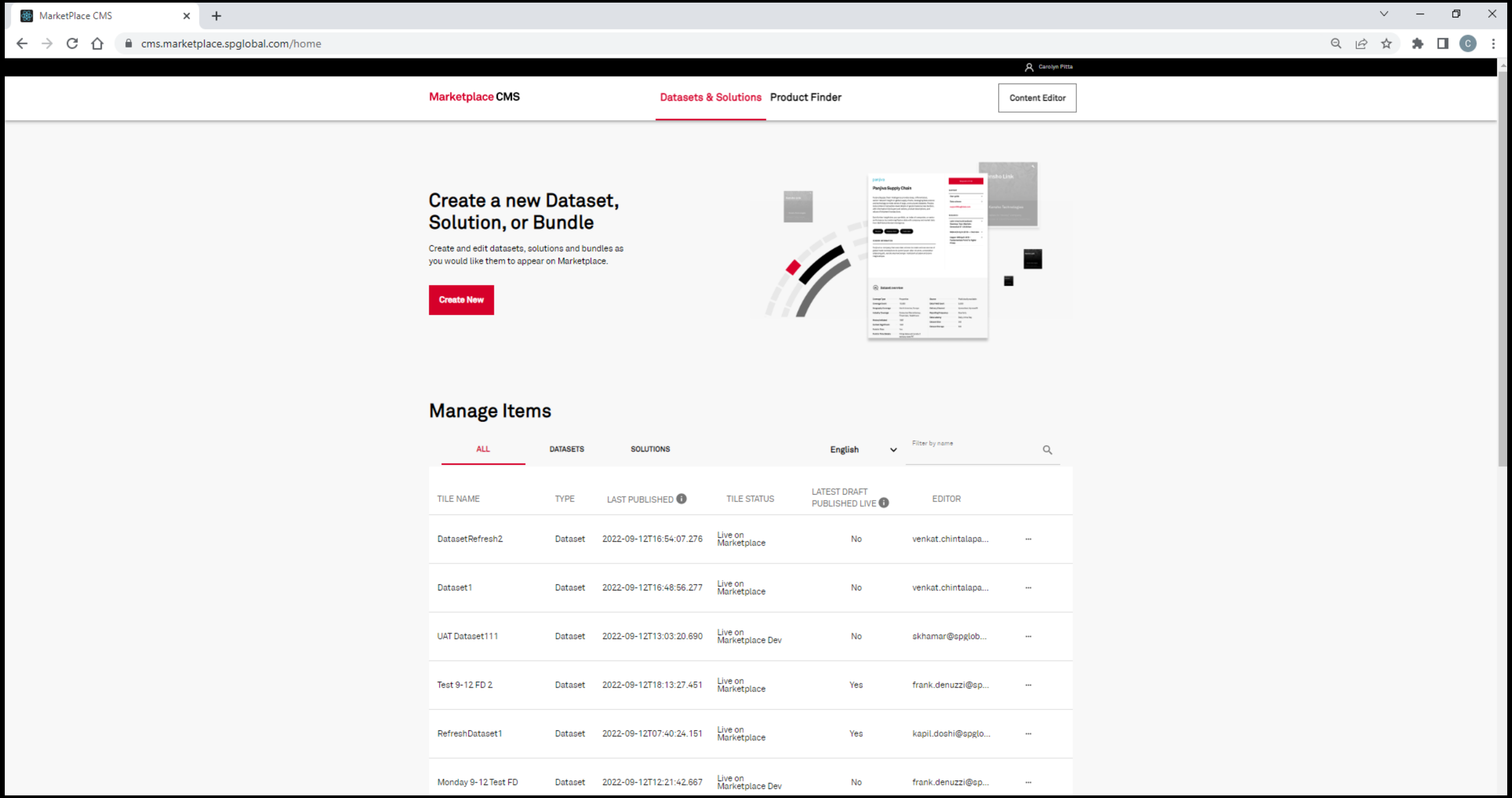
S&P Global Marketplace Content Management System (CMS) User Guide

S&P Global Marketplace CMS Application – User Guide

The Marketplace CMS application is a content management tool which allows S&P Global Product Managers to fully own and curate dataset and/or Solution content directly on the S&P Global Marketplace. Please note Marketplace CMS does not support Blueprint tile creation yet. For Blueprint tile requests, please submit through the [Marketplace Tile Requests form](#).



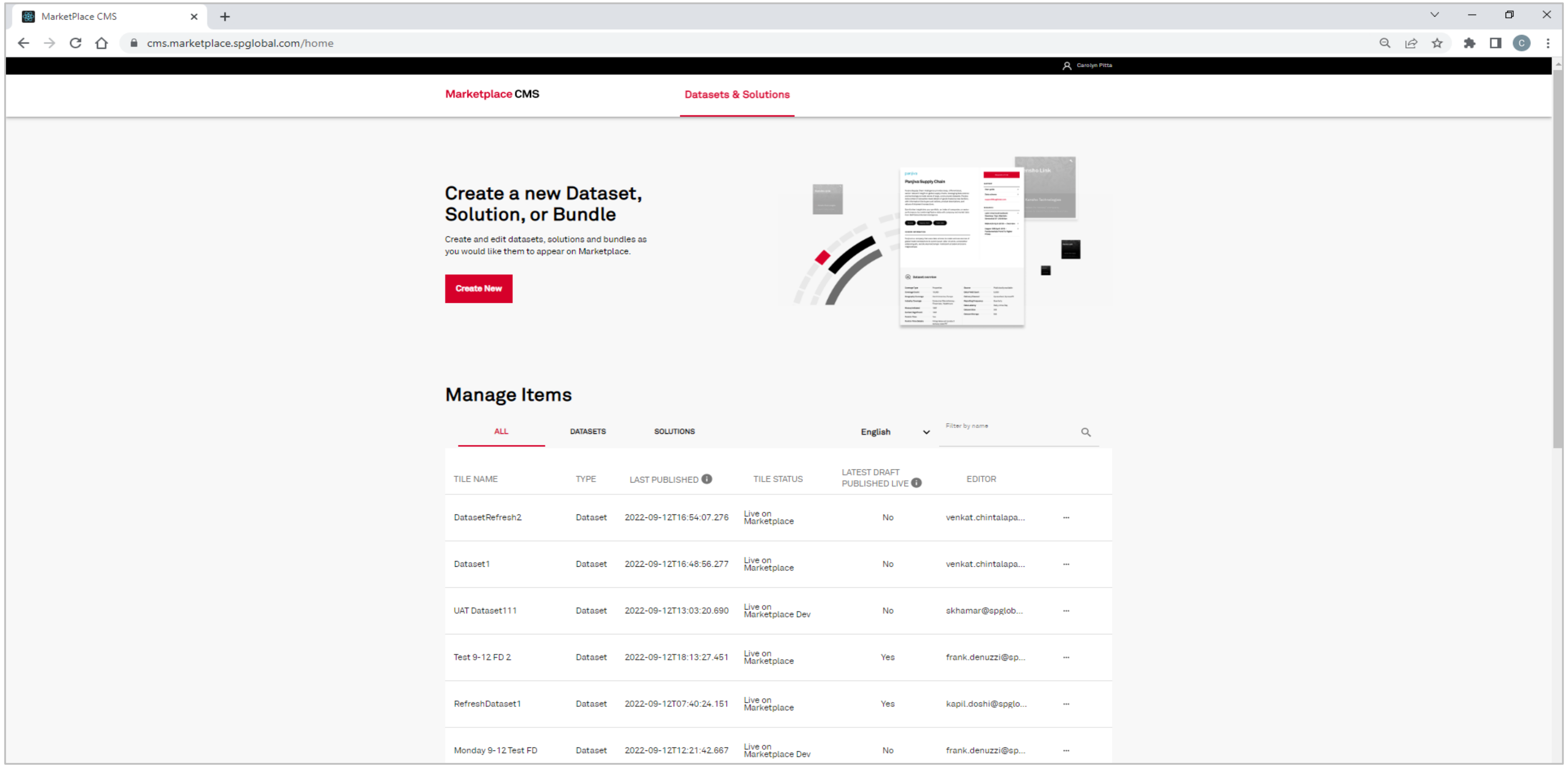
Marketplace CMS Link: https://cms.marketplace.spglobal.com/home

Marketplace CMS Hub

Overview

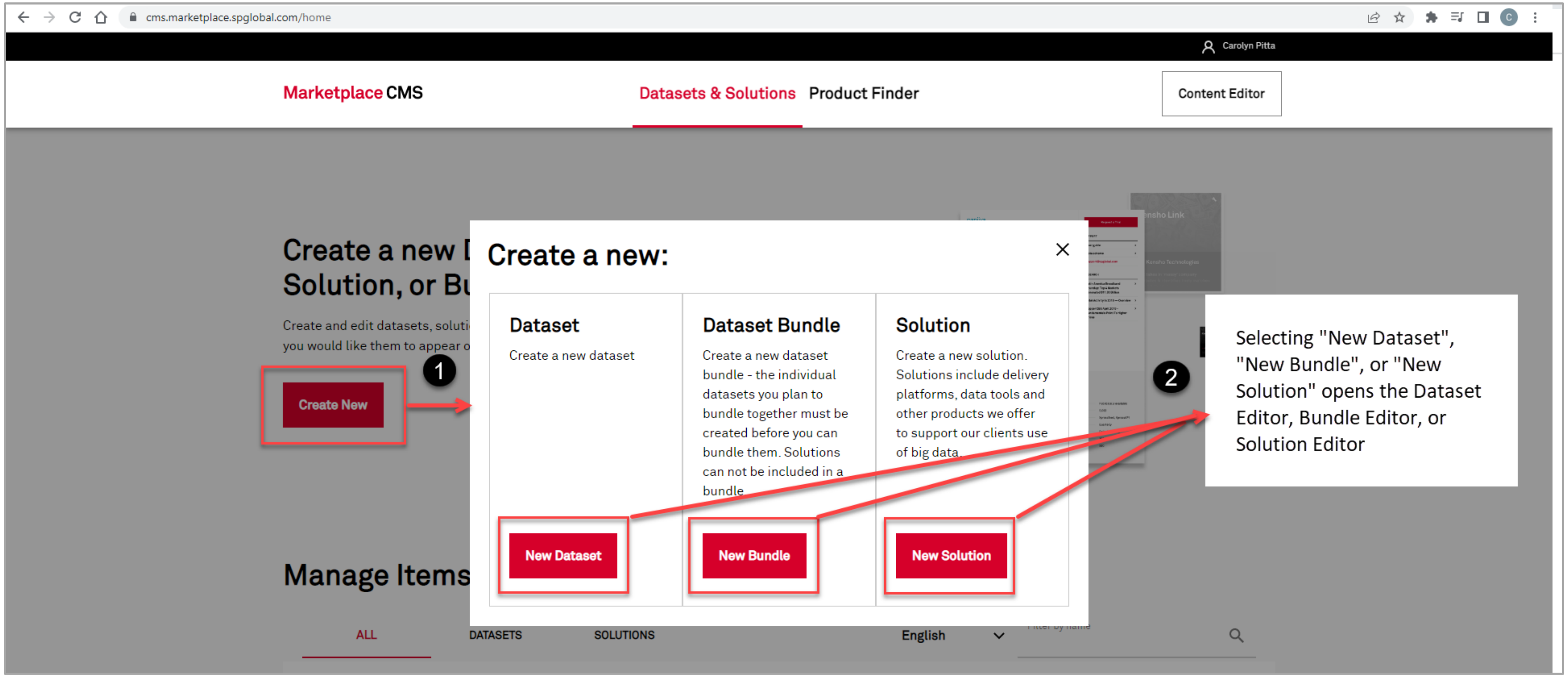
Upon logging into the Marketplace CMS Application, Production Managers are brought to the CMS Hub where they can create/edit new datasets, dataset bundles and solutions, locate all Datasets, Dataset Bundles, and Solutions which have been created along with their status (In Draft, Live on Marketplace Dev, Live on Marketplace), and whether the latest draft/edits have been published on the S&P Global Marketplace. For Blueprint tile requests, please submit through the **Marketplace Tile Requests form**.

Note: Application is currently enabled for only available for English Language Only.



Marketplace CMS: Create Datasets, Bundles, Or Solutions

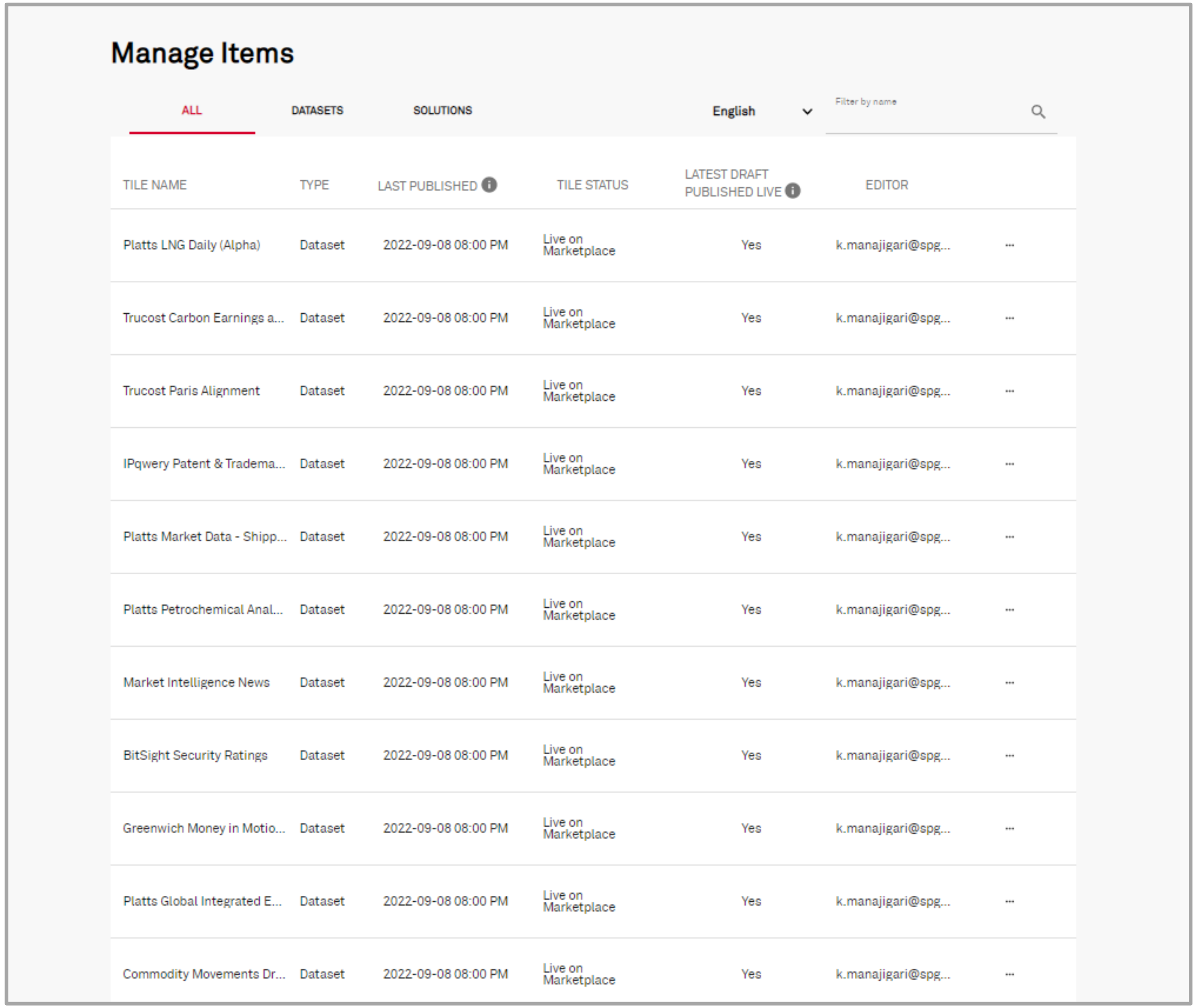
Overview
Selecting the 'Create New' launches the 'Create a new' window where Product Manages can choose to create a new Dataset, Dataset Bundle, or Solution



Marketplace CMS Hub Managed Items

Overview

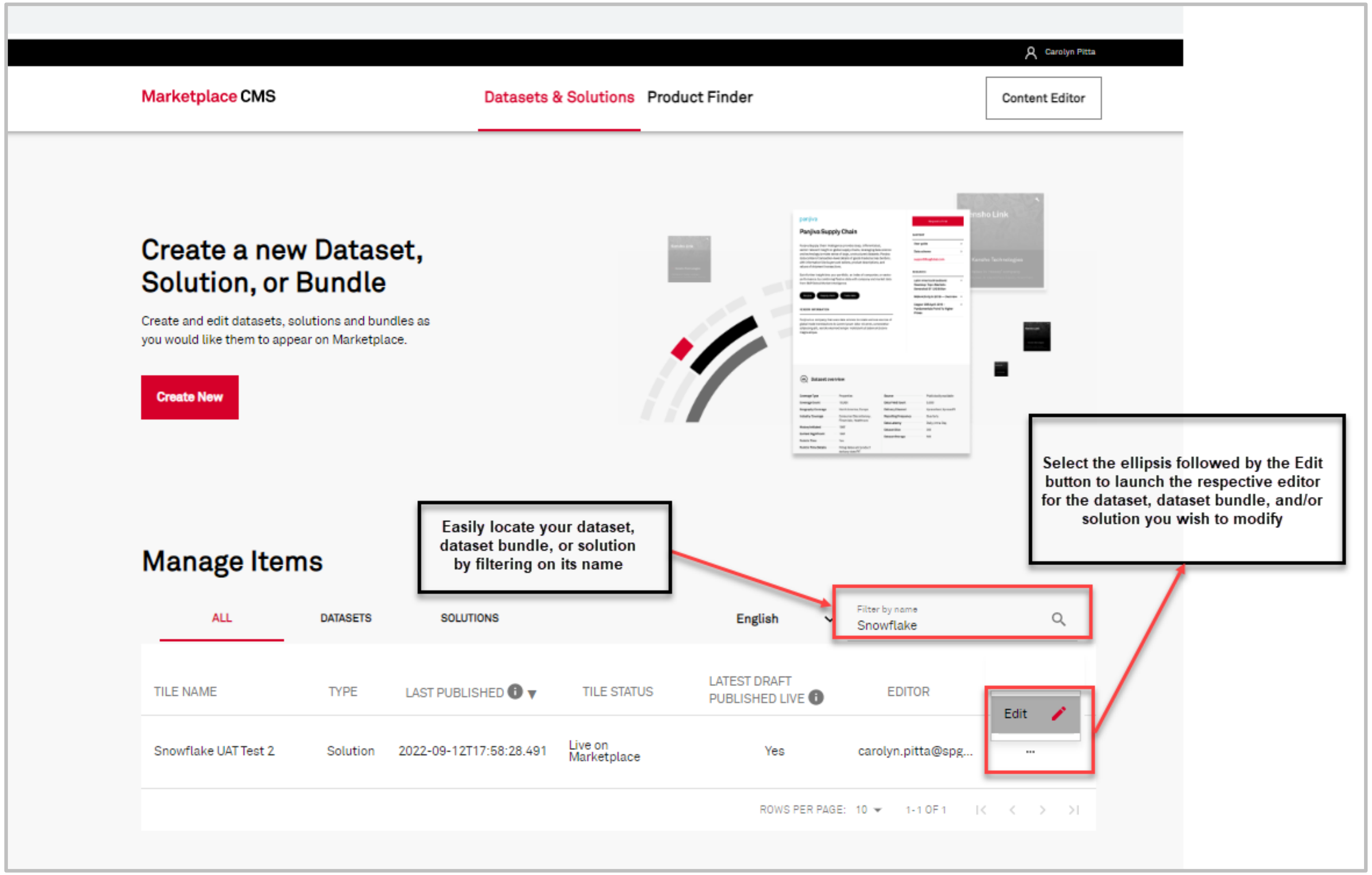
- The CMS Hub Managed Items allows product managers to locate all datasets, dataset bundles, and solutions which have been created and which are published to the S&P Global Marketplace.
- There are three tabs that you can navigate to
  - **All:** All datasets, dataset bundles, and solutions which have been created along with their published status
  - **Datasets:** Filters to only datasets and dataset bundles which have been created along with their published status
  - **Solutions:** Filters to only solutions which have been created along with their published status
- While there is a language filter, CMS is **only available** for English at the moment
- **Filter by Name**: Product Managers can search for datasets, dataset bundles, and solutions by name
- Managed Items Table Fields:
  - **Tile Name:** Name of the dataset, dataset bundle, or solution that appears or will appear on the Marketplace
  - **Type:** Dataset, Bundle, or Solution
  - **Last Published:** date and time the tile was last published to either Marketplace dev or Marketplace
  - **Tile Status:** Draft not published on Marketplace, Live on Marketplace Dev, Live on Marketplace
  - **Latest Published Live:** (Yes/No) indicates if the latest draft of the dataset, bundle, or solution has been published to the Marketplace
  - **Editor**: Last user who edited the dataset, dataset bundle, or solution



