erwin Data Intelligence

Data Marketplace Guide

Release v13.0

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Managing Data Marketplace

erwin Data Marketplace allows you to shop, share, and compare enterprise datasets at a centralized location. With its rich filters and tags, erwin Data Marketplace makes data discovery easy. Thus enabling you to create and manage datasets, view insights, raise data literacy, and ensure governance.

For more information on accessing and using the Data Marketplace module, refer to the Using Data Marketplace topic.

Using Data Marketplace

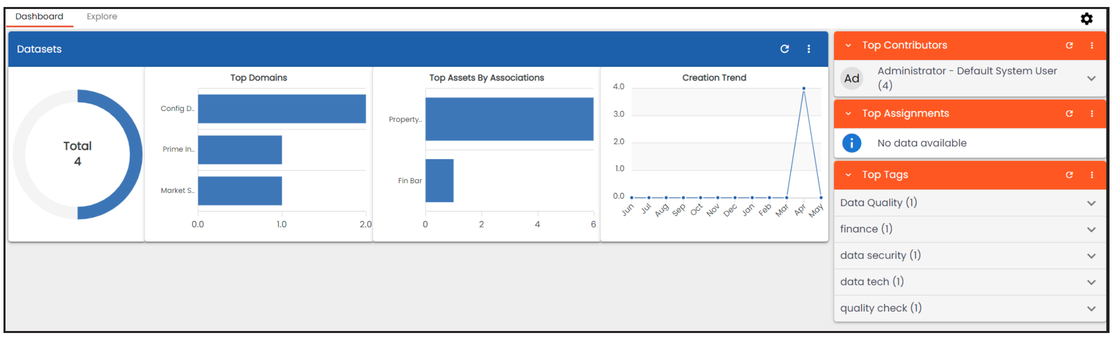
To access Data Marketplace, go to **Application Menu** > **Data Marketplace**.

Based on your configuration, either the Dashboard or the Explore tab opens. To change the default landing tab, click on the top-right corner and select the required tab from the following:

- Dashboard
- Explore

Dashboard

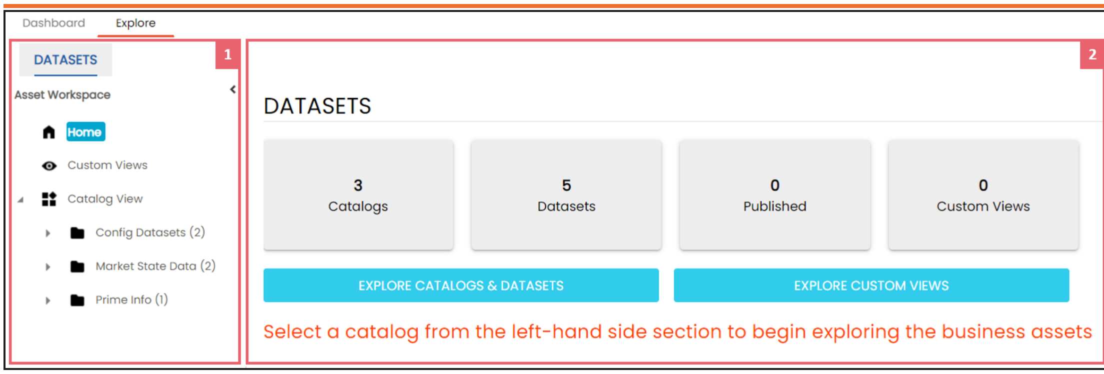
The Dashboard tab provides insights about marketplace assets in your organization. For more information, refer to the Viewing Data Marketplace Dashboard topic.



Explore

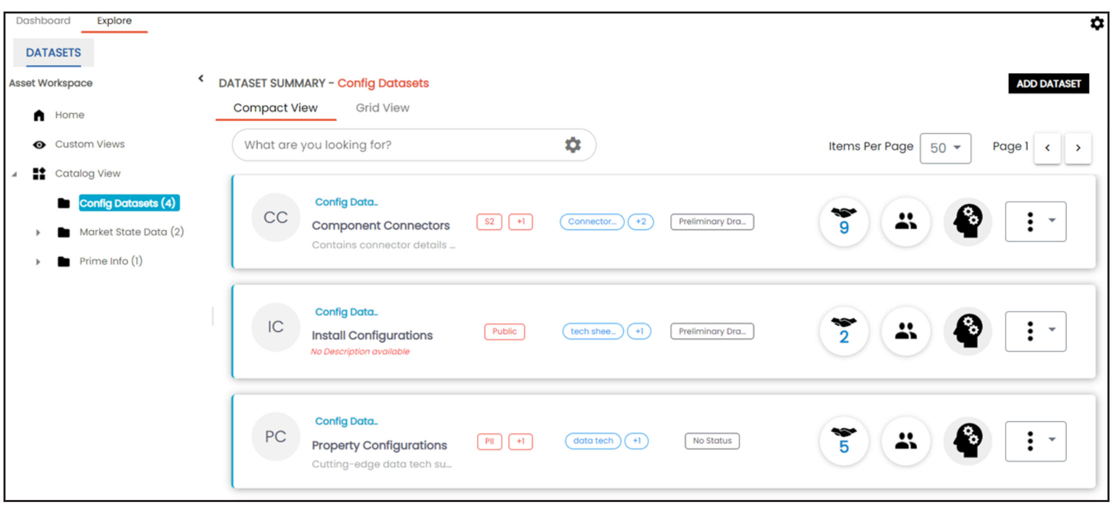
The Explore tab is the primary work area where you can create and manage marketplace assets, and view their mind maps, documents, and associations.

By default, the Datasets summary page appears.



UI Section	Function
1-Asset Workspace	Use this pane to browse through your Asset Workspace for datasets. It displays the available catalogs. In this pane you can view the following: ▪ **Home**: Displays the summary of datasets in your organization. ▪ **Custom Views**: Displays the available custom views. For more information on custom views, refer to the Creating Views topic. ▪ **Catalog View**: Displays the available catalogs. Expand catalogs to view existing datasets.
2-Asset Summary	Use this pane to view the summary of the objects. It displays the count of each component such as catalogs, datasets, published datasets, and custom views.

Selecting a catalog in the Asset Workspace opens the Dataset Summary pane containing a list of marketplace assets under the selected catalog.



Use the Dataset Summary pane to view a list of assets based on the selection in the Asset Workspace pane. You can open a dataset and work on it.

You can use this pane in two views:

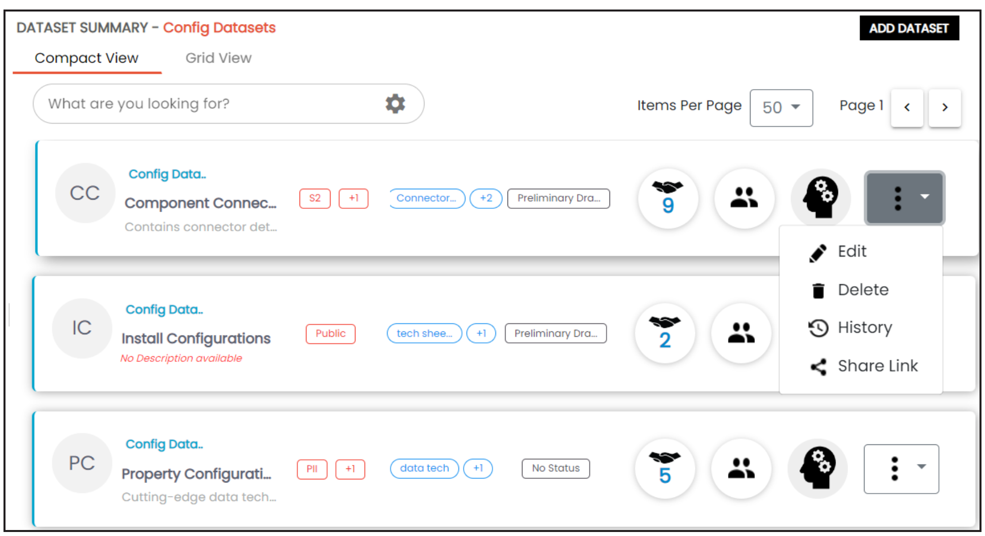
- **Compact View**: Displays a list of assets, their information, and available operations in a compact, card format. You can also use the **Search** box to search and filter marketplace assets.
- **Grid View**: Displays a list of assets, their information, and available operations in a tabular format.

Apart from creating and managing marketplace assets, you can view access rights and governance responsibilities of the assets.

Compact View

The Compact View displays a list of marketplace assets and their information, such as the asset name, description, status, tags, and sensitivity classification in a compact, card format. You can view governance responsibilities, associations, and mind maps of an asset using cards. Additionally, each card provides options to manage assets.

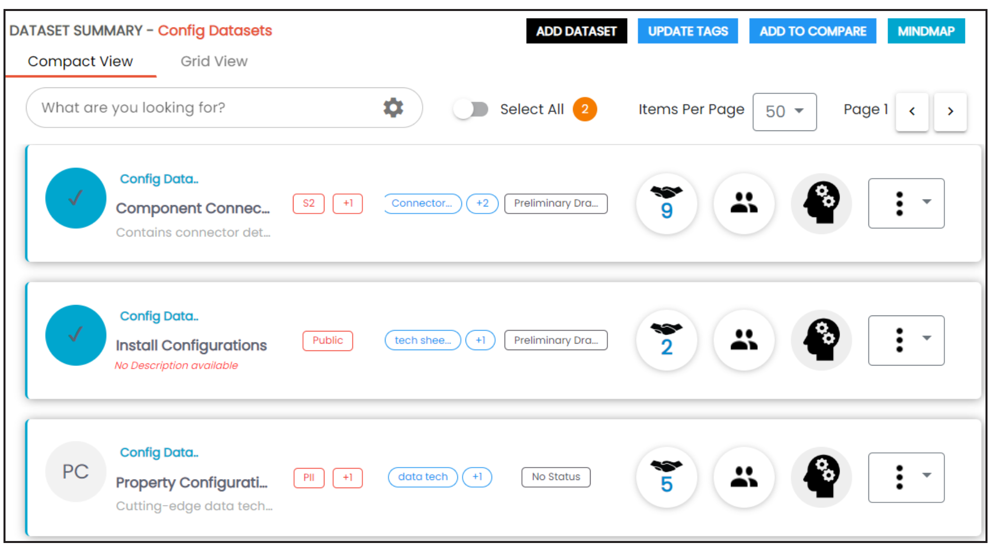
You can also search assets using the Search box in Compact View and narrow down the results using filters.



The following table explains the options available for you to work on marketplace assets:

Options	Description
	Use this option to configure search and filter options for the assets list. For more information about the search feature, refer to Search.
	Use this option to view the data governance responsibilities assigned for an asset.
	Use this option to view a list of associations or set up new associations. Clicking this option opens the Associations tab.
	Use this option to view the mind map for an asset. For more information about mind maps, refer to the Viewing Mind Maps topic.
	Use this option to manage the marketplace asset: ▪ Use to edit a marketplace asset and update term details, governance responsibilities, and so on. ▪ Use to delete a marketplace term that is no longer required. ▪ Use to view all the actions performed on an asset since created. ▪ Use to share a marketplace asset using a shareable link.

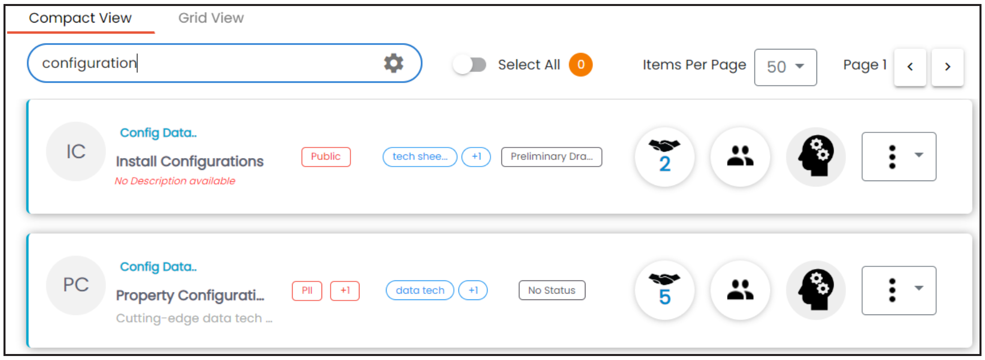
In addition to the options explained in the table above, you can also view mind maps, update tags, and compare marketplace assets. To update multiple marketplace assets, select the required assets, and click the relevant option. These options appear only when you select one or more assets.



Search

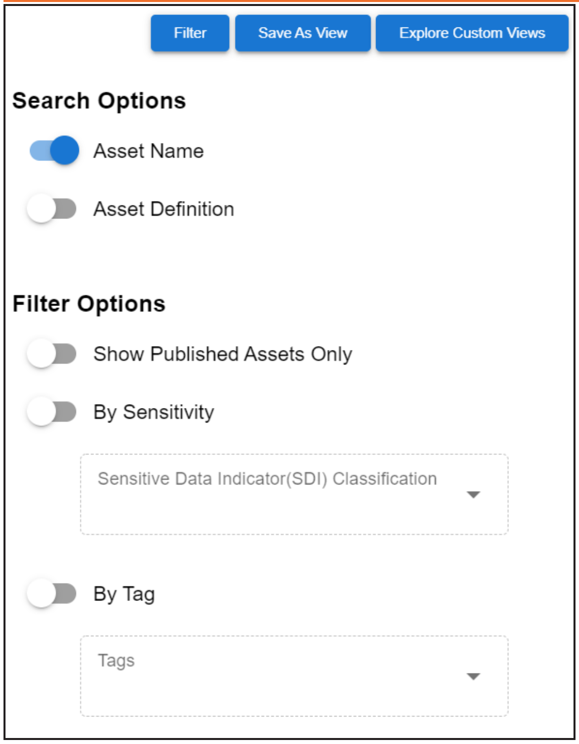
You can narrow down the list of marketplace assets or search for a specific asset using the search and filter options.

To search for assets, enter an asset name in the search box. The <Marketplace Asset> Summary pane displays assets based on your search term.



By default, the search uses a predefined configuration to filter and display search results. You can configure your search settings using the search and filter options.

To configure the search and filter options, on the **Search** box, click . The search and filter options pane appears.



Refer to the following table for descriptions of Search and Filter Options.

Options	Description
Asset Name	Switch this option on to search assets based on asset name. This option displays results when the search term matches an asset name in your marketplace.
Asset Definition	Switch this option on to search assets based on asset definition. This option displays results when the search term matches the content in the asset definition in your marketplace.
Show Published Assets Only	Switch this option on to filter and display only published assets.
By Sensitivity	Switch this option on to filter assets based on sensitivity. This enables the **Sensitive Data Indicator (SDI) Classification** list. Select a sensitivity classification based on which you want to filter results.
By Tag	Switch this option on to filter assets based on the enterprise tags applied to the marketplace asset. This enables the **Tags** list. Select one or more tags to filter results.

	You can create and assign new tags to marketplace assets, For more information about creating tags, refer to the Creating Enterprise Tags topic.
By Governance Responsibilities	Switch this option on to filter assets based on governance responsibilities. This enables the available data governance roles lists. Select one or more relevant users in each list.

Once you have configured the search and filter options, you can use the following options:

Filter

Use this option to display the filtered search results.

Save As View

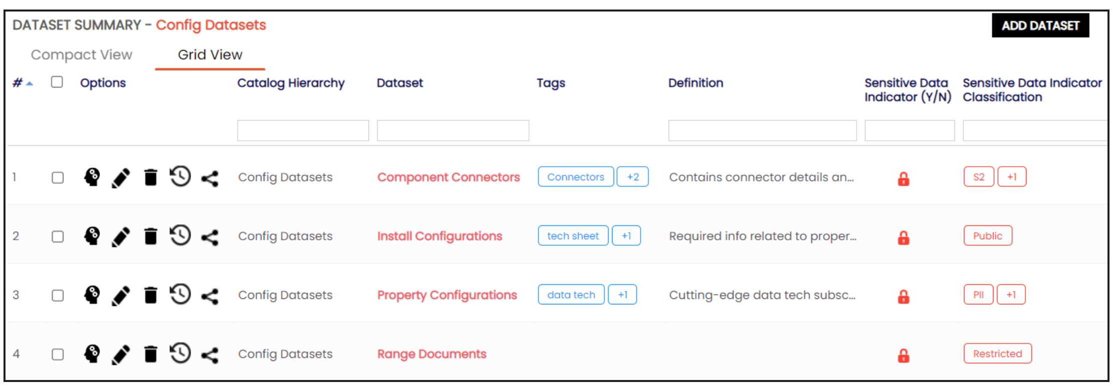
Use this option to save the search and filter configuration as a custom view.

Explore Custom Views

Use this option to display existing custom views.

Grid View

The grid view displays a list of assets and their information such as asset name, description, status, and sensitivity classification in a tabular format. You can also manage assets, generate mind maps, and share assets on the Grid View.



In the Grid View, you can:

- View mind maps
- Edit or delete marketplace assets

- View history
- Share links to marketplace assets
- Move marketplace assets
- Compare marketplace assets

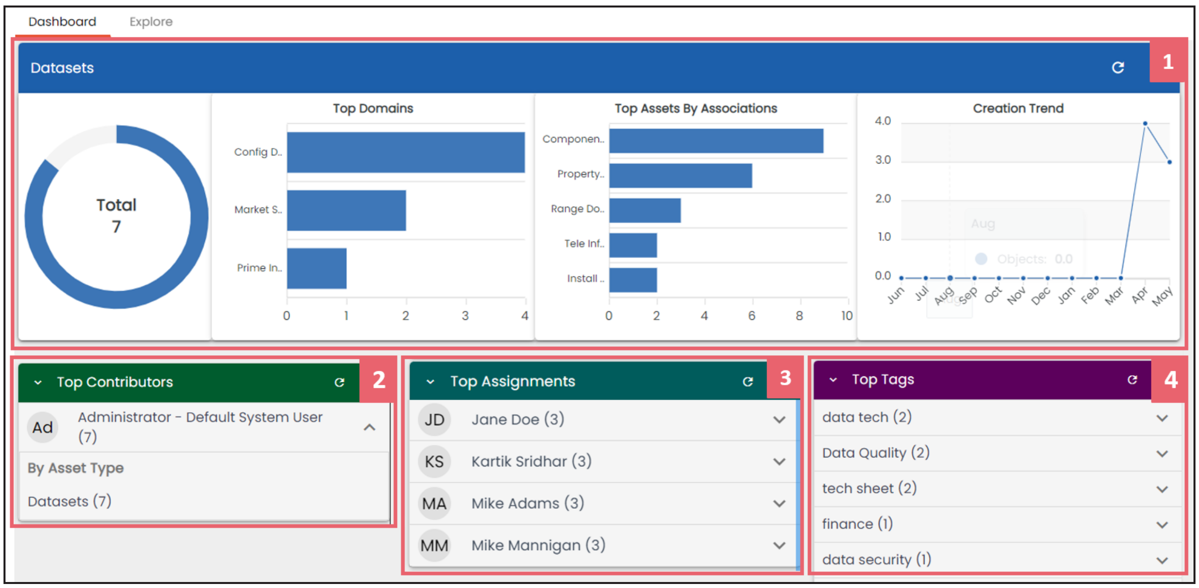
Additionally, you can create and manage existing marketplace assets using the Data Marketplace module.

Viewing Data Marketplace Dashboard

The Data Marketplace Dashboard displays insights about your marketplace assets across your organization. It helps you analyze marketplace assets based on creation trends, associations, and domains. You can also configure the dashboard to display insights of your favorite marketplace assets.

To access the dashboard, go to **Application Menu** > **Data Marketplace** > **Dashboard**.

The Data Marketplace Dashboard appears.

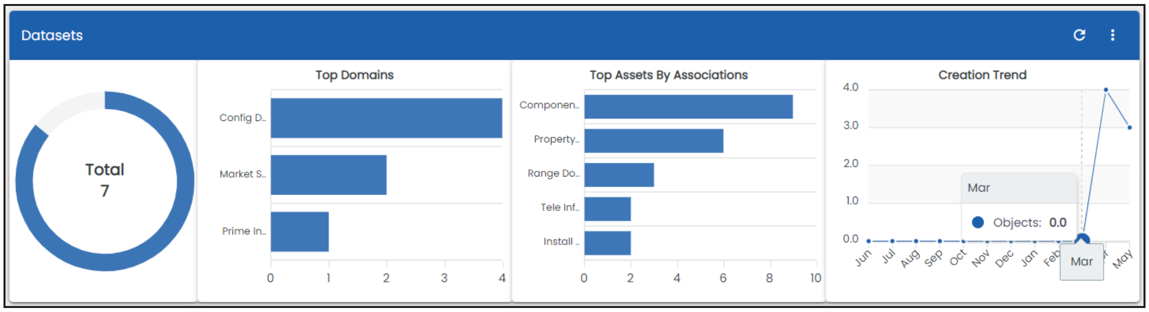


UI Section	Function
1-<Marketplace Asset>	Displays insights about all marketplace assets and their associations.
2-Top Contributors	Displays top contributors in your organization based on asset types.
3-Top Assignments	Displays a list of users with most responsibilities based on data governance responsibilities and asset types.
4-Top Tags	Displays a list of most used tags.

<Marketplace Asset>

For each asset type in your ecosystem, the <Marketplace Asset> section displays the total number of assets and associations on asset type-specific cards.

For example, the following screenshot displays insights about datasets.

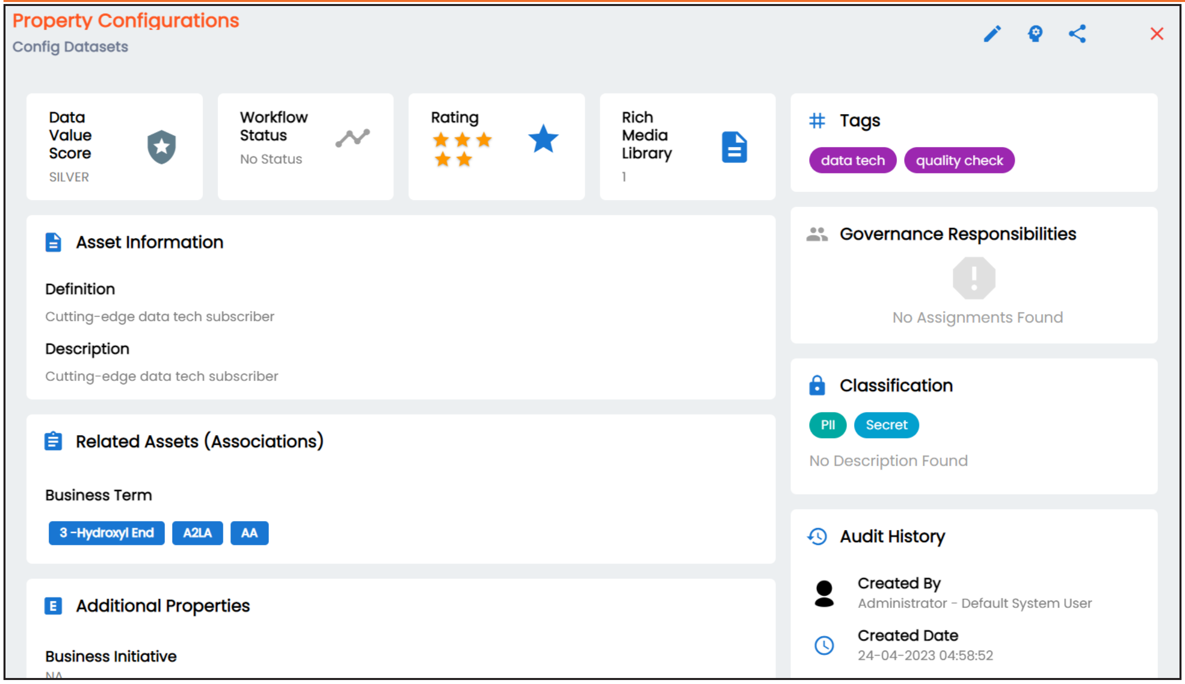


These cards display the following information:

- **Top Domains**: By default, it displays the top five domains (catalogs) with most number of marketplace assets.
- **Top Assets By Associations**: By default, it displays the top five assets with most number of associations.
- **Creation Trend**: It displays the month-wise asset creation trend.

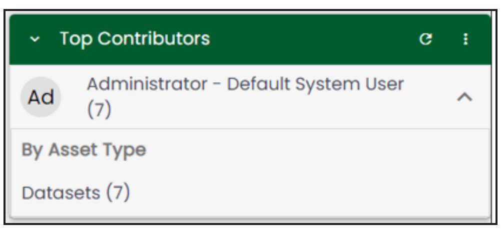
You can drill down to view detailed information of the marketplace assets.

To view detailed information of a marketplace asset or its association, click the chart on the card.



Top Contributors

The Top Contributors card displays the list of top contributors in your organization based on the number of marketplace assets assigned.



To view a contributor's list of assets based on the asset type, click .

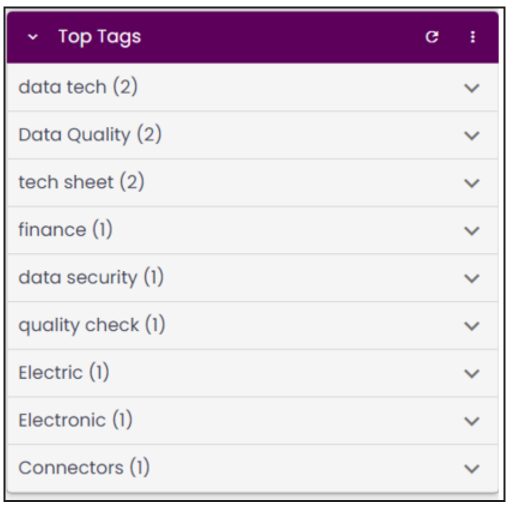
Top Assignments

The Top Assignments card displays a list of users with the most assigned responsibilities based on data governance responsibilities for the asset type.

