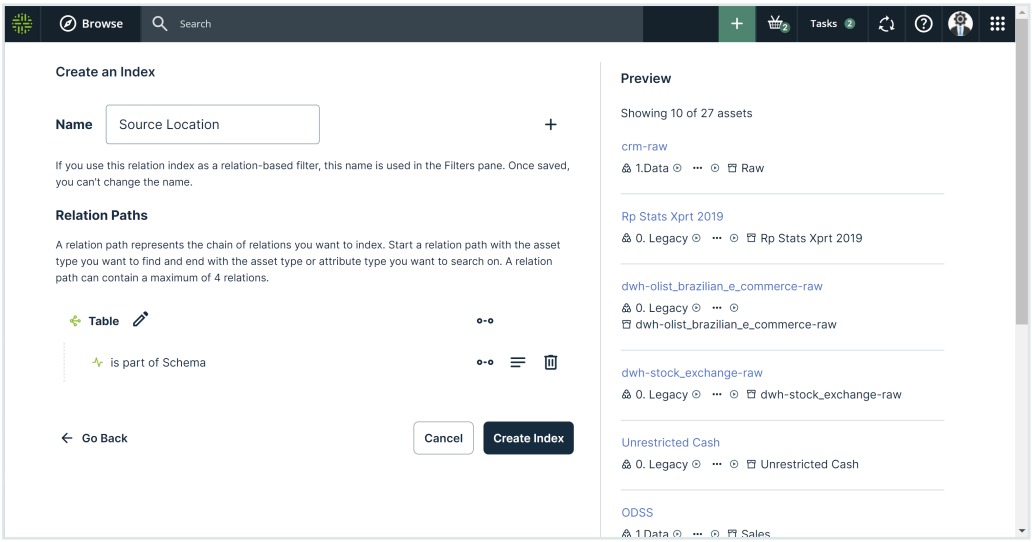
e. Enter the name of the index, Source Location.

f. Specify the relation path.

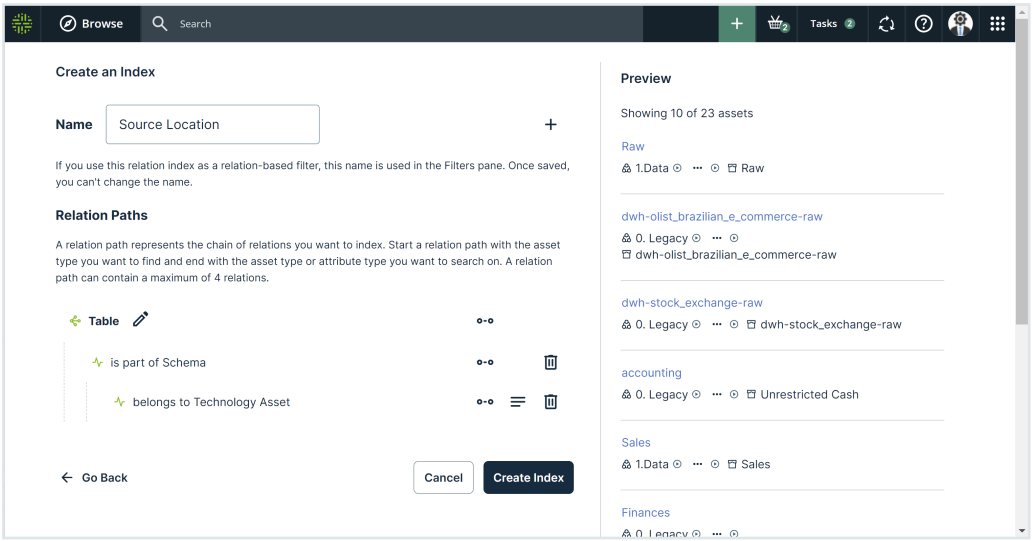
   i. Click ✎ and select the first asset type in your relation path. In our case, Table.



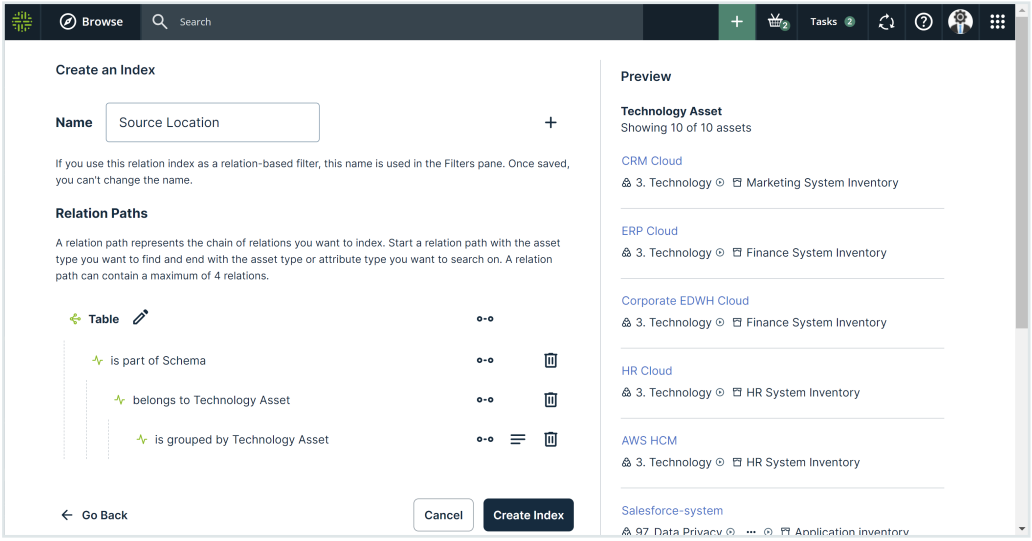
ii. Click ⚯ and select the relation (relation type and target asset type) you want to add. In our case, is part of Schema.



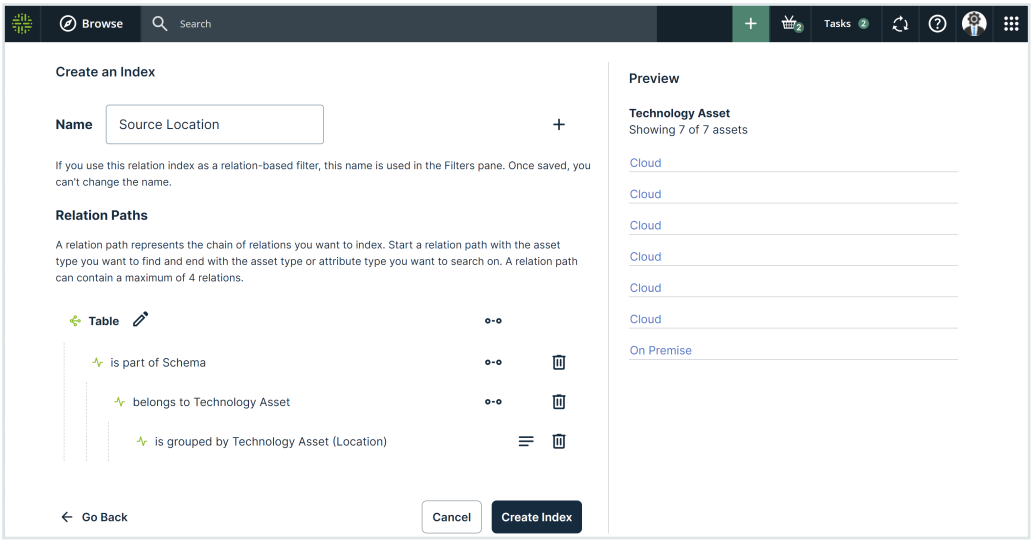
iii. Click and select the relation you want to add. In our case, belongs to Technology Asset.