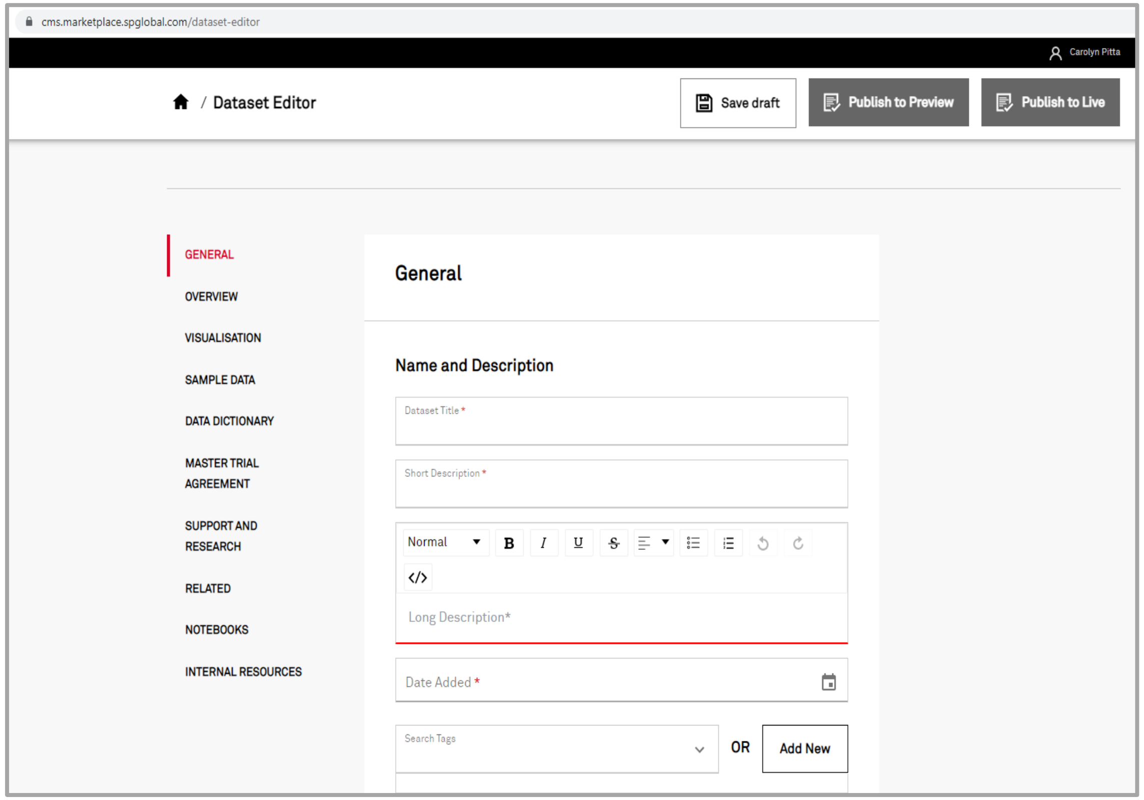
Marketplace CMS: Editing Datasets, Bundles, Or Solutions

Overview

To edit a dataset, dataset bundle, and/or solution, locate it in the Managed Items section of the Hub then select the ellipsis (three dots located to the far right of the dataset, bundle, solution) followed by 'Edit'.



CMS Dataset Editor



Overview

- The Dataset Editor consists of multiple tabs of form fields (General, Overview, Data Dictionary, etc.) for Data Product Managers/Stewards to complete when creating/editing a new Dataset (and/or Bundle) on the S&P Global Marketplace
  - ❑ **General:** Adds important metadata which describes the for the Dataset such as Title, Descriptions, Categorization, Date Added, Search Tags, etc.
  - ❑ **Overview:** Populates the Overview/Key Stats section of a Dataset Tile
  - ❑ **Visualisation:** Adds Visualizations to Dataset Tiles (Not Required)
  - ❑ **Sample Data:** Adds sample data in the Data Set Tile
  - ❑ **Data Dictionary:** Adds data dictionary to the Data Set Tile (Not Required**)**
  - ❑ **Master Trial Agreement:** Adds the optional Master Trial Agreement
  - ❑ **Support and Research:** Adds links to support documentation and related research content to the tile
  - ❑ **Related:** Adds related datasets and/or bundles to the data set to enable cross-selling opportunities
  - ❑ **Notebooks:** Adds workbench notebooks to the Dataset Tile
  - ❑ **Internal Resources:** Adds Internal Resources links to the Dataset Profile which are only visible to S&P Global employees who are connected to VPN

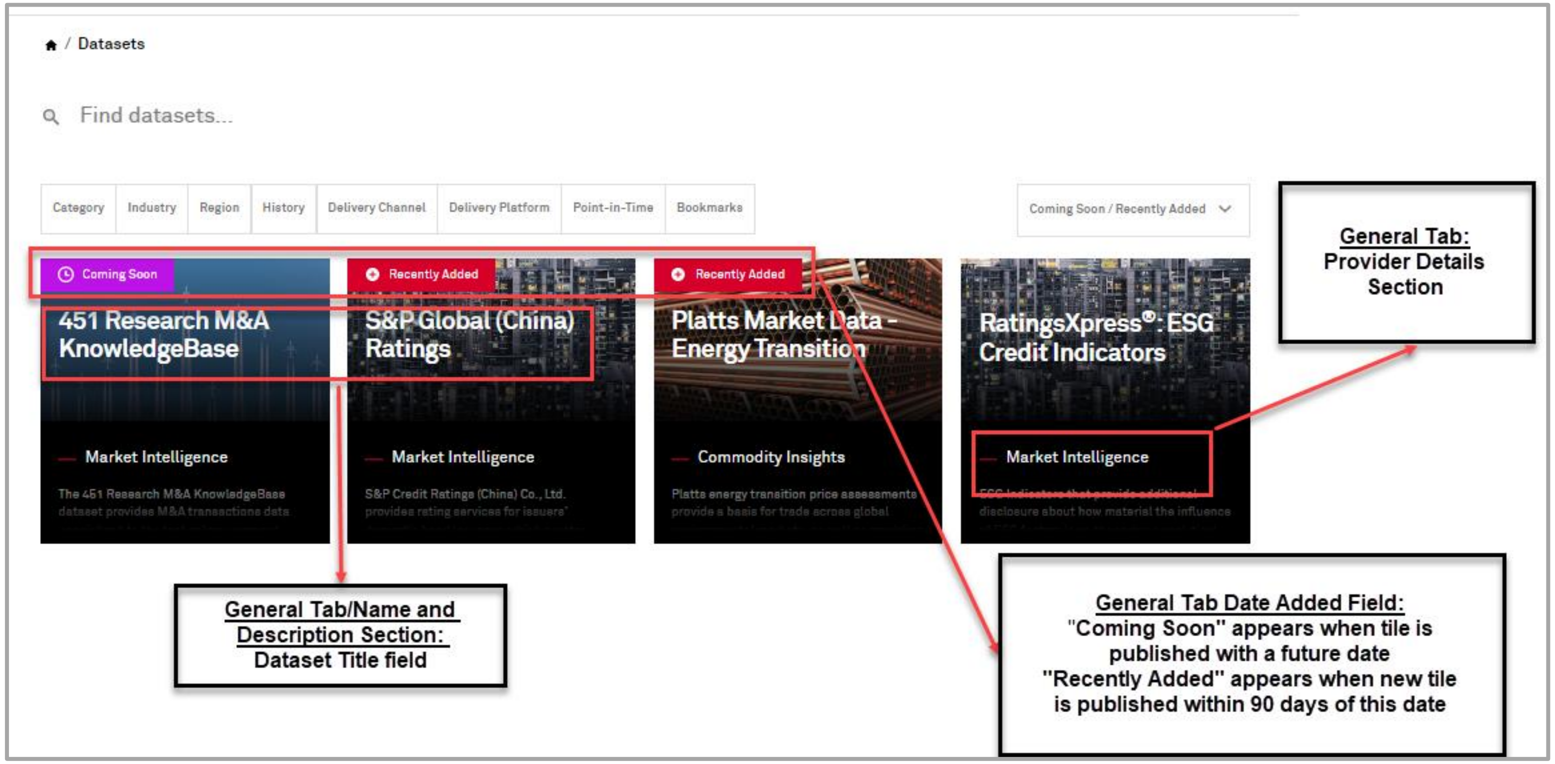
- At the top right of the Dataset Editor page, there are 3 buttons which allow Product Managers to:
  - **Save Draft:** saves the Dataset or latest edits in draft but does not publish to either S&P Global Marketplace Dev or S&P Global Marketplace. ***After Saving Draft, wait at least 3-4 minutes before Publishing to Preview***
  - **Publish to Preview:** Publishes the Dataset or Dataset's latest draft to the S&P Global Marketplace Dev. ***Email Marketplace Product team to clear cache for dataset/dataset updates to reflect on the Marketplace Dev environment***
  - **Publish to Live:** Publishes the Dataset or Dataset's latest draft to the S&P Global Marketplace. ***After Publishing to Live, please wait approximately 1 hour for the new tile/tile edits to reflect/open on the Marketplace.***

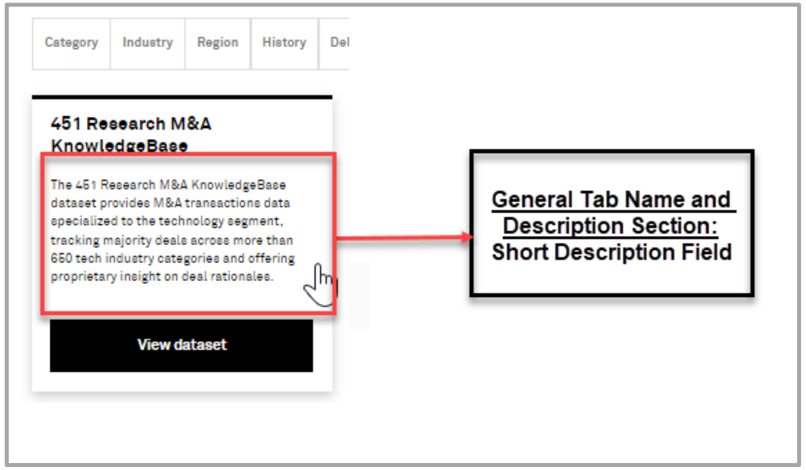
Marketplace CMS Dataset Editor General Tab

Section	Description
Name and Description	❑ **Dataset Title:*** Name of dataset as it will appear in the Marketplace; char limit 100 and should not be a duplicate of an existing dataset ❑ **Short Description:*** : Overview of dataset/data included ;char limit 255. Short description is the description which appears on the tile ❑ **Long Description:*** In-Depth Overview found in the Dataset Details page on the Marketplace; char limit 2000 *Note: The application will not publish duplicate datasets which have the same title, short description, and long description* ❑ **Date Added*:** Date when dataset is added to the Marketplace. Appears in the top right corner of the Dataset Details page ▪ If future dated, tile will reflect "Coming Soon" until that date in both the details page and the Marketplace Dataset page until that date ▪ "Recently Added" will reflect on the tile for tiles which were added within 90 days of this field ❑ **Search Tags:** Keyword tags associated with every dataset . Enable users to search datasets using predictive text search functionality. Choose from the list and/or add new search tags ❑ **Category:** Determine which Dataset filter category the Dataset Tile should be classified under ❑ **Trial Button Title:*** Allows for the customization of the button which launches the 'Request More Information' form (generally, for datasets, this button is entitled "Request More Information")
Tile Image	❑ Background Image which appears on the Tile. (Image added should be consistent with the type of industry the dataset belongs to)
Provider Details*	❑ Dataset Provide/Vendor Details (S&P global Market Intelligence, S&P Global Commodity Insights, S&P Global Mobility, S&P Global Engineering Solutions, S&P Global Ratings, S&P Dow Jones Indices, S&P Global Sustainable1). Adding the provider should automatically add the provider logo and vendor description to the Marketplace tile
Message Box Fields	❑ Adds Banner Message to top of the Dataset Profile for any special alerts (e.g. Release Notes, Enhancements) ❑ **Message Type**: **Alert** or **Recently Updated** ▪ When **Alert** is selected, fields to be completed are Alert Title (e.g. Release Notes) and Alert Description ➢ **Alert Title:** Banner Title; char limit 100 ➢ **Alert Description:** Description which summarizes the alert that will appear in the dataset; char limit 255 ▪ When **Recently Updated** is selected, the fields to be completed are Date Added, Enhancement Description, and/or Enhancement Link ➢ **Data Added**: Date material update was released for dataset. (ONLY RECENT ENHANCEMENTS WITHIN LAST 3 MONTHS). ➢ **Enhancement Description:** Maximum 255 character description summarizing updates to the dataset (Release notes). Only available if the above field is not Null. (ONLY RECENT ENHANCEMENTS WITHIN LAST 3 MONTHS) ➢ **Enhancement Link:** Provide the direct link URL to the release notes document on the Support site for the dataset's specific enhancement.

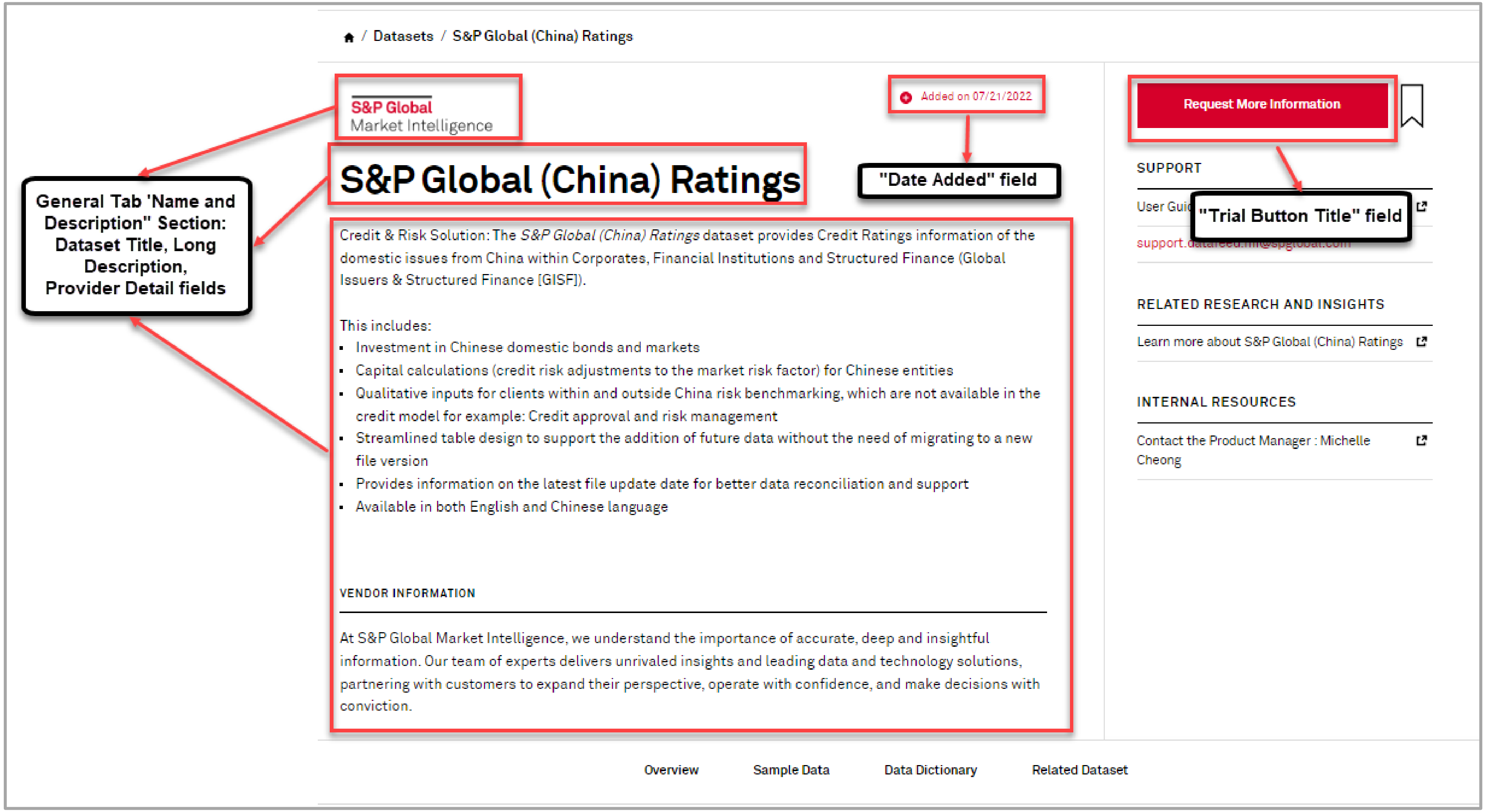
***denotes required field (e.g. unable to save draft, publish to preview, publish live without completing)**

Marketplace CMS Dataset Editor Field Mapping to Marketplace Tiles





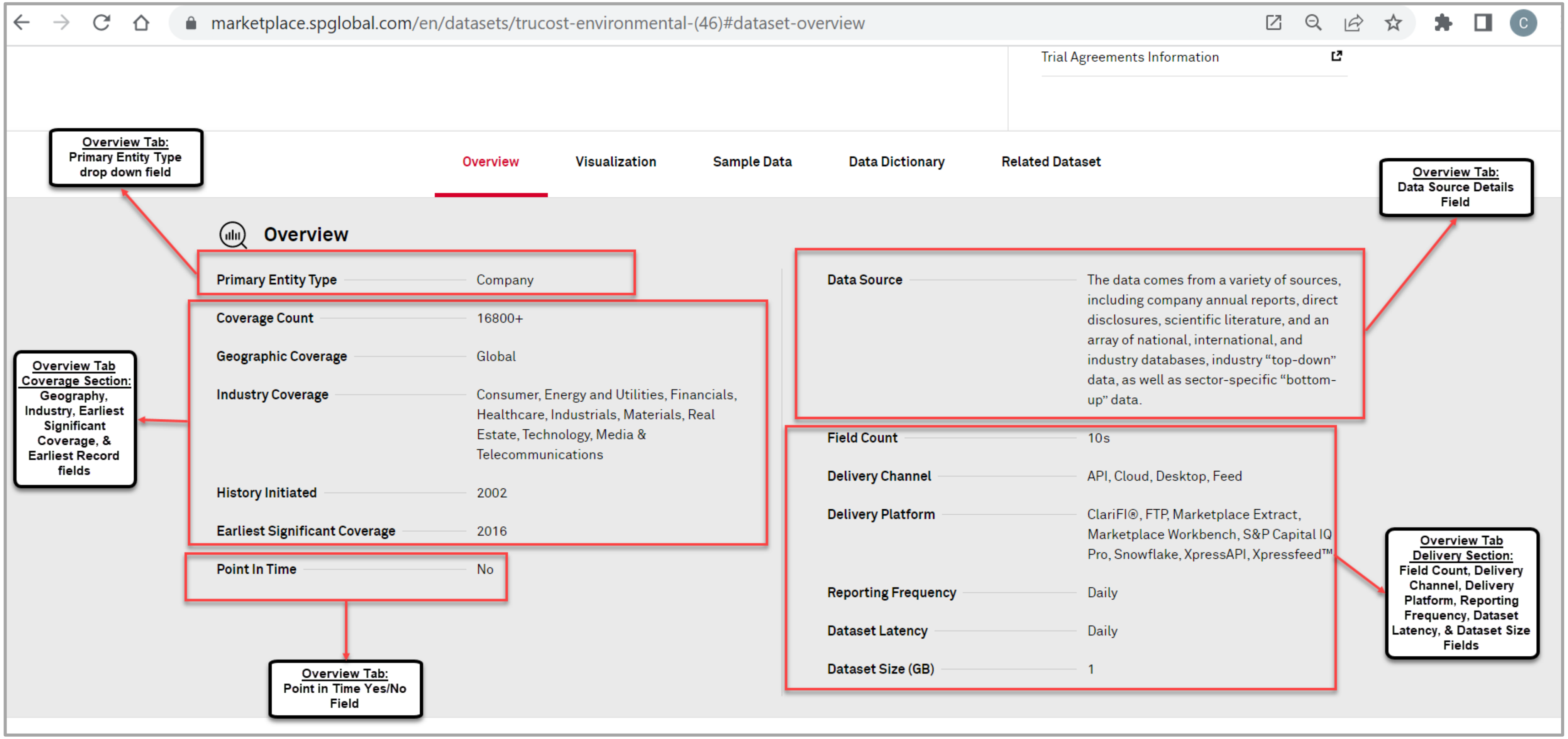
CMS Dataset Editor Field Mapping to Dataset Details Page