To view the top responsibilities list of assets based on the asset type, click .

Top Tags

The Top Tags card displays the most used tags based on the marketplace assets.



To view the list of top tags, click .

This displays the list of tags based on asset type.

You can also manage and customize the Data Marketplace Dashboard using the following options:

Refresh ( )

Use this option to refresh the data on the cards.

More Options ( )

Use this option to change the asset type and number of records displayed on the card. Click ⋮, and use the following options:

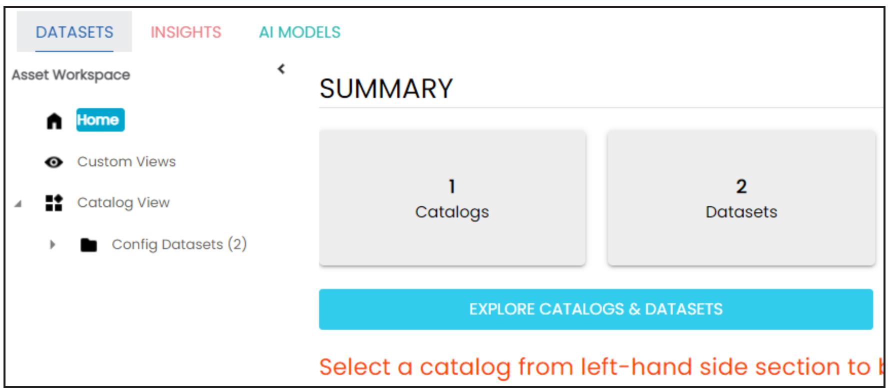
- **Change Asset**: Use this option to change the asset types on a card.
- **Records**: Use this option to set the number of records displayed on a card.
- **Background**: Use this option to change the card's background color. This option is not available for <Marketplace Asset> cards.

Creating Catalogs

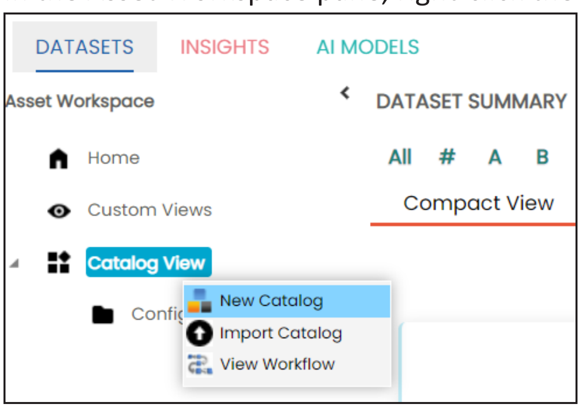
Catalogs are containers for all asset types that are created in the Data Marketplace module. You can group marketplace assets based on your organization's projects, departments, or functions. Therefore, before creating marketplace assets, you need to create a catalog. You can also create sub-catalogs to group assets further.

To create catalogs, follow these steps:

1. Go to **Application Menu** > **Data Marketplace** > **Explore**.
2. On the Asset Browser, select a marketplace asset.
   By default, Datasets appear, and Asset Workspace pane displays catalogs.
   This example walks you through creating a catalog under Datasets.

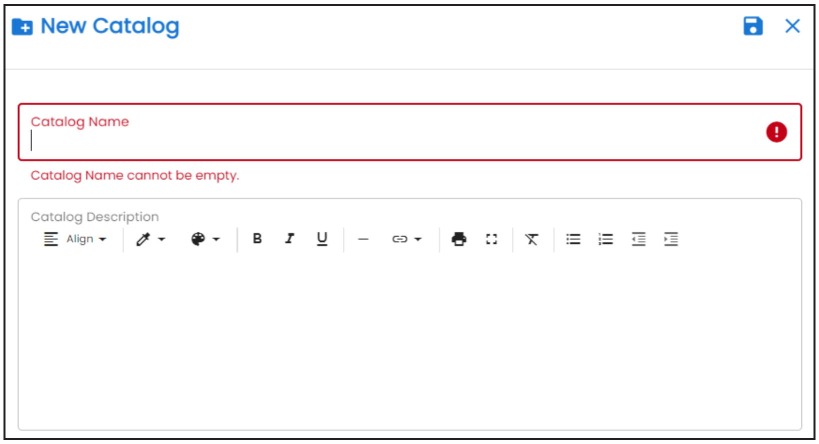


3. In the Asset Workspace pane, right-click the **Catalog View** node.



4. Click **New Catalog**.

   The New Catalog page appears.



5. Enter **Catalog Name** and **Catalog Description**.

   For example:

   - **Catalog Name**: Configuration Datasets
   - **Catalog Description**: The catalog contains configuration data for the datastes of your organization.

6. Click .

   A catalog is created and added to the catalog tree.

Once a catalog is created, you can manage it using the options available on right-clicking the catalog. Managing catalogs involves:

- Creating sub-catalogs
- Editing catalogs
- Importing or exporting catalogs
- Assigning users
- Viewing workflows

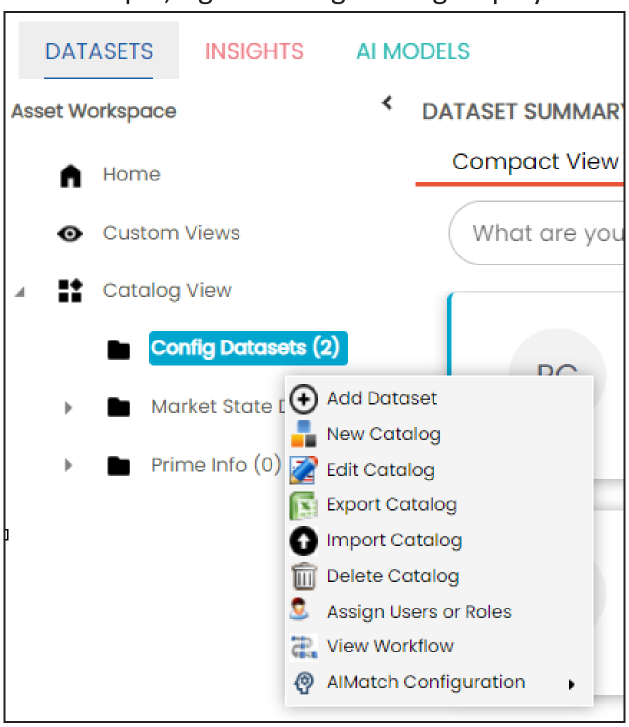
Managing Catalogs

Managing catalogs involves:

- Creating sub-catalogs
- Editing catalogs
- Importing or exporting catalogs
- Assigning users and roles
- Viewing workflows
- Configuring AIMatch

To manage catalogs, follow these steps:

1. Right-click a catalog.
   For example, right-clicking catalog displays the corresponding options.



2. Use the following options:

New Catalog

Use this option to create sub-catalogs and group marketplace assets further.

Edit Catalog

Use this option to update the catalog's name and description.

Import Catalog

Use this option to import existing catalogs. On the Import Business Catalog page, select the catalog file and click .

Export Catalog

Use this option to export a catalog to an XLSX file. You can later import this file to your glossary workspace.

Delete Catalog

Use this option to delete a catalog. Deleting a catalog also deletes all assets in it.

Assign Users or Roles

Use this option to assign users and roles to the catalog. For more information on assigning users and roles, refer to the Assigning Users and Roles topic.

View Workflow

Use this option to view the workflow assigned to the catalog. The workflow displays all the stages, users, and roles involved. It also shows the flow of information and action across the stages.

AIMatch Configuration

Use this option to schedule an AIMatch job to associate metadata to a marketplace asset and to detect sensitive data for associations. For more information, refer to the Associating Metadata for AI Matching topic.

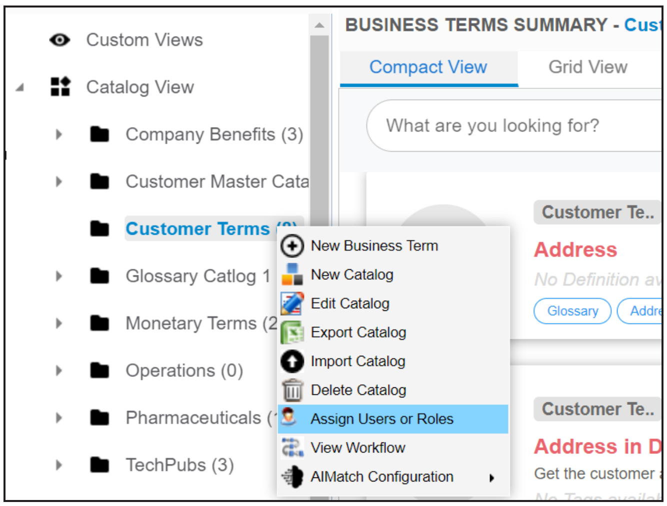
Assigning Users and Roles

You can assign users and roles to a marketplace catalog. These assignments facilitate governance responsibilities assignment to the marketplace assets in the catalog.

Assigning Roles

To assign roles, follow these steps:

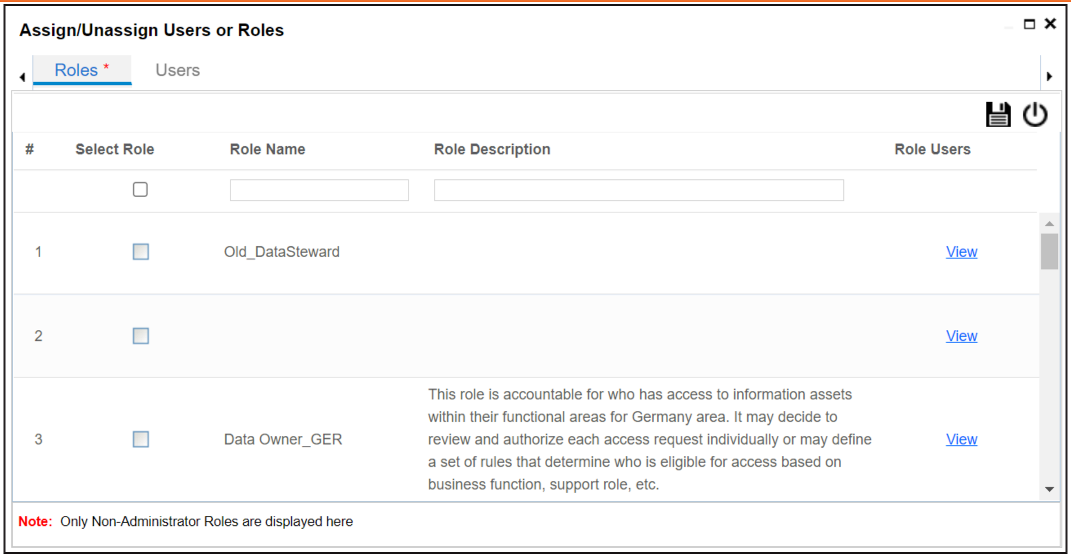
1. Right-click a catalog.



2. Click **Assign Users or Roles**.

   The **Assign/Unassign Users or Roles** page appears. By default, the Roles tab appears.

   You can click **View** to view the users assigned to a role.

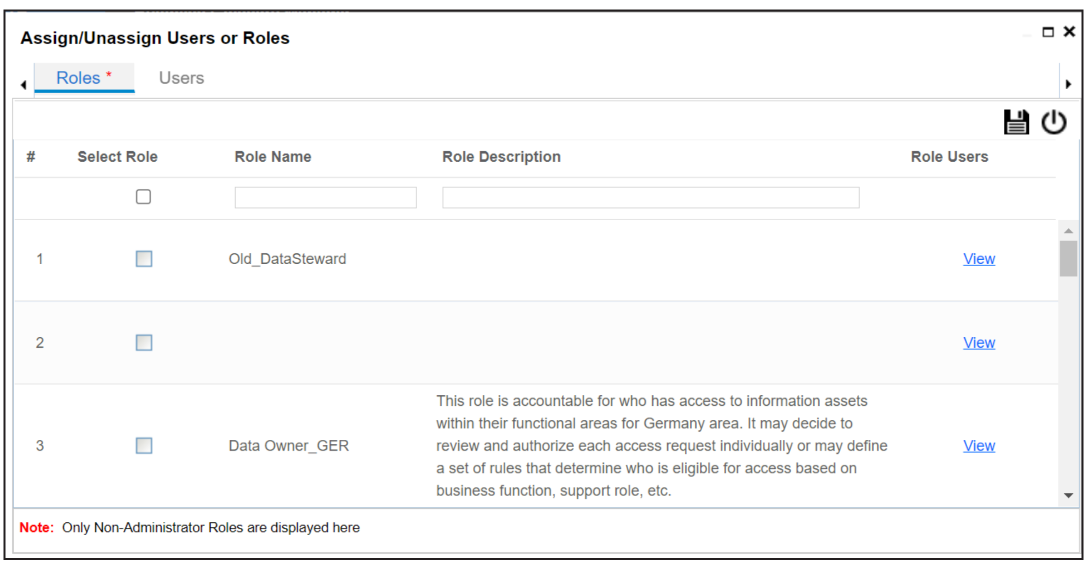


3. Select the required roles.
4. Click .

   The selected roles are assigned to the catalog.

Assigning Users

To assign users, on the **Assign/Unassign Users or Roles** page, click the **Users** tab.



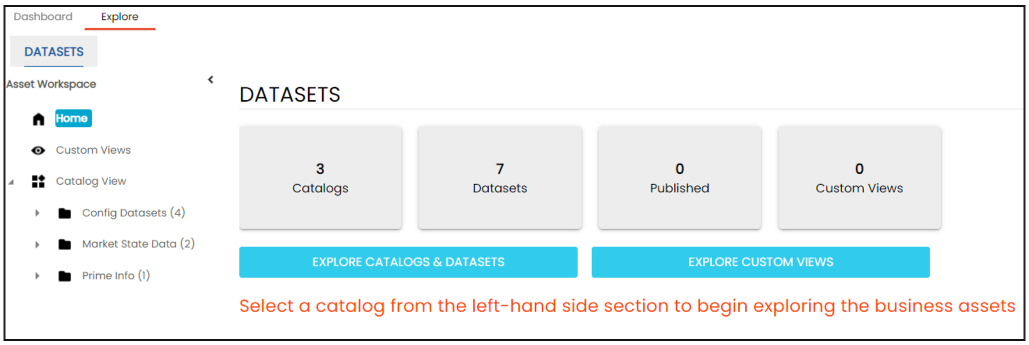
Select the required users and click .

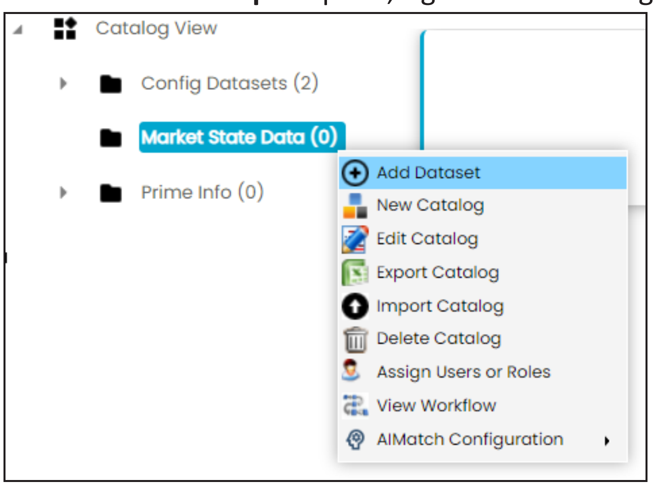
The users are assigned to the catalog.

Creating Datasets

Datasets are collections of data that enables you to analyze data across your organization and build insights about it. You can create datasets, manage associations, view mind maps, add tasks, and rich media to enrich them. You can create datasets in new or existing catalogs. For more information about catalogs, refer to the Creating Catalogs topic.

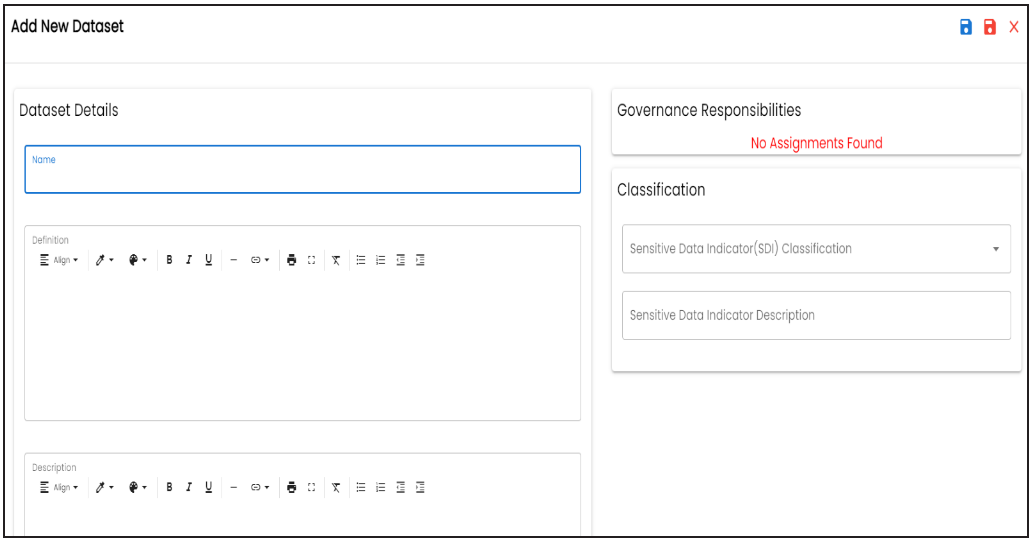
To create business terms, follow these steps:

1. Go to **Application Menu** > **Data Marketplace** > **Explore**.
   The Dataset summary pane appears.
   

2. In the **Asset Workspace** pane, right-click a catalog.
   

3. Click **Add Dataset**.
   Alternatively, on the Asset Workspace pane, select a catalog and then click **Add Dataset** in the Dataset Summary section.

The Add New Dataset page appears.



4. Enter appropriate values in the fields.

   Refer to the following table for field descriptions.

Field Name	Description
Name	Specifies the name of the dataset. For example, Account.
Definition	Specifies the definition of the dataset. For example: An Account contains data for a party.
Description	Specifies the description about the dataset. For example: Account contains data for posting, payments, debt recovery, and taxes.
Business Initiative	Specifies the strategic business initiative of the dataset. For example: Set up strategic goals to improve data quality and accessibility.
Expected Insights	Specifies the expected insights of the dataset. For example: Achieve cleaner data across the organization and access more documents.
Governance	Specifies the users assigned with data governance responsibilities for

Field Name	Description
Responsibilities	the assets. For more information, refer to Updating Data Governance.
Classification	Specifies the sensitive data indicator (SDI) classification of the dataset. You can add multiple SDI classifications to an asset. For example, PHI. For more information on configuring SDI classifications, refer to the Configuring Sensitive Data Indicator Classifications topic. This field is enabled for datasets by default. For more information on enabling sensitivity fields, refer to the Configuring Asset Details topic.

5. Click .
   The dataset is created and added to the catalog.
   Based on your workflow assignment settings, the new dataset may need further action for review or approval. For more information, refer to the Managing Data Marketplace Workflows topic.

Once you create a dataset, you can click that dataset in the Datasets Summary pane to view it. You can enrich it further by:

- Setting up associations
- Adding rich media
- Viewing workflow logs
- Adding tasks
- Comparing marketplace assets

You can manage a dataset using the options available under the Options column on the Grid View tab. Managing datasets involves:

- Viewing mind maps
- Viewing history

- Editing or deleting datasets
- Sharing links of datasets

Managing Datasets

Managing dataset involves:

- Viewing mind maps
- Editing or deleting datasets
- Viewing history
- Sharing links to datasets

To manage datasets, follow these steps:

1. On the **Compact View** tab, click ⋮.
   Alternatively, on the **Grid View** tab, use the **Options** column for a dataset.
2. Use the following options available under the Options column:

   View Mind Map ( )

   Use this option to view a dataset's mind map. A mind map provides a pictorial representation of the dataset, its associations, relationships, sensitivity, and more in a logical and conceptual view.
   For more information on mind maps, refer to the Viewing Mind Maps topic.

   Edit Dataset ( )

   Use this option to edit dataset properties.
   For more information on editing a dataset, refer to the Viewing or Editing Datasets topic.

   Delete Dataset ( )

   Use this option to delete datasets.

   View History ( )

   Use this option to view all the actions performed on a dataset since its creation.
   Alternatively, on the Edit Datasets page, click the **History** tab.

   Share Link( )

   Use this option to share dataset links. The following options are available to share the link:

Copy Link: Use this option to copy shortcut links. You can then share this link manually.

Email: Use this option to share shortcut links via email.

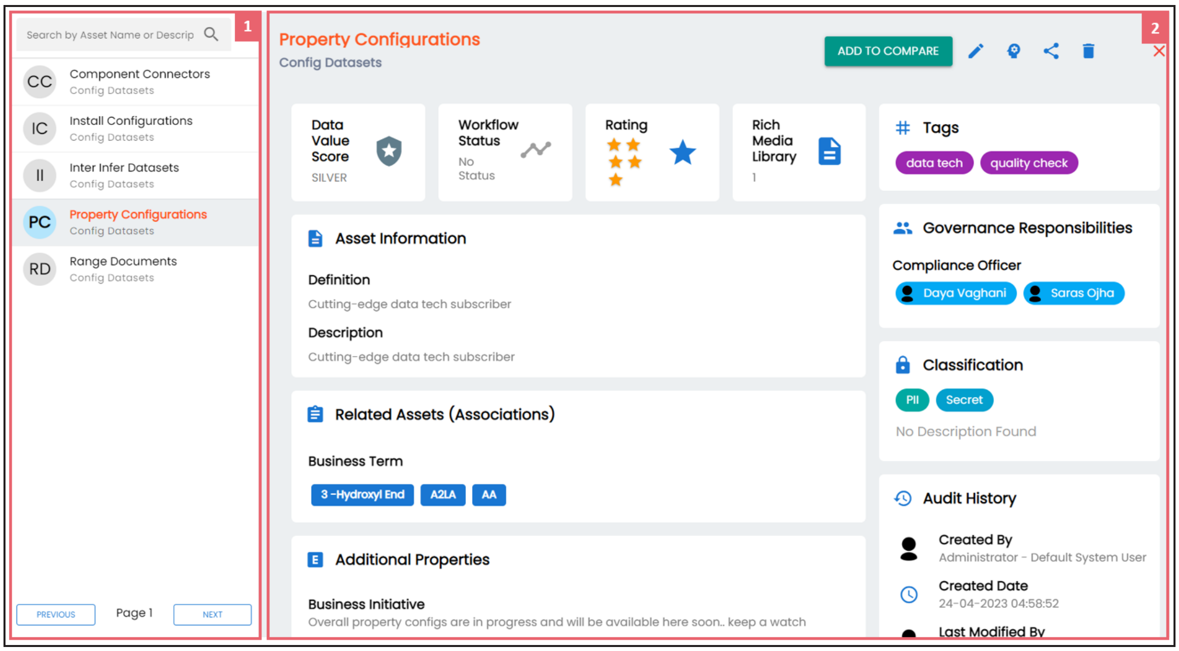
Viewing or Editing Datasets

You can view and edit details asset and properties.

Apart from viewing and editing datasets, you can also compare them while viewing datasets.

On the **Dataset Summary** page, click a dataset.

The dataset summary page appears.



UI Section	Function
1-Datasets List	Use this pane to browse and search through the list of datasets.
2-Asset Details	Use this section to view dataset details. Apart from viewing datasets, you can view and edit the following properties: ▪ Asset Information ▪ Workflow Status ▪ Governance Responsibilities

	▪ Classification ▪ Tags ▪ Data Value Score ▪ Miscellaneous

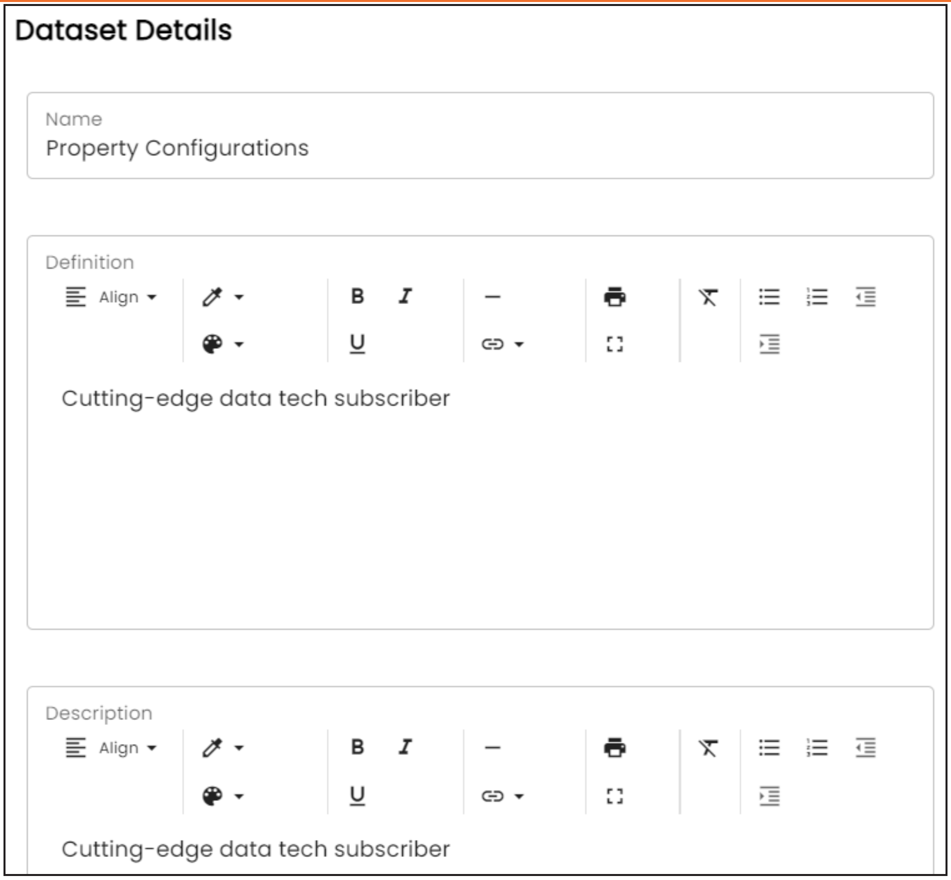
Editing Datasets

To edit a datasets, follow these steps:

1. On the dataset summary page, click ✎.
2. On the Edit Dataset tab, use the following options:

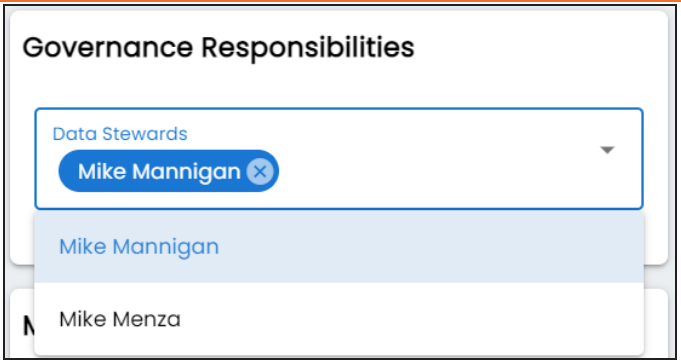
   Asset Information

   Use this section to edit dataset's details, such as its name, definition, and description. For description of fields on this section, refer to the Creating Datasets topic.