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



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



g. Click **Create Index**.

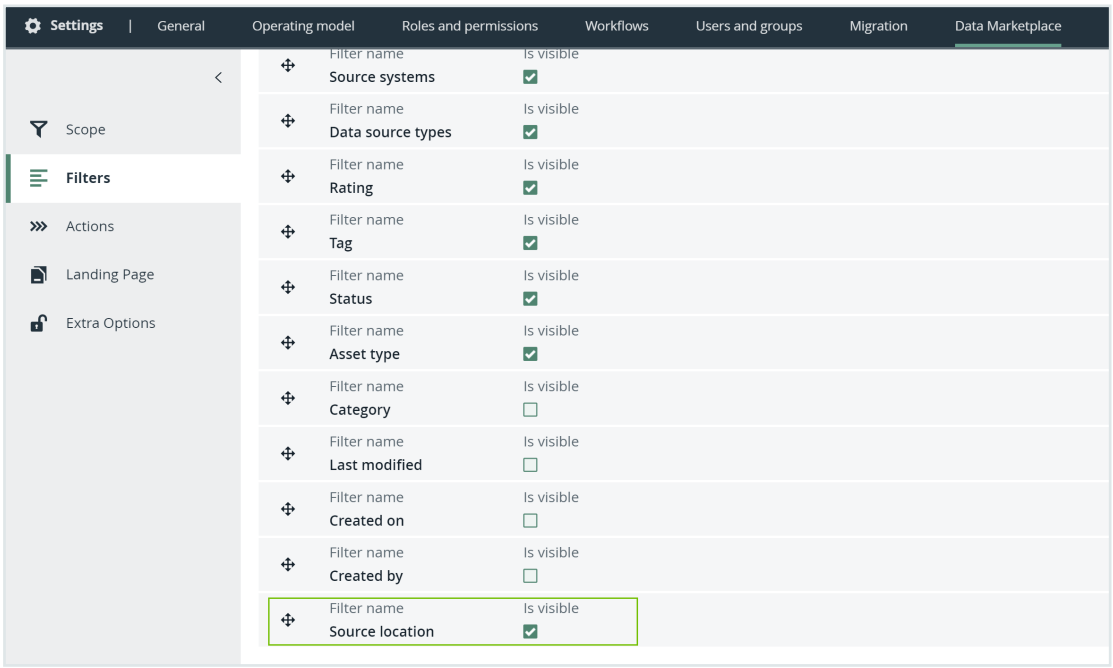
» The relation index is created and the indexing of the relations starts.

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

a. Go to the Filter settings.

b. Select the **Is visible** check box for the filter.

c. Click **Save**.



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

Update or delete a relation index

You can change the available relation indexes.

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

> **Important** You cannot update the name of relation indexes.

Prerequisites

Investigate which changes you want to make. For information on how to construct relation paths, see About relation indexes.

Delete a relation index

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

Update a relation-based filter

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

Reset the relation indexes

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

Configure the filter tabs in Data Marketplace

Data Marketplace shows the search results in tab pages, called filter tabs.
Filter tabs allow you to quickly apply a filter based on an asset type or on a group of filters that are frequently used. As an administrator, you can create, edit and delete filter tabs, make them visible to the data consumers, and change the order.

> **Important**
> The out-of-the-box filter tabs 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** filter tab compared to other out-of-the-box filter tabs.

Prerequisites

- Data Marketplace is enabled.
- You are an administrator in Data Marketplace.

Create a new filter tab

1. Select the filters you want to apply via the filter tab:
   a. On the main menu, click , and then click **Data Marketplace**.
      » The Data Marketplace landing page opens.
   b. Search for * to see all available filters in the search results.
      » The search results appear.
   c. Select the filters you want to save in a filter tab.

      > **Tip**
      > - The filter tab saves the sort order.
      > - The filter tab doesn't save your search terms.

2. Click the arrow next to **More** and then **Save new tab**.
   » The **Save Current Filters** dialog box appears.
3. Enter a name for the new filter tab.
4. Click **Save Changes**.
   » The filter tab is saved and available. Data consumers can select it from the **More** drop-down list.

Edit or delete filter tabs

1. On the main menu, click , and then click **Data Marketplace**.
   » The Data Marketplace landing page opens.

2. Search for something, for example * to see all available filters in the search results.
   » The search results appear.
3. Click the arrow next to **More**.
4. Click **Edit filter tabs**.
   » The **Edit Filter Tabs** dialog box appears.
   - In the **Arrange Tabs** tab page, you can define the filter tabs that must be visible and the order in which they appear.
   - In the **Edit Tabs** tab page, you can change the name of a filter tab or delete it.

   > **Tip**
   > - You can't hide the **All** filter tab.
   > - You can't rename or delete the out-of-the-box filter tabs, but you can hide them if you don't want to use them.
   > - You can hide a filter before you delete it to check the reaction of the data consumers.
   > - The filter tabs appear in the order of this list.

5. If required, in the **Arrange Tabs** tab page click the icon to hide a filter tab.
   » The icon indicates the filter does not appear.
6. If required, edit the order of the filter tabs by dragging and dropping the icon.
7. If required, delete a filter tab by selecting the **Edit Tabs** tab and clicking .
8. If required, change the name of a filter tab by selecting the **Edit Tabs** tab and clicking .
9. Click **Save Changes**.
   » The filter tabs are saved.

What's next?

Continue the Data Marketplace configuration

Reindex Data Marketplace relations

Some relations in Collibra are not automatically reindexed for Data Marketplace. This can cause inconsistencies between Collibra and Data Marketplace.
Therefore, you can reindex the relations manually.
Relations are not indexed automatically if Automatic relation indexing is not enabled.
For more information, see Filtering and searching based on relations in Data Marketplace.

Prerequisites

You have a global role that has the System administration global permission.