Marketplace CMS Dataset Editor Overview Tab

Section	Description
Primary Entity Type	Coverage Type of the dataset (list should contain: Bond, Company, Currency, Index, Rate, Security, Other, Deal, FX Rate, People, News, Equity, Product, Physical Asset, Financial Asset, Industry, Professionals, Documents, Country or Sovereign)
Coverage	❑ **Geography:** Geographic Coverage of the dataset which also impacts the Geography filter when filtering on Datasets from the Marketplace homepage and Datasets Page. ▪ **Options:** United States and Canada, Latin America and Caribbean, Africa, Asia-Pacific, Europe, Middle East ➢ Choose all that apply. “Global” will reflect in the dataset when all regions are selected ❑ **Industry:** Industries covered by the dataset which also impacts the Industry filter when filtering on the homepage and Datasets pages ▪ **Options:** All, Financials, Real Estate, Energy and Utilities, Materials, Healthcare, Industrials, Consumer, and Technology, Media, and Telecommunications). ❑ **Coverage Count**: total count of entities ❑ **Earliest Significant Coverage:** Earliest year where there is significant coverage for analysis ❑ **Earliest Record:** Year of first record in the dataset
Point in time	Is the dataset a point in time (yes/no). In addition to the Dataset Overview section reflecting this value, any dataset which is a point-in-time dataset (e.g. "Yes") should be included in the result set when filtering on Point-in-Time from Global Search & Dataset tab
Data Source	Source of dataset content; where was the content collected from; char limit 255
Delivery	❑ **Field Count:** Field Count - number of distinct fields within database ❑ **Delivery Channel:** Delivery channels for the dataset (valid values: API, Cloud, Desktop, Feed) ❑ **Delivery Platform:** Delivery methods for dataset (e.g. API, ClariFi, Marketplace Extract, Marketplace Workbench, S&P Capital IQ, S&P Capital IQ Pro, Snowflake, XpressAPI, XpressFeed, Ratings 360, Marketplace Workbench, FTP, Data Lake etc) ❑ **Reporting Frequency:** Describes how often the data can be delivered. (Valid Values: Daily, Weekly, Monthly, Yearly, Ad Hoc, Bi Weekly, Intraday, Near Real Time, Quarterly, Real Time, Semi Annually, Variable) ❑ **Dataset Latency:** how often the dataset is updated (e.g. 15,000 companies covered) ❑ **Dataset Size:** size of the dataset in GB
Linked Identifier	Identifier which related/links all the data within a dataset (not an active field today so ignore for now)

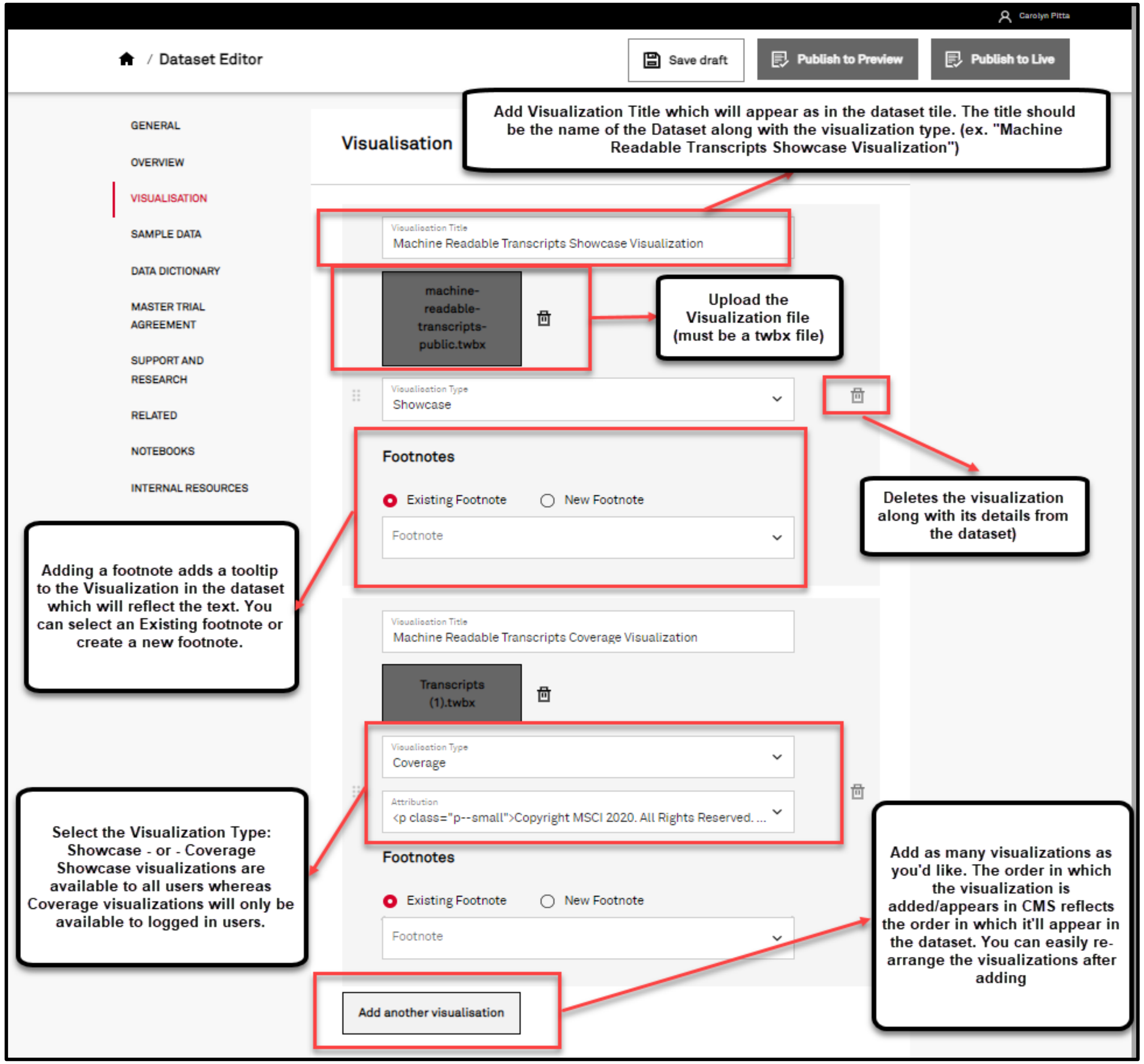
Marketplace CMS Dataset Editor Field Mapping to Marketplace Tiles



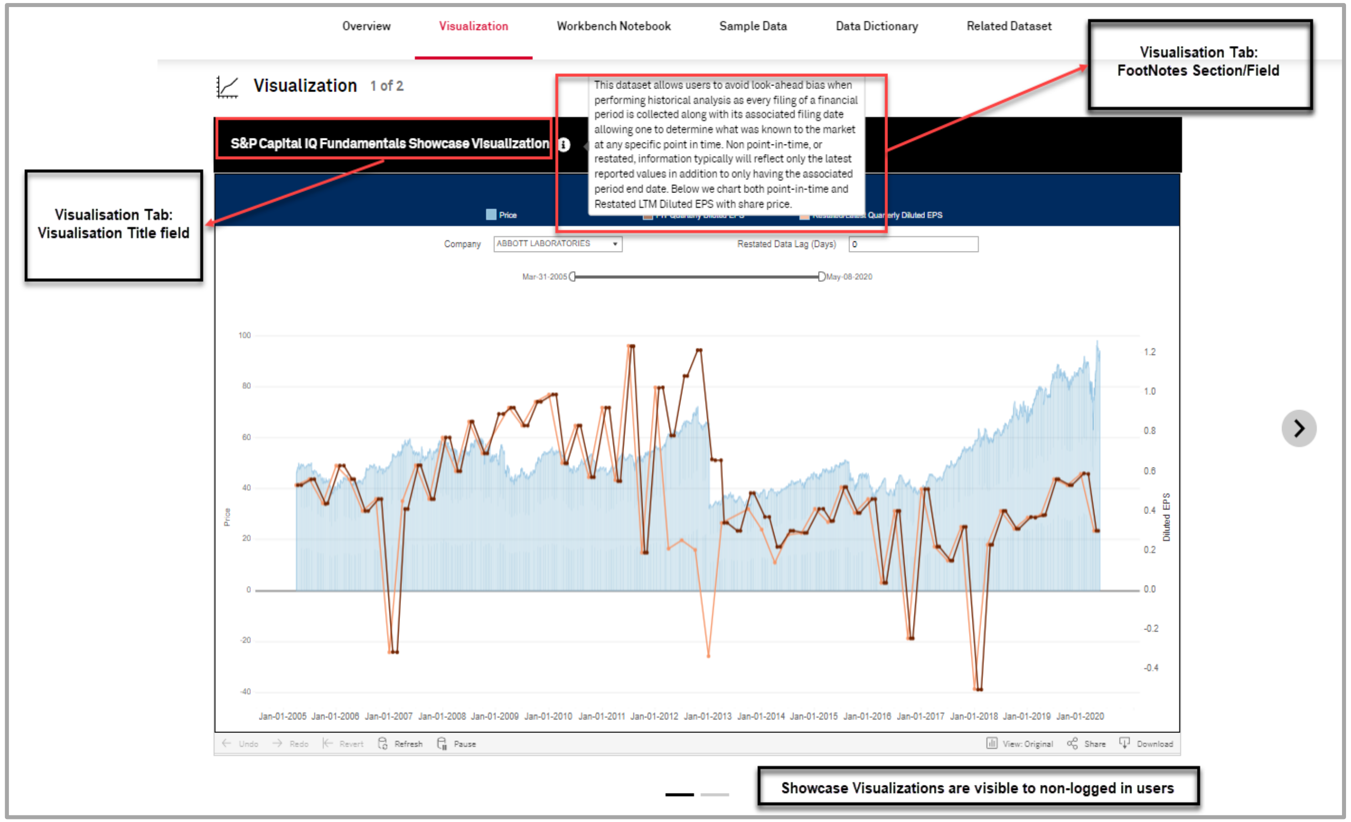
Marketplace CMS Dataset Editor Tabs: Visualizations

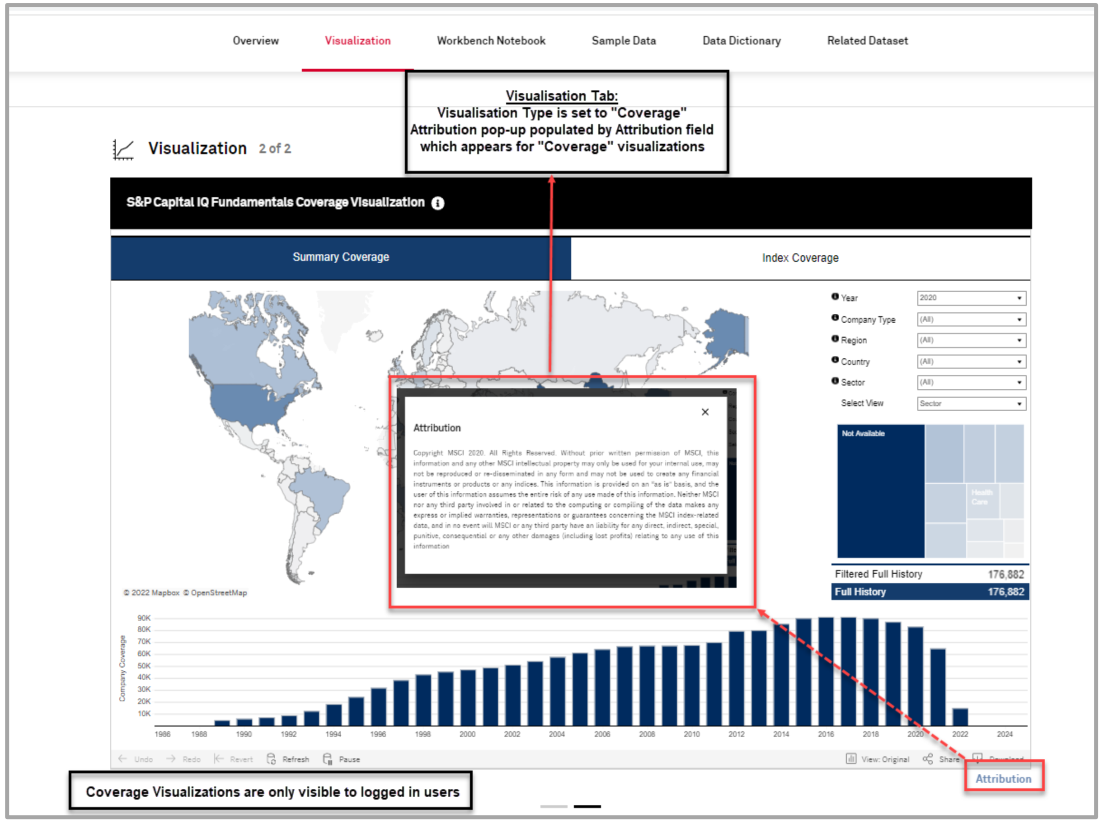
Visualization Field Instructions

- ❑ If the dataset has a visualization(s) associated with it, for each visualization, add the Visualization Title which will appear in the dataset profile, Upload the Visualization(s) which will appear in the profile, select the Visualization Type (Showcase or Coverage), and Footnotes (e.g. populates the tooltip which appears next to the title of a Visualization)
  - ❑ Visualization Tile should be the name of the dataset plus it's visualization type (e.g. "Machine Readable Transcripts Showcase Visualization")
  - ❑ Visualization file must be a twtbx file
  - ❑ Showcase visualizations are available to non-logged in users
  - ❑ Coverage visualizations are only available to logged in users and may have an attribution language that needs to be populated



Marketplace CMS Dataset Editor Field Mapping to Marketplace Tiles





Visualization Tab Notes

- Visualization uploaded must be a twbx file
- Visualisation Type Field:
  - If “Showcase” is selected, visualization will be available to non-logged in users
  - If “Coverage” is selected, visualization will not be available to non-logged in users and attribution field becomes available
- Tooltip is populated by the Footnotes Section/Field

Marketplace CMS Dataset Editor Tab: Sample Data Section

Sample Data

Sample Data Display File Upload:

Upload / Select   Sample Data Display File

Sample Data Download File Upload:

Upload / Select   Sample Data Download File

Field	Field Description
Sample Data Display File Upload	❑ Sample data which will render in the UI of the Dataset Profile (do not include anything other than table headers or table content for the sample data in the UI file)
Sample Data Download File Upload	❑ Sample data which clients can download from the Dataset Profile. If upload and download file are the same, you will have to upload the file twice.

Internal Use Only   Confidential   Highly Confid

Sample Data Display File Upload
(should only contain the header row and table content that you wish to render in the tile)

	A	B	C	D	E	F	G	H	I
1	conm	gvkey	datadate	coifnd_id	cyearq	item	valuei	effdate	thrudat
2	PARETEUM CORP	108348	6/30/2019	9943011	2019	CEQQ	169.616	8/7/2019 16:00	9/3/
3	PARETEUM CORP	108348	6/30/2019	9943011	2019	CEQQ	169.659	9/4/2019 00:00	12/31/
4	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIBEGNIQ	-0.55	8/7/2019 16:00	9/3/
5	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIBEGNIQ	-0.515	9/4/2019 00:00	12/31/
6	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIQ	-0.115	8/7/2019 16:00	9/3/
7	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIQ	-0.08	9/4/2019 00:00	12/31/
8	PARETEUM CORP	108348	6/30/2019	9943011	2019	CITOTALQ	-0.115	8/7/2019 16:00	9/3/
9	PARETEUM CORP	108348	6/30/2019	9943011	2019	CITOTALQ	-0.08	9/4/2019 00:00	12/31/
10	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFD12	99.2963	8/7/2019 16:00	9/3/
11	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFD12	92.2573	9/4/2019 00:00	12/31/
12	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFDQ	125.153	8/7/2019 16:00	9/3/
13	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFDQ	111.075	9/4/2019 00:00	12/31/
14	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHOQ	109.765	8/7/2019 16:00	9/3/
15	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHOQ	111.652	9/4/2019 00:00	12/31/
16	PARETEUM CORP	108348	6/30/2019	9943011	2019	DILAVQ	-0.55	8/7/2019 16:00	9/3/
17	PARETEUM CORP	108348	6/30/2019	9943011	2019	DILAVQ	-0.515	9/4/2019 00:00	12/31/
18	PARETEUM CORP	108348	6/30/2019	9943011	2019	IBADJ12	-18.826	8/7/2019 16:00	9/3/
19	PARETEUM CORP	108348	6/30/2019	9943011	2019	IBADJ12	-18.791	9/4/2019 00:00	12/31/
20	PARETEUM CORP	108348	6/30/2019	9943011	2019	IBADJQ	-0.55	8/7/2019 16:00	9/3/

Compustat Snapshot Data

Sample Data Download File
(can contain multiple tabs, etc.)

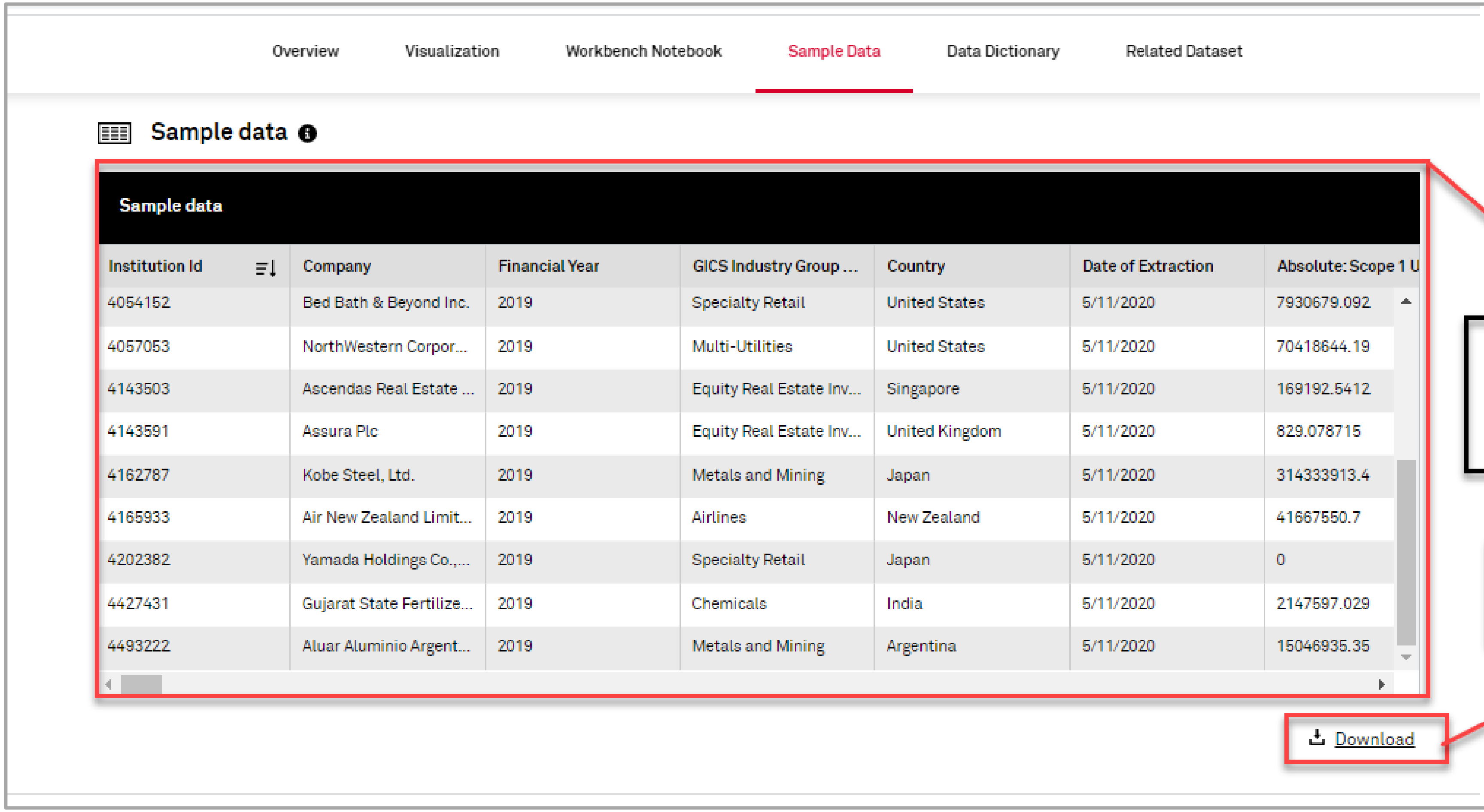
R25

	A	B	C	D	E	F	G	H	I
1	S&P Global Market Intelligence								
2									
3									
4	conm	gvkey	datadate	coifnd_id	cyearq	item	valuei	effdate	thrudate
5	PARETEUM CORP	108348	6/30/2019	9943011	2019	CEQQ	169.616	8/7/2019 16:00	9/3/2019 23:59
6	PARETEUM CORP	108348	6/30/2019	9943011	2019	CEQQ	169.659	9/4/2019 00:00	12/31/9999 00:00
7	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIBEGNIQ	-0.55	8/7/2019 16:00	9/3/2019 23:59
8	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIBEGNIQ	-0.515	9/4/2019 00:00	12/31/9999 00:00
9	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIQ	-0.115	8/7/2019 16:00	9/3/2019 23:59
10	PARETEUM CORP	108348	6/30/2019	9943011	2019	CIQ	-0.08	9/4/2019 00:00	12/31/9999 00:00
11	PARETEUM CORP	108348	6/30/2019	9943011	2019	CITOTALQ	-0.115	8/7/2019 16:00	9/3/2019 23:59
12	PARETEUM CORP	108348	6/30/2019	9943011	2019	CITOTALQ	-0.08	9/4/2019 00:00	12/31/9999 00:00
13	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFD12	99.2963	8/7/2019 16:00	9/3/2019 23:59
14	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFD12	92.2573	9/4/2019 00:00	12/31/9999 00:00
15	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFDQ	125.153	8/7/2019 16:00	9/3/2019 23:59
16	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHFDQ	111.075	9/4/2019 00:00	12/31/9999 00:00
17	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHOQ	109.765	8/7/2019 16:00	9/3/2019 23:59
18	PARETEUM CORP	108348	6/30/2019	9943011	2019	CSHOQ	111.652	9/4/2019 00:00	12/31/9999 00:00
19	PARETEUM CORP	108348	6/30/2019	9943011	2019	DILAVQ	-0.55	8/7/2019 16:00	9/3/2019 23:59
20	PARETEUM CORP	108348	6/30/2019	9943011	2019	DILAVQ	-0.515	9/4/2019 00:00	12/31/9999 00:00
21	PARETEUM CORP	108348	6/30/2019	9943011	2019	IBADJ12	-18.826	8/7/2019 16:00	9/3/2019 23:59
22	PARETEUM CORP	108348	6/30/2019	9943011	2019	IBADJ12	-18.791	9/4/2019 00:00	12/31/9999 00:00
23	PARETEUM CORP	108348	6/30/2019	9943011	2019	IBADJQ	-0.55	8/7/2019 16:00	9/3/2019 23:59