Governance Responsibilities

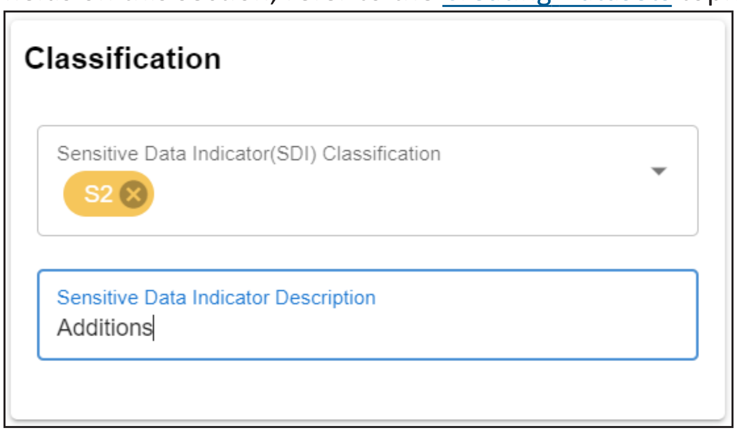
Use this section to edit governance responsibilities assignment. It displays roles groups based on the roles and users assigned to a dataset catalog. To edit governance responsibilities, click a role group and add or remove users. For example, in the following image Mike Mannigan is added to the Data Stewards role group.



For more information on assigning roles and users to a catalog, refer to the Updating Data Governance Assignments topic.

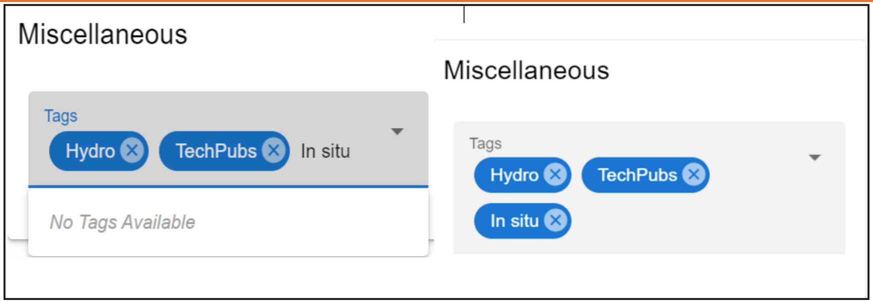
Classification

Use this section to edit the SDI classification of a dataset. For description of fields on this section, refer to the Creating Datasets topic.



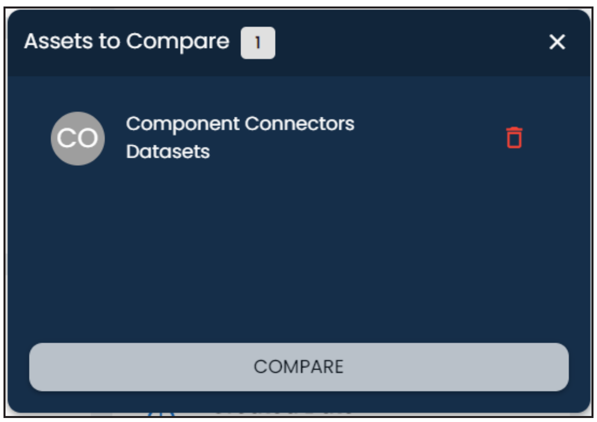
Miscellaneous

Use this section to associate enterprise tags with datasets. Click **Tags** and select an existing tag or enter a tag name to create one on the fly.
For example, in the following image, a tag, "In situ", is created and assigned to a dataset.

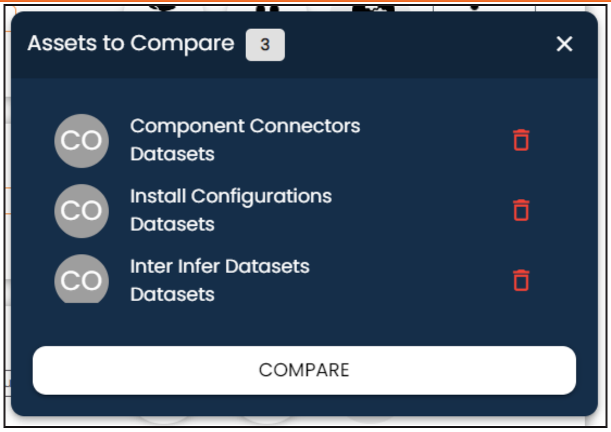


Comparing Datasets

To compare datasets while viewing them, follow these steps:

1. On the Assets Details page, click **Add to Compare**.
   The Assets to Compare page appears.
   

2. On the Datasets List, select other assets that you want to compare and click **Add to Compare**.
   The selected asset is added to the Assets to Compare page.



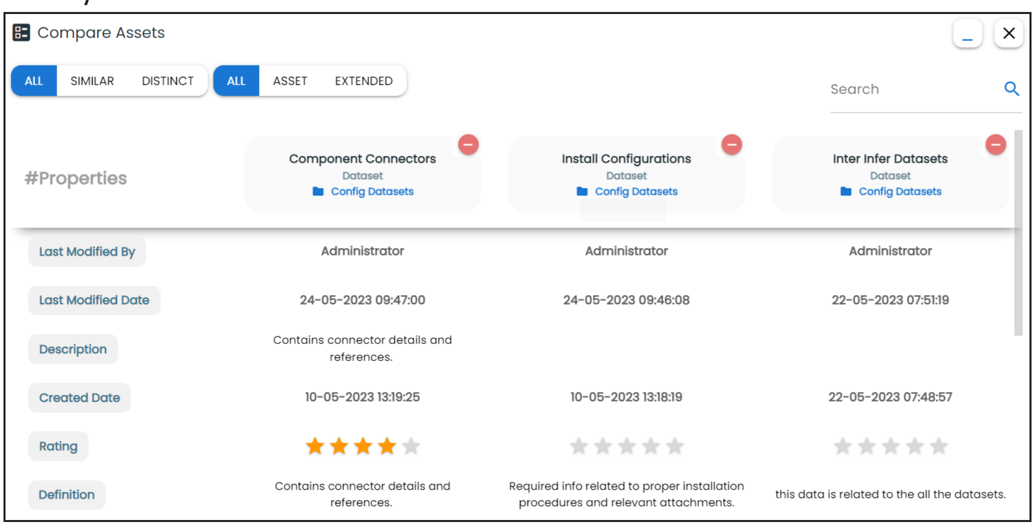
You can click to remove assets from the compare list.

Repeat this step to add more assets for comparison.

You can select up to five assets for comparison.

3. Click **Compare**.

   The Compare Assets pane appears and displays the comparison of asset properties side by side for the selected assets.



For more information about comparing assets based on properties, refer to the Comparing Marketplace Assets topic.

Setting Up Associations for Datasets

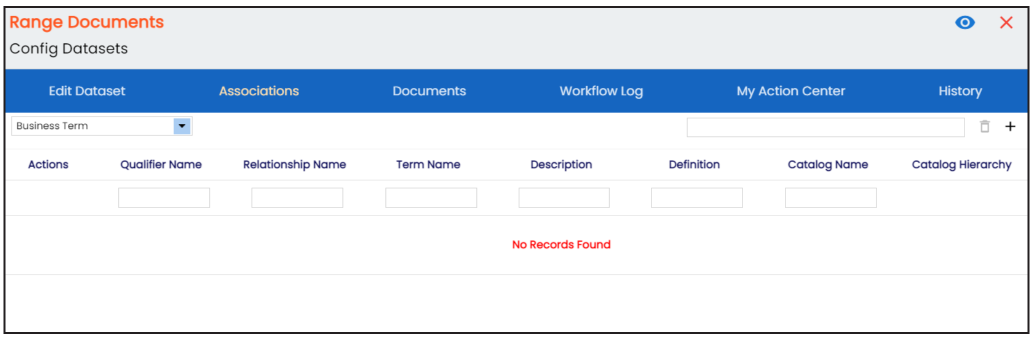
By default, you can associate datasets with other marketplace assets (insights and AI models), business assets (business policies and other business terms), and technical assets (columns, environments, and tables). You can control the available asset types for association using the Business Glossary Manager & Data Marketplace Settings page. For more information, refer to the configuration topic.

To set up associations, follow these steps:

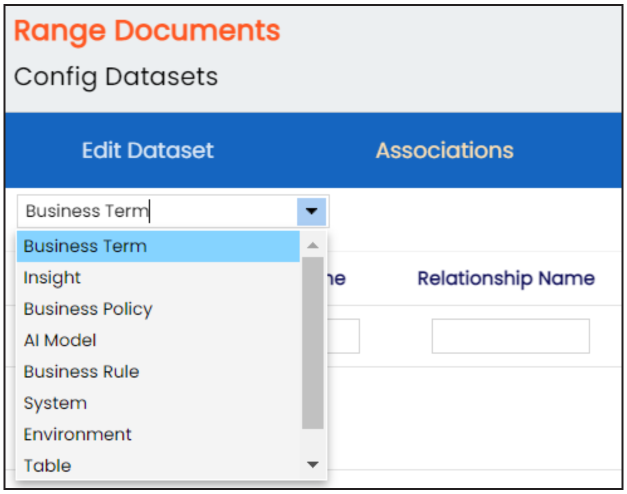
1. On the **Compact View** tab, click .

   Alternatively, on the **Grid View** tab, under the **Options** column, click . Then, click **Associations**.

   The Associations tab opens in edit mode.

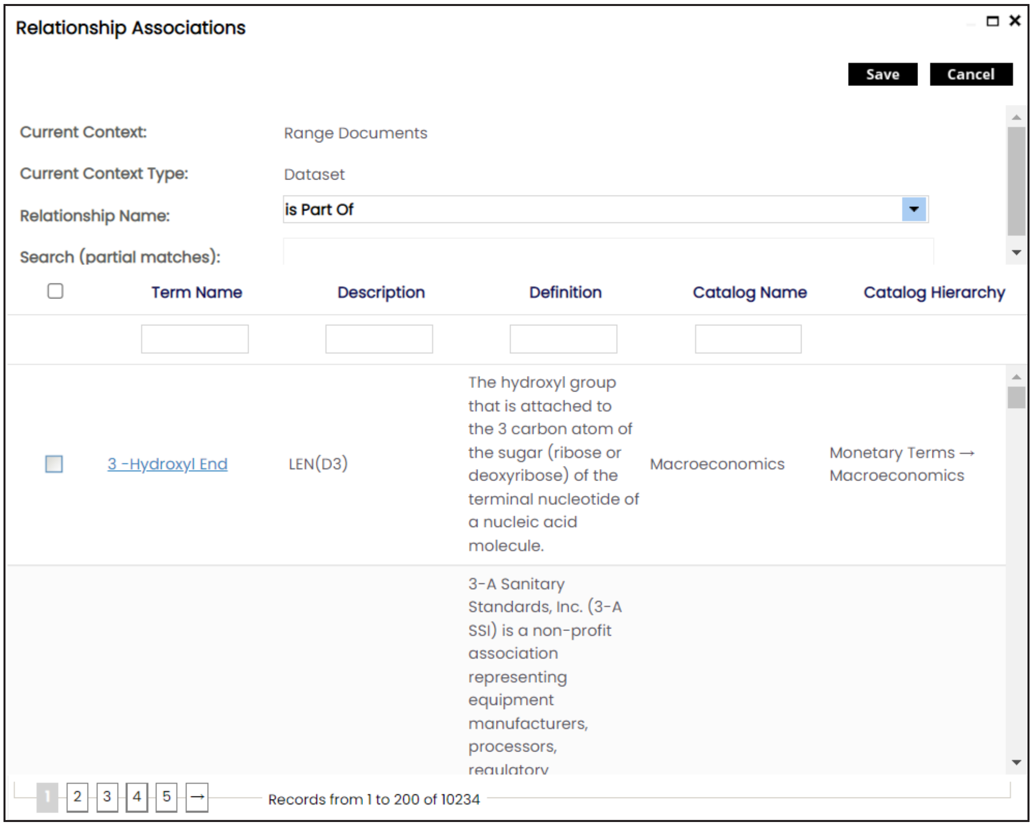
   

2. In the asset type (displays technical, business, and marketplace assets) list, select an asset type to associate with the dataset.



3. Click +.
   The Relationship Associations page appears. Based on the asset type that you selec-

ted, it displays a list of available assets.



4. Select assets to associate with your dataset.

   If you know the asset name, use the Search (partial matches) field to look up for it.

5. Click **Save**.

   The selected assets are associated with the dataset and added to the list of associations.

   You can define as many associations as required.

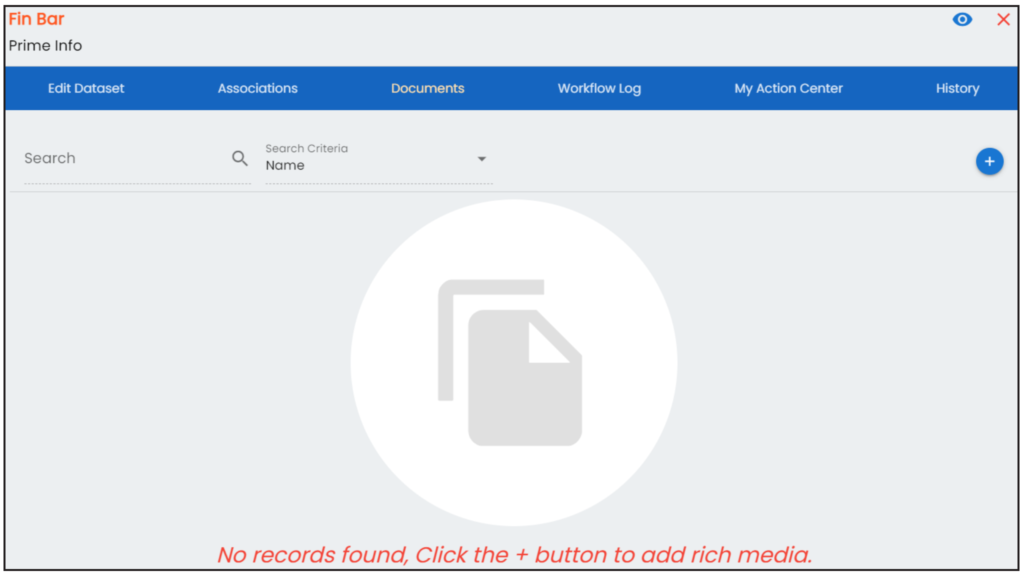
You can associate multiple marketplace assets with other business and technical assets, and view the associations based on a qualifier view in the mind map. For more information, refer to the topic Setting Up Associations using Qualifiers topic.

Adding Rich Media

You can add supporting artifacts, such as text files, audio files, video files, and so on to a dataset.

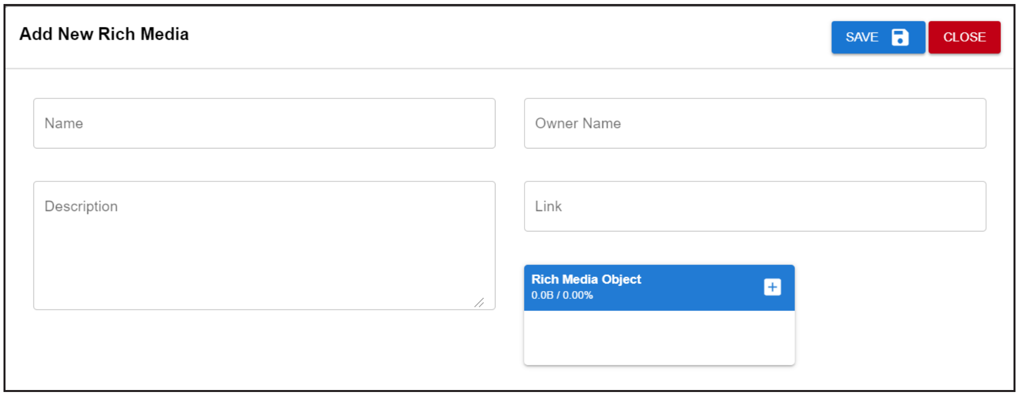
To add rich media to datasets, follow these steps:

1. On the **Compact View** tab, click ⋮. Then, click ✏.
   Alternatively, on the **Grid View** tab, under the **Options** column, click ✏.
   The dataset opens in edit mode.
2. Click the **Documents** tab.



3. Click  .

   The Add New Rich Media page appears.



4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Name	Specifies the name of the rich media being attached to the dataset. For example, Dataset Details.
Description	Specifies a description of the rich media that is being added.
Owner Name	Specifies the document owner's name. For example, John Doe
Link	Specifies the URL of the rich media. For example, https://drive.google.com/file/l/2sC2_SZIyeFKI7OOn-b5YkMBq4ptA7jhg5/view
Rich Media Object	Click the **Pick Files** button to choose and upload files from your computer.

5. Click **Save**.

   The selected rich media file and its description are added to the dataset.

Viewing Workflow Logs

You can view the flow of actions of the workflow assigned to a dataset. Along with other information, the workflow log displays the current state of the dataset in the workflow.

To view the workflow log, follow these steps:

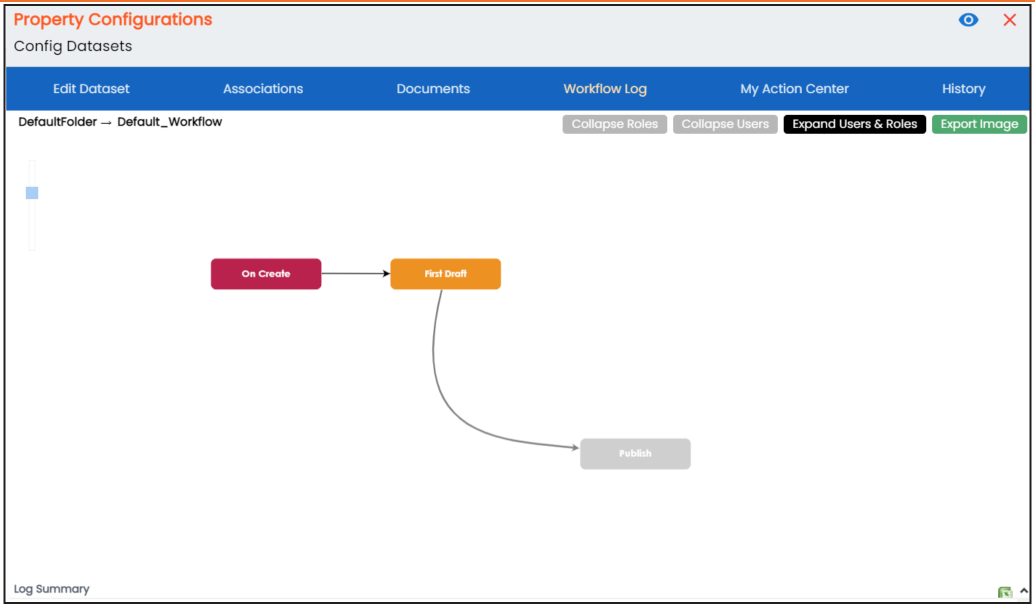
1. On the **Compact View** tab, click ⋮. Then, click ✎.
   Alternatively, on the **Grid View** tab, under the **Options** column, click ✎.
   The dataset opens in edit mode.
2. Click the **Workflow Log** tab.
   By default, it displays only the stages of the workflow and highlights the current stage. Use the following options to view more information:

   Expand Users & Roles

   Use this option to display users and roles associated with each workflow stage. You can choose to hide users or roles using the Collapse Users and Collapse Roles options.

   Log Summary

   Use this pane to view the action log.



You can export the workflow log summary in XLSX format. Click to export the summary.

Adding Tasks

To collaborate on marketplace assets, you can create tasks. By default, you can create to-do tasks, access requests, or issues. Apart from these task types, you can configure custom task types via Task Type Configuration.

To add tasks, follow these steps:

1. On the **Compact View** tab, click . Then, click .
   Alternatively, on the **Grid View** tab, under the **Options** column, click .
   The dataset opens in edit mode.
2. Click the **My Action Center** tab.
3. Click .
   A list of task types appears.
4. Click the required task type.
   The Create New Task page appears.
5. Enter appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Task is being created on Asset	Specifies the asset for which the task is created. This field autopopulates with the map name.
With Task Type as	Specifies the task type. For example, To do Task.
Name	Specifies the name of the task. By default, it autopopulates with a name in the following format: Mapping_<Map_Name>. You can edit it and rename the task. For example, Test Mappings.
Description	Specifies a description of a task. For example: Test all the mappings and record the effort required.

Field Name	Description
Reason For Access	Specifies a description of the request raised to access an asset. This option is only available when you choose Request Access as the task type.
Important	Specifies whether the task is important
Due	Specifies the due date of the task. Use to set the due date.
Assign Users	Specifies the users assigned to the task. You can assign DI and BU users from the list. For example, Richard Cooper.
External user emails	Specifies the email ID of external users. For example, chris.harris@quest.com

6. Click .

   The task is created and saved. Use to edit the task details and attach relevant documents.

Chat

Use the Chat tab to send messages to the assigned and external users of a task.

On the **Chat** tab, enter your message in the text box and use the following options:

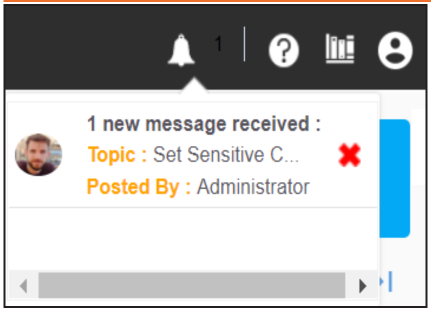
Assigned

Use this option to send messages to the assigned users.

External

Use this option to send messages to external users.

Users are notified via Messaging Center.



You can manage a task using the options available on the task list. Managing a task involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading Chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

With the My Action Center tab, you can filter and search tasks based on its status and assignments. For more information on search and filter mechanisms, refer to the Filter and Search topic.

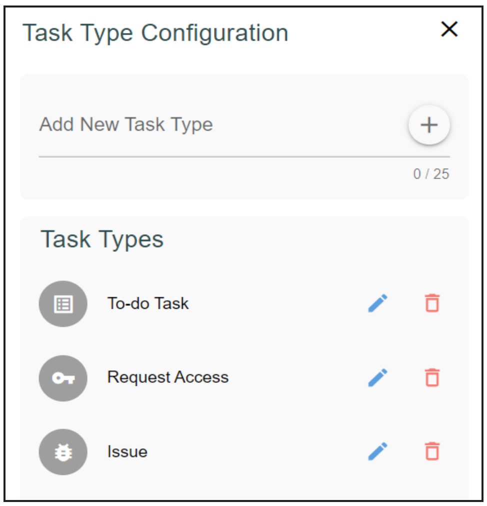
Configuring Task Types

You can configure task types to categorize tasks. By default, three task types, To-Do Task, Request Access, and Issue, are available. You cannot edit or delete these task types.

To configure task types, follow these steps:

1. In the utility section, click .

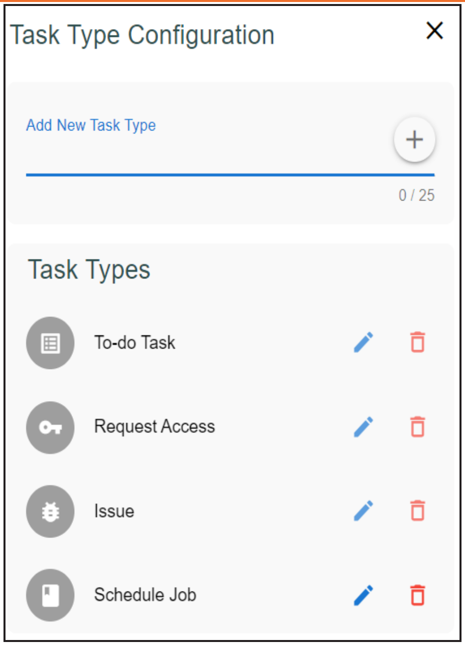
   The Task Type Configuration pane appears. It displays a list of available task types.

2. In the Add New Task Type box, enter a new task type and click .

   The task type is added tp the list of available tasks.

   For example, in the following image, a task type, Schedule Job is added.



Use the following options to manage task types:

Edit ( )

Use this option to edit task types.

Delete ( )

Use this option to delete task types.