Steps

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

Chapter 5

Using Data Marketplace

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

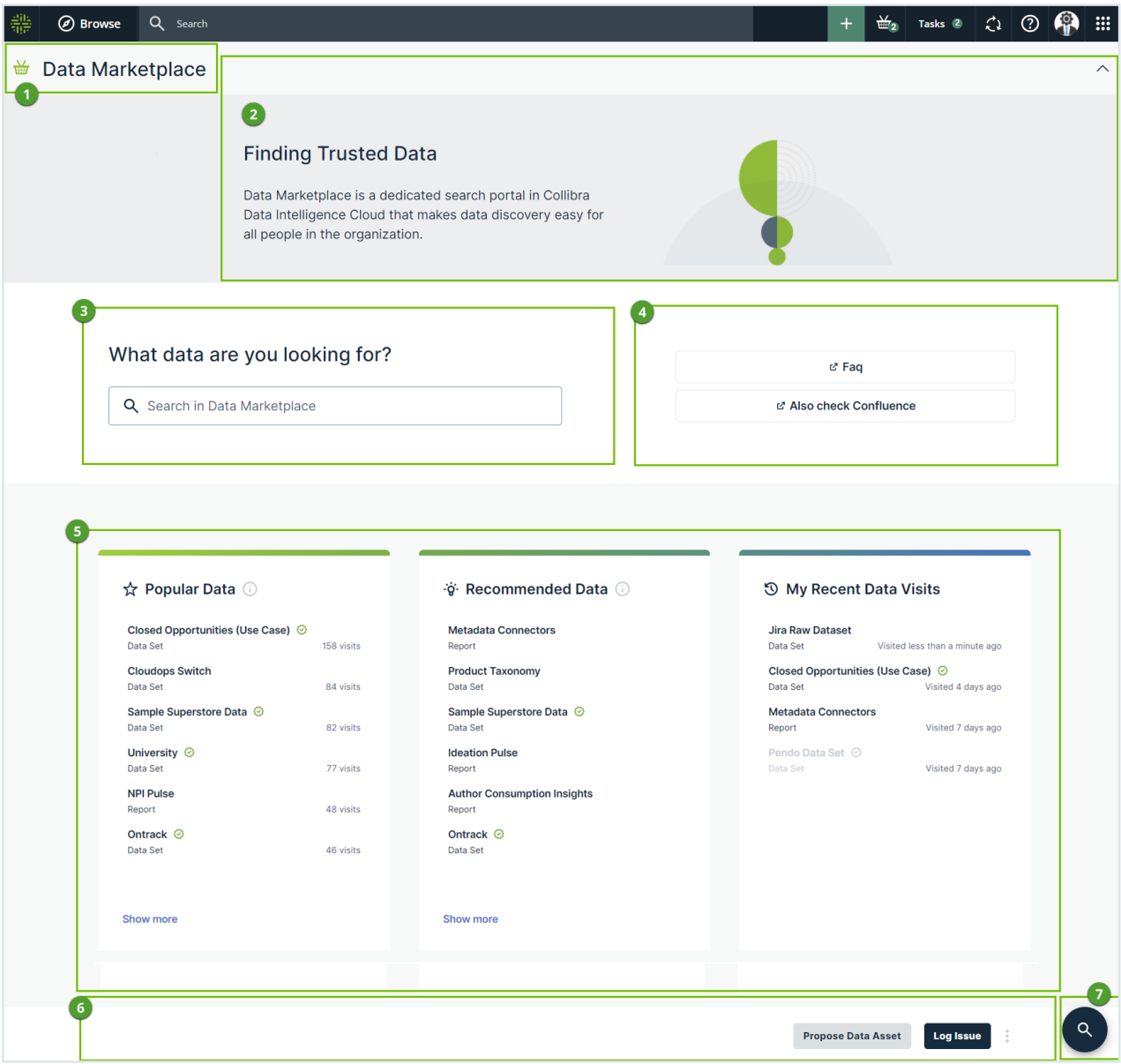
The Data Marketplace landing page 62

Searching in Data Marketplace 67

Previewing assets in Data Marketplace 79

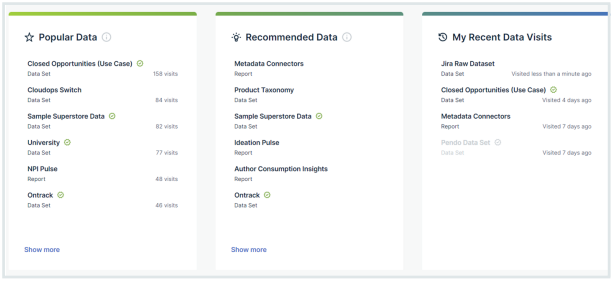
The Data Marketplace landing page

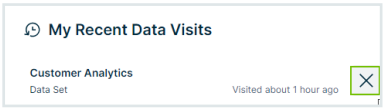
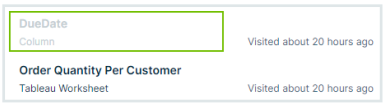
As a data consumer, the Data Marketplace landing page is your starting point for finding the data you need. The page consists of multiple sections.

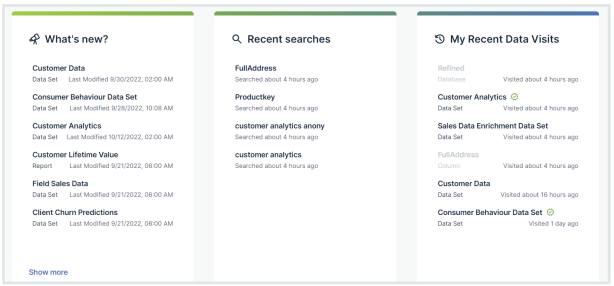
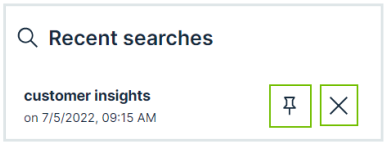


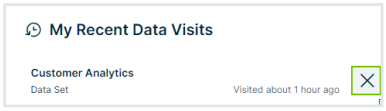
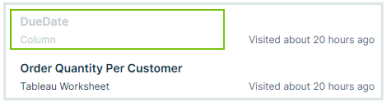
	Section	Description
1	Title	Data Marketplace title

	Section	Description
2	Introduction section	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. Your Data Marketplace administrator can change the available text.
3	Search	The search field allows you to find any asset within the Data Marketplace scope. • If search suggestions are enabled, Data Marketplace provides suggestions while you are typing. Click one of the suggestions to use it or press `Enter` to ignore the suggestions. • If search suggestions are not enabled, the search starts automatically after a few seconds.
4	Quick links	This section can provide quick access to useful information in your organization. Your Data Marketplace administrator can define these quick links.

	Section	Description
5	Cards	Cards allow you to navigate quickly to data that might interest you. The available cards depend on whether data discovery is enabled. • If data discovery is enabled, you have access to **Popular Data**, **Recent Data Visits**, and **Recommended Data**. Get more information.  **Popular Data**: 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. ◦ Data Marketplace checks the usage data once a day. For more information on these recommendations, go to Asset recommender. ◦ Click **Show more** to view more popular assets. ◦ Loading this card can take a few seconds. ◦ If you click an asset, the asset preview opens in the Discover page.

	Section	Description
		My Recent Data Visits: This card shows the assets for which you opened the preview in Data Marketplace. ◦ Click **Show more** to view more recently visited assets. ◦ Click ✕ to remove the visited asset.  ◦ An asset is grayed out when the asset is no longer available in Data Marketplace. Usually this is due to a change in the Data Marketplace scope. 
		Recommended Data: This card shows data based on the data you search for and visit in Data Marketplace, Collibra, Collibra for Desktop, and Collibra for Mobile and that are in the scope of Data Marketplace. ◦ Data Marketplace checks the usage data once a day. For more information on these recommendations, go to Asset recommender. ◦ Loading this card can take a few seconds. ◦ If you click an asset, the asset preview opens in the Discover page.
		Tip No recommendations can be given to new users because no data is available yet. Recommendations will be provided after one day.
		• If data discovery is not enabled, you have access to **Recent searches**, **Recent data visits**, and **What's new**. Get more information.

	Section	Description
		 **What's new?** — This card shows all assets that have recently been updated in Data Catalog and that are in scope of Data Marketplace. Click **Show more** to open the search results page with all updated assets. **Recent searches** — This card shows the recent searches you performed in Data Marketplace. • Click **Show more** to view more recent search actions. • Click to pin the search action to your list. • Click to remove the recent search action. 