Compustat Snapshot Data   Compustat Fundamental Data   Reference Data

Ready

Marketplace CMS Dataset Editor Field Mapping to Marketplace Tiles



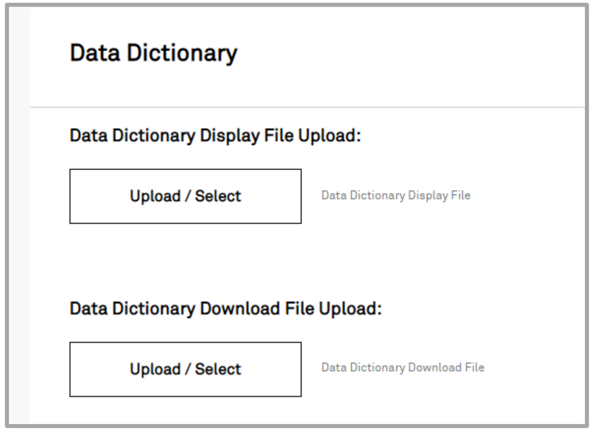
Institution Id	Company	Financial Year	GICS Industry Group ...	Country	Date of Extraction	Absolute: Scope 1 U
4054152	Bed Bath & Beyond Inc.	2019	Specialty Retail	United States	5/11/2020	7930679.092
4057053	NorthWestern Corpor...	2019	Multi-Utilities	United States	5/11/2020	70418644.19
4143503	Ascendas Real Estate ...	2019	Equity Real Estate Inv...	Singapore	5/11/2020	169192.5412
4143591	Assura Plc	2019	Equity Real Estate Inv...	United Kingdom	5/11/2020	829.078715
4162787	Kobe Steel, Ltd.	2019	Metals and Mining	Japan	5/11/2020	314333913.4
4165933	Air New Zealand Limit...	2019	Airlines	New Zealand	5/11/2020	41667550.7
4202382	Yamada Holdings Co.,...	2019	Specialty Retail	Japan	5/11/2020	0
4427431	Gujarat State Fertilize...	2019	Chemicals	India	5/11/2020	2147597.029
4493222	Aluar Aluminio Argent...	2019	Metals and Mining	Argentina	5/11/2020	15046935.35

Download

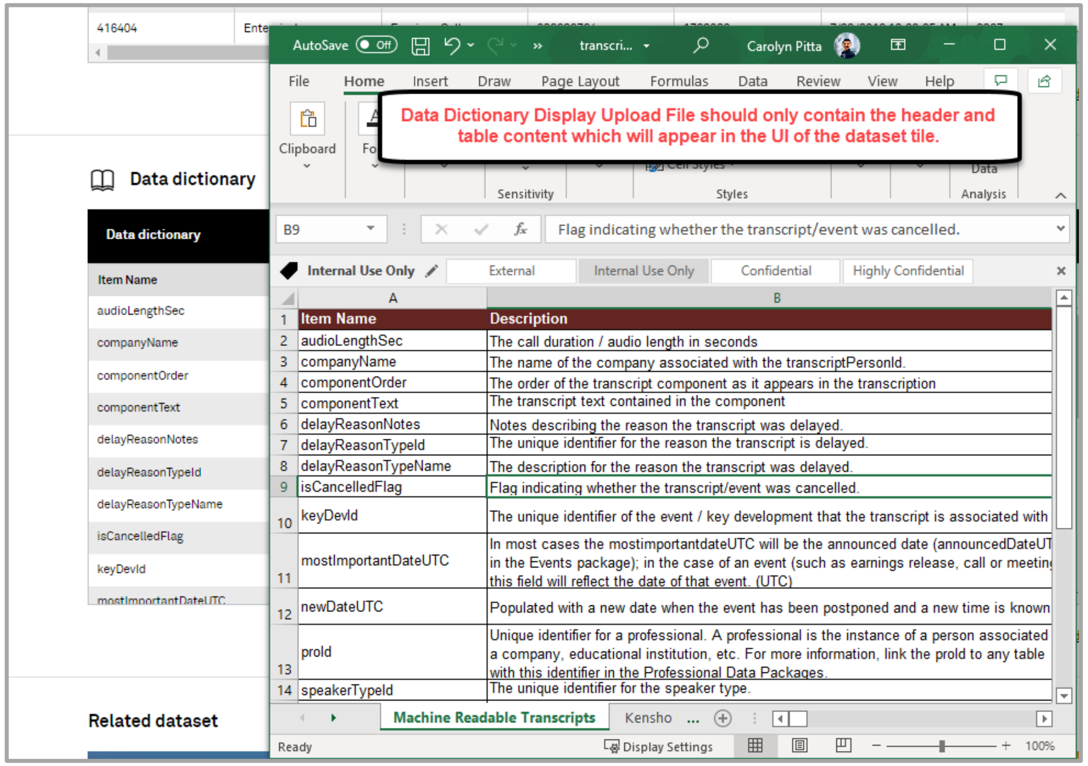
Sample Data Tab:
Sample Data Display File Upload functionaltiy

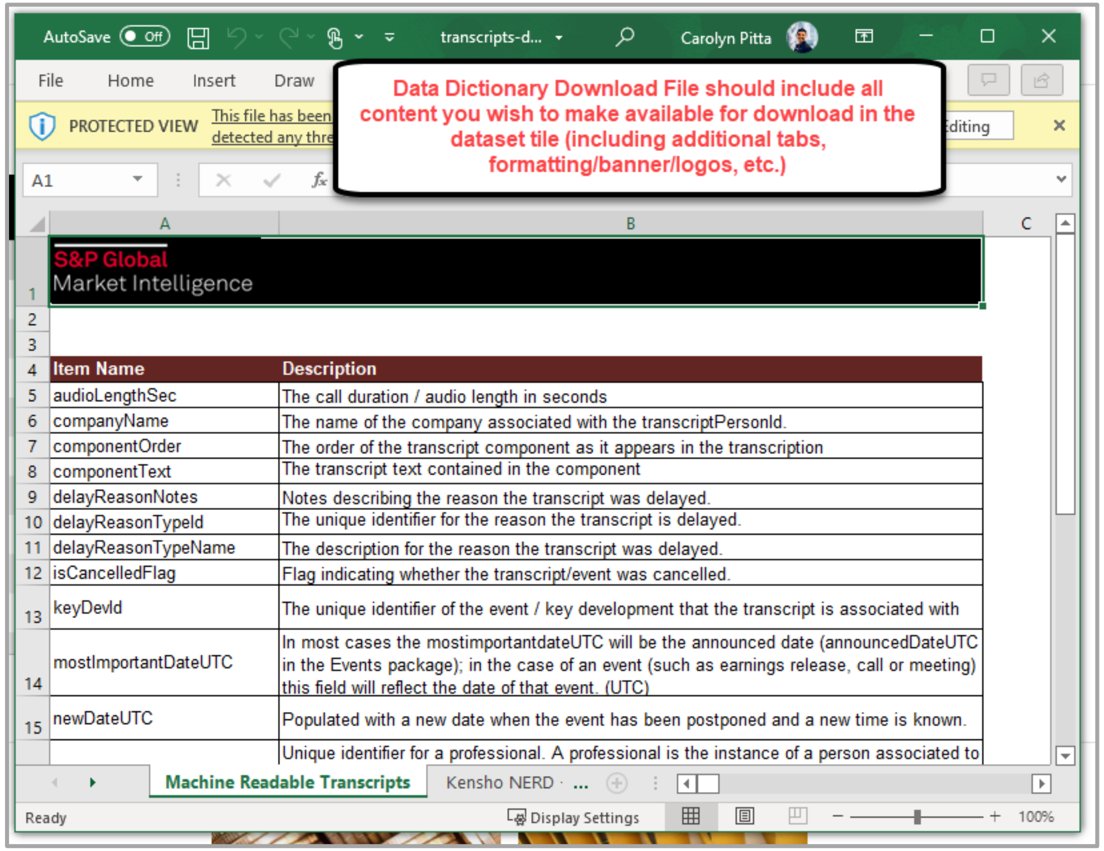
Sample Data Tab:
Sample data download File upload functionality

Marketplace CMS Dataset Editor Tab: Data Dictionary Data Section



Field	Field Description
Data Dictionary Display File Upload	❑ Data Dictionary which will render in the UI of the Dataset Profile.(do not include anything other than table headers or table content for the data dictionary in the UI file)
Data Dictionary Download File Upload	❑ Data Dictionary that clients can download from the Dataset Profile. If upload and download file are the same, you will have to upload the file twice.





Marketplace CMS Dataset Editor Field Mapping to Marketplace Tiles

Overview | Visualization | Workbench Notebook | Sample Data | Data Dictionary | Related Dataset

Data dictionary

Data dictionary

Item Name	Description
Absolute: Scope 1 Unpriced Carbon Cost	The estimated additional costs arising directly in different scenarios and years, based...
Absolute: Scope 2 Unpriced Carbon Cost	The estimated additional costs arising indirectly in different scenarios and years base...
Absolute: Total Unpriced Carbon Cost	The estimated additional costs arising directly and indirectly in different scenarios an...
dataItemDefinition	Data item definition.
dataItemId	Unique identifier for the Trucost Carbon Earnings at Risk data item.
dataItemName	Trucost Carbon Earnings at Risk data item name.
dataItemValue	Numeric value for the Trucost Carbon Earnings at Risk financial data item.
dataItemValueText	Textual value for the Trucost Carbon Earnings at Risk financial data item.
EBIT at Risk	Indicates that a company's earnings before interest and taxes (EBIT) are at risk at the ...
EBITDA at Risk	Indicates that a company's earnings before interest, tax, depreciation and amortizati...

Download

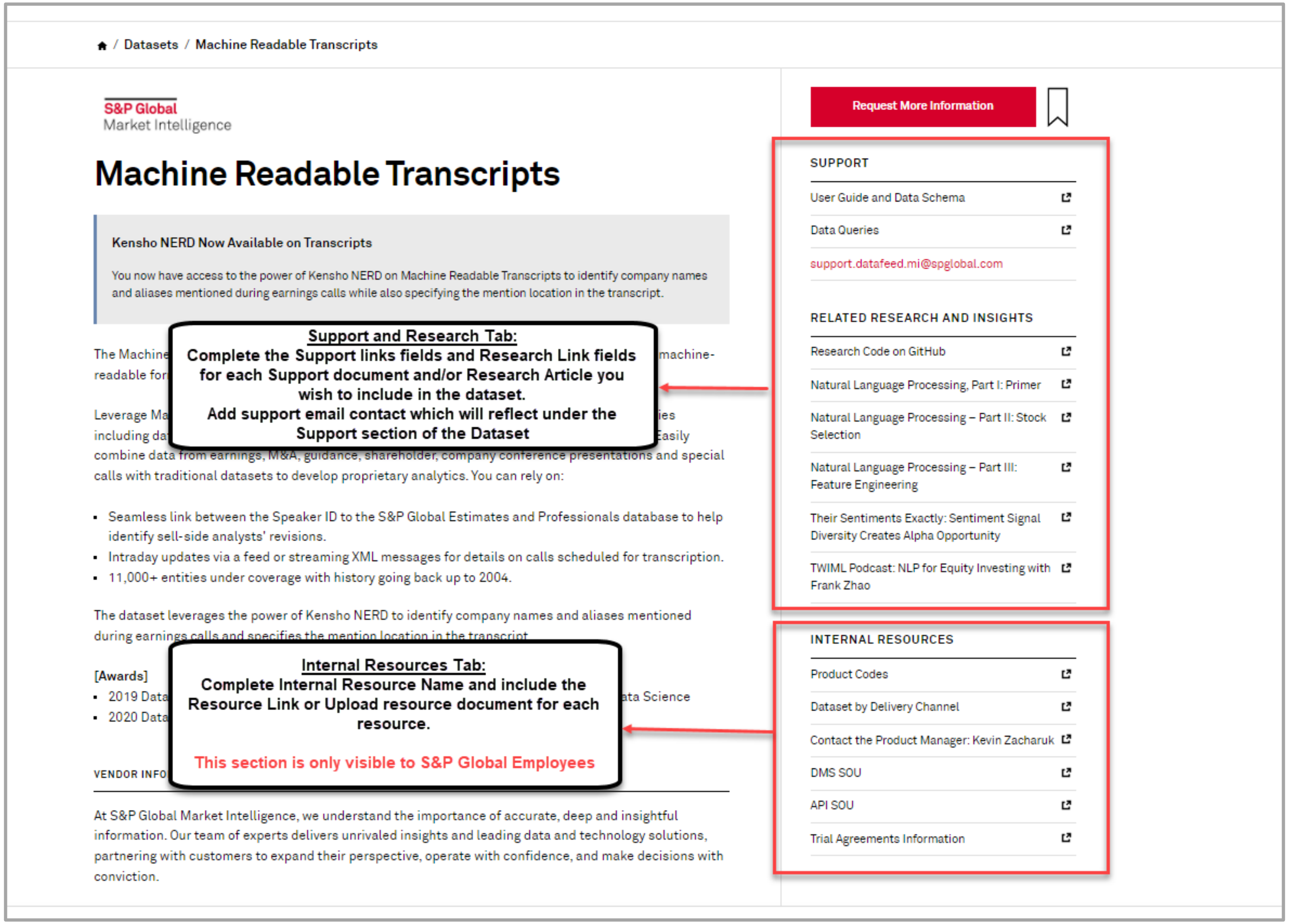
**Data Dictionary Tab:
Sample Data Dictionary
Display Upload file button**

**Data Dictionary Tab:
Upload Data Dictionary File
Upload/select button**

Marketplace CMS Dataset Editor Tabs Continued

Tab	Description
Master Trial Agreement	❑ We have an option for prospective clients to accept any trial agreement electronically on the Request a trial form which may speed up the sales process in order to provide a trial for our clients. Selecting the Master Trial Agreement enables this form in the Request for More Information Form. ○ Please note that you must also select the Master Trial Agreement Tooltip to add the following disclaimer language to the form: "Users are not required to agree to the Trial Agreement in order to submit a Request for Trial"
Support and Research	❑ **Support Links:** Add Support Resource Name and Support Resource Link or upload the Support Document for each support document for the dataset. Each support resource should reflect in the dataset profile under "Support“ ❑ **Resource Links:** Add Research Resource Name (e.g. Research Article Title), Research Website URL, and/or Research document for each publicly available research article related to the dataset. Each Research article should reflect under "Related Research and Insights" of the dataset profile ❑ **Support Email:** Email contact to receive support for dataset and will reflect under "Support" within the dataset profile. If email address is not provided, then *support.datafeed.mi@spglobal.com* will display by default *Note: when uploading a file, switch from “Custom Files” to “All Files” from the file explorer window to see all of your files*
Related	❑ Add existing datasets which are related to the dataset and will reflect under Related datasets in the dataset profile
Notebooks	❑ For each Workbench Notebook associated with the dataset, complete the Notebook Title which will appear in the profile, Upload the Notebook HTML File which will appear in the profile, add Attribution language (if applicable), and applicable Footnotes (tooltip)
Internal Resources	❑ Internal Resource links added are only visible to internal S&P Global users who are connected to VPN under the Internal Resources section of the dataset profile ❑ Provide Internal Resource Name, Resource Link, and/or internal resource document for each internal resource for the dataset ▪ When uploading a file, switch from “Custom Files” to “All Files” from the file explorer window ▪ When adding email address contacts, prefix the email address with ‘mailto:’ [example: mailto:taylor.swift@test.com]

CMS Dataset Editor Field Mapping to Dataset Details Page

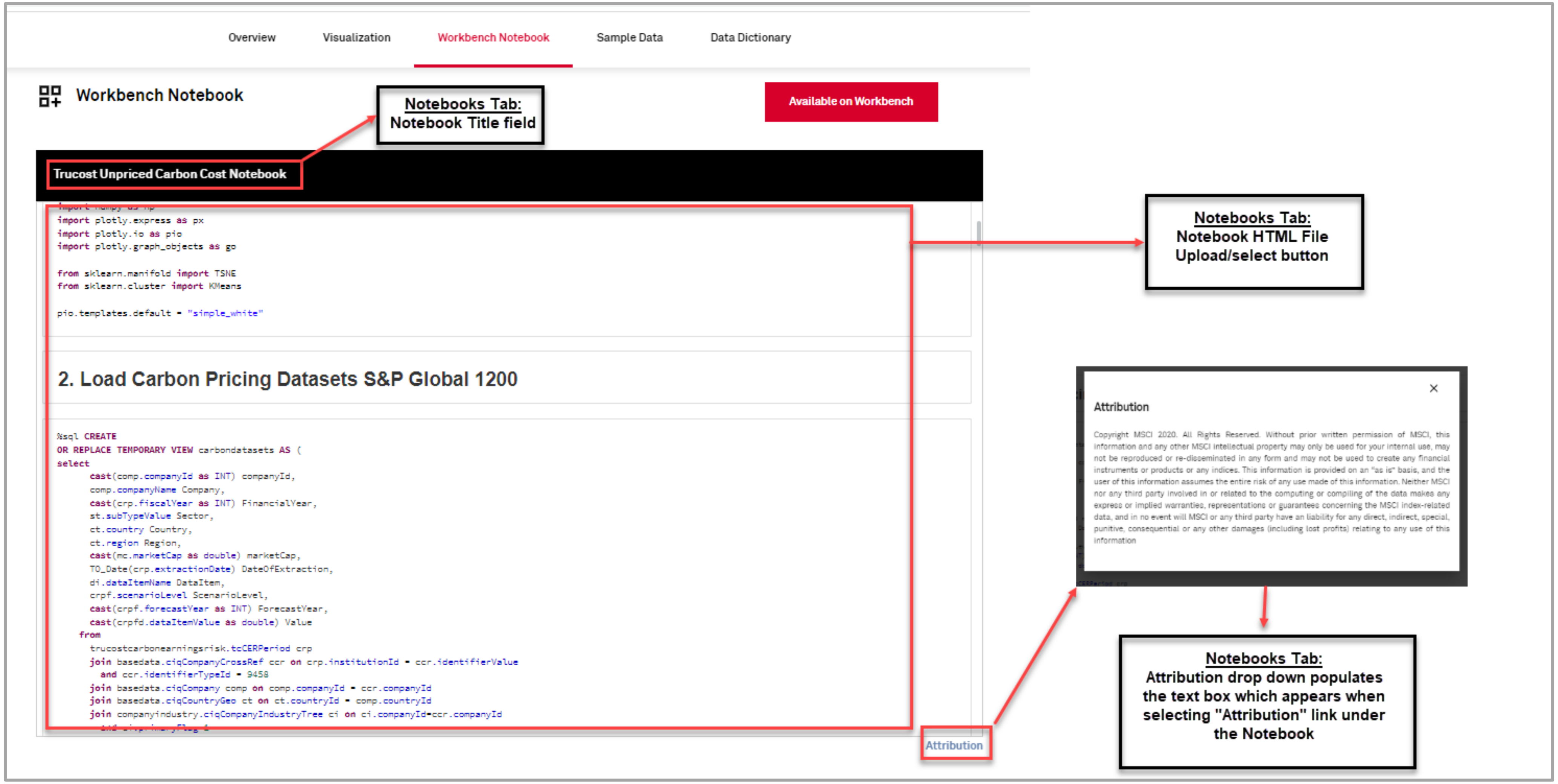


Support and Research Tab:
Complete the Support links fields and Research Link fields for each Support document and/or Research Article you wish to include in the dataset.
Add support email contact which will reflect under the Support section of the Dataset