Managing Tasks

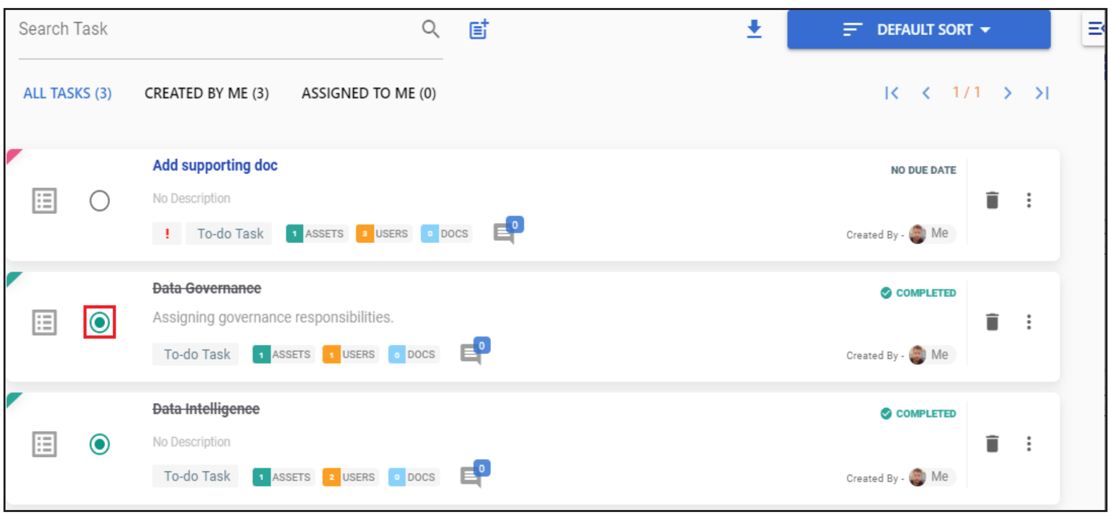
Managing tasks involves:

- Marking tasks complete
- Viewing task details
- Editing task details
- Disabling notifications
- Downloading chat
- Sharing chat
- Marking tasks as pending
- Deleting tasks

To mark tasks complete, on a task tile, click the radio button.

The task is moved to the list of completed task.

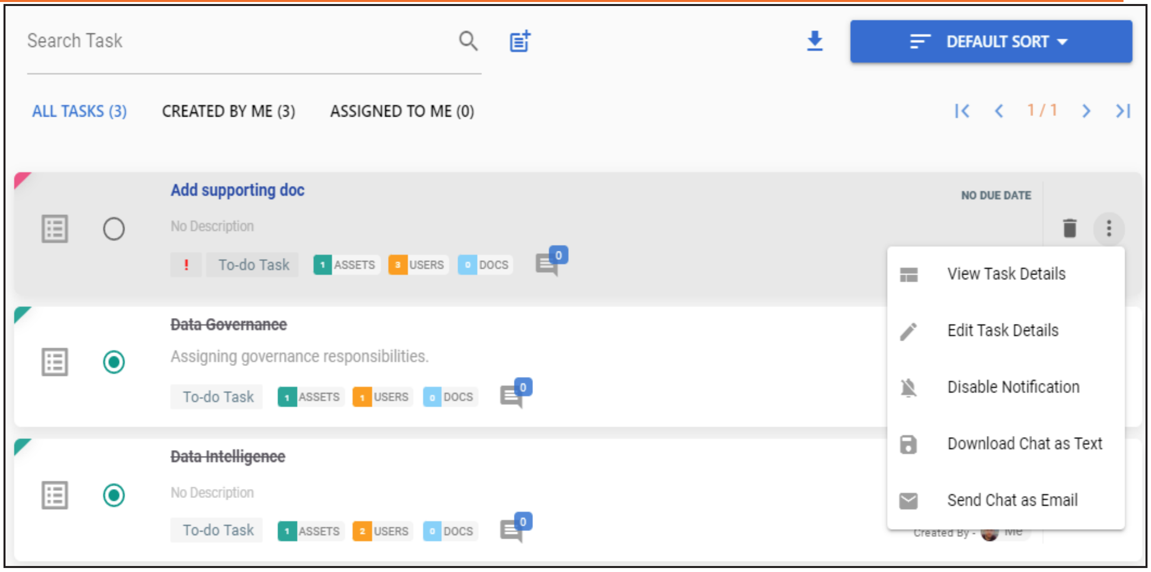
For example, in the following image, the tasks with strike-through are marked complete.



To further manage tasks, follow these steps:

1. On a task tile, click ⋮.

   The available options appear.



2. Use the following options to work on tasks:

View Task Details

Use this option to view task details. These details include task name, description, assigned assets, attached documents, and so on.

Alternatively, you can click a task tile to view its details.

Edit Task Details

Use this option to update task details.

Disable Notification

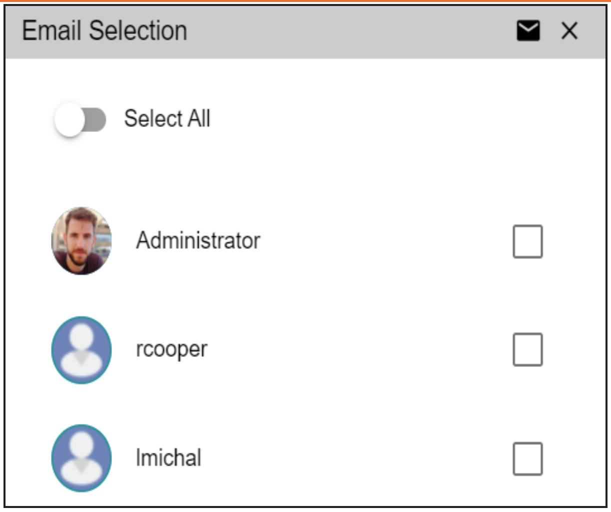
Use this option to stop receiving notifications related to a task. By default, notifications are enabled, and users assigned to a task receive them.

Download Chat as Text

Use this option to download chats related to a task in the TXT format.

Send Chat as Email

Use this option to share chats related to a task via email. To do this, click **Send Chat as Email**.
The Email Selection page appears. It displays a list of users assigned to the task.



Select the required users, and then click . An email is sent to the selected users.

Mark as Pending

Use this option to mark a task as pending. This option is available for completed tasks.

To delete a task, on a task tile, click .

> You can only delete a tasks that you created.

Viewing History

You can use the History tab to track and view the changes made to a dataset. It displays details such as change status, added records, and more.

To view the history of datasets, follow these steps:

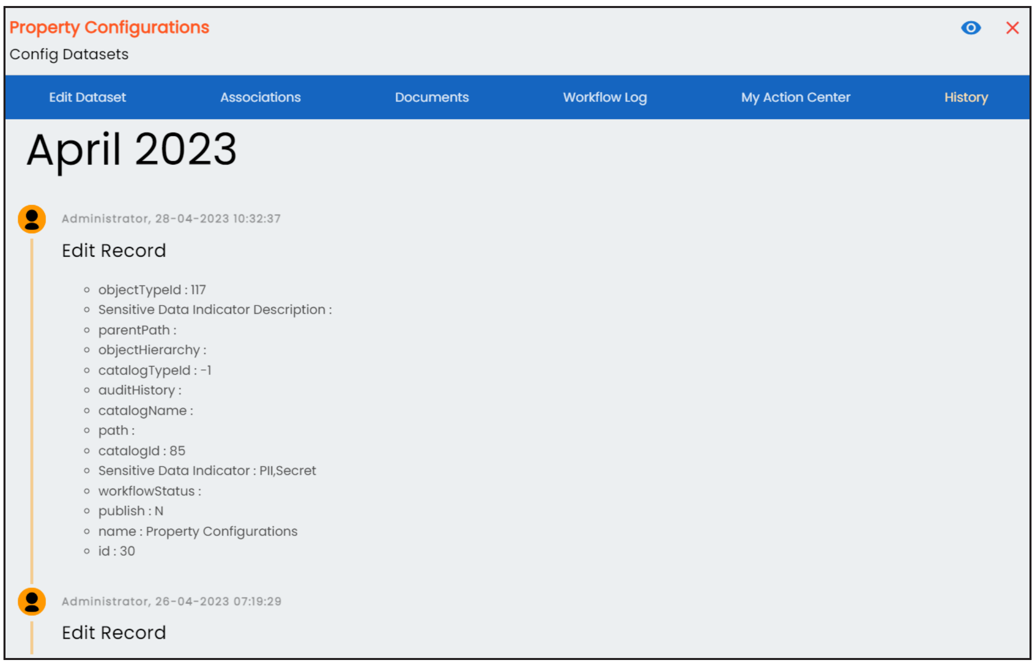
1. On the **Compact View** tab, click . Then, click .

   Alternatively, on the **Grid View** tab, under the **Options** column, click .

   The business term opens in edit mode.

2. Click the **History** tab.

   On the History tab, you can view the change history of the dataset.



Viewing Mind Maps

A mind map provides a pictorial representation of a marketplace asset (datasets) and their association with other business, technical, and marketplace assets. Technical assets refer to systems, environments, tables, and columns. Business assets refer to business terms, business policies, business rules, and other business assets as defined in the Business Glossary Manager & Data Marketplace Settings. You can also generate mind map for multiple marketplace assets at the catalog level.

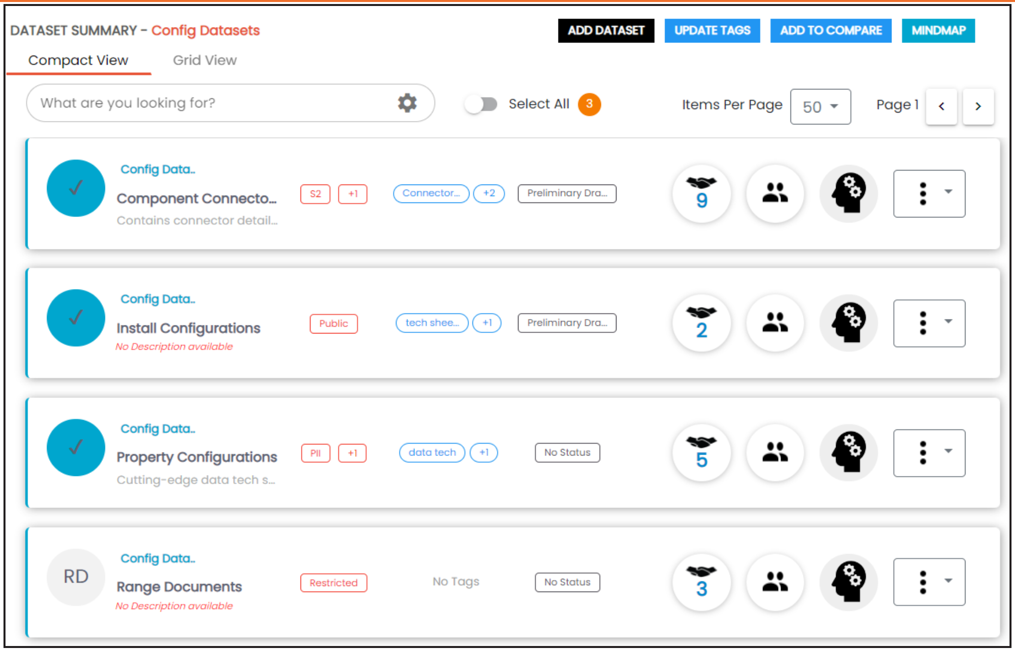
You can view and analyze Mind Maps in following views:

- Logical View
- Conceptual View

To view mind maps, follow these steps:

1. In the <Markeplace_Asset> Summary section, do one of the following:
    - Select multiple assets and click  to view a mind map for the selected assets.

Viewing Mind Maps

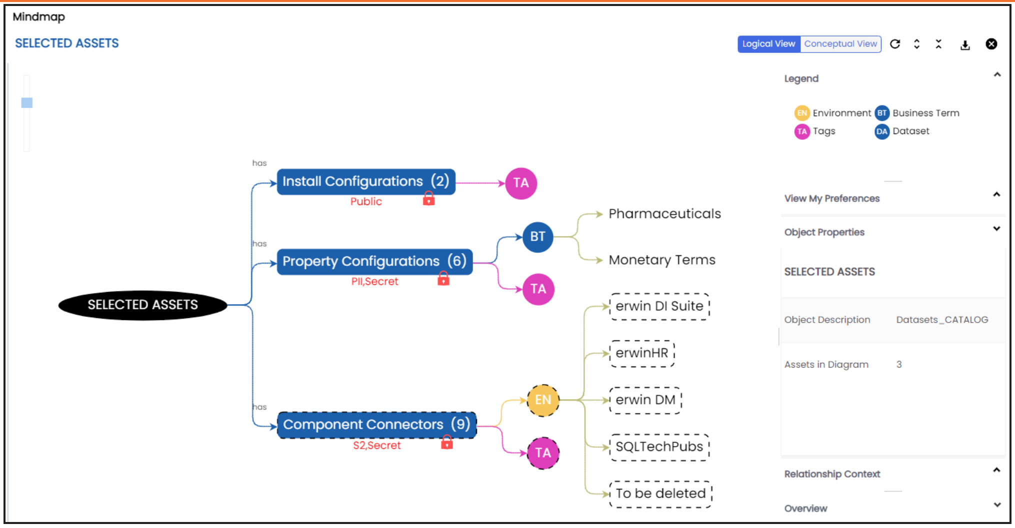


- Click  for an asset to view mind map for that asset alone.

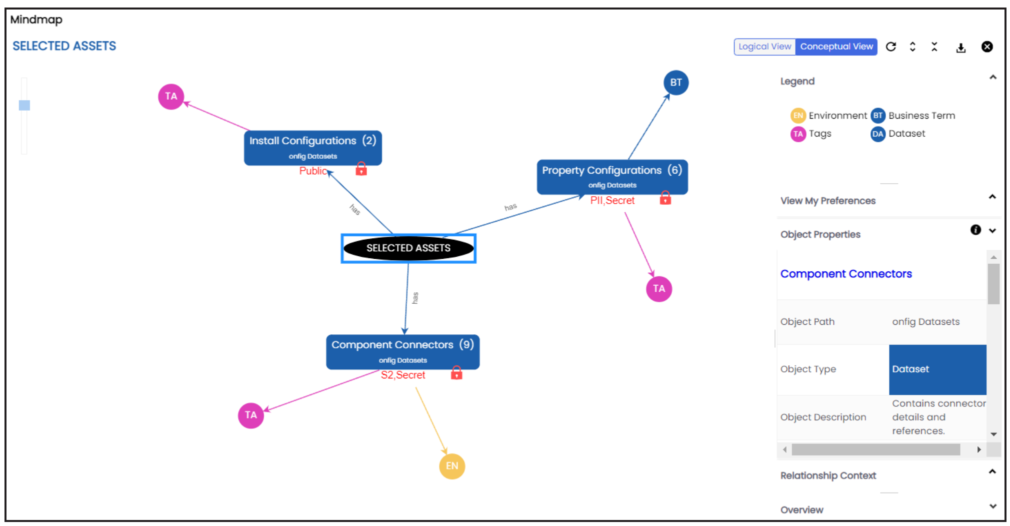
The Mind Map page appears and the Logical View opens by default.

2. On the Mind Map page, you can click **Logical View** or **Conceptual View** to switch between them:

   - **Logical View**: The logical view displays the associated technical assets on the left side and associated business assets on the right of the business asset. Selecting an asset on the mind map displays its properties in the Object Properties pane.



- **Conceptual View**: The conceptual view displays the associated technical assets in non-hierarchical representation. Selecting an asset on the mind map displays its properties in the Object Properties pane.



3. Use the following options to work on the mind map:

Reload Diagram (↻)

Use this option to reload the mind map to its default appearance.

Expand Diagram (⌃⌄)

Use this option to expand the mind map to view the associated marketplace, technical, and business assets.

Reset Diagram to Original View ( )

Use this option to collapse the expanded nodes and restore the mind map to its original form.

Export ( )

Use this option to export the mind map. Hover over **Export** and use the following options:

Mind Map - Excel Report: Use this option to download the mind map in the XLSX format. Ensure that you expand the mind map before downloading the report.

Mind Map - Image: Use this option to download the mind map as an image, in the .jpg format. Ensure that you expand the mind map before downloading the mind map image.

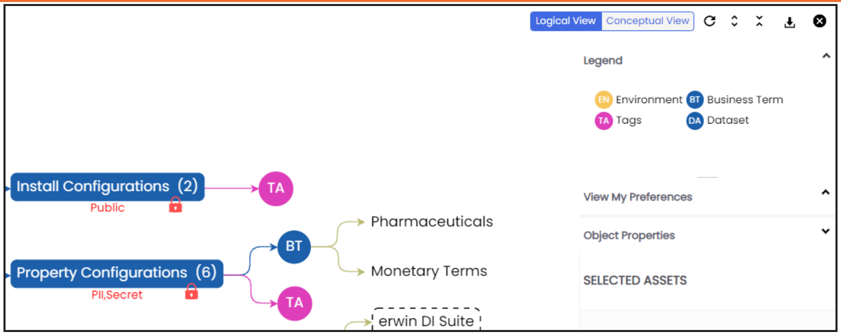
Sensitivity Details - Excel Report: Use this option to download the sensitivity report of all associated assets in the XLSX format. This report includes sensitive data indicator (SDI), SDI classification, and SDI description of the associated assets.

You can use the following panes to view properties and configure preferences for the mind map:

- Legend
- View My Preferences
- Object Properties
- Overview

Legend

Use legends to identify objects on the mind map.



View My Preferences

You can set your preferences to view the mind map according to your requirements. The available settings differ based on the logical and conceptual view. Expand the **View My Preferences** pane and use the following options:

Assets

Use the **Include Assets without Associations** to display business assets with no associations.

> This option is only available when you generate mind maps for multiple assets at the same time.

Qualifier

Use the **Show Qualified View** to display business asset and its association with other business and technical assets that are created using a unique qualifier (business asset). For more information about creating associations using a qualifier, refer to the Setting Up Associations Using Qualifiers topic.

Asset Hierarchy

Use the following options to view asset hierarchy:

- **Gray Background**: Use this option to display gray-colored background for the asset hierarchy nodes. For example, the following mind map displays nodes in the hierarchy with a gray-colored background.

This option is only available for Logical View.

- **Show Asset Hierarchy/Show Hierarchy**: Use this option to view hierarchy of all the assets in a mind map.

Association Statistics

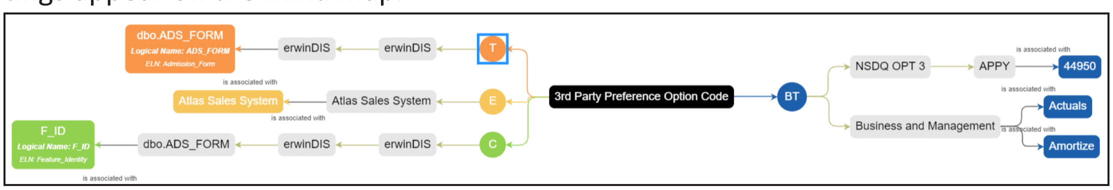
Use the **Show Counts** option to view the number of associations for a business asset.

Relationship Options

Use the following options to configure relationship options:

- **Include Relationships**: Use this option to display relationships between the assets on the mind map.
- **Switch to Enterprise Relationship configuration**: Use this option to apply the selected line color and type configured in the Business Glossary Manager & Data Marketplace Settings.

  For example, in the following mind map, the relationship (is associated with) and the line color as set in Business Glossary Manager & Data Marketplace Settings appear on the mind map.



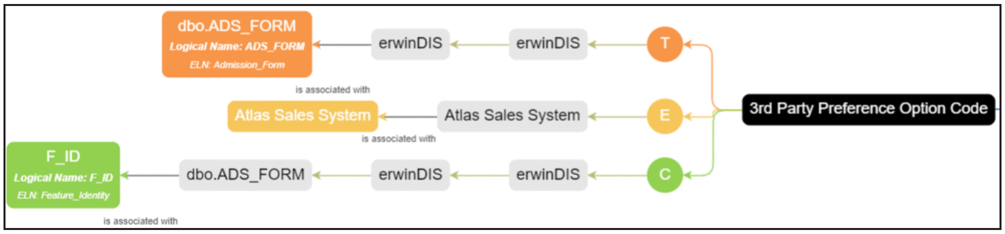
View Logical Names

Use the following options to view logical and expanded logical names of tables and columns on the mind map:

- **Logical Names**: Use this option to view the logical names of tables and columns on the mind map.
- **Expanded Logical Names**: Use this option to view the expanded logical names of tables and columns on the mind map.

  You can configure logical names and expanded logical names of tables and columns in the Metadata Manager.

For example, the following mind map displays logical names and expanded logical names.



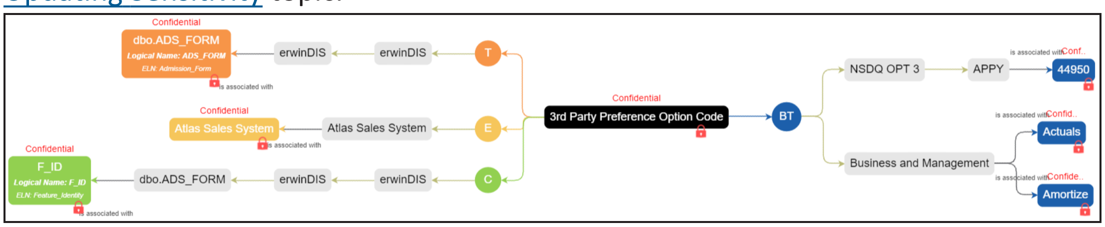
View Sensitivity

Use the following options to view sensitivity information of the assets on the mind map:

- **Sensitivity Data Indicator(Y/N)**: Use this option to indicate whether an asset is classified as sensitive.
- **Sensitive Data Classification**: Use this option to view the sensitivity classification of assets.

  For example, the following mind map displays the sensitive data indicator () for assets that are classified sensitive.

  For more information on updating asset sensitivity in mind maps, refer to the Updating Sensitivity topic.



Filters

Use the following filter options to select information availability on mind maps:

- **By Asset Type**: Use this option to filter and display required asset types on the mind map.
- **By Relationship**: Use this option to filter and display required assets on the mind map based on relationships.

For example, in the By Asset Type list, select Column and in the By Relationship list select is associated with. Doing this displays only those columns that have the is associated type of relationship with the asset.

Object Properties

Expand the Object Properties pane to view the selected asset's information, such as its path, type, association statistics, data governance responsibilities, and sensitivity classification of an asset.

Overview

Expand this pane to open a panned view of the mind map. You can drag the purple box to move across the mind map and focus on specific areas.

Comparing Marketplace Assets

You can compare marketplace assets side by side to gain more insight and see asset property differences. You can also compare them based on similarity or distinct properties and more.

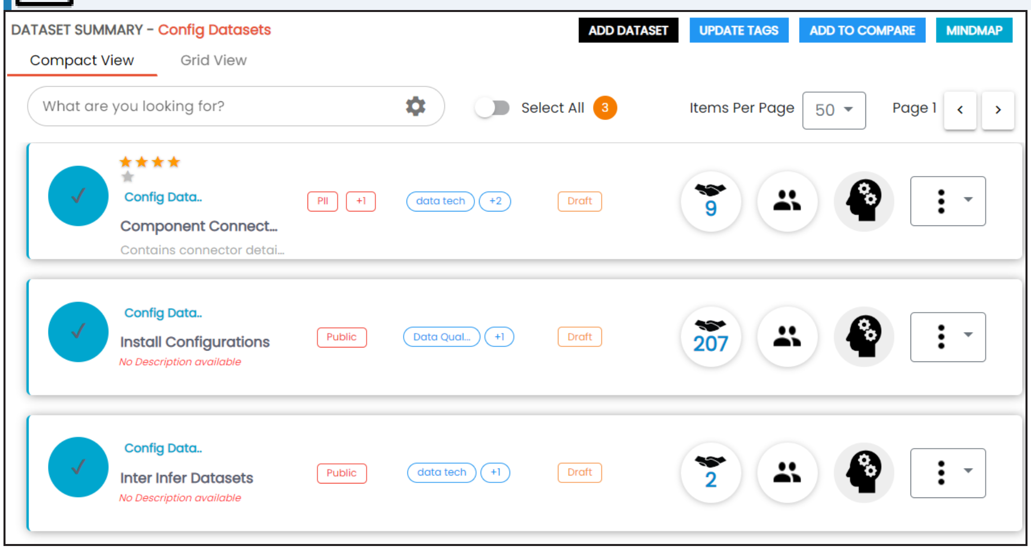
For example, to compare datasets, follow these steps:

1. In the **Asset Workspace** pane, click the required catalog.

   The datasets list appears in the Compact View tab.

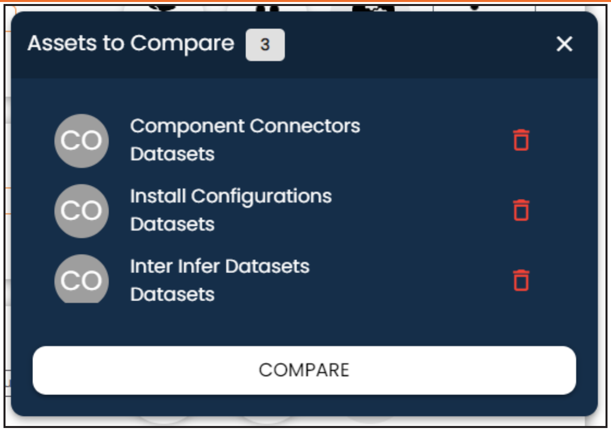
2. Select the required assets from the list.

   You can select up to five assets for comparison.

   Alternatively, you can also compare assets in the Grid View tab.