	Section	Description
		My Recent Data Visits This card shows the assets for which you opened the preview in Data Marketplace. • Click **Show more** to view more recently visited assets. • Click ✕ to remove the visited asset.  • An asset is grayed out when the asset is no longer available in Data Marketplace. Usually this is due to a change in the Data Marketplace scope. 
6	Landing page actions	Your Data Marketplace administrator can make buttons available in this section.
7	Go to search	Click this button to go to the search field.

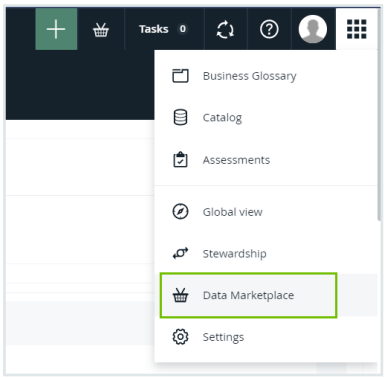
Searching in Data Marketplace

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

Search in Data Marketplace

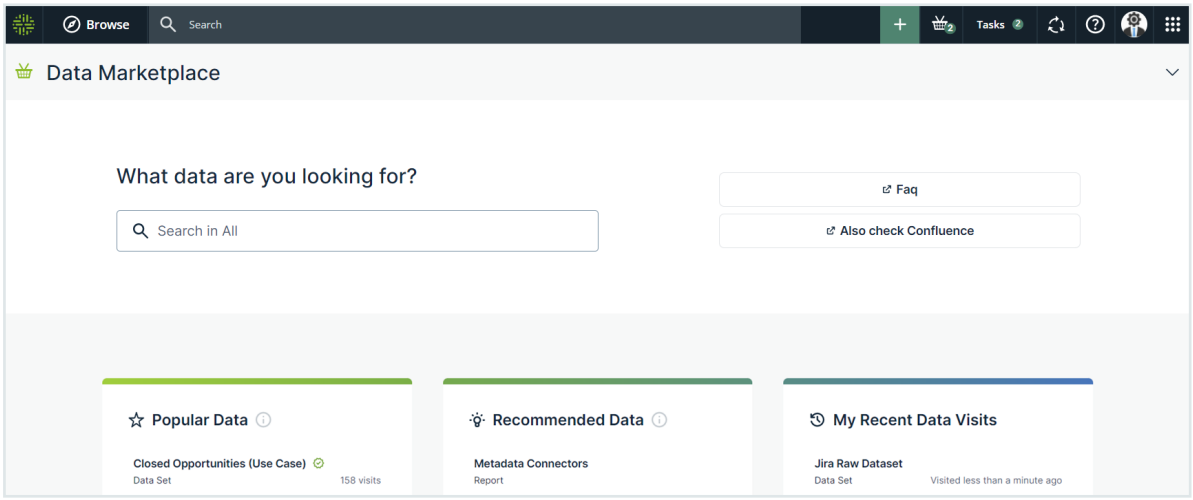
1. Open Data Marketplace from the ⠿ icon.

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



   If Data Marketplace does not appear in the application selector after clicking ⠿, the feature is not enabled or you don't have the required permissions.

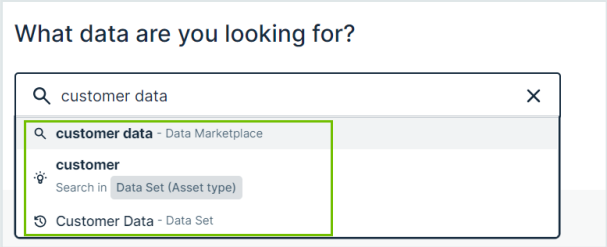
   » The Data Marketplace landing page opens.



2. In the search field, enter your search terms.
   - Optionally, use wildcards and symbols.
   - If you add multiple terms without wildcards and symbols, the OR operator and * wildcard is used.

> **Example** For serarch terms 'Address data', the search will look 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, datas, 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.



- Click ✕ to remove your search terms.

» 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 follow wildcards in your search terms:

Wildcard	Description	Example
?	A question mark replaces any single character.	Search term: *?ar* Possible results: Car, Bar, Tar.

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

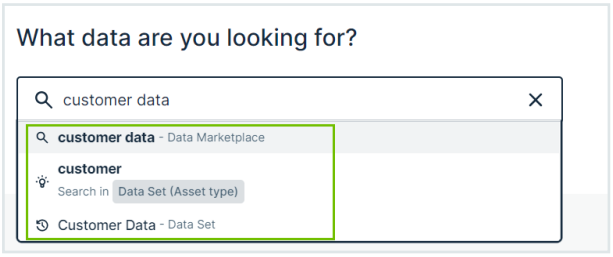
- If you want to find a literal piece of text, you can add the terms between double quotation marks.
  Don't forget to close the quotation marks. If you add only one, you receive an error message.

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

Important
The following characters are not supported in the search field:
/ slash
: colon
^ circumflex
( ) parenthesis
[ ] square brackets
{ } curly brackets

About search suggestions in Data Marketplace

Search suggestions guide you to the information you might be looking for.
If search suggestions are enabled, Data Marketplace provides suggestions as you type. You can click one of the suggestions to use it. The result of clicking a suggestion depends on the suggestion type.



Suggestion types

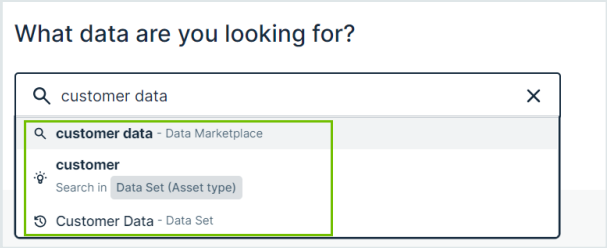
The icon in front of a suggestion indicates the suggestion type.

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

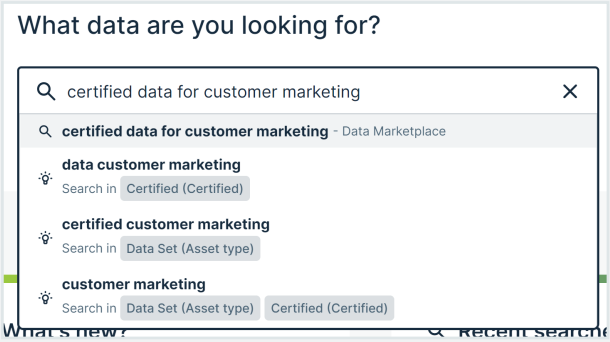
Examples

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.