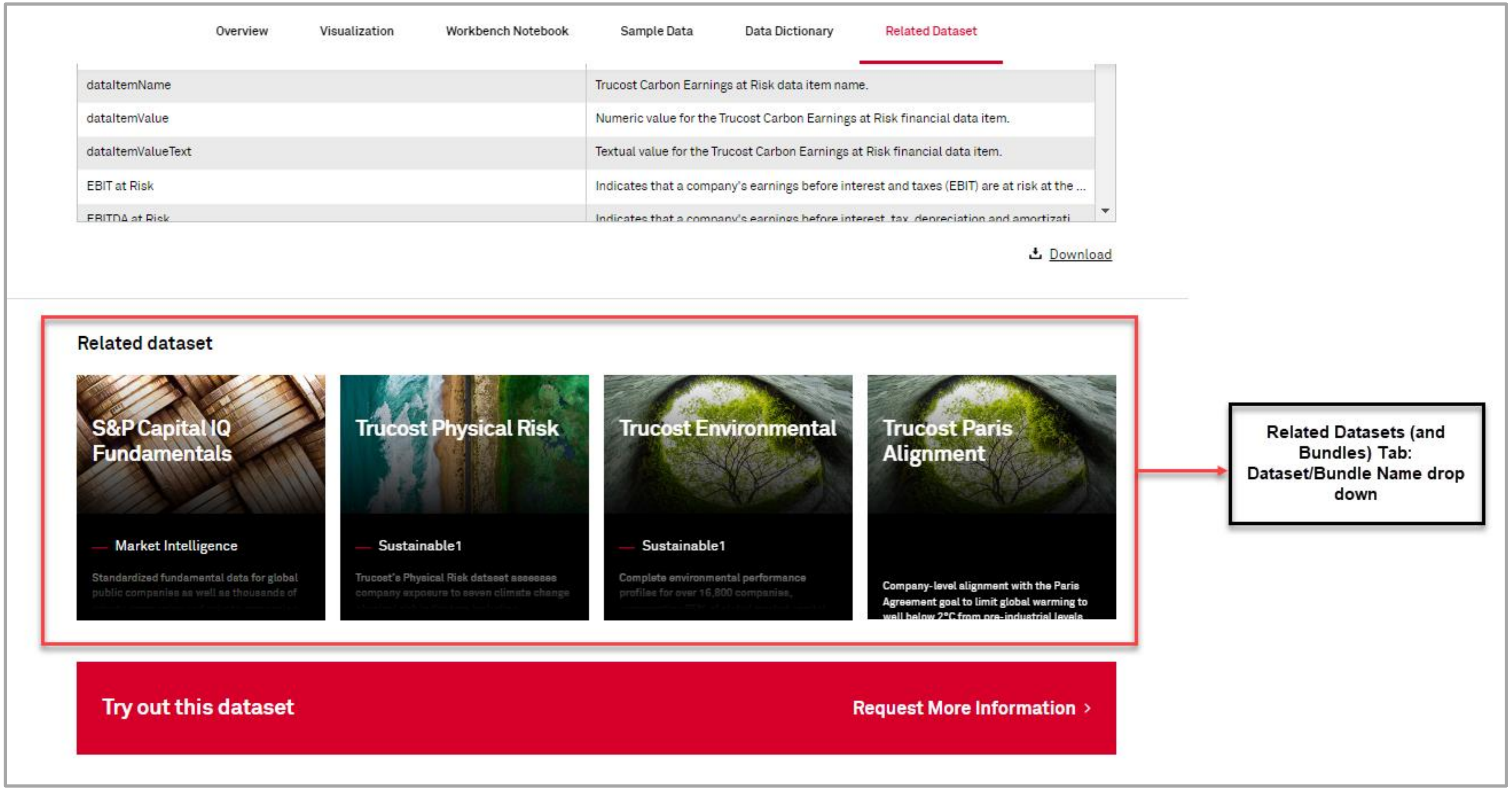
Internal Resources Tab:
Complete Internal Resource Name and include the Resource Link or Upload resource document for each resource.

This section is only visible to S&P Global Employees

Marketplace CMS Dataset Editor Field Mapping to Marketplace Tiles

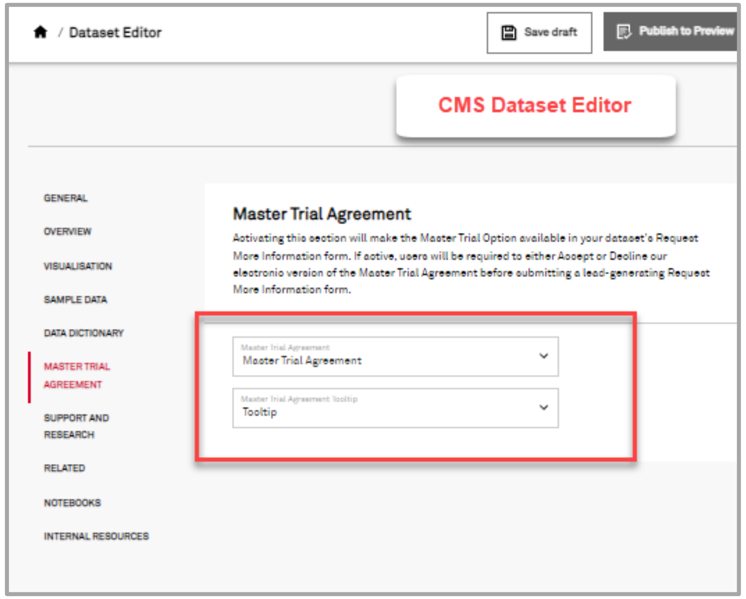


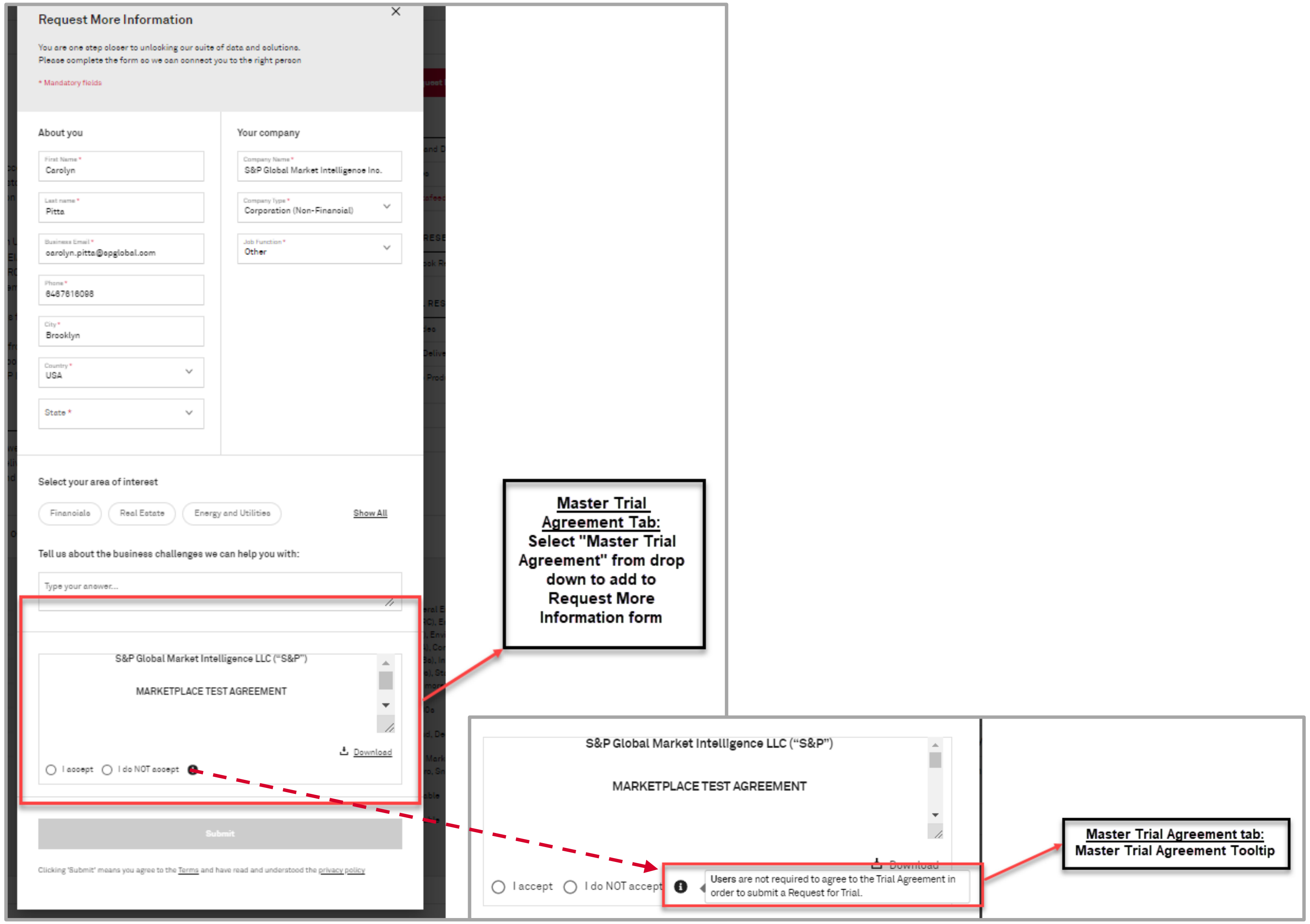
Marketplace CMS Dataset Editor Field Mapping to Marketplace Dataset Profile



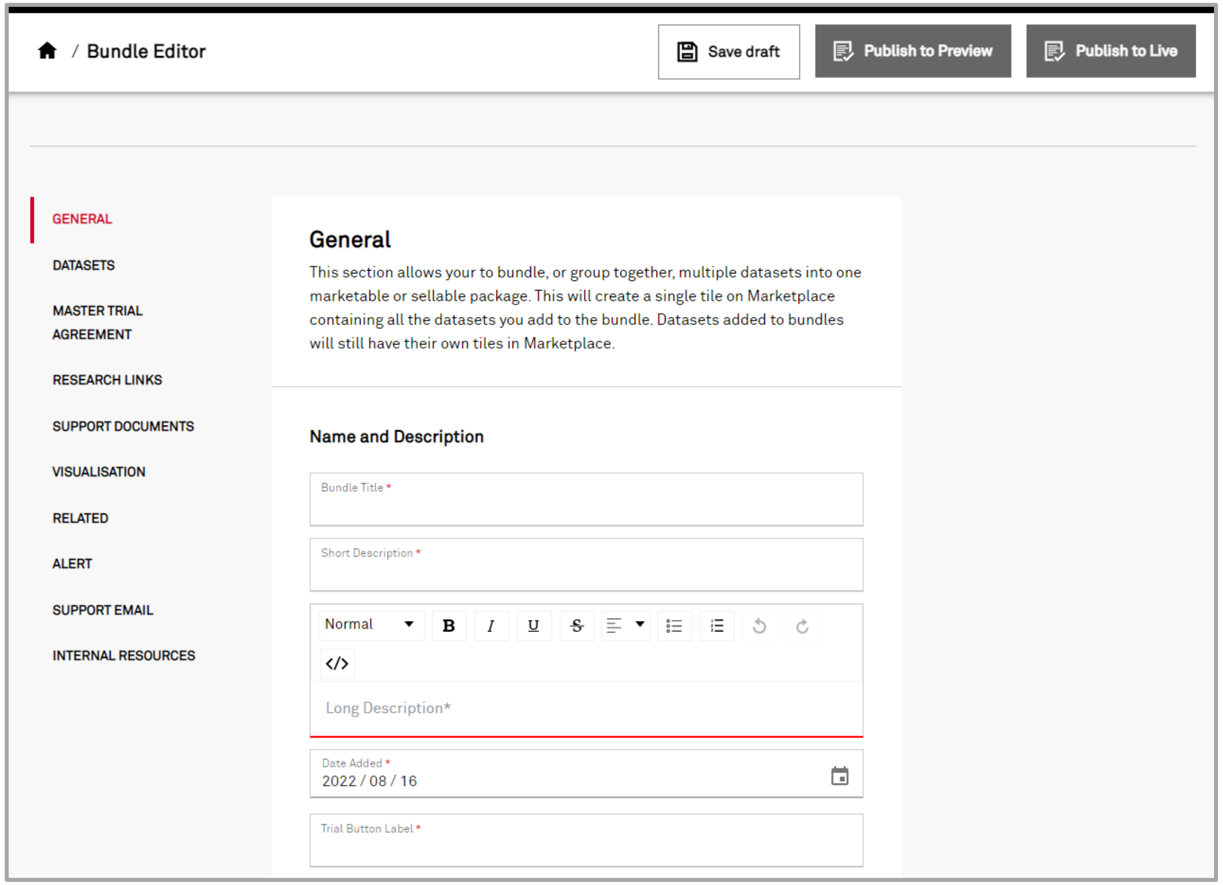
Related Datasets (and Bundles) Tab: Dataset/Bundle Name drop down

Marketplace CMS Dataset Editor Field Mapping to Marketplace Dataset Profile





CMS Bundle Editor



Overview

- **The Bundle Editor consists of multiple tabs of form fields (General, Overview, Data Dictionary, etc.) for Data Product Managers/Stewards to complete when creating/editing a new Dataset Bundle on the S&P Global Marketplace**
  - **General:** Adds important metadata for the Dataset Bundle such as Title, Descriptions, Categorization, Date Added, Search Tags, etc.
  - **Datasets:** Adds datasets which are included in the Bundle
  - **Master Trial Agreement:** Adds the optional Master Trial Agreement
  - **Research Links:** Adds links to related research
  - **Support Documents:** Adds links to support documentation
  - **Visualisation:** Adds Visualizations to Dataset Tiles (not Required)
  - **Related:** Adds related datasets and/or bundles to the data set to enable cross-selling opportunities
  - **Alert:** Adds banner alert notifications to the Bundle Profile
  - **Support Email:** Adds the support email contact details
  - **Internal Resources:** Adds internal resources that are available to S&P Global employees

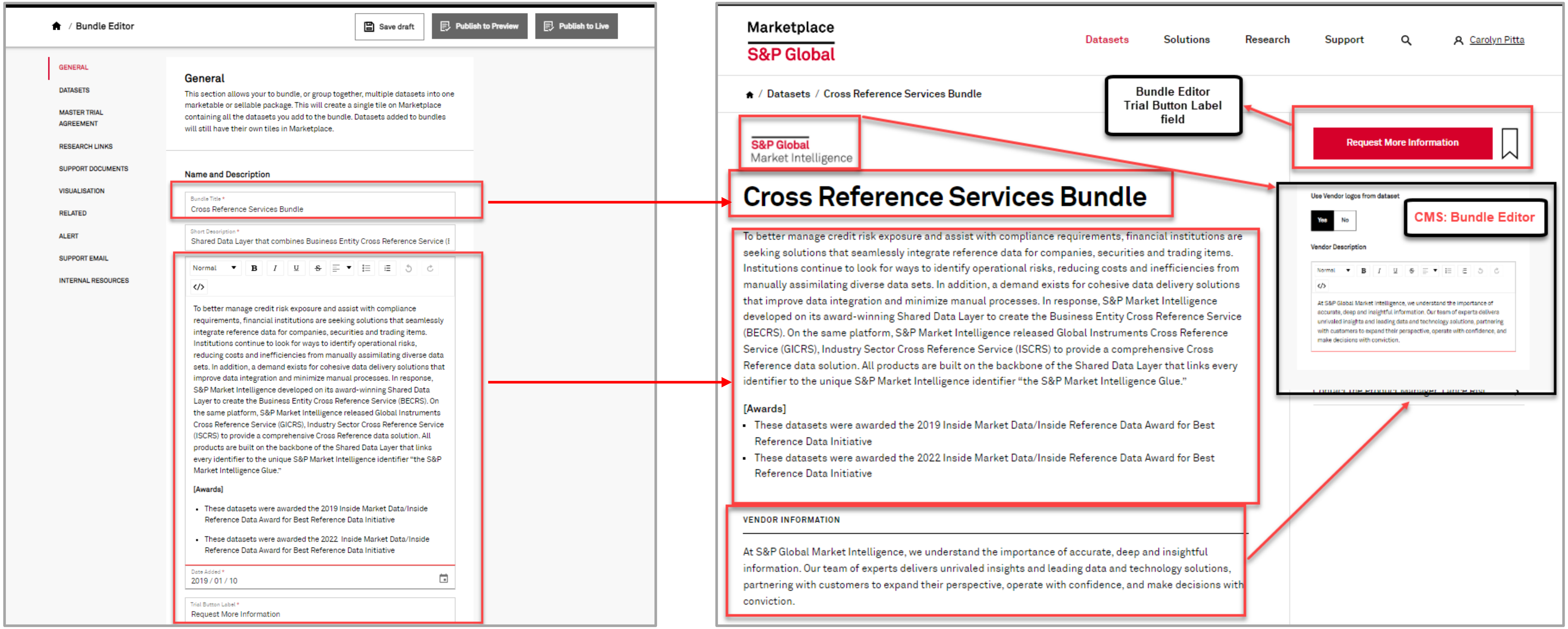
- At the top right of the Bundle Editor page, there are 3 buttons which allow Data Product Managers to:
  - **Save Draft:** saves the Dataset or latest edits in draft but does not publish to either S&P Global Marketplace Dev or S&P Global Marketplace. ***After Saving Draft, wait at least 3-4 minutes before Publishing to Preview***
  - **Publish to Preview:** Publishes the Dataset or Dataset's latest draft to the S&P Global Marketplace Dev. ***Email Marketplace Product team to clear cache for dataset/dataset updates to reflect on the Marketplace Dev environment***
  - **Publish to Live:** Publishes the Dataset or Dataset's latest draft to the S&P Global Marketplace. ***After Publishing to Live, please wait approximately 1 hour for the new tile/tile edits to reflect/open on the Marketplace.***

CMS Bundle Editor General Tab

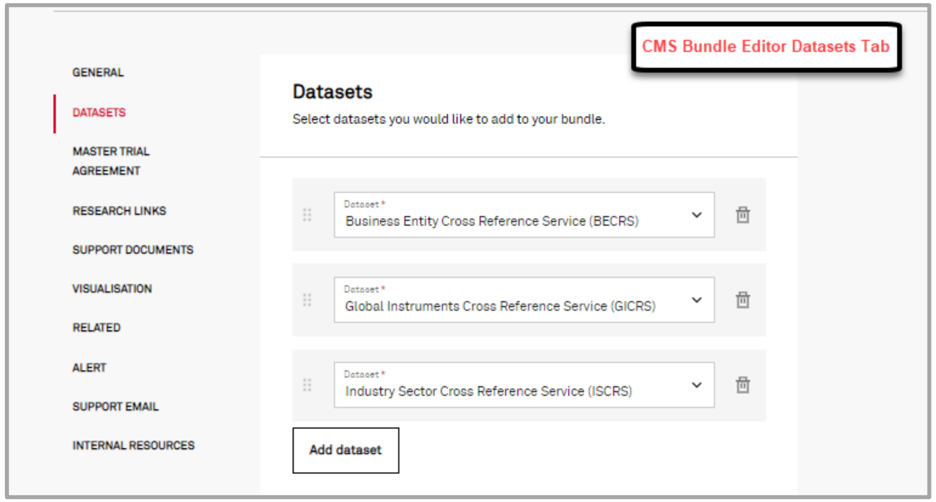
Section	Description
Name and Description	❑ **Bundle Title:*** Name of dataset bundle as it will appear on the Marketplace; char limit 100 ❑ **Short Description:*** :Short overview/synapsis of dataset/data bundle as it will appear in the tile; char limit 255 ❑ **Long Description:*** In-Depth Overview found in the dataset bundle details page; char limit 2000 *Note: The application will not publish duplicate bundles which have the same title, short description, and long description* ❑ **Date Added*:** Date when dataset bundle is available for purchase ▪ If future dated, tile will reflect "Coming Soon" until that date in both the details page and the tile until that date ▪ "Recently Added" will reflect on the tile for tiles which were added within 90 days of this field and date added will reflect in the top right of the profile page ❑ **Trial Button Label:** Allows for the customization of the button which launches the 'Request More Information' form (generally, for datasets and bundles, this button is entitled "Request More Information")
Tile Image	❑ Background Image which appears on the Tile. (Image added should be consistent with the type of industry the dataset bundle belongs to)
Use Vendor Logos from dataset (yes/no)	• If yes, provider logo from dataset which are added to the bundle will be used • If no, the dataset provider logo must be uploaded
Vendor* Description	Data provider long description; char limit 1500