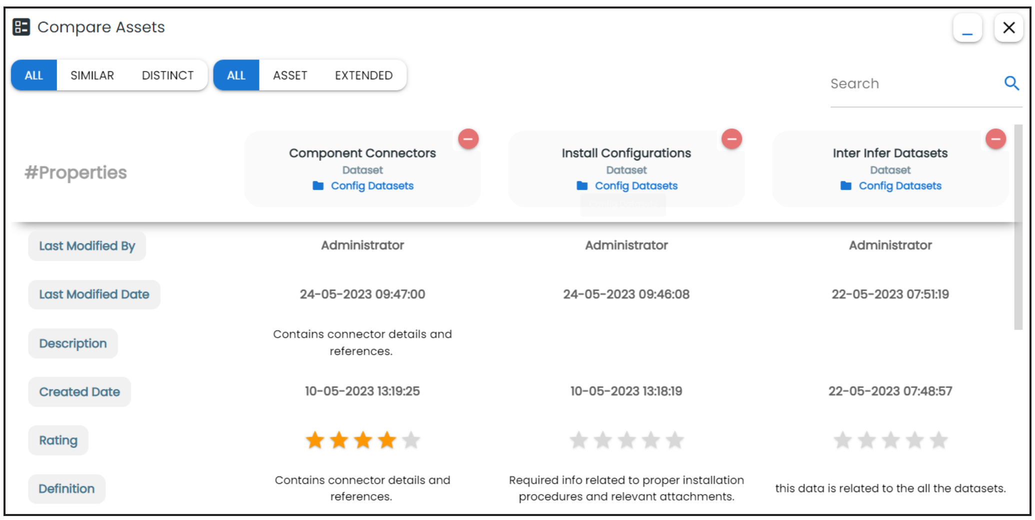
3. Click **Add to Compare**.
   The Asset to Compare sheet appears.



You can click to remove assets from the compare list.

4. Click **Compare**.

   The Compare Assets page appears and displays side by side comparison of asset properties for the selected assets.



   Also, use the Search box to search and compare specific properties of the assets in comparison.

On the Compare Assets pane, you can compare assets using the property filter options to enhance the marketplace asset comparison.

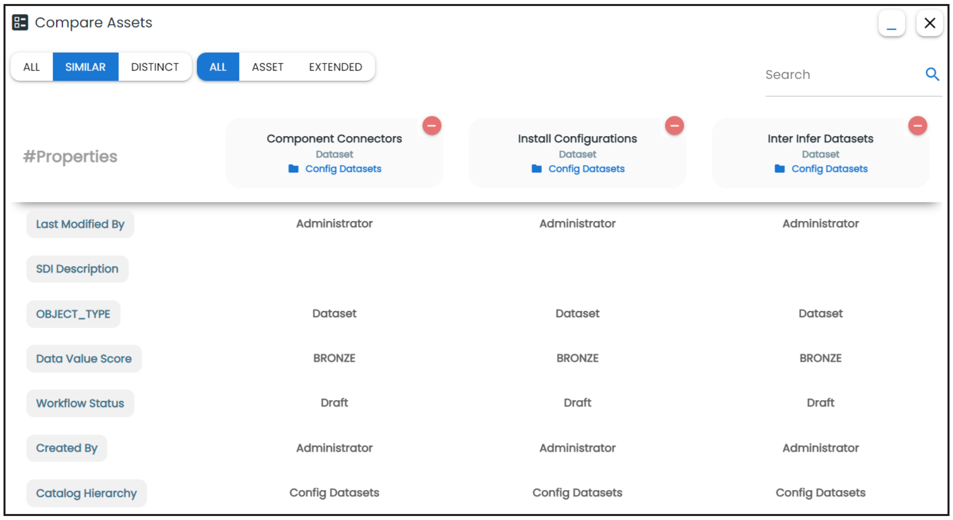
Use the following options to compare assets based on similar or distinct properties:

All

Use this option to view all asset properties for comparison.

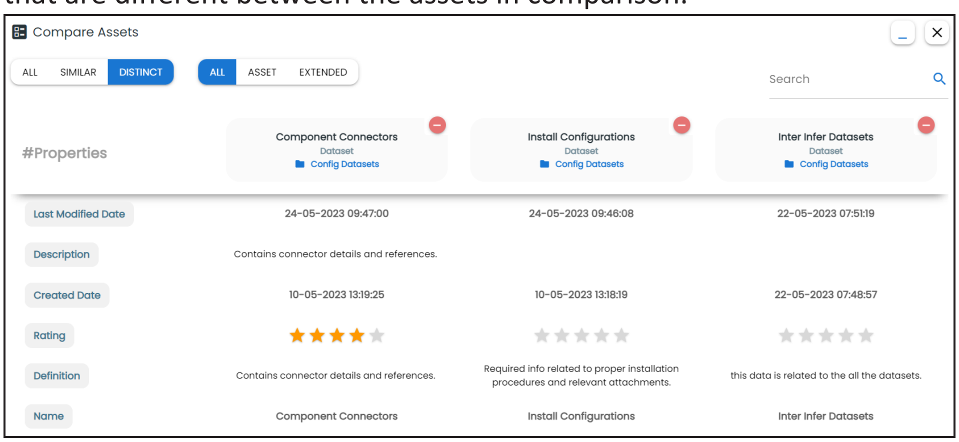
Similar

Use this option to view only the asset properties that are similar to the assets in comparison. For example, the following image displays properties that are similar to the assets in comparison.



Distinct

Use this option to view only the asset properties that are different from the assets in comparison. For example, the following image displays the properties that are different between the assets in comparison.



Comparing Marketplace Assets

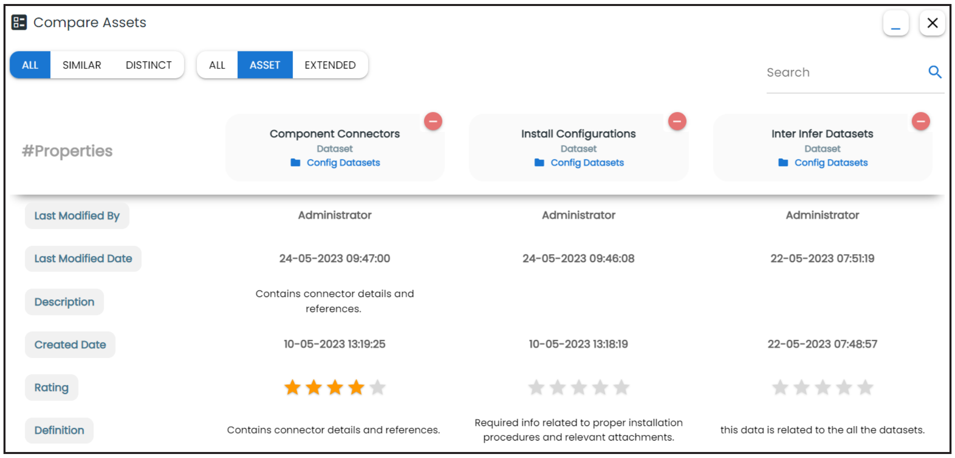
Use the following options to compare assets based on extended properties and asset details:

All

Use this option to view all asset properties for comparison.

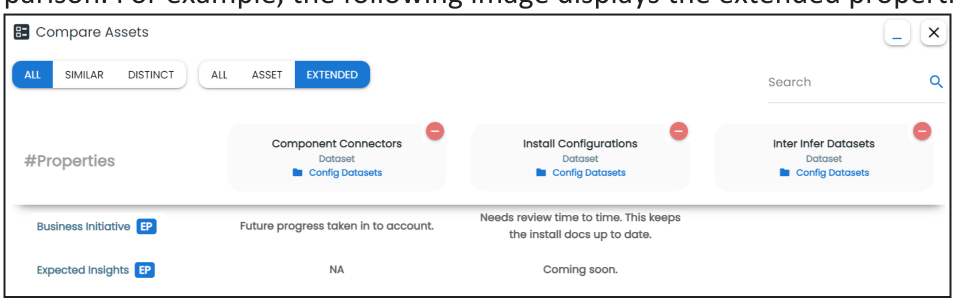
Asset

Use this option to view only the asset properties of the assets in comparison. For example, the following image displays all the asset properties.



Extended

Use this option to view only the extended properties of the assets in comparison. For example, the following image displays the extended properties.



Moving Marketplace Assets

You can move marketplace assets from one catalog to another and preserve catalog hierarchy while moving them.

For example, to move datasets, follow these steps:

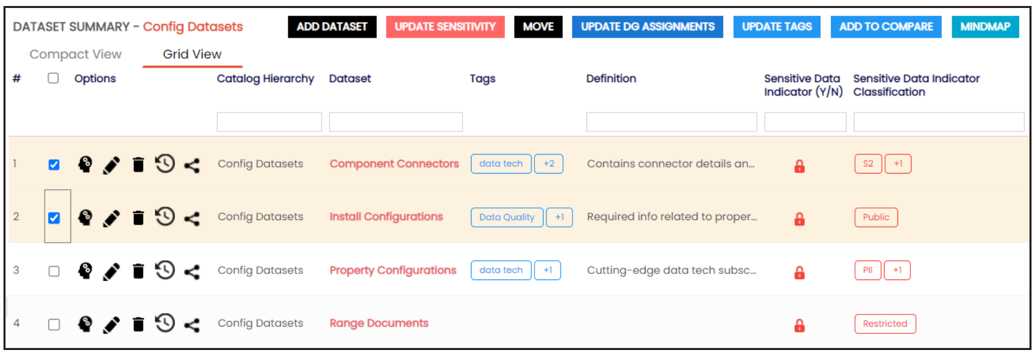
1. In the **Asset Workspace** pane, click the required catalog.

   By default, assets appear in the Compact View.

2. Click the **Grid View** tab.

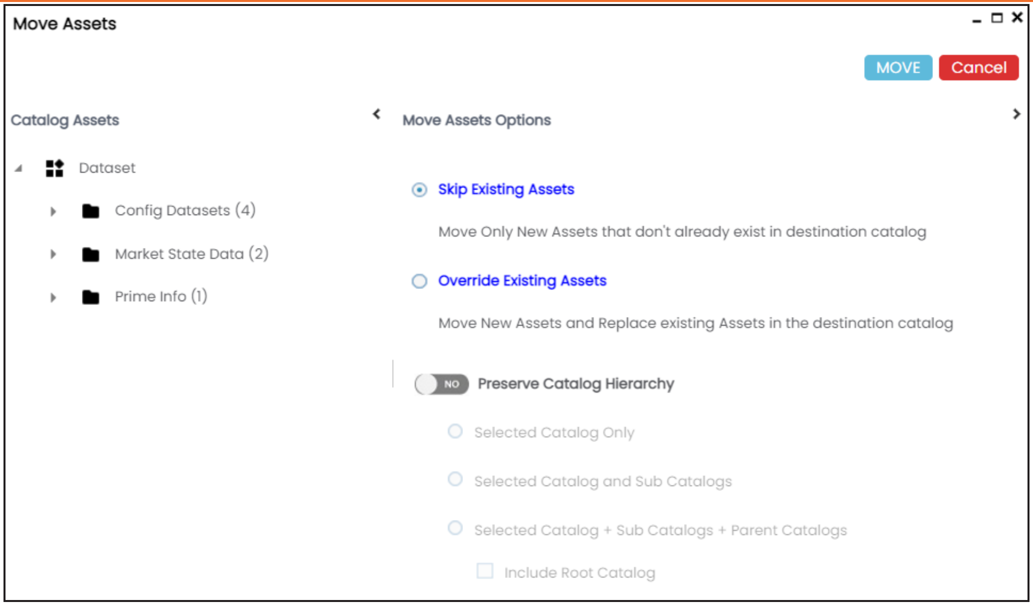
   The list of datasets in the catalog appears.

3. Select the required rows or use the check box at the top to select all the rows.



4. Click **Move**.

   The Move Assets page appears.



5. In the **Catalog Assets** pane, select a destination catalog.
6. In the **Move Assets Options** pane, use the following options:

Skip Existing Assets

Use this option to move only those assets that do not exist in the destination catalog.

Override Existing Assets

Use this option to move new business terms and replace any existing ones in the destination catalog.

Preserve Catalog Hierarchy

Switch **Preserve Catalog Hierarchy** to **Yes** to enable options for preserving catalog hierarchy.

- **Selected Catalog only**: Use this option to move only the selected source catalog under the destination catalog.
- **Selected Catalog and Sub Catalogs**: Use this option to move the source catalog and its sub-catalogs under the destination catalog.

- **Selected Catalog + Sub Catalogs + Parent Catalogs**: Use this option to move the source catalog, its sub-catalogs, and its parent catalogs under the destination catalog.
- **Include Root Catalog**: This option is enabled only when you select the **Selected Catalog + Sub Catalogs + Parent Catalogs** option. Use this option to move the root catalog of the source catalog under the destination catalog.

7. Click **Move**.
   The datasets are moved to the selected catalog.

Similarly, you can move other default and user defined marketplace assets from one catalog to another.

Setting Up Associations using Qualifiers

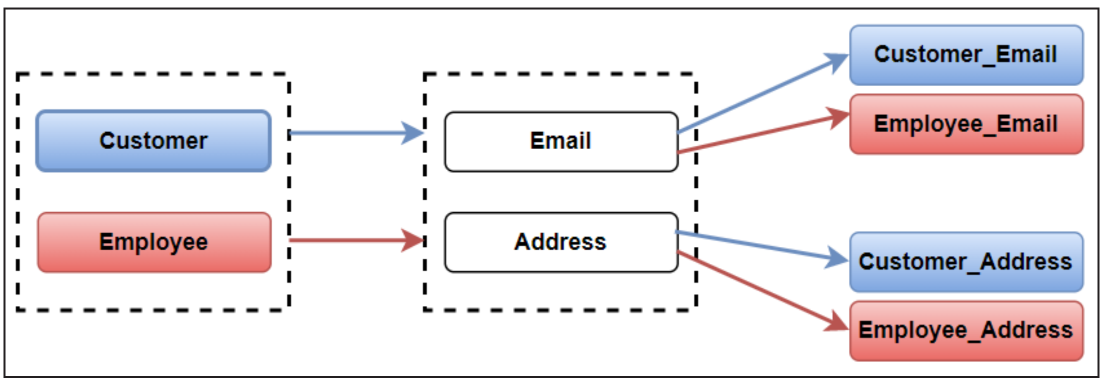
You can associate marketplace assets based on a unique qualifier. A qualifier displays associations that are uniquely identified by a marketplace asset in a mind map. You can also create multiple levels of associations that are unique for a marketplace asset.

This topic walks you through the steps to create associations based on a unique qualifier for a Business Term using an example.

This example creates associations datasets in two parts:

- Datasets, Customer and Employee are associated with respective assets, such as Email and Address.
- Datasets, Email and Address are associated with relevant assets using Customer and Employee as qualifiers.

The following diagram shows how assets are associated.



In this diagram:

1. Customer information (customer's email and address) is associated with dataset, Customer, using it as a qualifier.
2. Employee information (employee’s email and address) is associated with the dataset, Employee, using it as a qualifier.

As a result, when you view mind map of either of the datasets (Customer or Employee) with the qualifier option enabled, only the associations related to Customer or Employee are displayed. For more information on mind map, refer to the Viewing Mind Maps topic.

Similarly, you can set up associations for all the business and technical assets.

> For the qualifier option to function as intended, we recommend that you follow the example in this topic to set up associations.

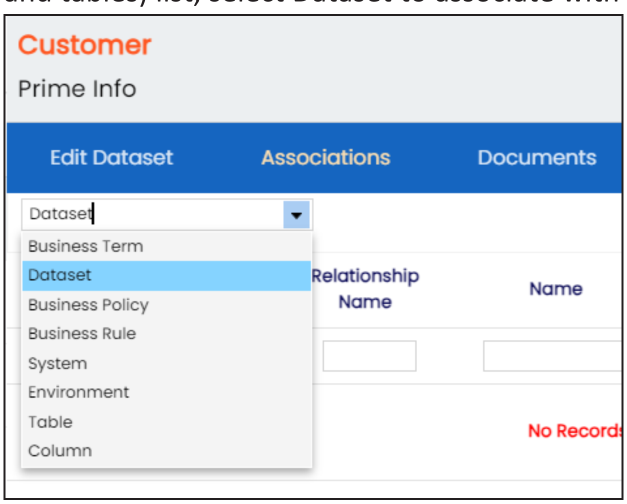
To set up associations for datasets (Customer and Employee) using a qualifier, go to **Application Menu** > **Data Marketplace** > **Explore**. Then, set up associations as follows:

- Associating Customer as a Unique Qualifier
- Associating Employee as a Unique Qualifier

Associating Customer as a Unique Qualifier

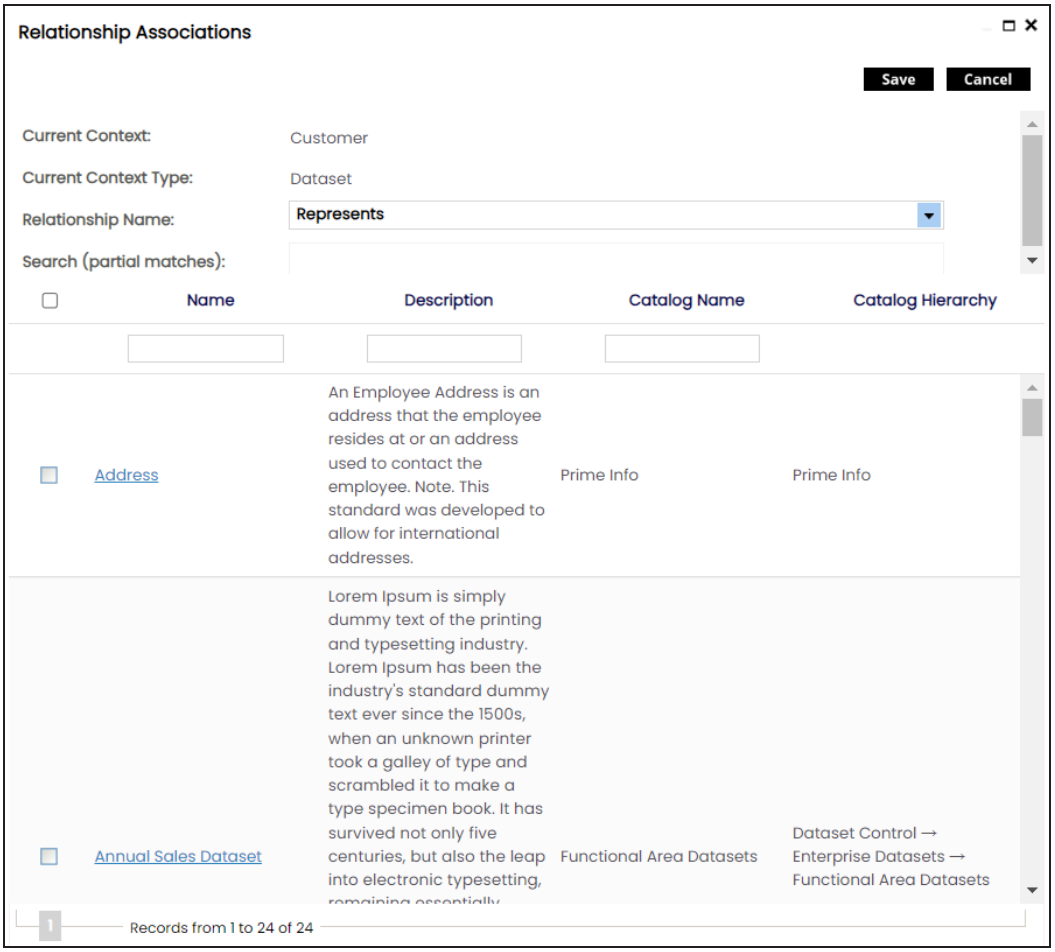
To define associations for Customer based on the diagram explained above, and use it as a unique qualifier for its associations, follow these steps:

1. On the **Compact View** tab, on customer card, click .
   Alternatively, on the **Grid View** tab, under the **Options** column, click . Then, click **Associations**.
   The Associations tab opens in edit mode.
2. In the asset type (business policies, business terms, columns, environments, dataset, and tables) list, select Dataset to associate with the dataset, Customer.



3. Click +.

   The Relationship Associations page appears. Based on the asset type that you select, it displays a list of available assets.

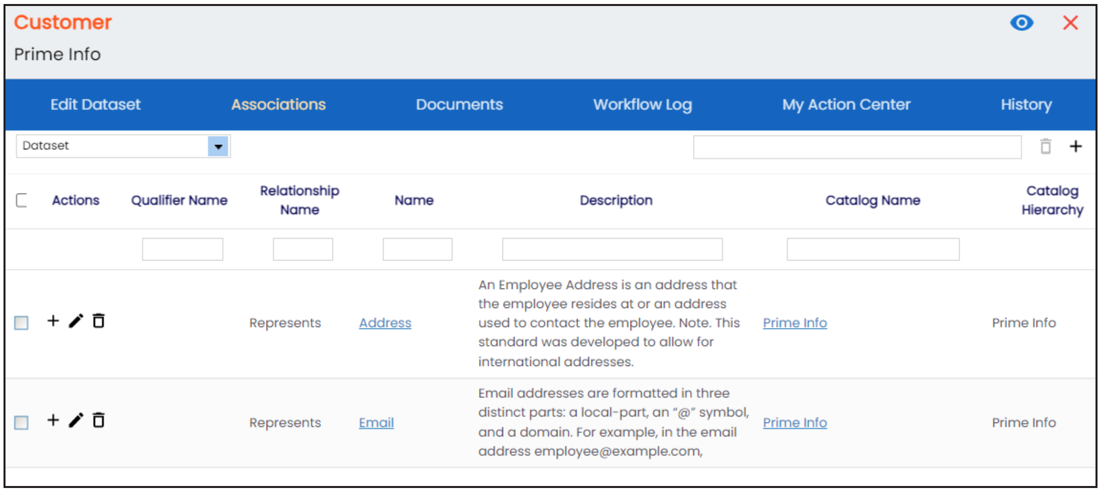


4. Select the assets, Email and Address, to associate with Customer.

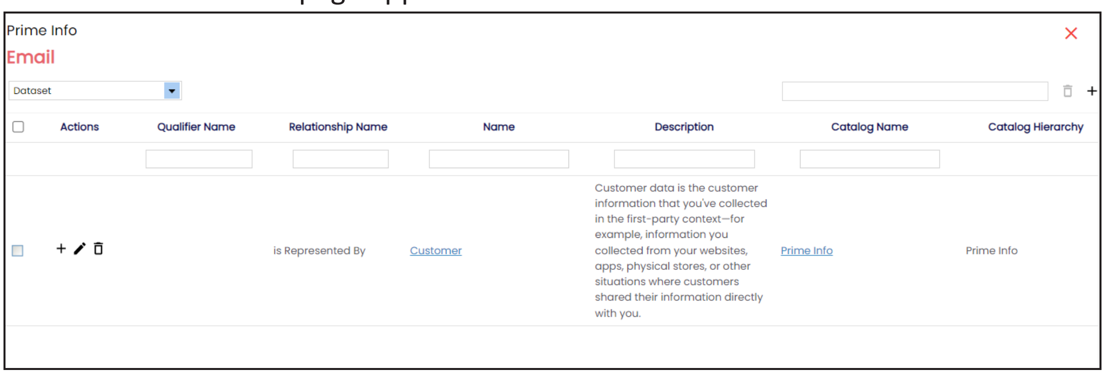
   If you know the asset name, use the Search (partial matches) field to look up for it

5. Click **Save**.

   Email and Address are associated with the Customer and added to its list of associations.



6. For Email, under the **Actions** column, click + to associate it with other assets using Customer as a qualifier.
   The asset associations page appears.

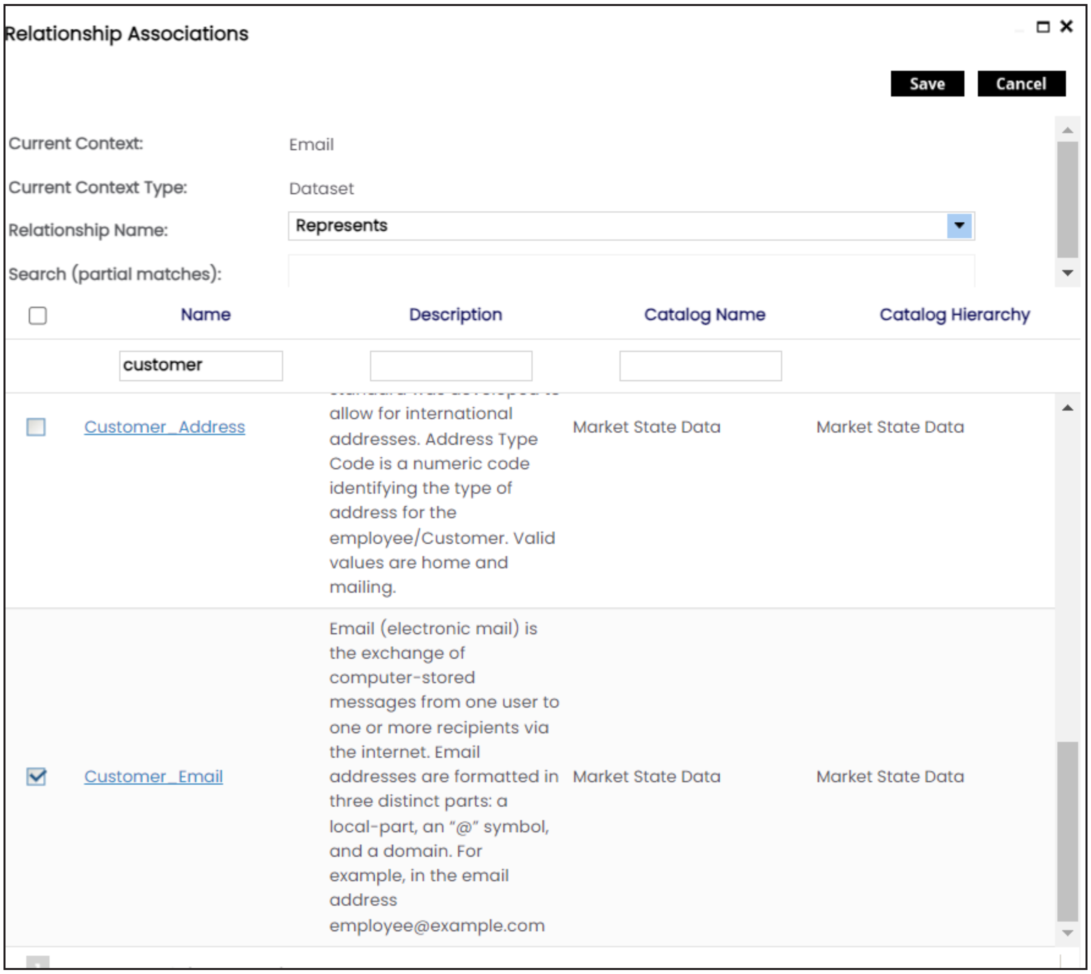


   On the relationship association page, select Dataset from the asset type list to associate with the dataset Email using Customer as a qualifier.