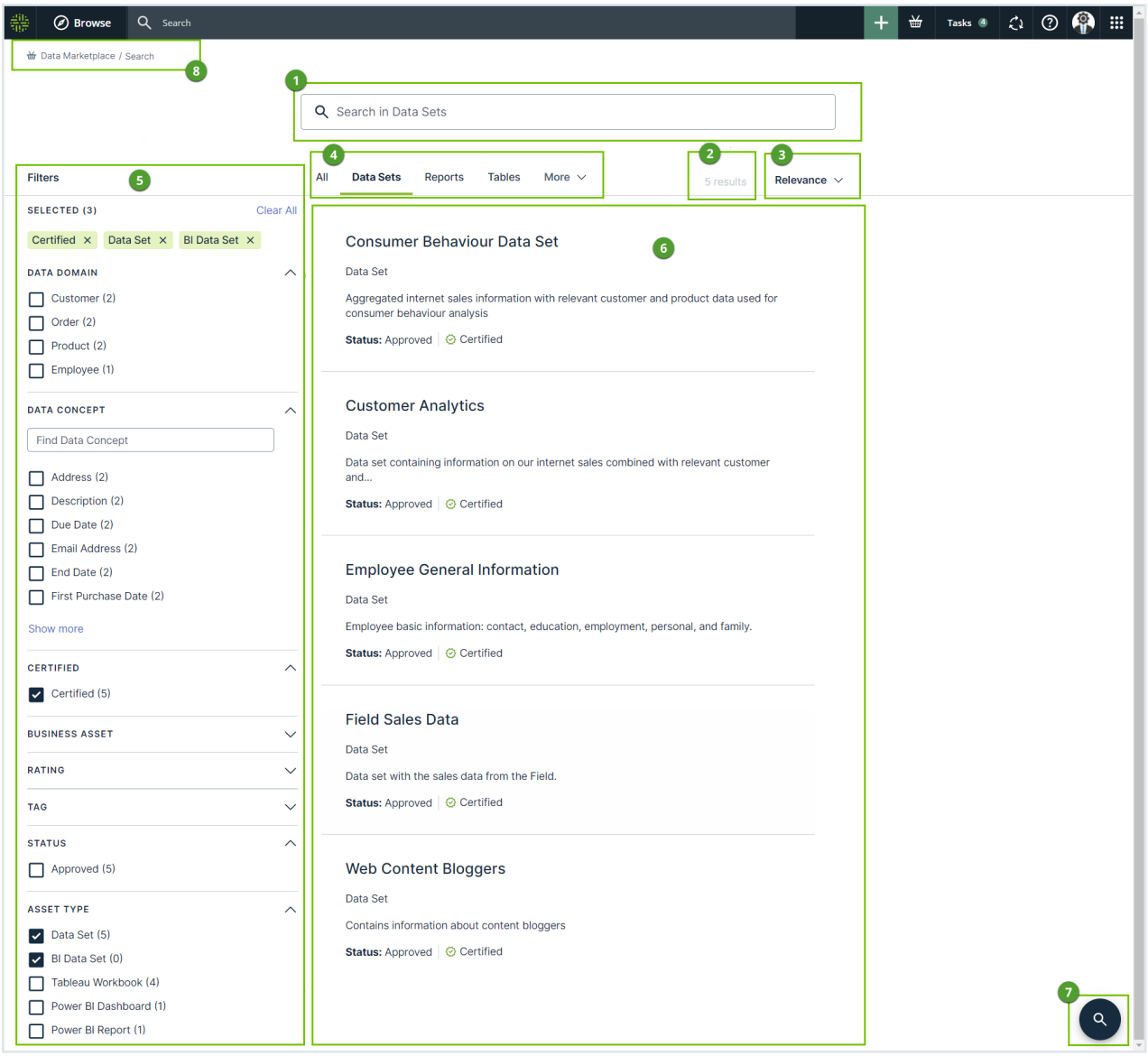
Example
The search terms *certified data for customer marketing* result in following suggestions.



- 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*.

The Data Marketplace search results page

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



	Section	Description
1	Search	The search field contains the search terms you used. You can perform a new search by changing the search terms.
2	Number of search results	This section shows the number of results for your search action.
3	Sort options	The sort options allow you to sort your search results.

	Section	Description
4	Filter tabs	Filter tabs allow you to only show assets of a specific type or apply a group of filters in one action. See also Filter your search results. The available filter tabs are configured by the Data Marketplace administrator.
5	Filters pane	Filters allow you to refine your search results further. The available filters depend on your search results and on how the Data Marketplace administrator has configured the Filters pane.
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 preview. The search results depend on multiple factors: • The Data Marketplace scope that was configured by the administrator. • Whether you have view permission on the asset. • The filter tab that is selected. • Filters that are applied.
7	Back to search	This icon guides you to the top of the page.
8	Breadcrumb in Data Marketplace	The breadcrumb provides information on your location in Data Marketplace. Click the Data Marketplace link to go back to landing page.

Available filter options

You can filter your search results in the following ways:

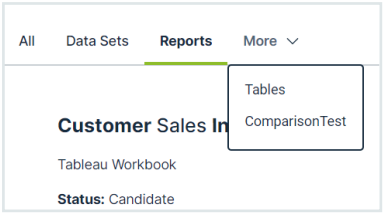
- By selecting a filter tab
- Via the Filters pane

The selected filters are visible in a specific area in the **Filters** pane.

Filter tabs

Data Marketplace shows the search results in tab pages, called filter tabs.
Filter tabs allow you to quickly apply a filter based on an asset type or on a group of filters that

are frequently used. Via the **More** drop-down list, you have access to additional filter tabs.



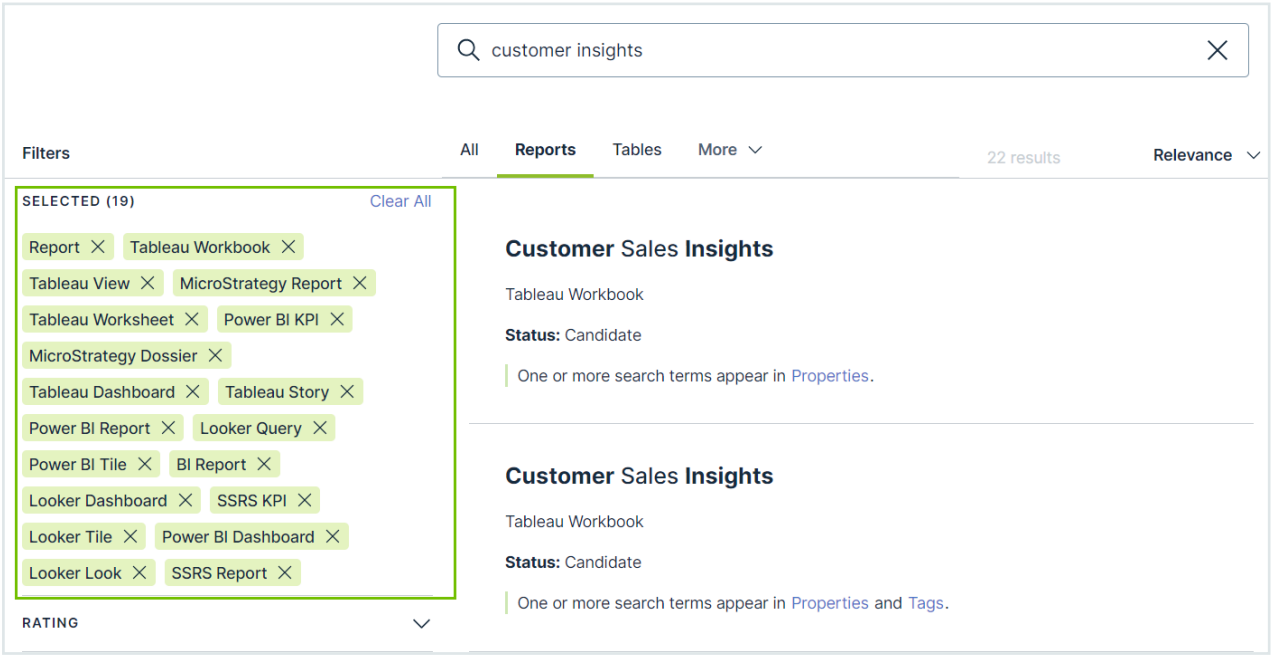
Administrators can configure filter tabs in Data Marketplace.