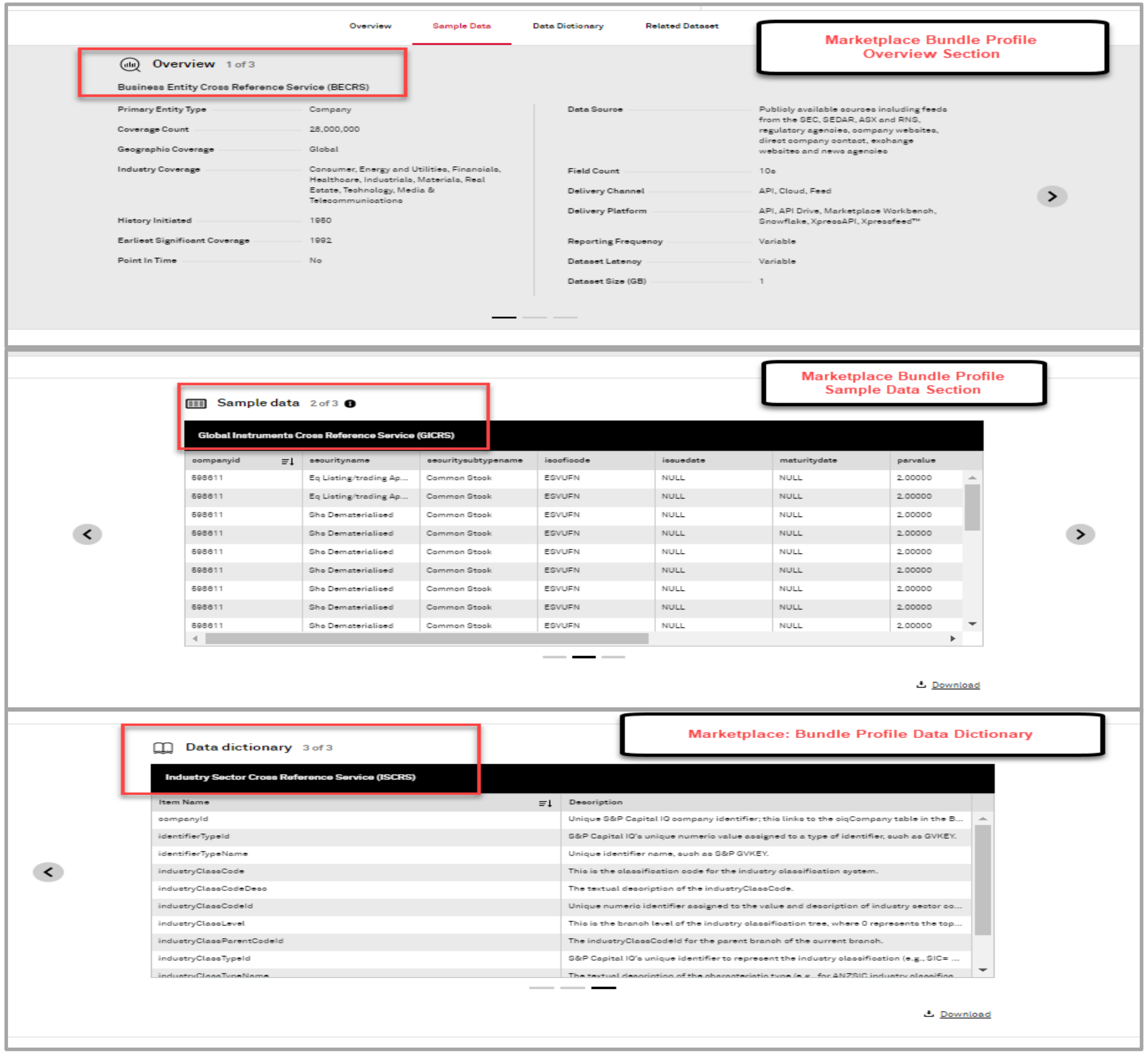
***denotes required field (e.g. unable to save draft, publish to preview, publish live without completing)**

CMS Bundle Editor to Marketplace Bundle Profile Page Field Mapping



CMS Bundle Editor: Datasets Tab





Field Instructions

- ❑ Select all the datasets which are to be added to the bundle which will automatically add Overview Section, Sample Data, & Data Dictionaries from each dataset to the bundle tile (note: Datasets must be first created in the Dataset editor before they can be added to a bundle)

CMS Bundle Editor: Datasets Tab

Workbench Notebook

Available on Workbench

Trucost Unpriced Carbon Cost Notebook

```
      cast(crpfd.dataItemValue as double) Value
    from
      trucostcarbonearningsrisk.tcCERPeriod crp
      join basedata.ciqCompanyCrossRef ccr on crp.institutionId = ccr.identifierValue
        and ccr.identifierTypeId = 9458
      join basedata.ciqCompany comp on comp.companyId = ccr.companyId
      join basedata.ciqCountryGeo ct on ct.countryId = comp.countryId
      join companyindustry.ciqCompanyIndustryTree ci on ci.companyId=ccr.companyId
        and ci.primaryFlag=1
      join companyindustry.ciqSubType st on st.subTypeId = ci.subTypeId
        and st.childLevel = 1
      join trucostcarbonearningsrisk.tcCERPeriodForecast crpf on crpf.periodId = crp.periodId
      join trucostcarbonearningsrisk.tcCERPeriodForecastData crpfd on crpfd.periodForecastId = crpf.periodForecastId
      join trucostcarbonearningsrisk.tcDataItem di on di.dataItemId = crpfd.dataItemId
      join marketdata.ciqMarketCap mc on mc.companyId = comp.companyId
    where
      1=1
      and crpfd.dataItemId in (327651, 327652)
      and crp.fiscalYear = 2018
      and crpf.forecastYear in (2020, 2025, 2030, 2040, 2050)
      and mc.pricingDate = crp.extractionDate
      and exists (
          select 1 from indexdata.ciqIndexProvider ip
            join indexdata.ciqIndex i on i.indexProviderID = ip.indexProviderID
            join indexdata.ciqIndexConstituentCurrent ic on ic.indexID = i.indexID
            join basedata.ciqTradingItem ti on ti.tradingItemId = ic.tradingItemID
            join basedata.ciqSecurity s on s.securityId = ti.securityId
          where i.indexID = 2671244 --SP1200
          and s.companyId = comp.companyId
        )
)

OK
```

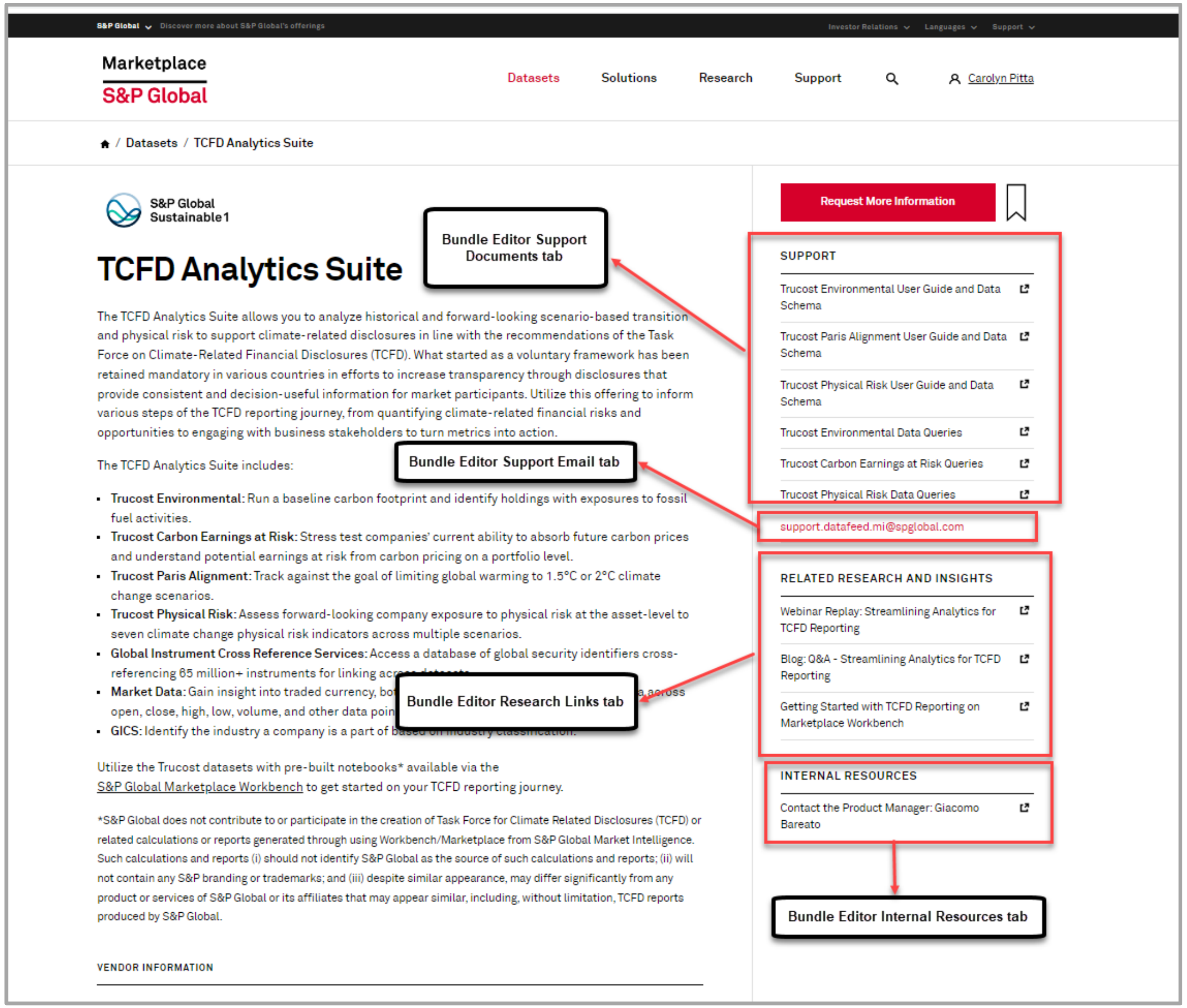
```
sparkDF = spark.sql("select * from carbondatasets")
df = sparkDF.toPandas()
```

Attribution

Datasets tab:
Workbench Notebook(s) are pulled in from dataset(s) which are added to bundle

CMS Bundle Editor Tabs to Marketplace Bundle Profile Mapping

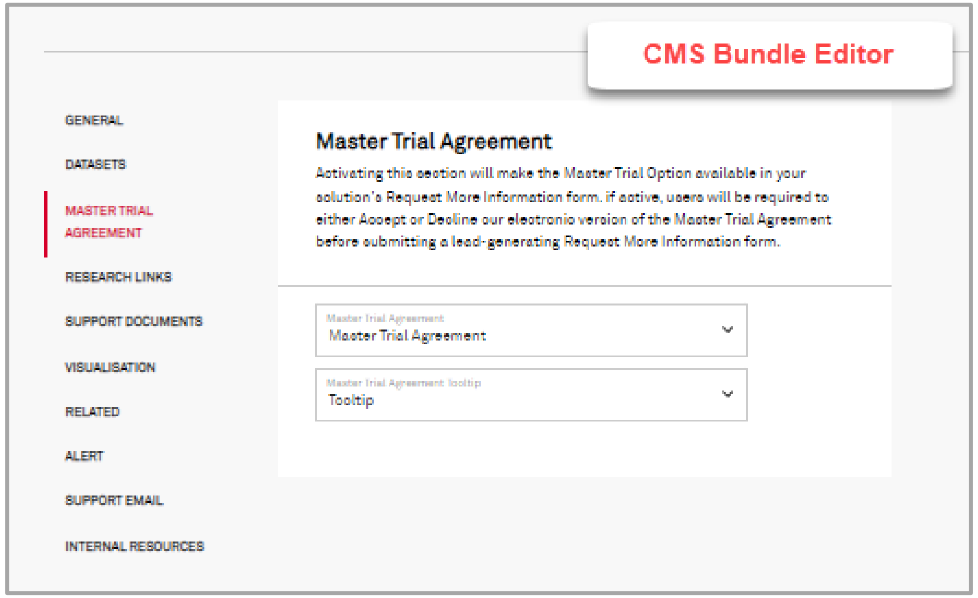
Tabs	Description
Research Links	❑ Resource Links: Add Research Resource Name (e.g. Research Article Title), Research Website URL, and/or Research document for each publicly available research article related to the dataset. Each Research article should reflect under "Related Research and Insights" of the dataset bundle profile
Support Documents	❑ Support Links: Add Support Resource Name, Support Resource Name, and/or Support Document for each support document for the dataset bundle. Each support resource should reflect in the dataset profile under "Support" ❑ *Note: when uploading a file, switch from “Custom Files” to “All Files” from the file explorer window to see all of your files*
Support Email	❑ Email contact to receive support for dataset and will reflect under "Support" within the dataset profile. If email address is not provided, then *support.datafeed.mi@spglobal.com* will display by default
Internal Resources	❑ Internal Resource links added are only visible to internal S&P Global users who are connected to VPN under the Internal Resources section of the dataset profile ❑ Provide Internal Resource Name, Resource Link, and/or internal resource document for each internal resource for the dataset ▪ When uploading a file, switch from “Custom Files” to “All Files” from the file explorer window ▪ When adding email address contacts, prefix the email address with ‘mailto:’ [example: mailto:taylor.swift@test.com]

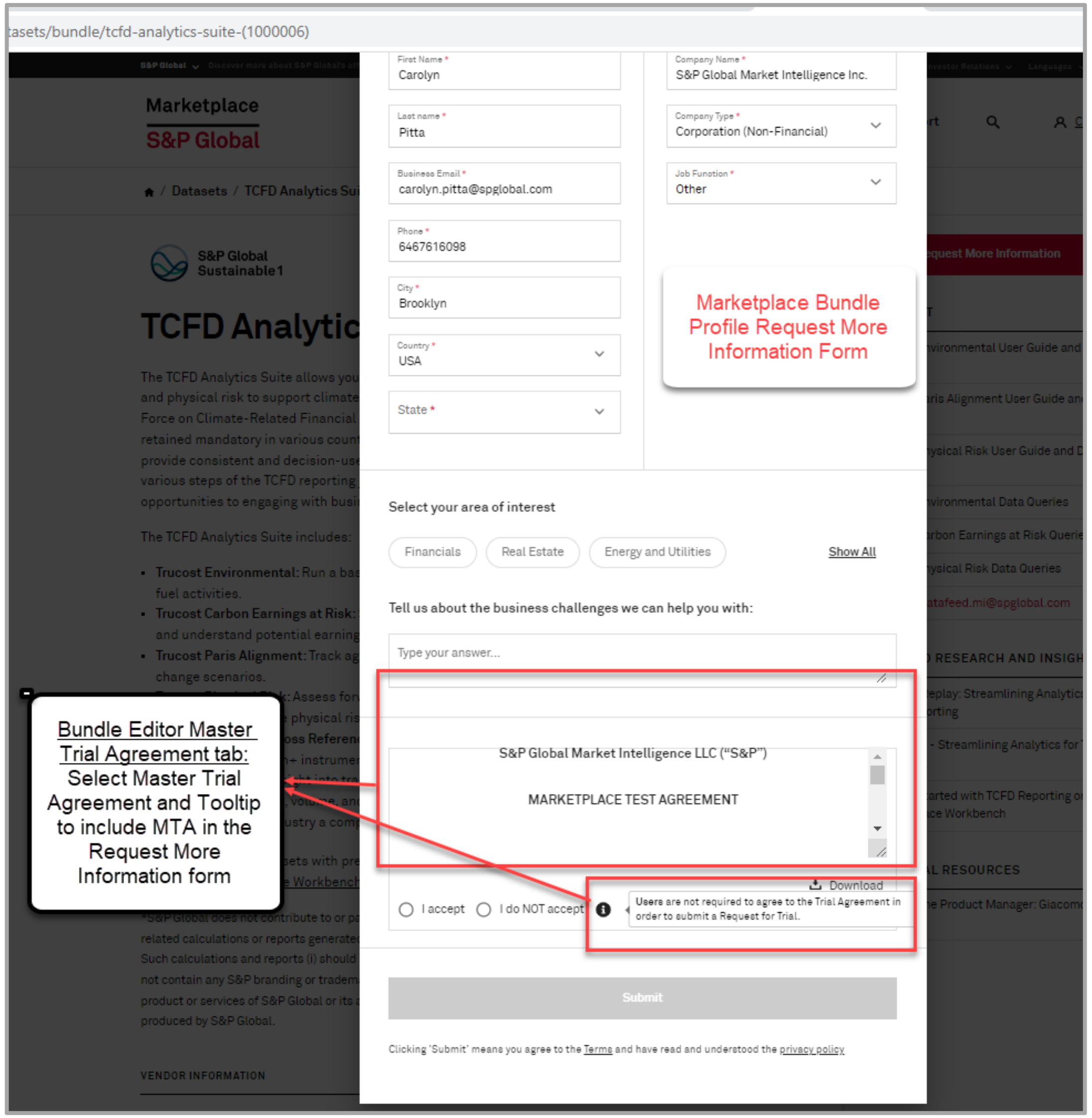


CMS Bundle Editor Tab: Adding Master Test Agreement

Section Instructions

- ❑ We have an option for our potential clients to accept any trial agreement electronically on the Request a trial form which may speed up the sales process in order to provide a trial for our clients. Selecting the Master Trial Agreement enables this form in the Request for More Information Form.
  - Please note that you must also select the Master Trial Agreement Tooltip to add the following disclaimer language to the form: "Users are not required to agree to the Trial Agreement in order to submit a Request for Trial"