7. In the asset type (business policies, business terms, columns, environments, dataset, and tables) list, select Dataset to associate with the dataset Email using Customer as a qualifier.

8. Click + on the top-right corner.
   The Relationship Associations page appears.

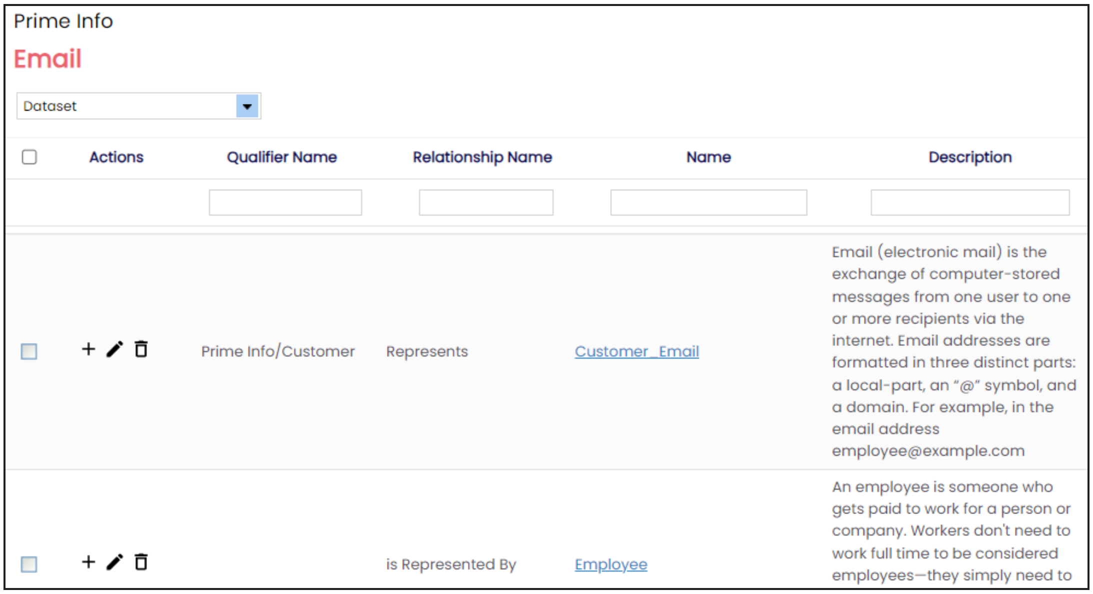
9. Select Customer_Email to associate with Email, using Customer as a qualifier.



10. Click **Save**.

    Customer_Email is associated with Email using Customer as a qualifier.

    Once the Customer_Email is associated with Email, the **Qualifier Name** column displays Customer as a unique qualifier for the asset.



Prime Info

Email

Dataset

	Actions	Qualifier Name	Relationship Name	Name	Description
	+ ✎ 🗑	Prime Info/Customer	Represents	Customer_Email	Email (electronic mail) is the exchange of computer-stored messages from one user to one or more recipients via the internet. Email addresses are formatted in three distinct parts: a local-part, an "@" symbol, and a domain. For example, in the email address employee@example.com
	+ ✎ 🗑		is Represented By	Employee	An employee is someone who gets paid to work for a person or company. Workers don't need to work full time to be considered employees—they simply need to

11. Repeat steps 6 to 10 to associate Customer_Address with Address using Customer as a qualifier.
    Once the Customer_Address is associated with Address, the **Qualifier Name** column displays Customer as a unique qualifier for the asset.

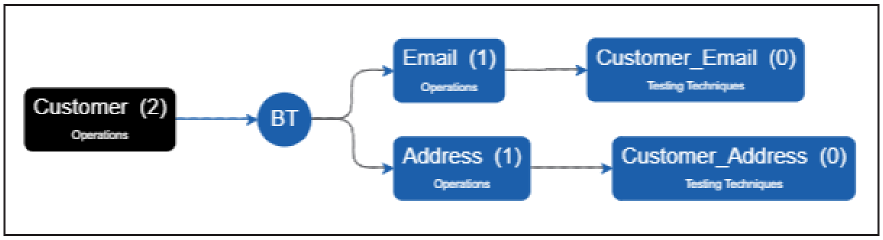
Associating Employee as a Unique Qualifier

Similarly, you can define associations for Employee based on the diagram explained above and use it as a unique qualifier for its associations. To create association based on the diagram, follow the steps in Association Customer Using a Qualifier section.

Once you have created associations, you can view them in mind map. Use the **Show Qualified View** option in the mind map to view the associations only based on a qualifier. In this case, Customer.

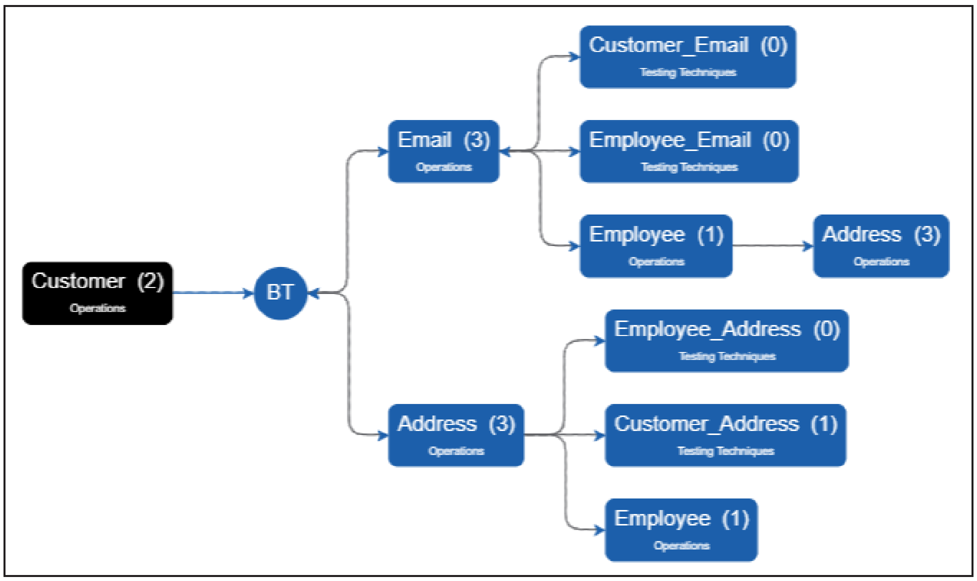
To view mind map, in Compact View, on the Customer card, click . Then, select the **Show Qualified View** option. Selecting this option displays only those associations that are based on the unique qualifier, Customer.

- **With Show Qualified View option**: View associations based on Customer as a qualifier.



Similarly, you can view associations in a mind map using Employee as a qualifier.

- **Without Show Qualified View option**: View all associations.



Similarly, you can view associations in a mind map for the business term Employee.

Tagging Marketplace Assets

You can tag marketplace assets in bulk via:

- Compact View:
  Use this option when you want to tag marketplace assets and their associated assets.
- Grid view:
  Use this option when you want to tag a marketplace asset of an asset type.

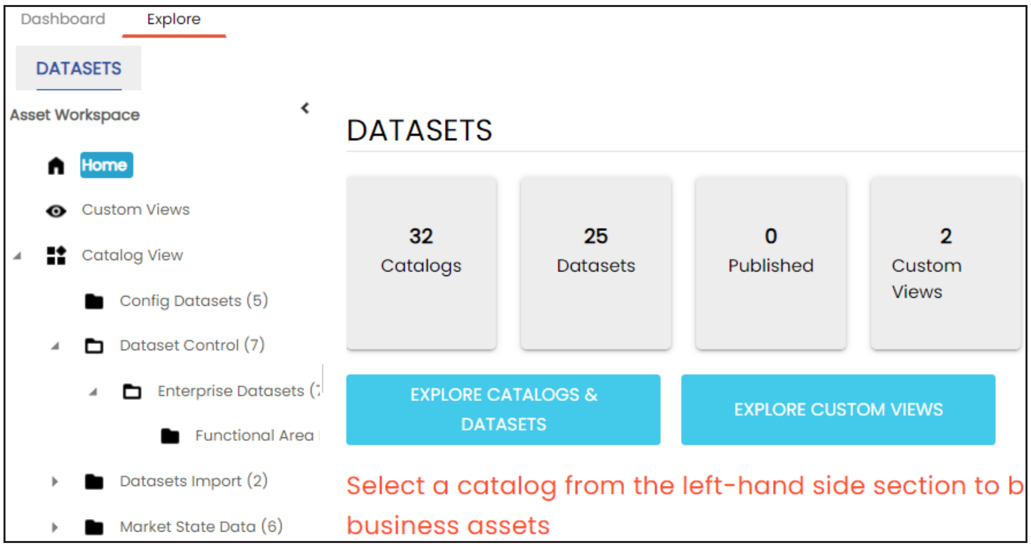
Tagging Marketplace Assets-Compact View

On the Compact View tab, you can tag an asset and its associated assets in bulk.

To tag marketplace assets, follow these steps:

1. On the asset browser, click a <Marketplace_Asset_Type>.

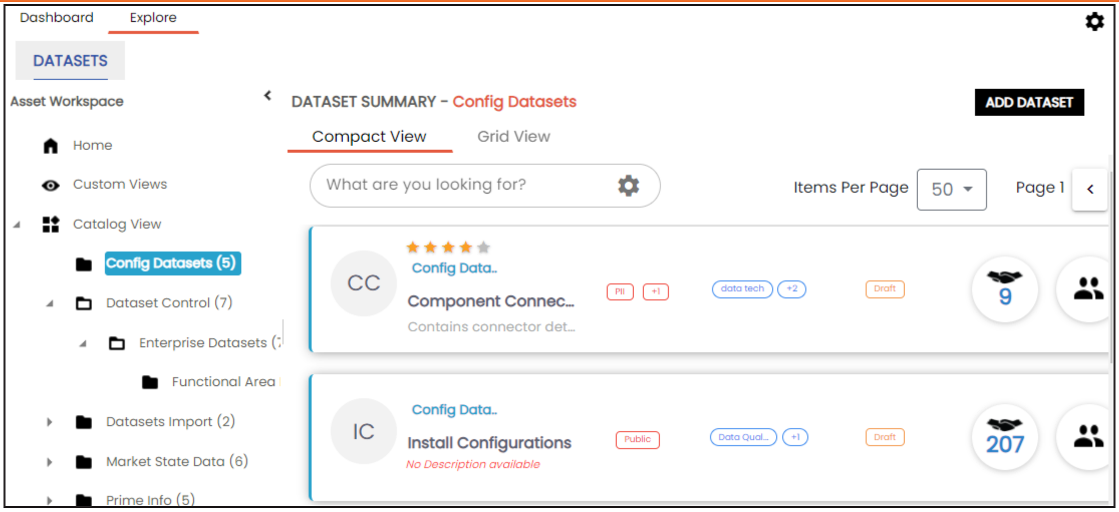
   The Asset Workspace switches to the marketplace asset view. For example, if you click Datasets on the asset browser, the Asset Workspace switches to the datasets view.

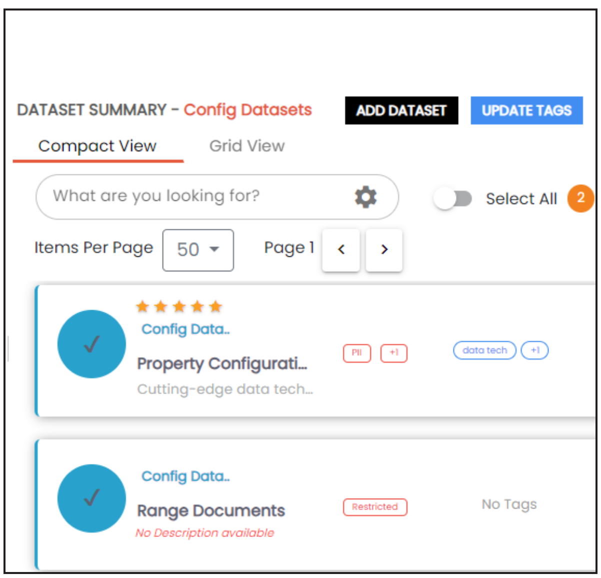
2. In the Asset Workspace, select the required catalog.
   For example, select Config Datasets.

   The Compact View tab displays datasets in the Config Datasets catalog.

Updating Tags-Compact View



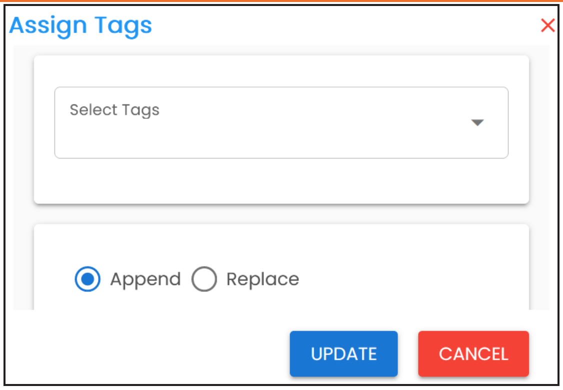
3. Select the required marketplace asset.
   The Update Tags button is enabled.
   For example, select Property Configurations and Range Documents.
   To select all datasets, you can switch the **Select All** option to Yes.



4. Click **Update Tags**.

   The Assign Tags page appears.

Updating Tags-Compact View



5. Click **Select Tags** and select tags from the suggestions that appear.
   The list contains tags created in the Enterprise Tags module; based on the configured scope.

   > You can also create a tag by typing a tag name in the Select Tags box and then pressing Enter.

6. Use the following options:

   Append

   Use this option to add tags to the existing list of tags.

   Replace

   Use this option to replace existing tags.

7. Click **Update**.

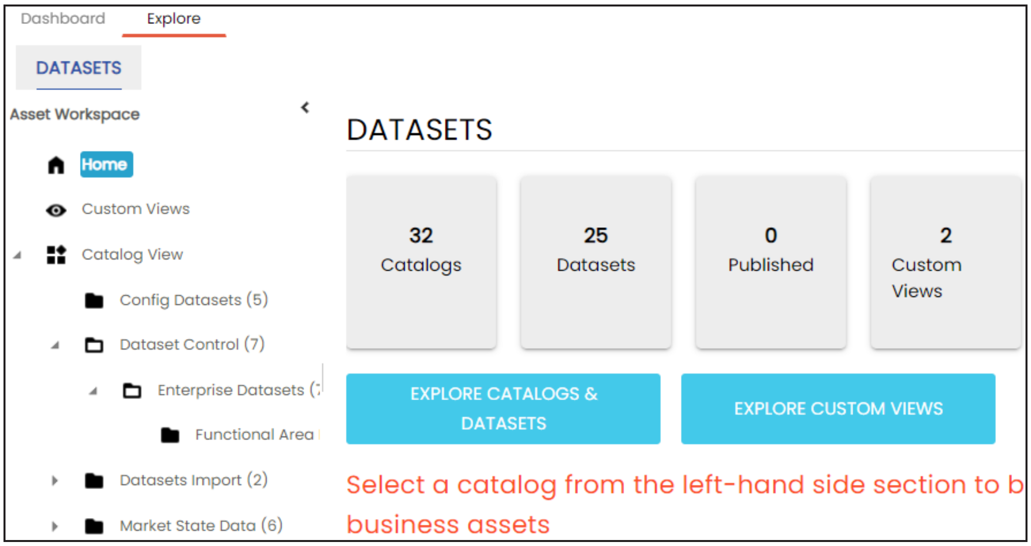
   The selected marketplace assets and their associated assets are tagged.

Tagging Marketplace Assets-Grid View

Ont he Grid View tab, you can tag marketplace assets in bulk.

To tag marketplace assets, follow these steps:

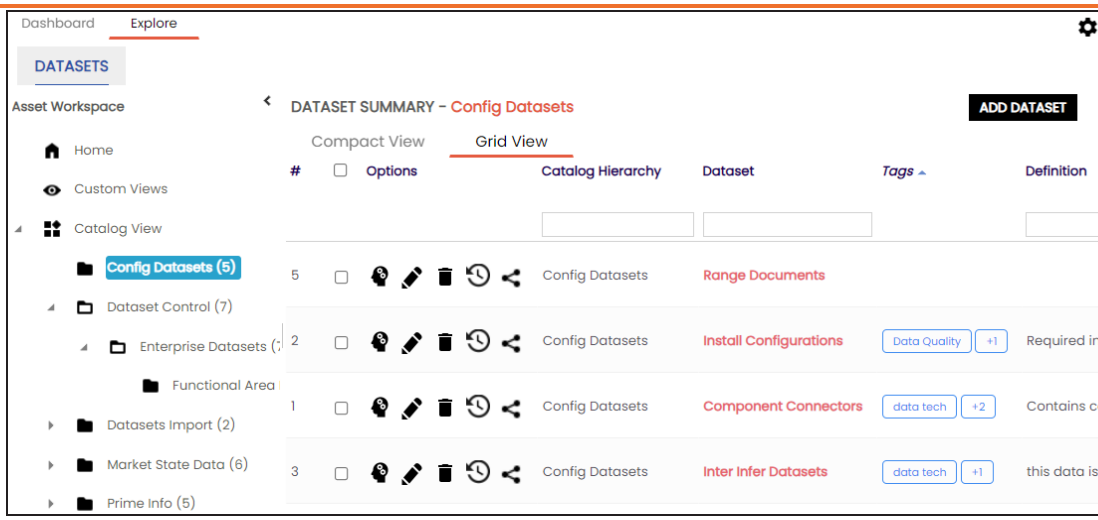
1. On the asset browser, click a <Marketplace_Asset_Type>.
   The Asset Workspace switches to the marketplace asset view. For example, if you click Datasets on the asset browser, the Asset Workspace switches to the datasets view.



2. In the Asset Workspace, select the required catalog.
   For example, select Config Datasets.
3. Under **<Marketplace_Asset> Summary**, click the **Grid View** tab.

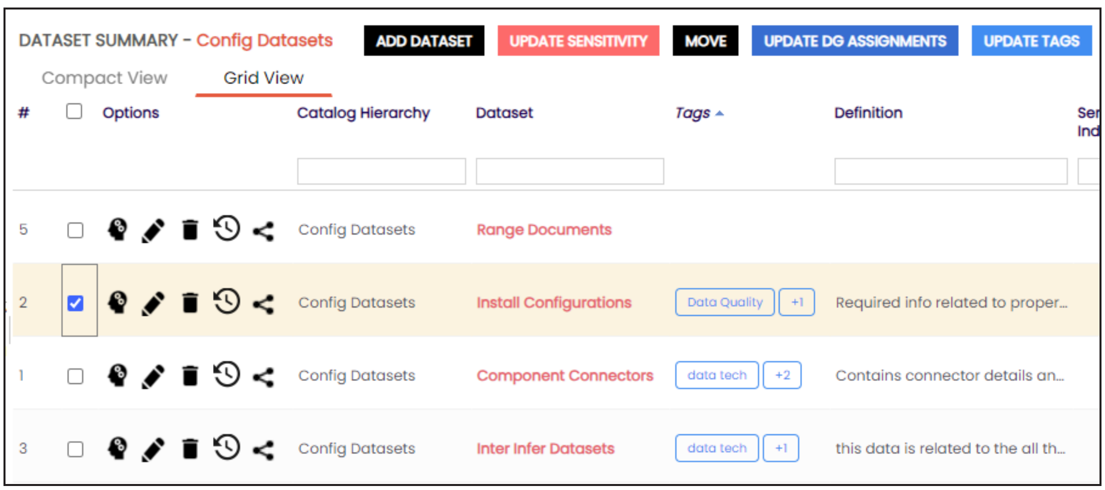
   The grid view for the marketplace asset appears. For example, the following image shows the grid view for Datasets.

Updating Tags-Grid View



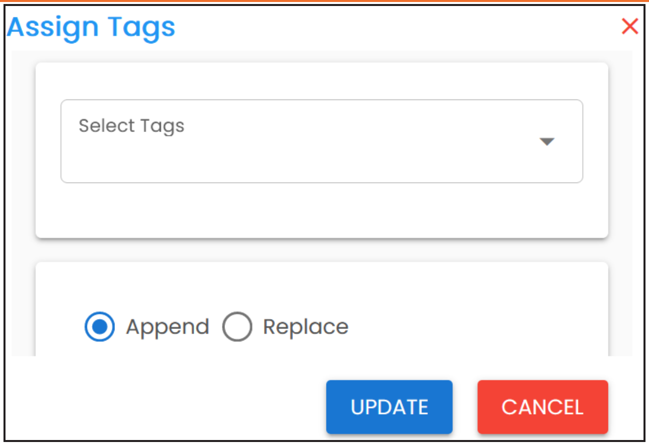
4. Select the required marketplace asset.
   The Update Tags button is enabled.
   For example, select Install Configurations.

   To select all the listed marketplace assets, use the check box at the top of the grid.



5. Click **Update Tags**.

   The Assign Tags page appears.



6. Click **Select Tags** and select tags from the suggestions that appear.
   The list contains tags created in the Enterprise Tags module; based on the configured scope.

   > You can also create a tag by typing a tag name in the Select Tags box and then pressing Enter.

7. Use the following options:

   Append

   Use this option to add new tags to the existing marketplace assets.

   Replace

   Use this option to replace existing tags.

8. Click **Update**.

   The selected marketplace assets are tagged.

Updating Sensitivity in Bulk

Updating sensitivity involves marking the marketplace assets sensitive with an appropriate sensitive data indicator classification. Although you can set up sensitivity of a marketplace asset while creating it, you can also update sensitivity of assets in bulk using:

- Mind map:
  Use this option when you want to update sensitivity of associated marketplace, business, and technical assets.
- Grid view:
  Use this option when you want to update sensitivity of an asset type.

Before updating sensitivity of assets, ensure that you enable sensitivity for the asset type. For more information on enabling sensitivity for an asset type, refer to the Configuring Asset Details topic.

You can configure the email notifications to be sent whenever sensitivity is updated in bulk. For more information on configuring the notification, refer to the Configuring Sensitivity Update Notifications topic.

Updating Sensitivity-Mind Map

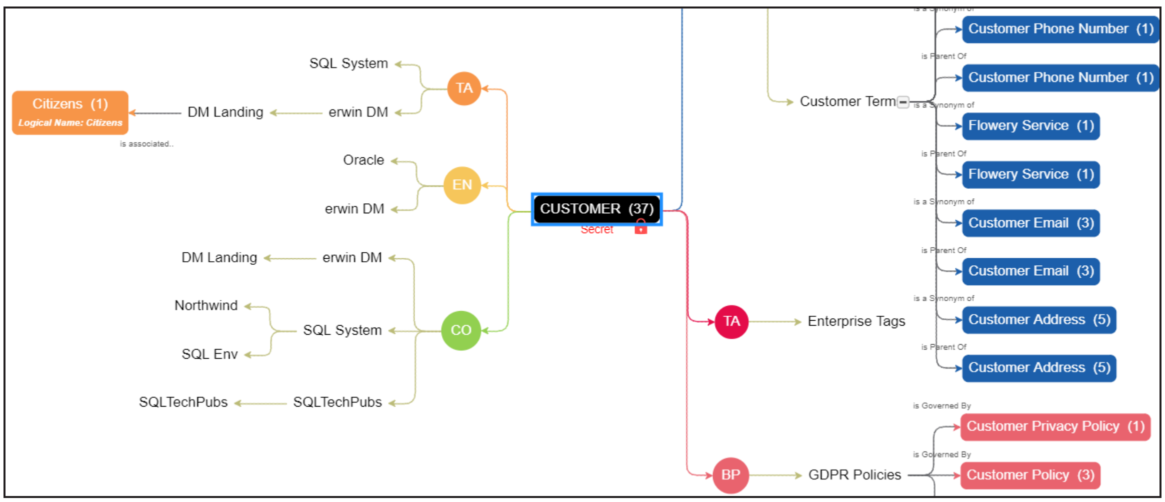
You can update sensitivity of an asset and its associated assets in bulk through a mind map. Associated assets are of three types, technical, business, and marketplace assets (datasets). Technical assets refer to columns, tables, environments, and systems. Business assets refer to business terms, business policies, business rules, and other business assets defined in the Business Glossary Manager & Data Marketplace Settings.

Selected Assets

To update sensitivity of an asset, follow these steps:

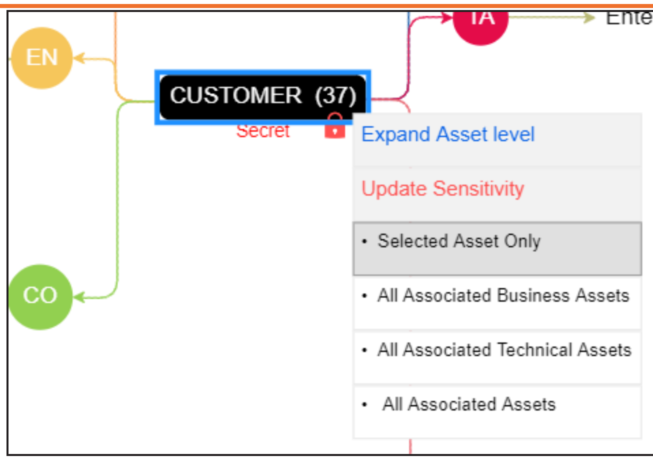
1. On the mind map, click ⌃⌄ to expand diagram.