Filters in the Filters pane

In the **Filters** pane, only filters that are selected by the Data Marketplace administrator and that are relevant to the search results are available.
If you select filters, the **Filters** pane is automatically updated with the filters that are relevant to the refined search results.
If a filter does not contain any values, the filter is not visible.

Selected filters in the Filters pane

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

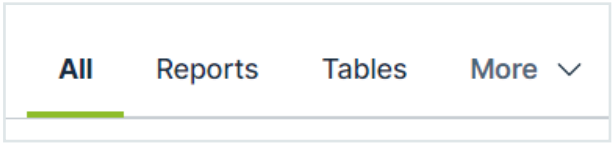


Filter your search results

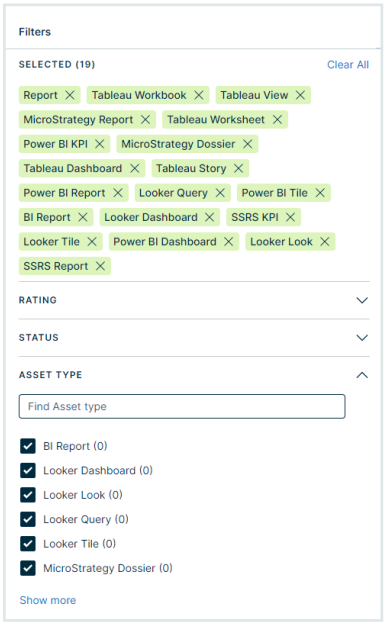
You can use filters to refine the search results. You can apply filters via filter tabs and via the **Filters** pane.
Once filters are applied, you can remove a filter or start over by clearing all filters in one action.

Steps

1. Search in Data Marketplace.
   » In the search results page, the **All** filter tab is selected. This tab page shows all search results within the Data Marketplace scope.
2. If required, select another filter tab.
   Only a few filter tabs are displayed. Click **More** to see extra filter tabs.



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.
   » All selected filter criteria are visible in the **Selected** section in the **Filters** pane.



4. If required, use the **Selected** section in the **Filters** pane to remove applied filters.
   - To remove one filter, click ✕ next to the applied filter.
   - To remove all filters in one action, click **Clear All**.

5. Analyze the remaining search results and click the title of a search result to open the asset preview.

Sort your search results

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

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

Discover data

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

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

Prerequisites

Data discovery is enabled.