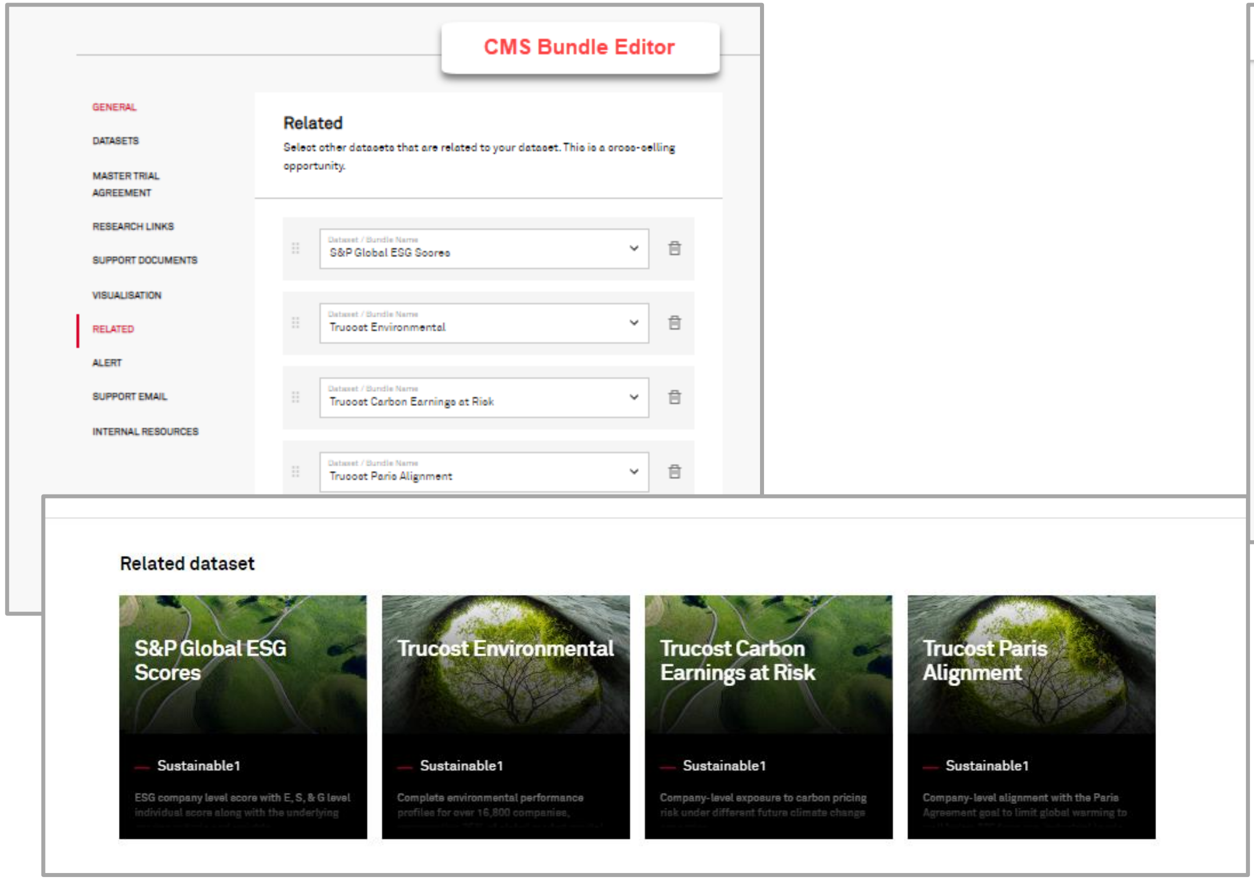


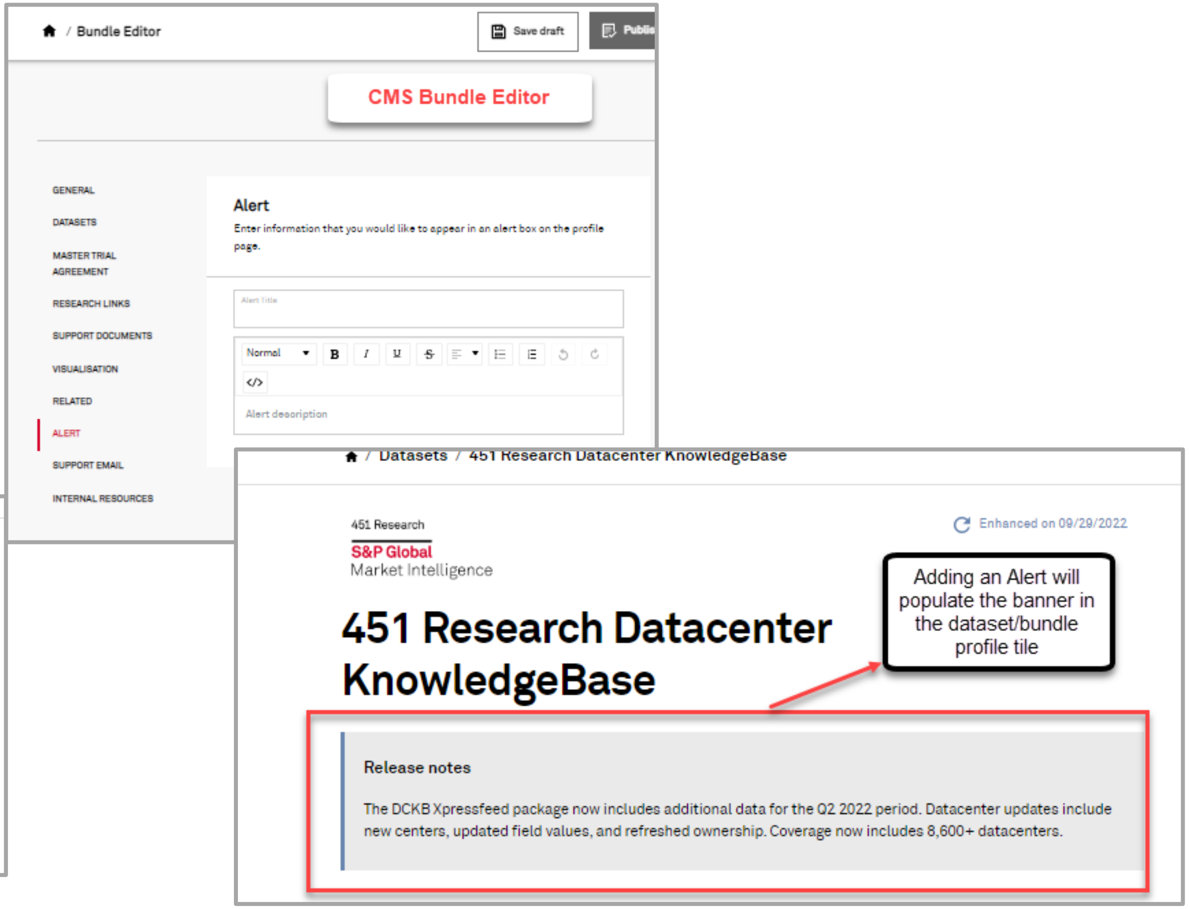


*Master Trial Agreement functionality works the same for Dataset & Solution Editor when adding MTA to Datasets and/or Solutions

CMS Bundle Editor Tab: Alert & Related Tabs

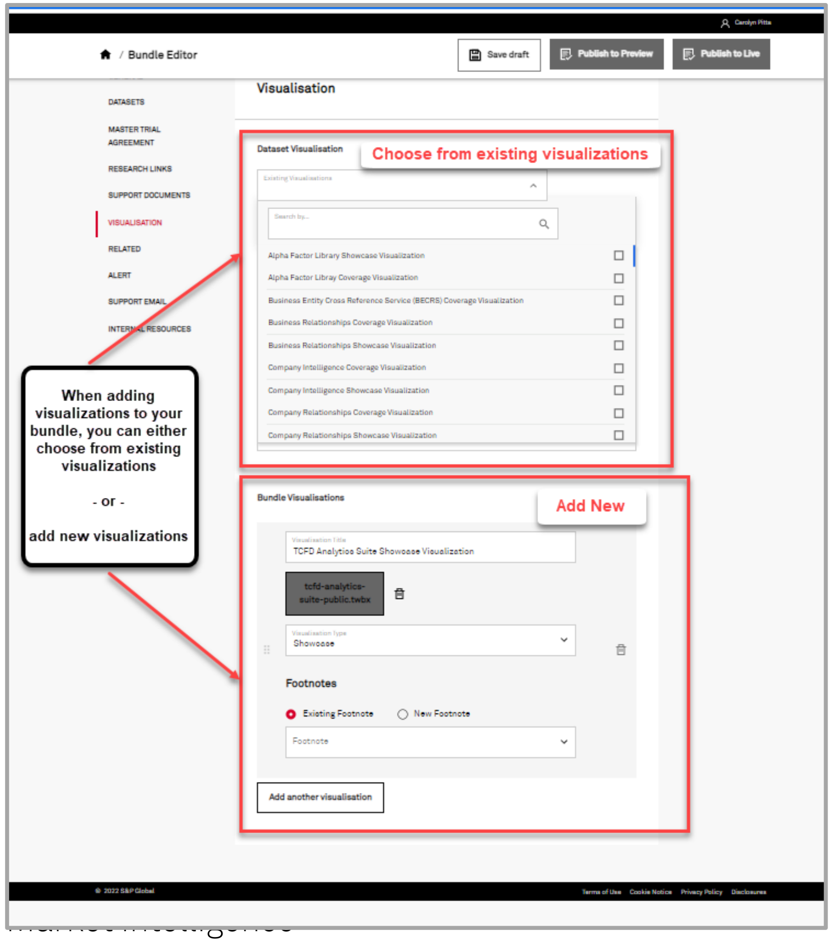
Tabs	Instructions
Related	❑ To include Related Datasets to the Bundle, select and existing datasets from the Related tab of the Bundle Editor
Alert	❑ To add a banner message to top of the Dataset Bundle Profile, complete the Alert Title (e.g. Release notes) and Description fields of the Alert tab

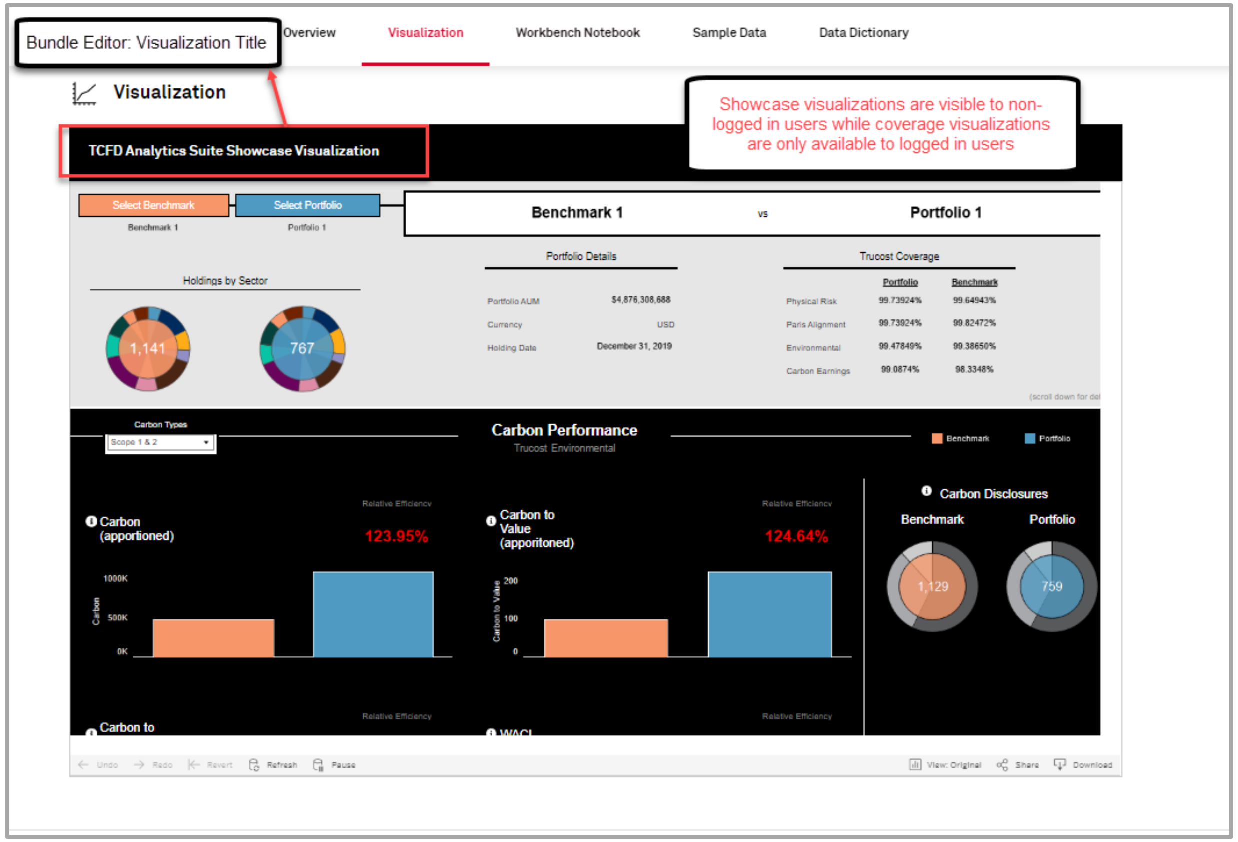




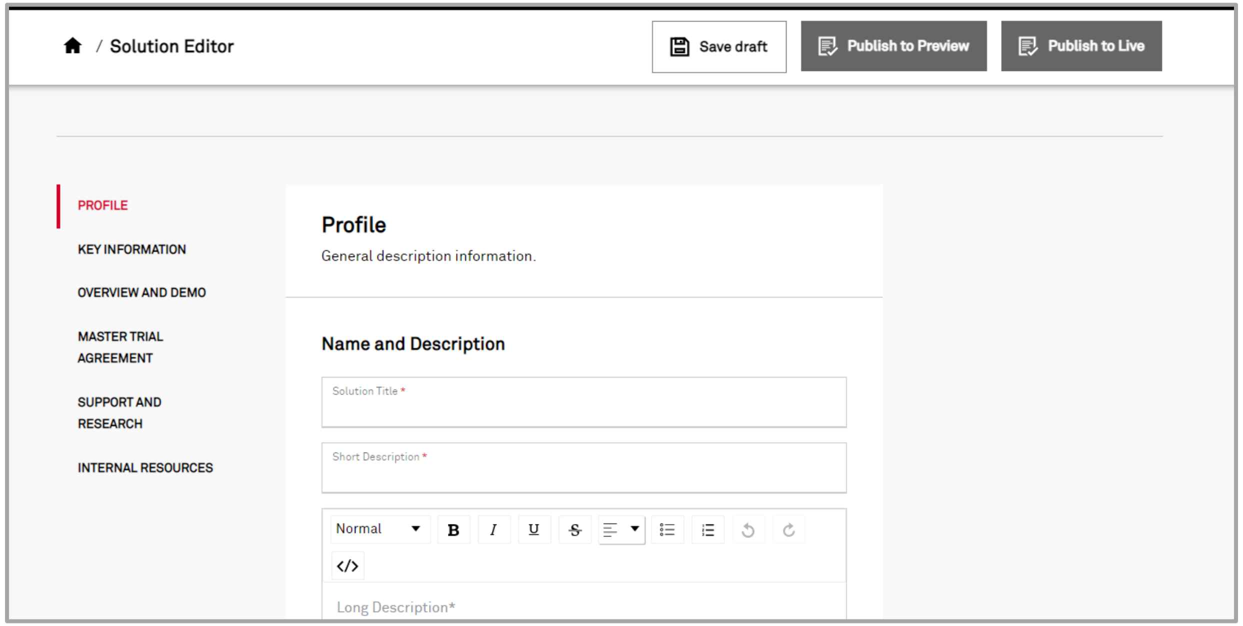
CMS Bundle Editor Tab: Adding Visualizations to a Bundle

- ❑ If the bundle has visualizations, the data steward/product manager can either choose to include existing visualizations from the datasets under the Dataset Visualisation section and/or add a new visualization from the Visualizations tab
- ❑ When adding a new visualization, add the Visualization Title which will appear in the dataset profile, upload the visualization file(s) which will appear in the profile, select the Visualization Type (Showcase or Coverage), and, if applicable, add a footnote (tooltip) language
  - ❑ Visualization Tile should be the name of the dataset plus it’s visualization type (e.g. “TCFD Analytics Suite Showcase Visualization”)
  - ❑ Visualization file must be a twtbx file
  - ❑ Showcase visualizations are available to non-logged in users
  - ❑ Coverage visualizations are only available to logged in users and may have an attribution language that needs to be populated





CMS Solution Editor



Overview

- The Solution Editor consists of multiple tabs of form fields (General, Overview, Data Dictionary, etc.) for Product Managers to complete when creating/editing a new Solution on the S&P Global Marketplace
  - **Profile:** Adds important metadata for the Solution tile such as Title, Descriptions, Date Added, Search Tags, etc.
  - **Key Information:** Adds Key Information details found in the Solution Profile
  - **Overview and Demo:** Adds Overview and Demo content to the Solution Profile
  - **Master Trial Agreement:** Adds the optional Master Trial Agreement to the Solution
  - **Support and Research:** Adds any support documents, support email contact info, and related research articles to the Solution Profile
  - **Internal Resources:** Adds internal resources available for the Solution to S&P Global employees

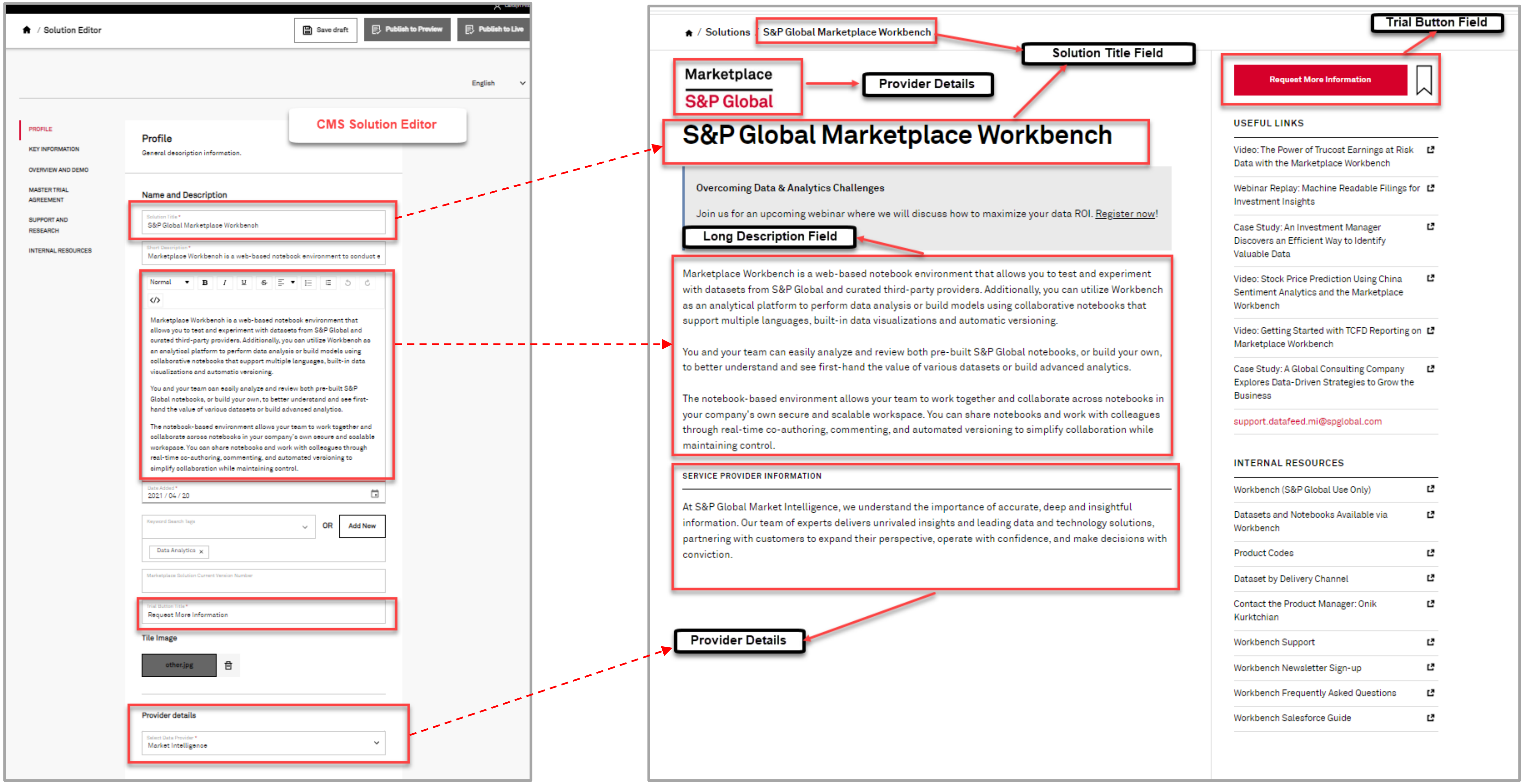
- At the top right of the Solution Editor page, there are 3 buttons which allow Product Managers to:
  - **Save Draft:** saves the Dataset or latest edits in draft but does not publish to either S&P Global Marketplace Dev or S&P Global Marketplace. ***After Saving Draft, wait at least 3-4 minutes before Publishing to Preview***
  - **Publish to Preview:** Publishes the Dataset or Dataset's latest draft to the S&P Global Marketplace Dev. ***Email Marketplace Product team to clear cache for dataset/dataset updates to reflect on the Marketplace Dev environment***
  - **Publish to Live:** Publishes the Dataset or Dataset's latest draft to the S&P Global Marketplace. ***After Publishing to Live, please wait approximately 1 hour for the new tile/tile edits to reflect/open on the Marketplace.***

CMS Solution Editor Profile Tab

Tabs	Description
Name and Description	❑ **Solution Title:*** Name as it should appear on the Marketplace of a service, tool, or capability offered (100 char limit) ❑ **Short Description:*** Short description of the service, tool, or capability at it should appear on the tiles in the catalog (255 char limit) ❑ **Long Description:*** long description of a service, tool, or capability offered which appears in the profile page (2000 char limit) *Note: The application will not publish duplicate solutions which have the same title, short description, and long description* ❑ **Date Added:*** date as of which the service, tool, or capability is available to clients for purchase/subscription ▪ If future dated, tile will reflect "Coming Soon" until that date in both the details page and the tile until that date ▪ "Recently Added" will reflect on the tile for tiles which were added within 90 days of this field and date added will reflect in the top right of the profile page ❑ Keyword Search Tags: Keyword tags associated with every Solution . Enable users to search Solutions using predictive text search functionality. Choose from the list or add new search tags ❑ Marketplace Solution Current Version Number: Current version number for a given solution on the external marketplace ❑ **Trial Button Title:*** Allows for the customization of the button which launches the 'Request More Information' form (generally, this button is entitled "Request More Information" or "Subscribe Now")
Tile Image	Image which reflects on the tile of the catalogue
Provider Details	❑ **Select Data Provider*:** Service, tool, or capability Provide/Vendor Details (S&P global Market Intelligence, S&P Global Commodity Insights, S&P Global Mobility, S&P Global Engineering Solutions, S&P Global Ratings, S&P Dow Jones Indices, S&P Global Sustainable1). Adding the provider should automatically add the provider logo and vendor description to the Marketplace tile
Message Type	❑ Adds Banner Message to top of the Solution Profile ❑ **Message Type**: **Alert** or **Recently Updated** ▪ When **Alert** is selected, fields to be completed are Alert Title (e.g. Release Notes) and Alert Description ➢ Alert Title: Banner Title; char limit 100 ➢ Alert Description: Description which summarizes the alert that will appear in the dataset; char limit 255 ▪ When Recently Updated is selected, the fields to be completed are Date Added, Enhancement Description, and/or Enhancement Link ➢ **Data Added**: Date material update was released for service, tool, or capability. (ONLY RECENT ENHANCEMENTS WITHIN LAST 3 MONTHS). On the Marketplace, the tile should reflect "Recently Enhanced" for 90 days after this date and the top right corner of the Profile Page should reflect "Recently Enhanced on [Date Added]" ➢ **Enhancement Description:** Maximum 255 character description summarizing updates to the service, tool, or capability (Release notes). Only available if the above field is not Null. (ONLY RECENT ENHANCEMENTS WITHIN LAST 3 MONTHS) ➢ **Enhancement Link:** Provide the direct link URL to the release notes document on the Support site for the Solution's specific enhancement.