   The mind map appears in its expanded form.



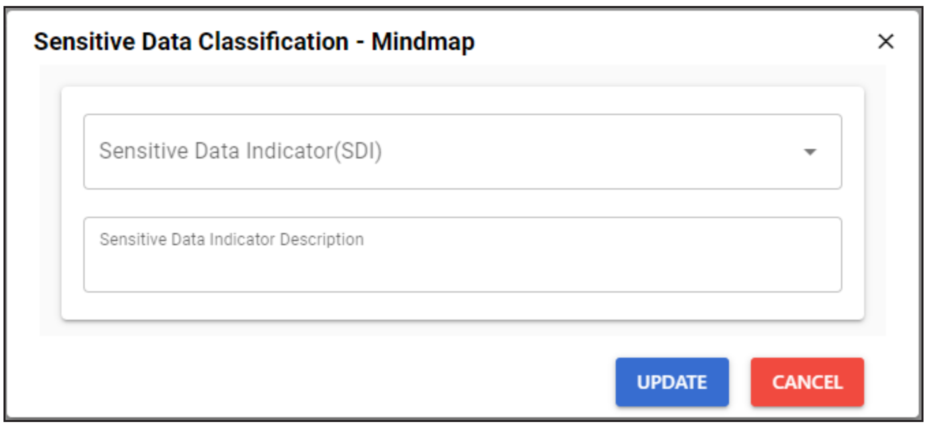
2. Right-click the required asset.

   The options available for the asset appear.



3. Click **Selected Asset Only**.

   The Sensitive Data Classification - Mindmap page appears.



4. In the drop-down list, select sensitivity data indicator (SDI) classification. You can add multiple classifications to the asset type.
5. In the **Sensitive Data Indicator Description** field, enter comments or description of the sensitivity indicator.
6. Click **Update**.

   The sensitivity of the assets is updated based on the options you selected.

Associated Assets

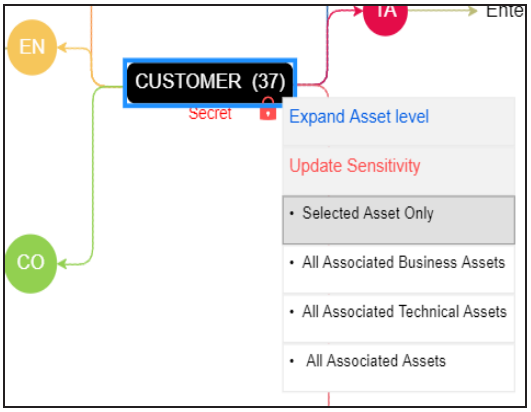
You can update sensitivity of associated assets in bulk through a mind map.

Updating Sensitivity-Mind Map

To update sensitivity of associated assets through mind maps, follow these steps:

1. On the mind map, right-click the required asset.

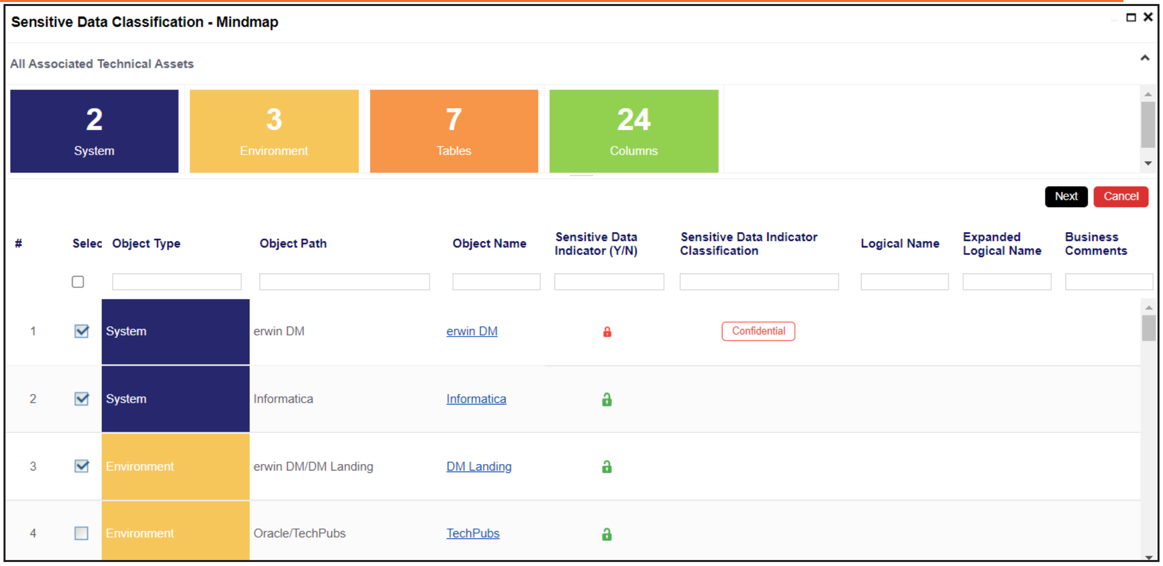
   The options available for the asset appear.

2. Click any one of the following:

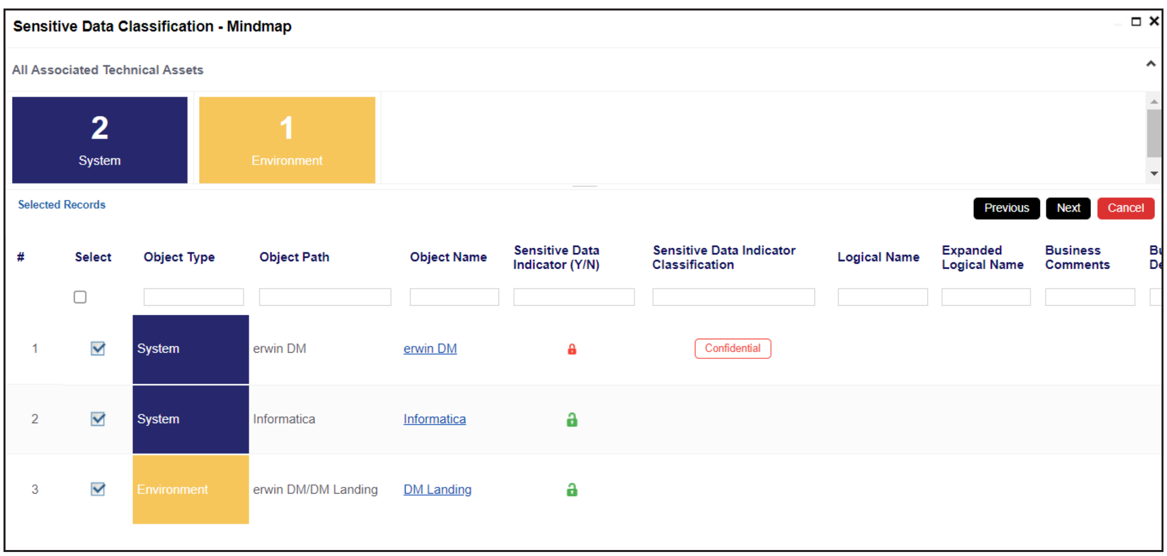
   - **All Associated Business Assets**: Use this option to update sensitivity of associated business assets.
   - **All Associated Technical Assets**: Use this option to update sensitivity of associated technical assets.
   - **All Associated Assets**: Use this option to update sensitivity of associated business and technical assets.

   For example, if you click All Associated Technical Assets, a list of all associated technical assets appear.



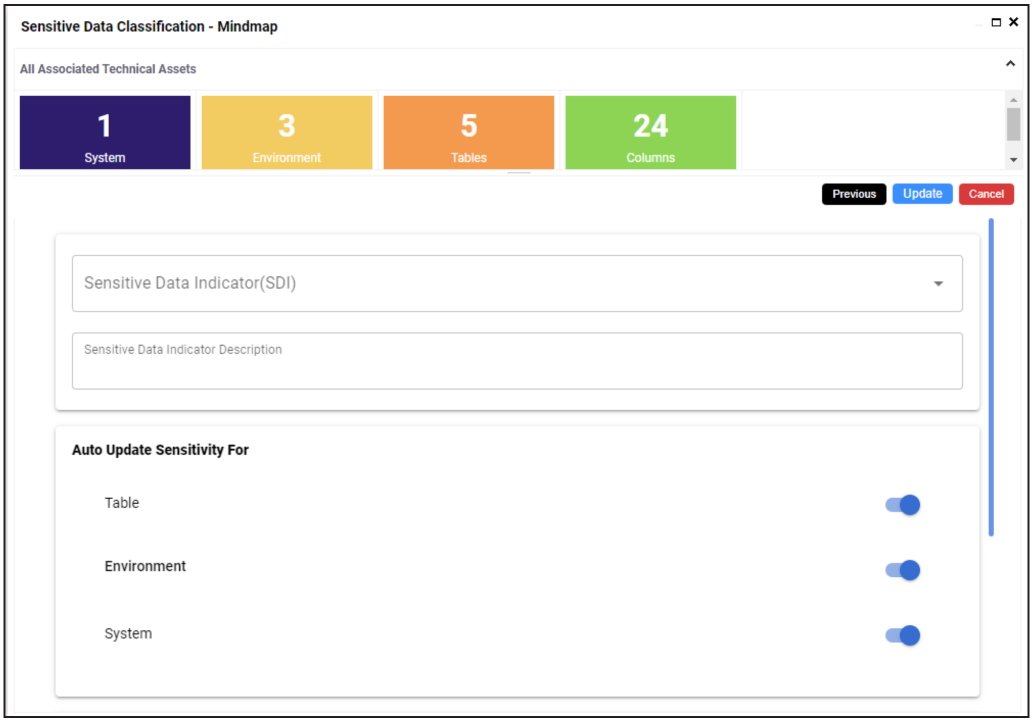
3. Select the required assets and click **Next**.

   The Selected Records page appears. You can verify the selected assets and clear the check box if required.



4. Click **Next**.

The Auto Update Sensitivity For section does not appear for business assets.



5. Enter or select appropriate values in the fields. Refer to the table below for field descriptions.

Field Name	Description
Sensitive Data Indicator (SDI)	Specifies the SDI classification of the selected asset. Also, you can add multiple classifications to the selected columns. For example, PII. For more information on configuring SDI classifications, refer to the Configuring Sensitivity Classifications topic.
Sensitive Data Indicator Description	Specifies the description of the SDI classification. For example, This classification indicates that the data contains personal identifiable information. Use this for data such as, address or social security number.

Field Name	Description
Auto Update Sensitivity For	Specifies whether sensitivity is applicable to: ▪ System: Switch the **System** option on to apply sensitivity to all the systems containing the assets. ▪ Environment: Switch the **Environment** option on to apply sensitivity to all the environments containing the assets. ▪ Table: Switch the **Table** option on to apply sensitivity to the tables containing the assets.
Asset Update Options	Specifies whether sensitivity is applicable to: ▪ **Unclassified Only**: Click Unclassified Only to apply sensitivity to assets that are not marked sensitive. ▪ **All Classified Only**: Click All Classified Only to apply sensitivity to assets that are marked sensitive. ▪ **All Classified And Unclassified**: Click All Classified And Unclassified to apply sensitivity to both the types of assets, sensitive or not sensitive.

6. Click **Update**.

   The sensitivity of the assets is updated based on the options you selected.

Updating Sensitivity-Grid View

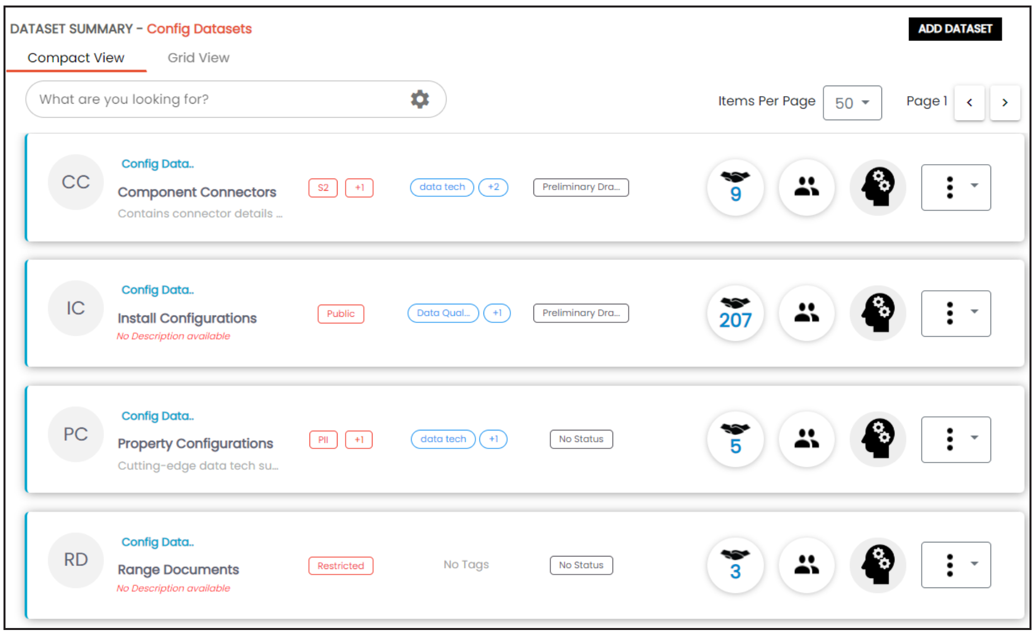
You can view a list of marketplace assets under the Compact View and Grid View tab. On the Grid View tab, you can update sensitivity of the marketplace assets in bulk.

This topic walks you through updating sensitivity of datasets. Similarly, you can updated sensitivity of other marketplace assets in bulk.

To update sensitivity of datasets, follow these steps:

1. In the Business Asset List, click a <Business_Asset_Name>.

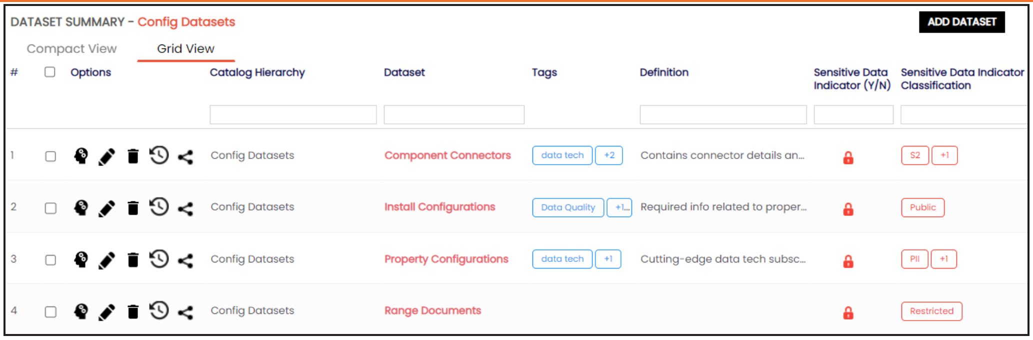
   The Asset Workspace switches to the business assets view. For example, if you click Business Terms in the business asset list, the Asset Workspace switches to the business terms view.

2. Under **Datasets Summary**, click the **Grid View** tab.

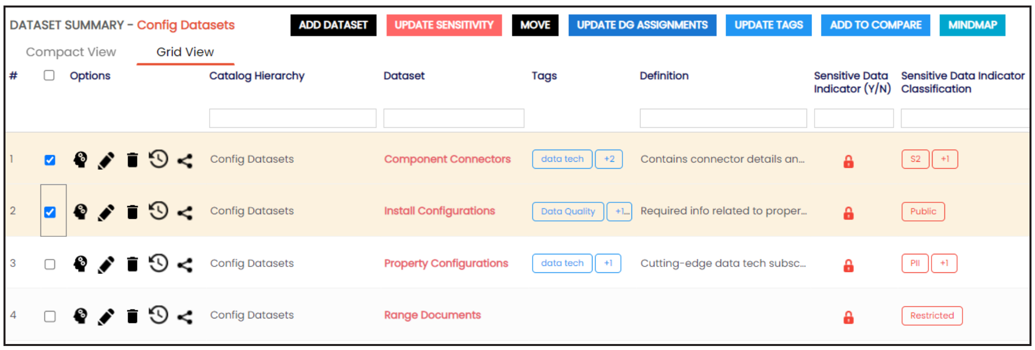
   The grid view for the asset appears.

Updating Sensitivity-Grid View



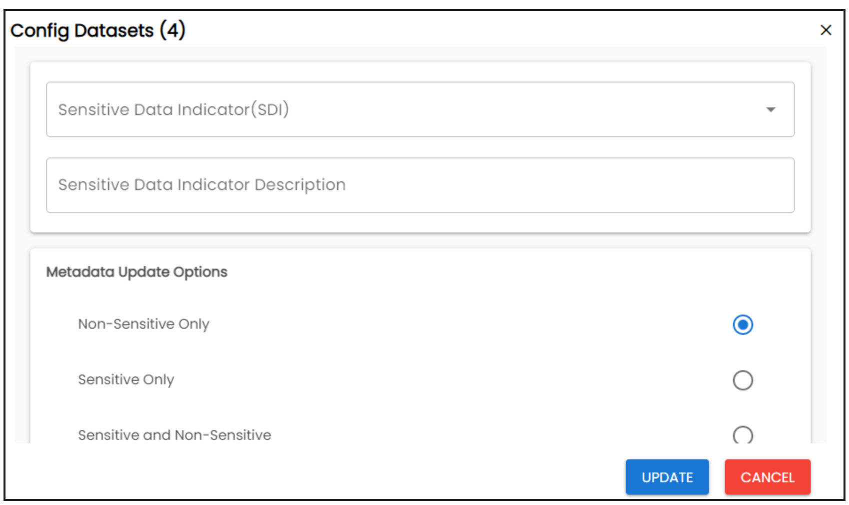
3. Select the required assets.

   You can use the check box at the top to select all the assets.



4. Click **Update Sensitivity**.

   The datasets update page appears.



5. Enter or select appropriate values in the fields. Refer to the following table for field descriptions.

Field Name	Description
Sensitivity Data Indicator (SDI)	Specifies the sensitivity data indicator (SDI) classification of the selected assets. Also, you can add multiple classifications to the selected columns. For example, PHI. For more information on configuring SDI classifications, refer to the Configuring Sensitivity Classifications topic.
Sensitivity Data Indicator Description	Specifies the description of the SDI classification. For example, This classification indicates that the data contains personal identifiable information. Use this for data such as, address or social security number.
Metadata Update Options	Specifies whether sensitivity applies to: ▪ **Unclassified Only**: Use this option to apply sensitivity to assets that are not marked sensitive. ▪ **All Classified Only**: Use this option to apply sensitivity to assets that are marked sensitive. ▪ **All Classified And Unclassified**: Use this option to apply sensitivity to both the types of assets, sensitive or not sensitive.

6. Click **Update**.

   Sensitivity of the selected assets are updated.

Updating Data Governance Assignments

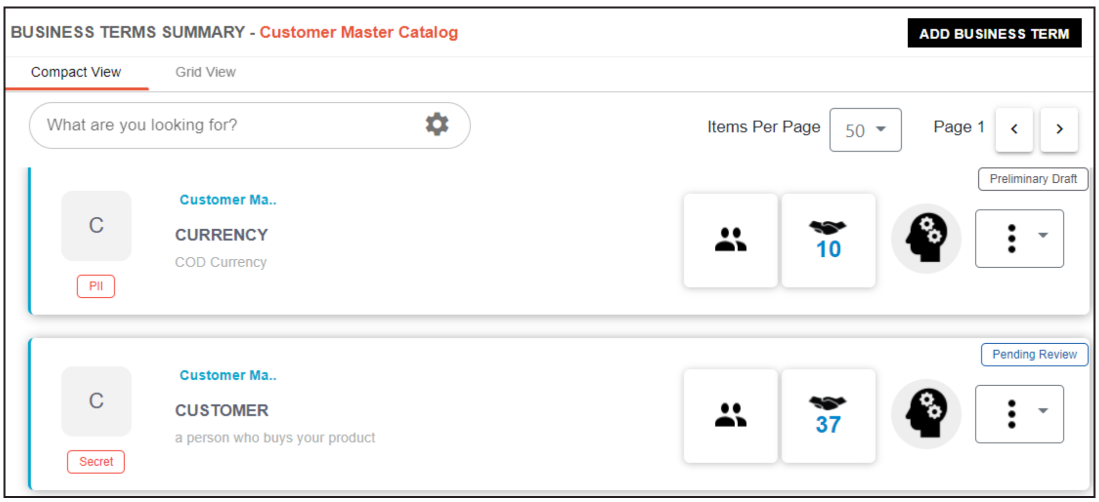
You can update data governance and assign governance responsibilities for marketplace assets to users. The user-list appears as pick list values based on the roles group. Ensure that you assign appropriate roles and users to the catalog containing the marketplace assets.

To update data governance assignments, follow these steps:

1. Go to **Application Menu** > **Data Marketplace** > **Explore**.
   The Dataset Summary page appears. The Asset Workspace displays a list of catalogs corresponding to the asset.

2. In the **Asset Workspace** pane, click a catalog.

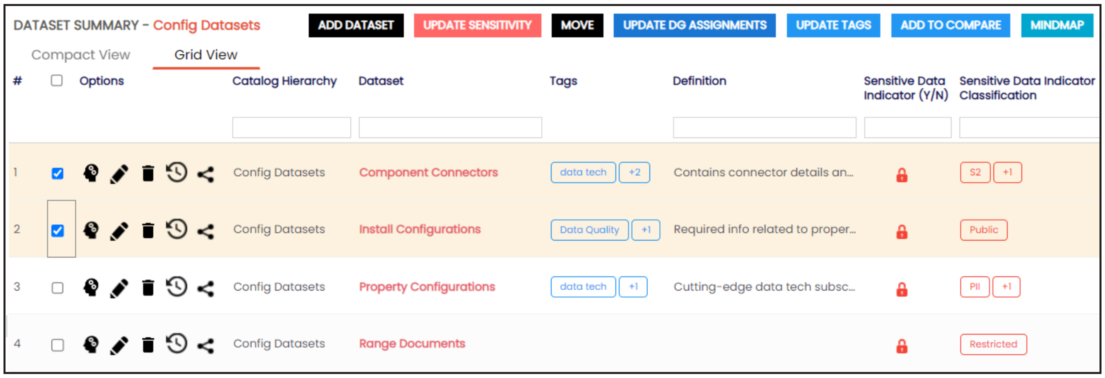
   By default, the Compact View tab appears. It displays the marketplace assets in the catalog.



3. Click the **Grid View** tab.

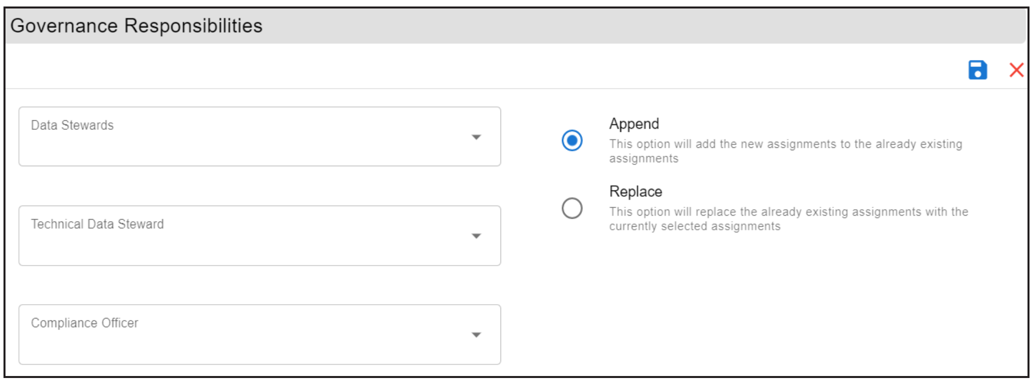
4. Select the required assets.

You can use the check box at the top to select all the assets.



5. Click **Update DG Assignments**.

   The Governance Responsibilities page appears. It displays roles groups based on the roles and users assigned to the catalog.



6. Select the required users for each roles group.
7. Use the following options:

   Append

   Use this option to add new assignments to existing assignments.

   Replace

   Use this option to replace existing assignments.

8. Click .

   The data governance assignment is updated.

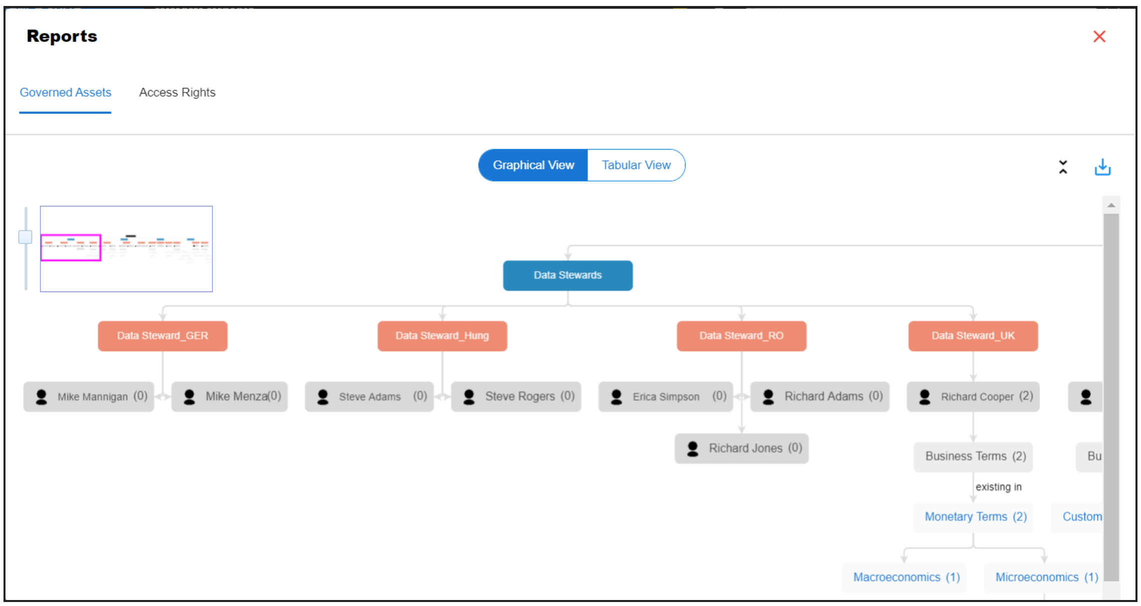
Viewing Access Rights and Data Governance Reports

From the Access to Enterprise Access Rights and Data Governance Documentation Reports page, you can view:

- Access rights
- Data governance reports

To view access rights and data governance reports, click from the top navigation pane.