Steps

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

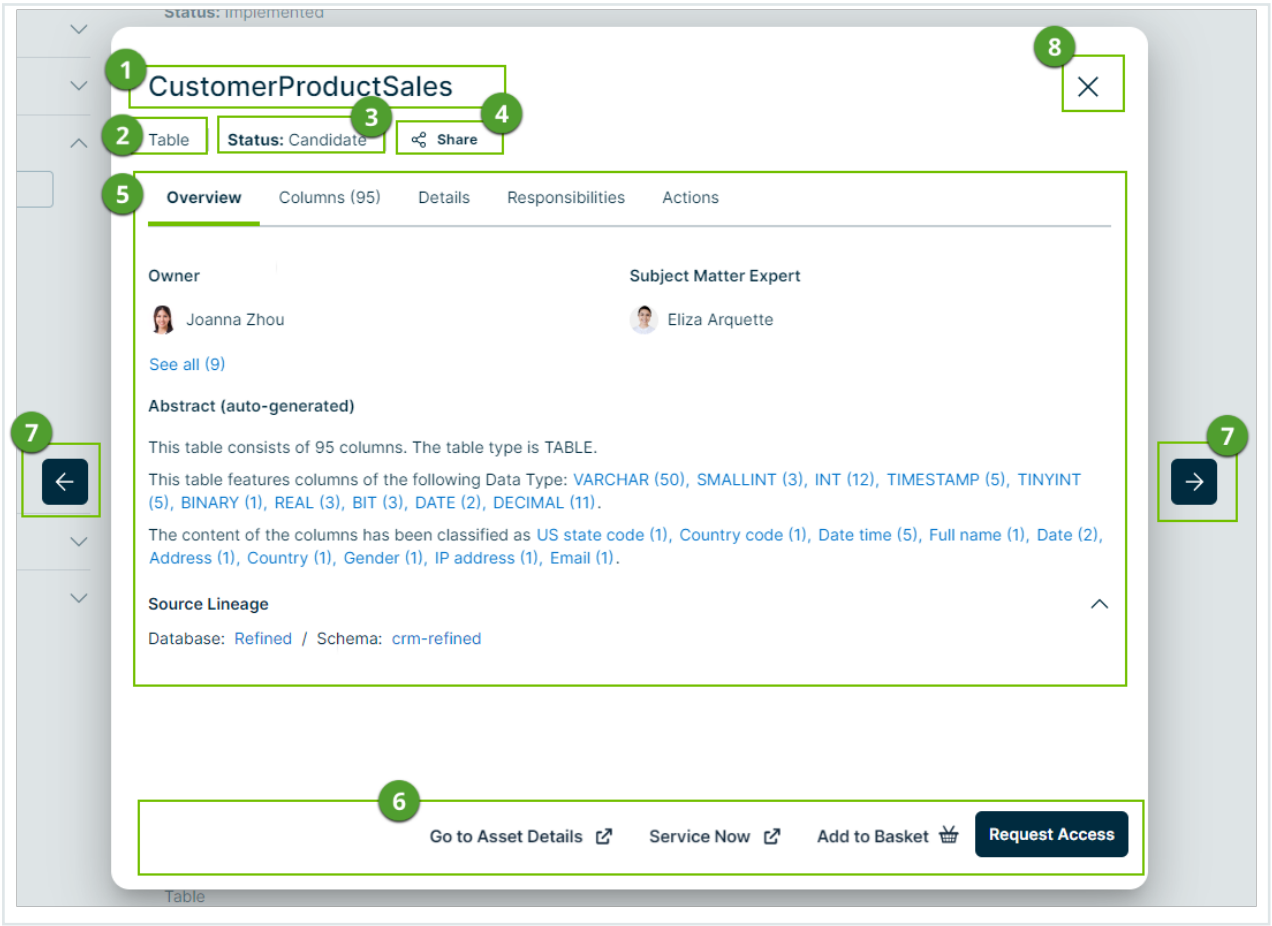
Previewing assets in Data Marketplace

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

The Data Marketplace asset preview

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

Asset preview sections



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

	Section	Description

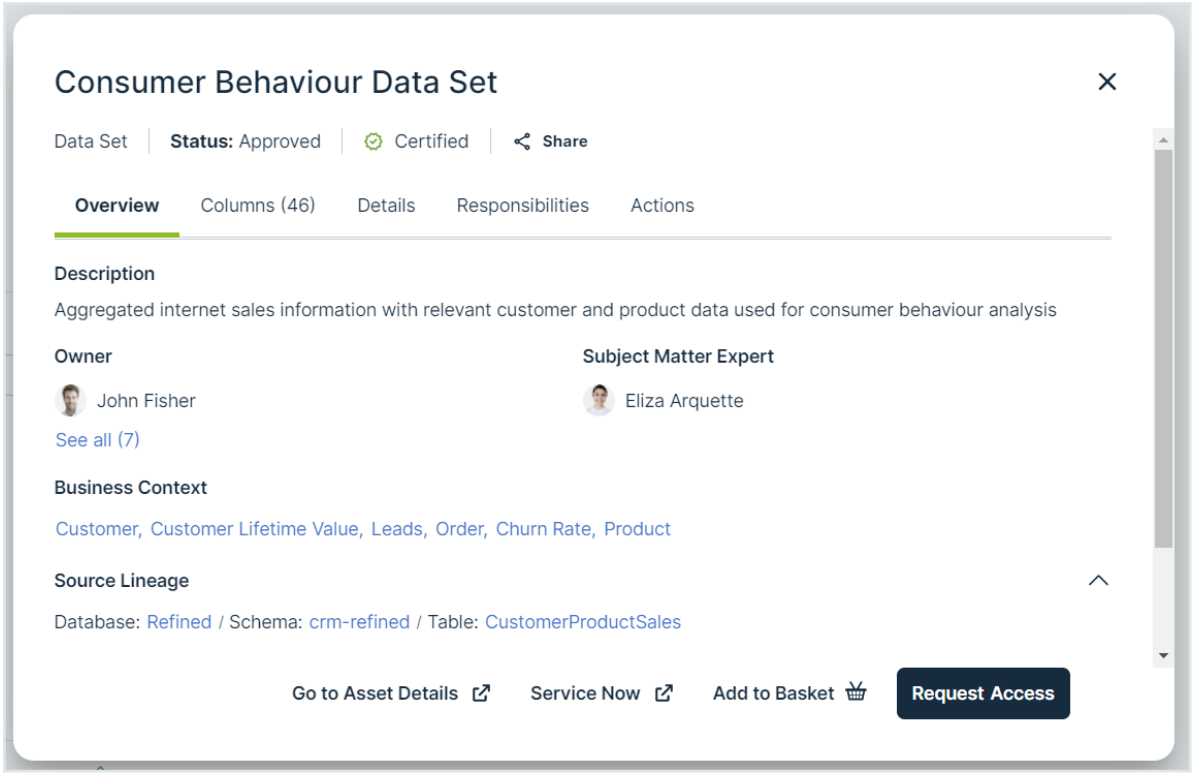
5	Tabs and tab content area	The available tabs depend on the asset type.
		The most common tabs are:
		• **Overview**: this tab page includes, for example:
		  ◦ The description of the asset.
		  ◦ All tags applied to the asset.
		  ◦ All responsibilities configured for the asset.
		• **Details**: this tab page includes, for example ratings and reviews of the asset.
		• **Responsibilities**: this tab page includes the roles assigned to the asset. Inherited responsibilities are not shown in Data Marketplace.
		• **Actions**: this tab pages includes all actions you can perform from this asset. They are the secondary actions. Secondary actions are selected by the administrator.

6	Main actions	This section shows the actions that administrator configured to be the most important actions in the asset preview. The section also shows the **Add to Basket** button if the data basket feature has been enabled. By default, you can always open the asset page in Collibra via **Go to Asset Details**.
7	Navigation area	Click the arrows to navigate to the previous or to the next search result.
8	Close	Click **Close** to closes the asset preview.

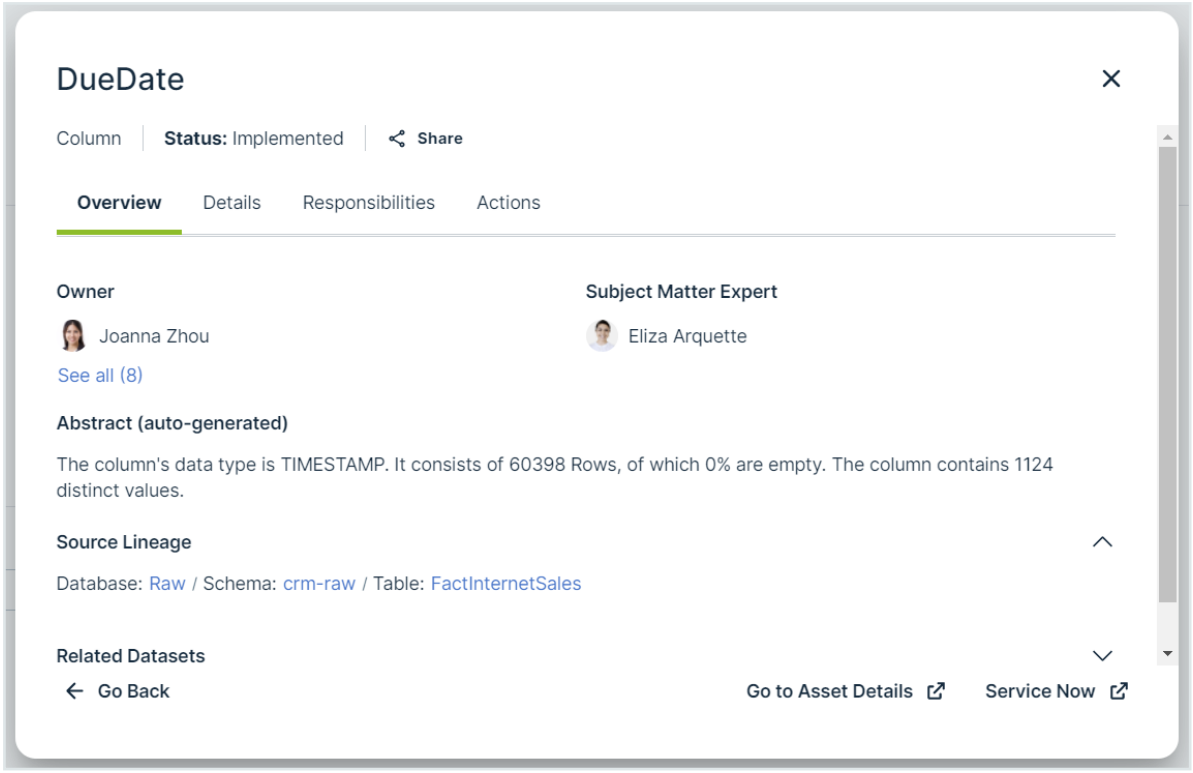
Preview content

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

Information for a Data Set asset:

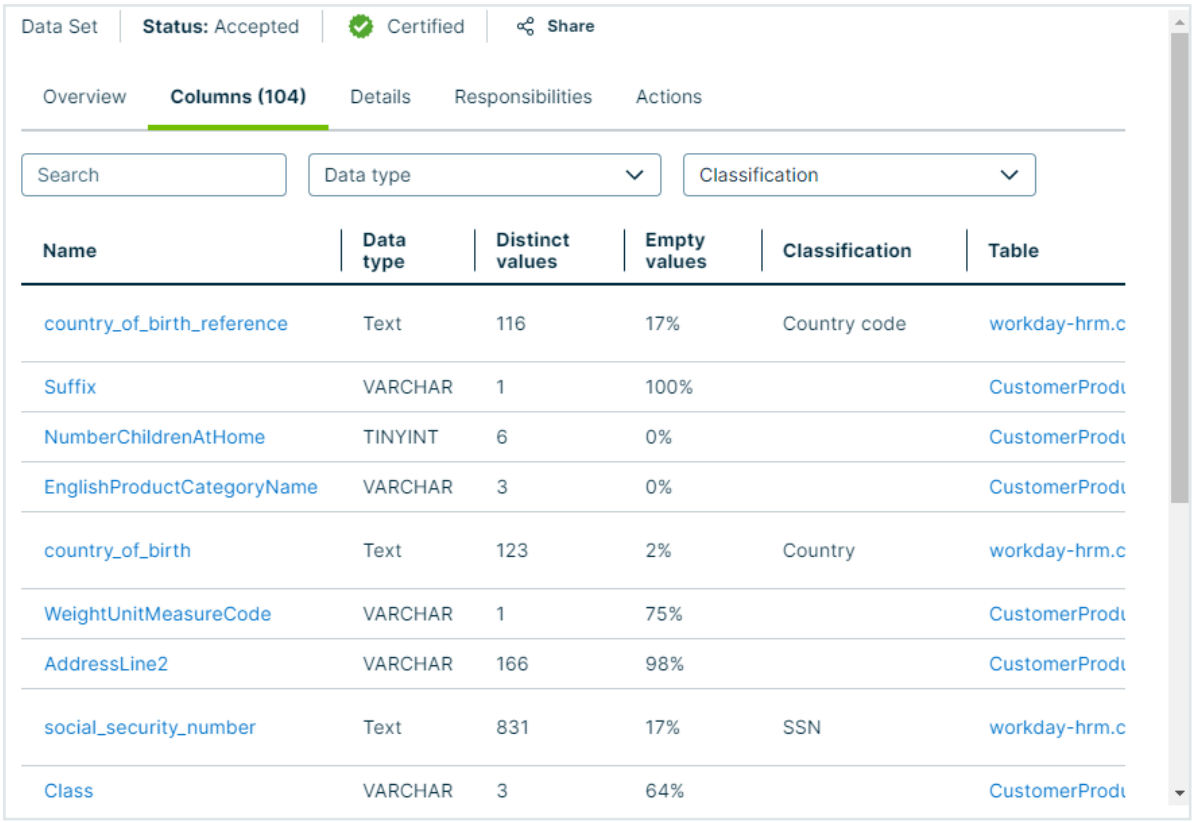


Information for a Column asset:



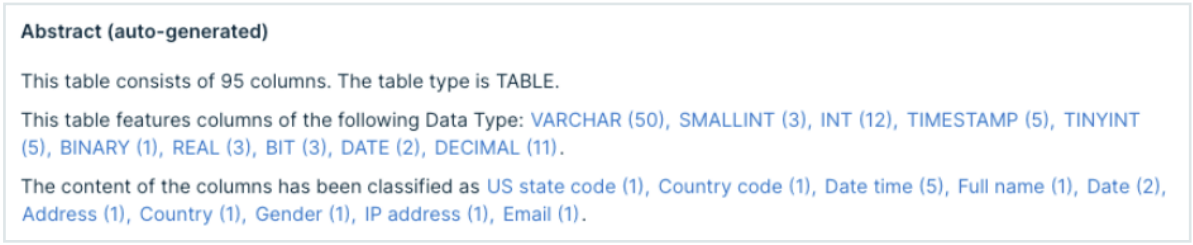
> **Note**
> If, in the asset type template, a field is defined but the information is not available for the selected asset, the field will not be displayed in the preview. This means you never see empty fields in the preview.
> For example: If the data has not been profiled, no profiling details are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

- Some asset previews contain a **Columns** tab. This tab page shows the available columns in the asset. The columns are displayed in a table in which you can search.



Name	Data type	Distinct values	Empty values	Classification	Table
country_of_birth_reference	Text	116	17%	Country code	workday-hrm.c
Suffix	VARCHAR	1	100%		CustomerProdu
NumberChildrenAtHome	TINYINT	6	0%		CustomerProdu
EnglishProductCategoryName	VARCHAR	3	0%		CustomerProdu
country_of_birth	Text	123	2%	Country	workday-hrm.c
WeightUnitMeasureCode	VARCHAR	1	75%		CustomerProdu
AddressLine2	VARCHAR	166	98%		CustomerProdu
social_security_number	Text	831	17%	SSN	workday-hrm.c
Class	VARCHAR	3	64%		CustomerProdu

- Column and Table assets show an **Abstract (auto-generated)**. This is a summary of the asset information that is generated by Data Marketplace based on the available asset details.
  For a table, for example, Data Marketplace identifies: the number of columns, number of rows, the primary key name, the table type, the description from the source, the data type of the columns and the classification of each column.



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

Actions

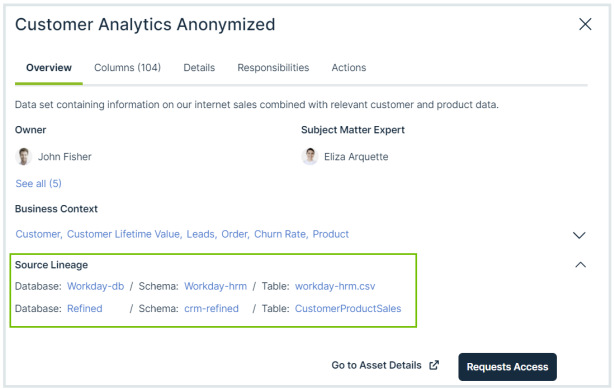
- Main actions:
  - Main actions are located at the bottom of the asset preview.
  - By default, the **Go to Asset Details** button is available. This opens the asset page in Collibra.
  - The Data Marketplace administrator can add more actions to this section.
  - The Data Marketplace administrator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

Find the source of a data set or report

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

Steps

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



4. Click the source system name.
   » The source system details open in the asset preview.

Using the data basket in Data Marketplace

If the data basket feature is enabled for Data Marketplace, data consumers can add some assets to their data basket from the asset preview.

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

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 filter tabs 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** filter tab compared to other out-of-the-box filter 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.

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 **Edit Tabs** tab page, you do not have any options to change the filter tabs.

Reason: You can't rename or delete the out-of-the-box filter tabs.
Solution: You can hide the out-of-the-box filter tabs via the **Arrange Tabs** tab page. For more information, go to Configure the filter tabs in Data Marketplace.

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 do not see a specific action, the workflow configuration may give you an indication on the reason.

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 Marketplacelanding page.
  These are the actions the administrators selected in the **Landing Page Actions** tab page.
- In the **Need help?** section if the search did not return any results.
  These are the actions the administrators selected in the **No Search Results Actions** tab page.

- At the bottom of an asset preview.
  These are the actions the administrators defined in the **Main Asset Preview Actions** tab page.
- In the **Actions** tab page in an asset preview.
  These are the actions the administrators selected in the **All Asset Preview Actions** tab page.

The workflow does not start

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

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

Issue: You have created a relation-based index that ends with an asset type attribute so data consumers can search for the attribute and find specific related asset types. You now add the attribute to an asset type's assignment because it was not there before.
You expect that this asset type is taken into account when Data Marketplace searches based on the relations, but the search does not seem to work.

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

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

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

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

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

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

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

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

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

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

How can you test relations-based search?

Go to How does relation-based search work? for information.