Reports page appears. From the Reports page, you can view governed assets and access rights. For more information on viewing access rights and data governance reports, see the topics below.

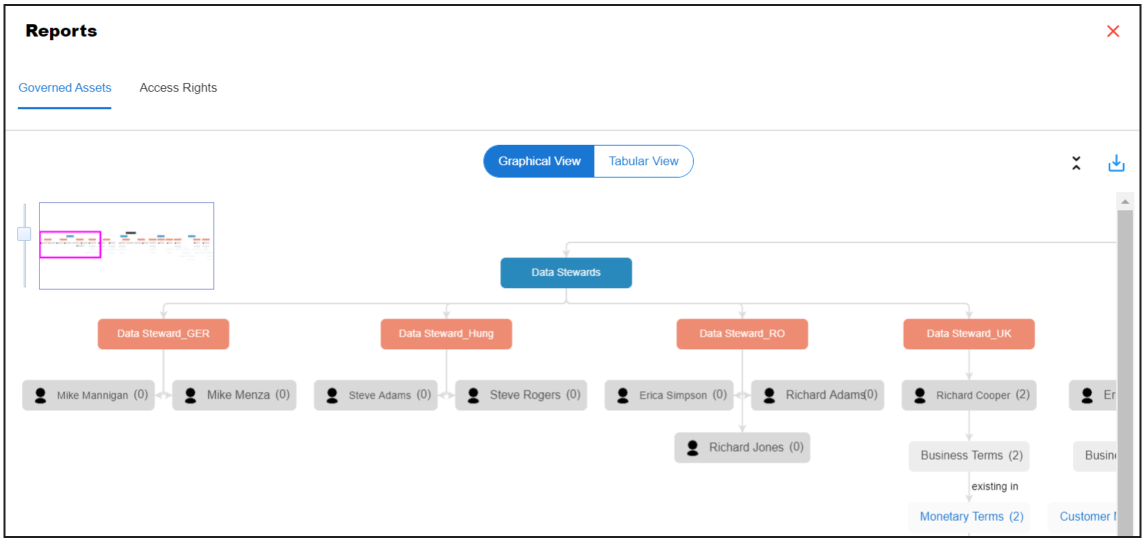


Data Governance Report

A successful data governance program demands an efficient grouping of roles based on the responsibilities. It is also important to assign appropriate users and roles to catalogs and then assign governance responsibilities to marketplace assets. The governance responsibilities report helps you track assignments of these governance responsibilities to the assets in the Data Marketplace.

Viewing Access Rights and Data Governance Reports

To view reports, click the **Governed Assets** tab.



Use the following two views to view reports:

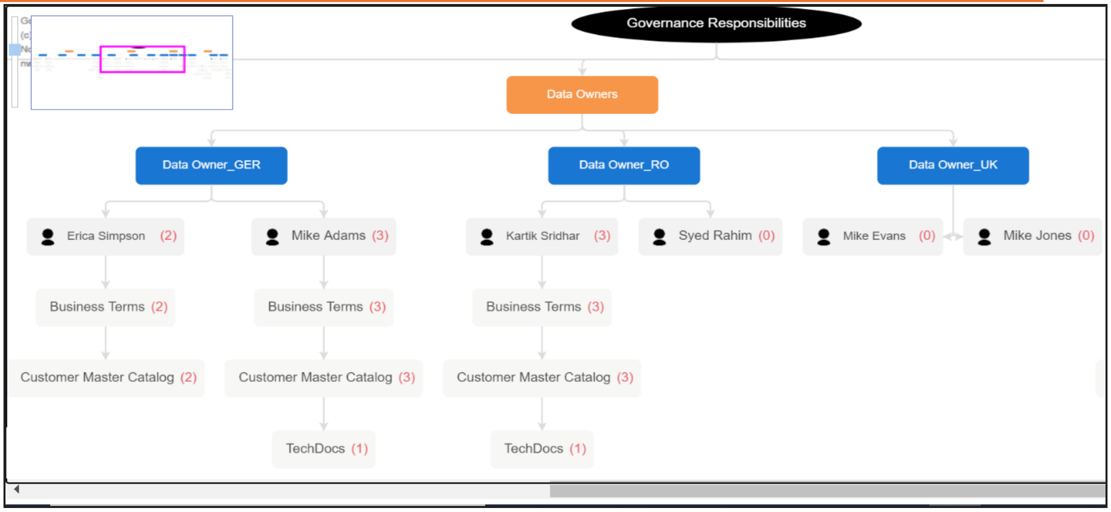
- **Graphical View**:
  The graphical view displays the governance responsibilities in a tree structure.
- **Tabular View**:
  The tabular view displays the governance responsibilities in a grid format.

By default, the graphical view opens.

To view report details in the graphical view, use the following options:

- **Expand/Collapse** ()

  Use this option to switch between the expanded or collapsed view. For example, the report displays the governance responsibilities in the expanded view.



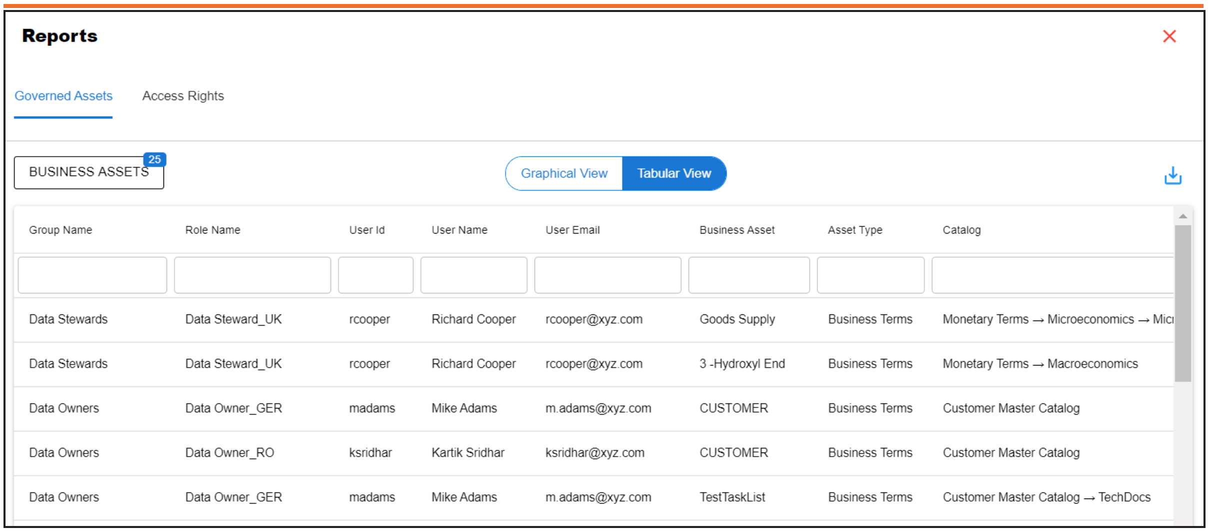
- **Pan View**

  Use this option to focus on a part of the governance responsibilities tree.

- **Export** ()

  Use this option to download the report in the JPG format.

The Tabular View displays governance responsibilities in a grid that includes, roles group, role, user details, asset name, asset type, and catalogs.



To download the report in XLSX format, click .

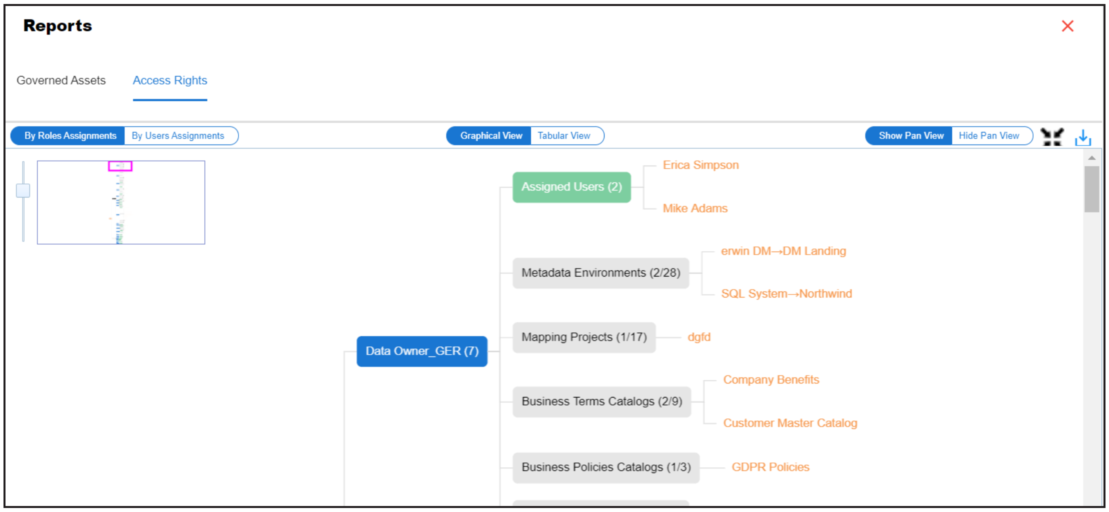
Access Rights

The Access Rights tab displays the roles and user assignments. You can view these assignments in the graphical and tabular views. The graphical view displays the assigned asset types and names in a tree structure that can be expanded. The tabular view displays the assigned asset types and names in a grid format.

To view access rights, follow these steps:

Viewing Access Rights and Data Governance Reports

1. From the **Reports** page, click the **Access Rights** tab.



2. Use the following options:

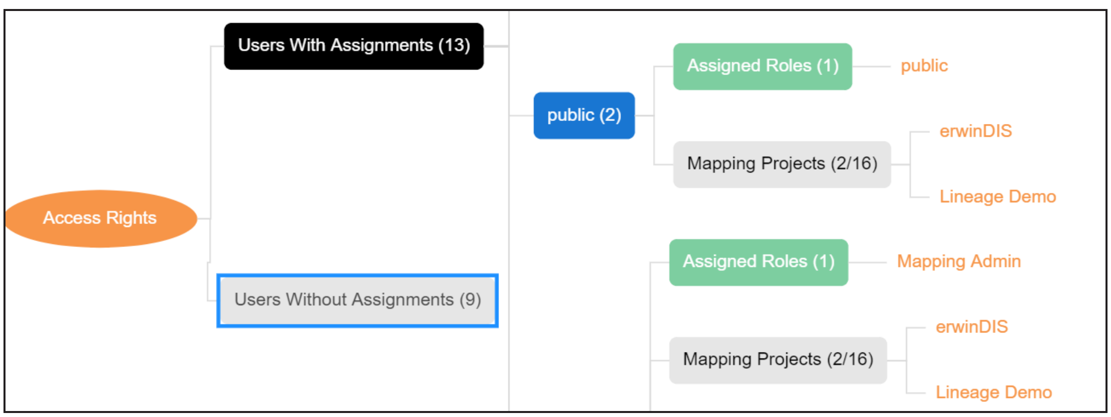
By Roles Assignments/By Users Assignments

Use this option to switch between the roles and user's assignments.

Graphical View/Tabular View

Use this option to switch between the graphical and tabular views.

The graphical view displays the assignments in a tree structure. You can expand the tree to view the asset types and names. For example, the following graphical view displays the users assignment.



Use the following options on the Graphical View:

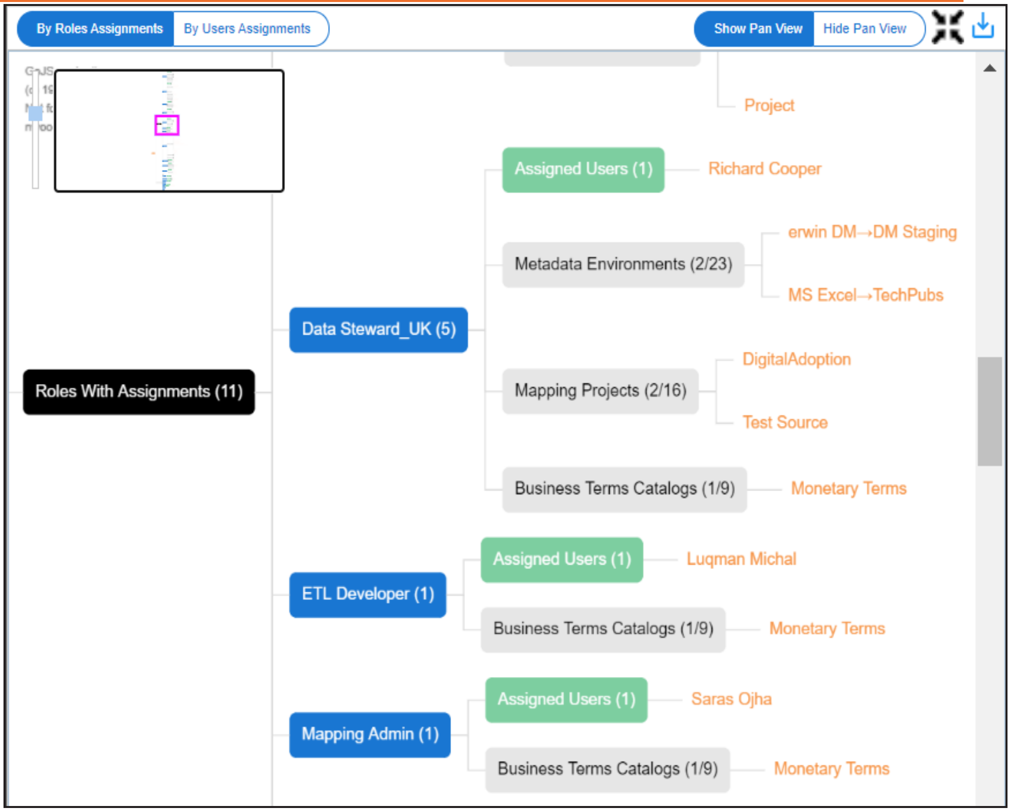
- **Show Pan View/Hide Pan View**

  Use this option to show or hide the pan view. The pan view enables you to navigate across the expanded assignment tree. Use the purple box to move across the tree structure.e

- **Expand/Collapse ()**

  Use this option to switch between the expanded or collapsed view. For example, the following assignment tree appears in the expanded view.



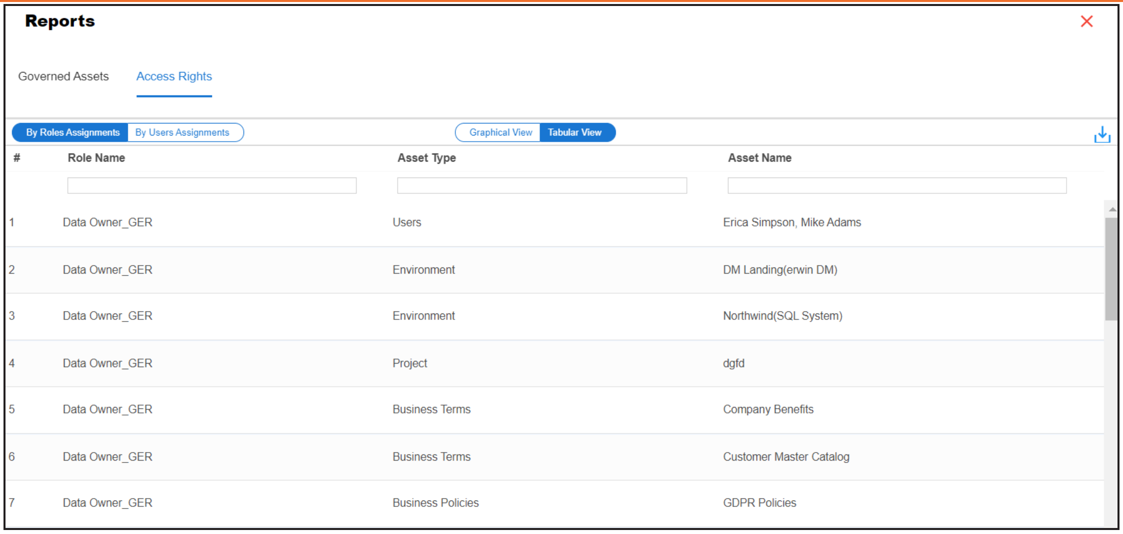
- **Expand Node Level**

  Use this option to expand the assignment tree at the node level. Hover over a node and click the plus (+) icon.

- **Export Image** ()

  Use this option to download the assignment tree in JPG format.

The Tabular View displays the assignment details in a grid format. For example, the following roles assignments are displayed in the grid format.



You can download the assignment details in XLSX format. To download the assignments, click on the **Tabular View**.

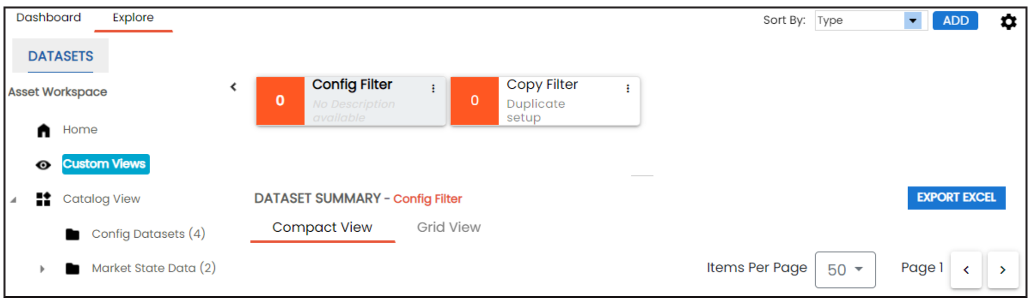
Creating Custom Views

Custom Views provide quick access to marketplace asset data that you access frequently or data that you want to be readily available. You can create custom views for all asset types using criteria sets based on your requirements.

This topic walks you through creating custom views for datasets. Similarly, you can create custom views for other assets.

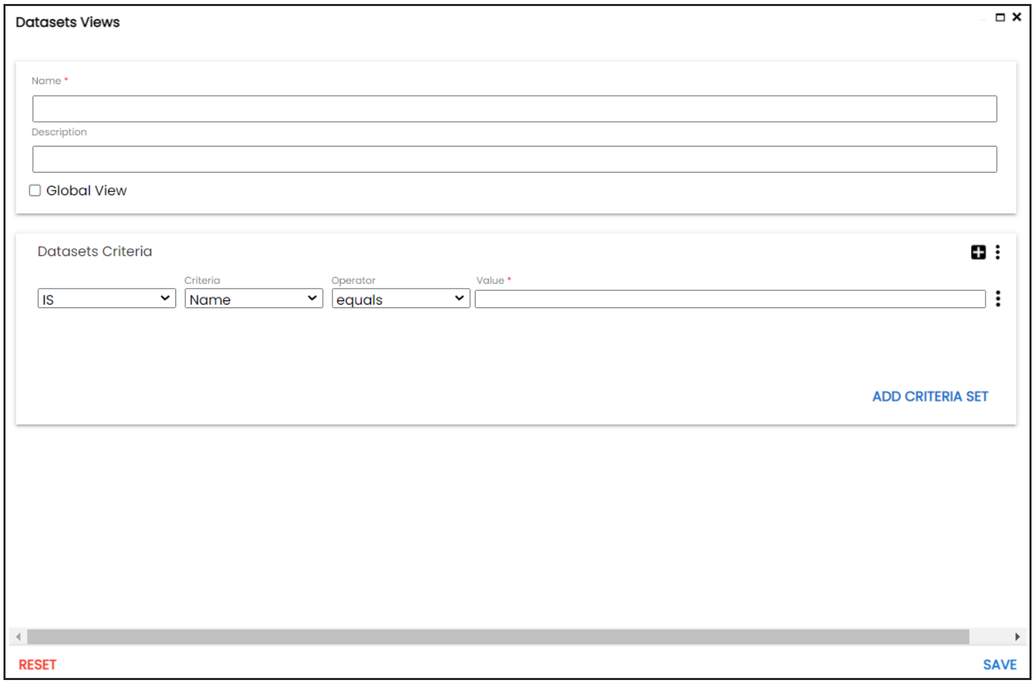
To create custom views, follow these steps:

1. Go to **Application Menu** > **Data Marketplace** > **Explore**.
   The Datasets summary pane appears.
2. In the **Asset Workspace** pane, click **Custom Views**.
   The Custom Views pane appears. It displays a list of available views.



3. Click **ADD**.

   The Datasets Views page appears.



4. Enter appropriate values in the fields. Fields marked with a red asterisk are mandatory. Refer to the following table for field descriptions.

Field Name	Description
Name	Specifies the name of the custom view. For example, BON View.
Description	Specifies the description of the custom view. For example, Displays BON custom view.
Global View	Specifies whether the custom view is accessible for everyone using the application
<Marketplace Asset> Criteria	Specifies the criteria based on which data is displayed in the custom view. For example, to display all datasets with a catalog name that contains TechPubs, set the criteria as follows:

Field Name	Description
	▪ IS ▪ Criteria: Catalog Name ▪ Operator: contains ▪ Value: TechPubs

You can also add multiple conditions to a criteria set. In the **Datasets Criteria** section, click ⊞. Alternatively, you can also add multiple criteria sets. To add criteria sets, click **Add Criteria Set**.

5. Click **Save**.
   A custom view is added to the Custom Views list.

Once you create custom views, you can manage them. Managing Custom Views involves:

- Modifying views
- Deleting views

Managing Custom Views

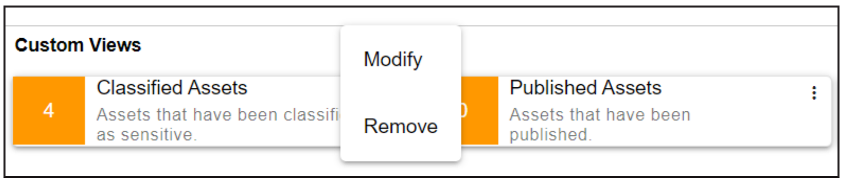
Managing custom views involves:

- Modifying views
- Deleting views

This topic walks you through managing custom views for datasets. Similarly, you can manage custom views for other assets.

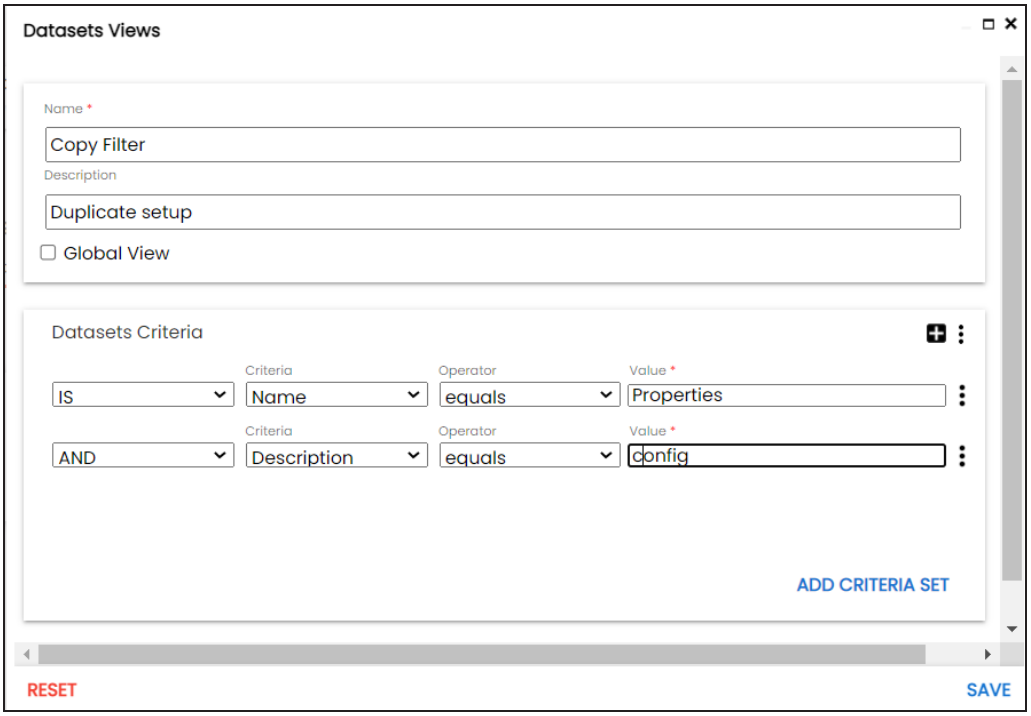
To modify custom views, follow these steps:

1. On the view card, click ⋮ .
   The options to manage the view appear.



2. Click **Modify**.

   The Datasets Views page appears.



3. Modify the required properties (name, description, and global view) of the view. Also, modify the **Datasets Criteria** as required.

   You can also modify the order of the conditions configured in a criteria set. Click ⋮ for a criteria set and use the following options:

   Move up

   Use this option to move criteria up within the Datasets Criteria set.

   Move down

   Use this option to move criteria down within the Datasets Criteria set.

   Remove

   Use this option to remove criteria from the Datasets Criteria set that is no more required.

   Apart from modifying the existing criteria set, you can add multiple criteria sets. To add criteria set, click **Add Criteria Set**.

4. Click **Save**.

The changes made to custom view are saved and the results based on the updated configuration are available on the **Custom Views** page.