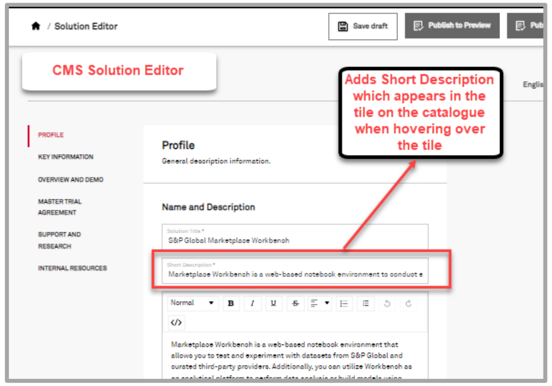
***denotes required field (e.g. unable to save draft, publish to preview, publish live without completing)**

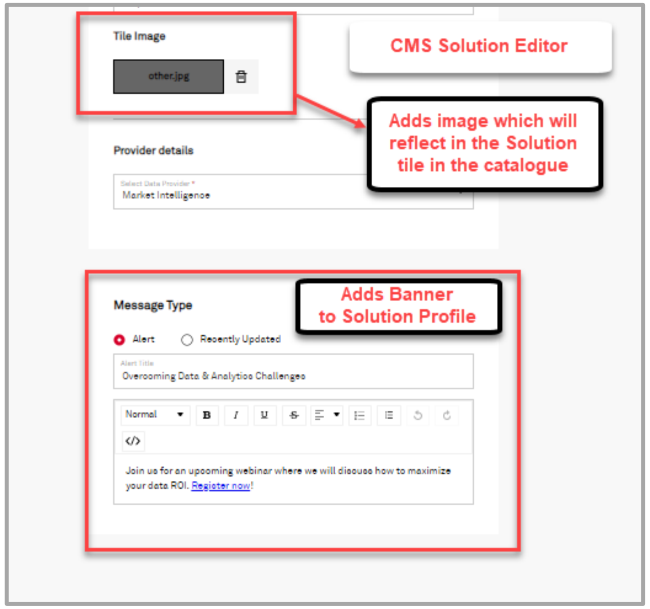
CMS Solution Editor Profile to Marketplace Solution Profile Mapping



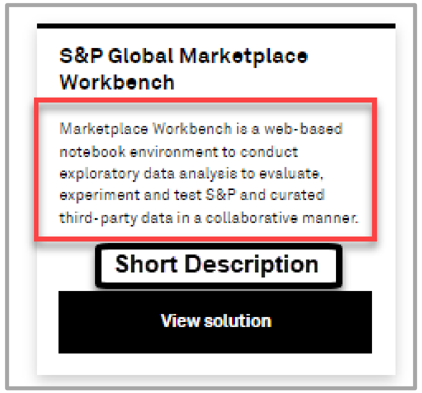
CMS Solution Editor Profile to Marketplace Solution Profile Mapping

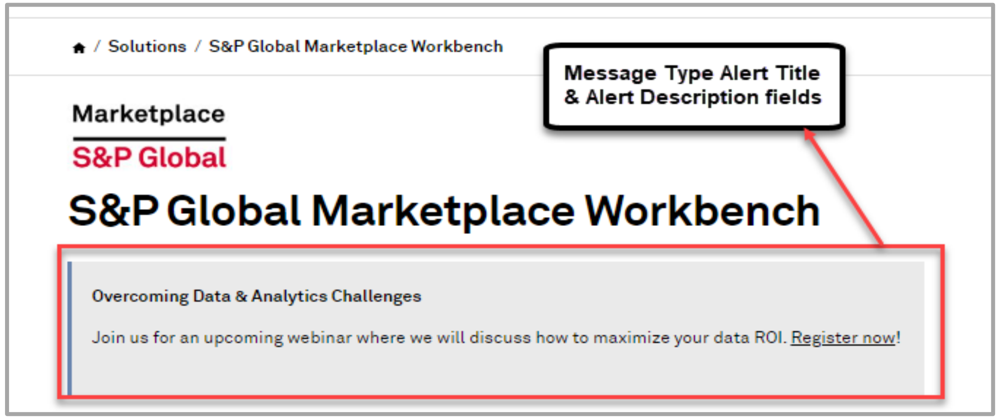
Marketplace CMS





Marketplace Solution Tile & Profile

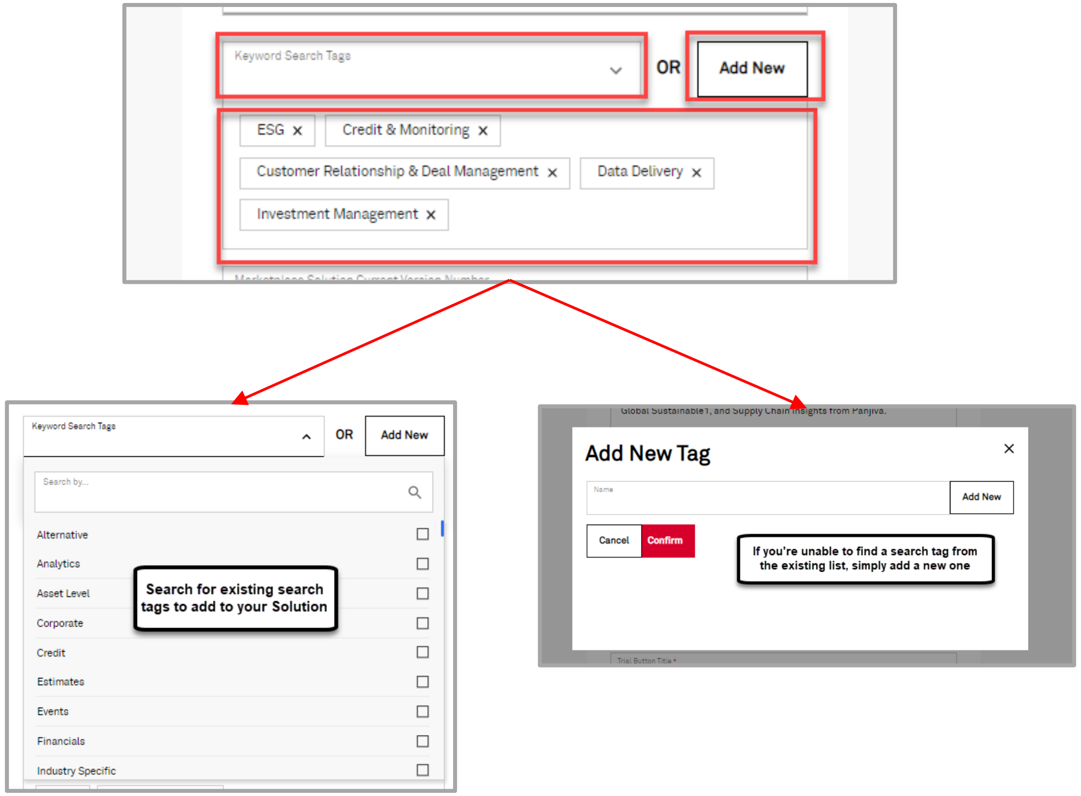




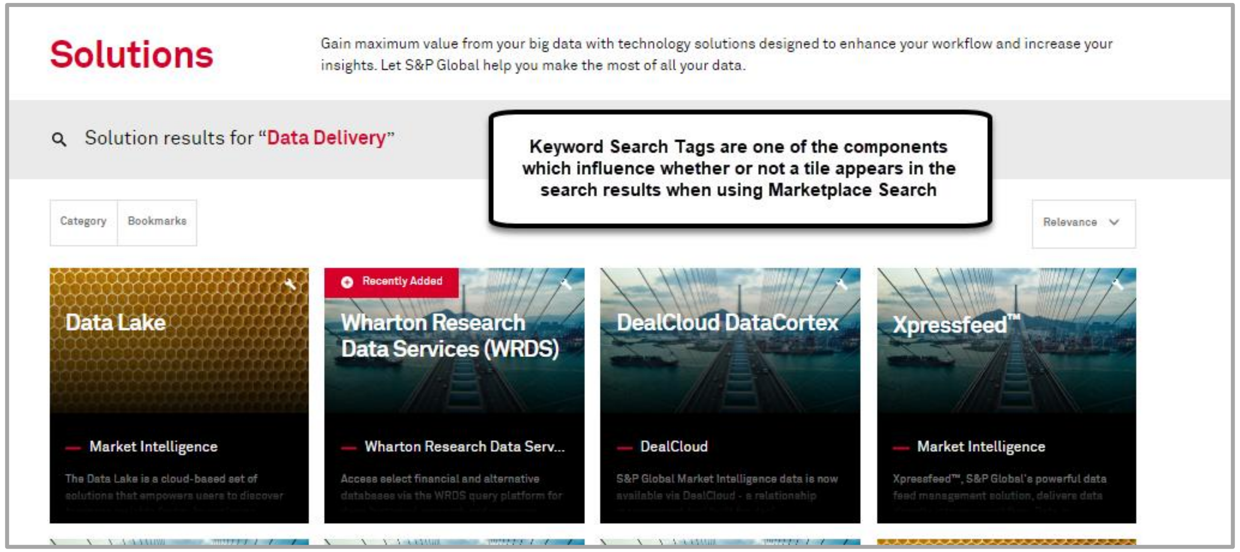
Marketplace CMS Solution Editor Field Key Word Search Tags

Keyword Search Tags: Keyword tags associated with every Solution . Enable users to search Solutions using predictive text search functionality. Choose from the list or add new search tags

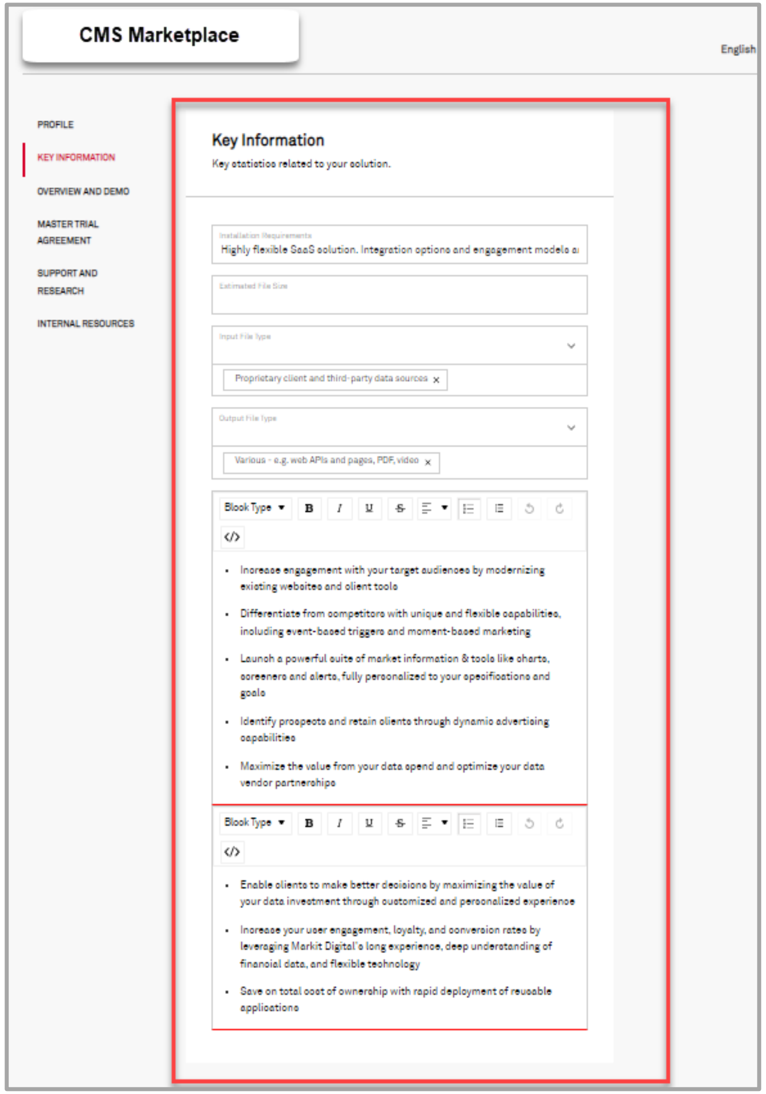
Marketplace CMS



Marketplace

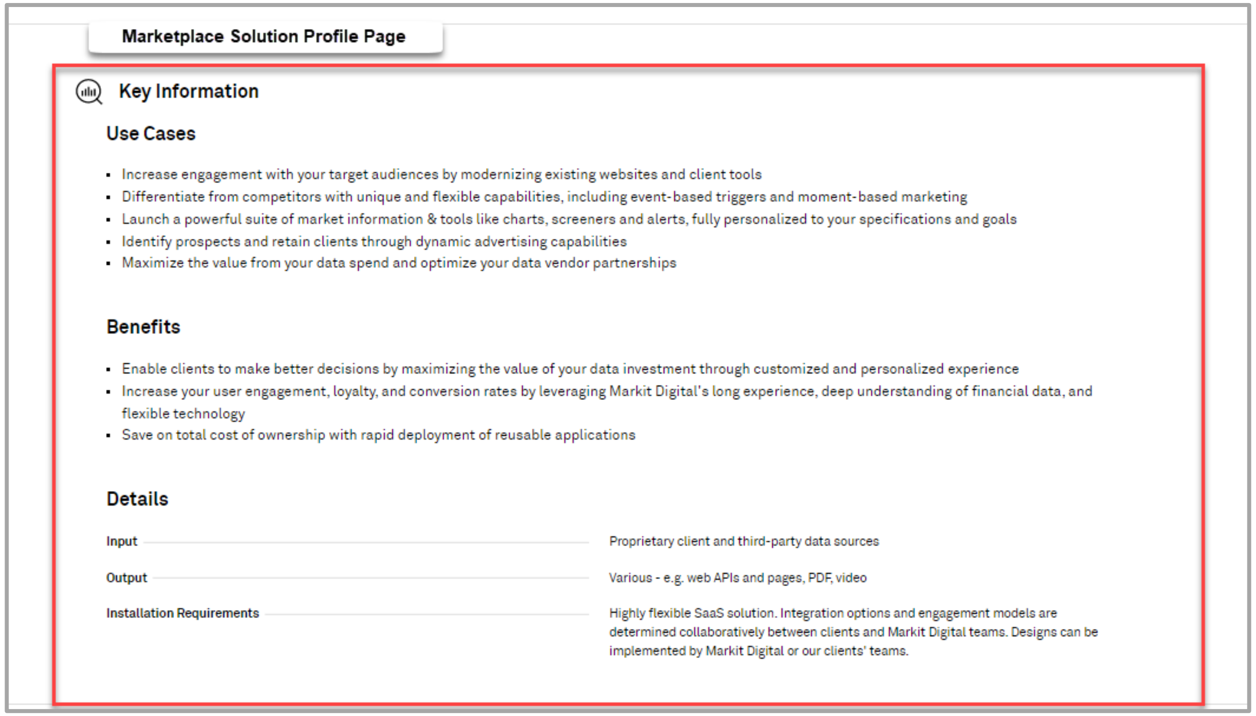


CMS Solution Editor Key Information Tab

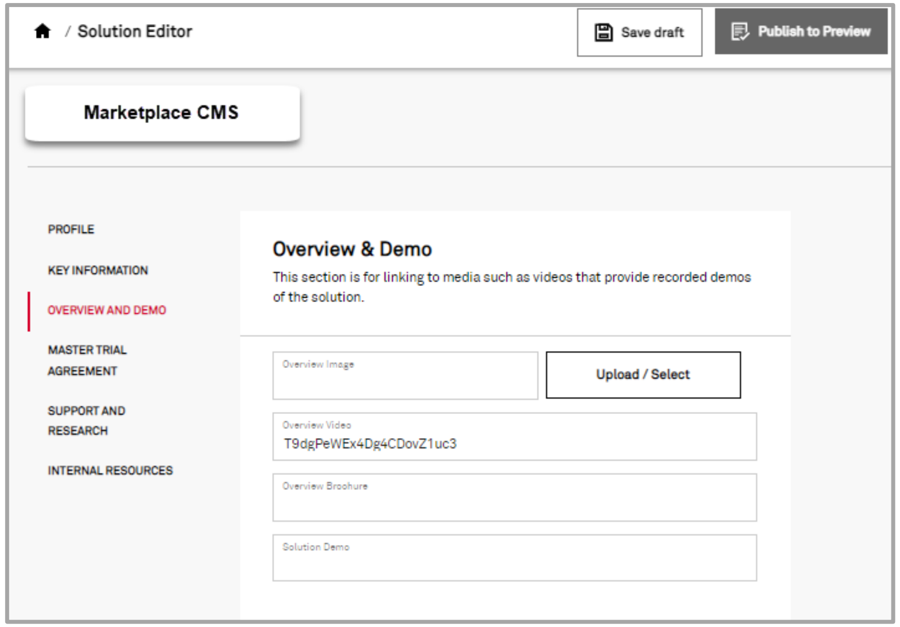


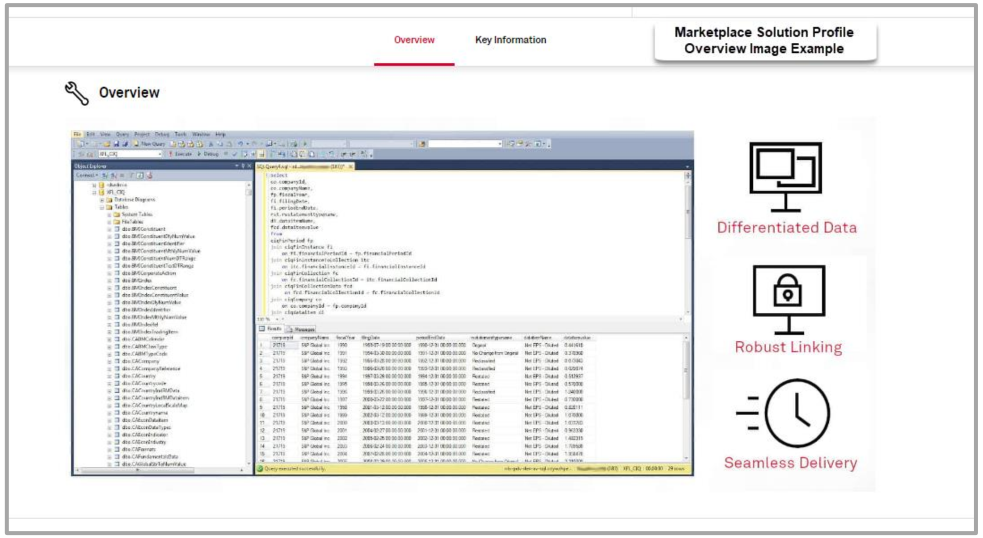
Description
❑ Installation Requirements: Basic requirements for on premises installation of a service, tool, or capability (255 char limit) ❑ Estimated File Size: The estimated file size of a service, tool, or capability for on premises installation (in MB) ❑ Input File Type: Service Input format ❑ Output File Type: Service Output format ❑ **Use Cases*:** The potential use cases to the user of a particular service, tool, or capability on the external marketplace (1000 char limit) ❑ **Benefits*:** Potential benefits of using a particular service, tool, or capability on the external marketplace (1000 char limit)

***denotes required field (e.g. unable to save draft, publish to preview, publish live without completing)**



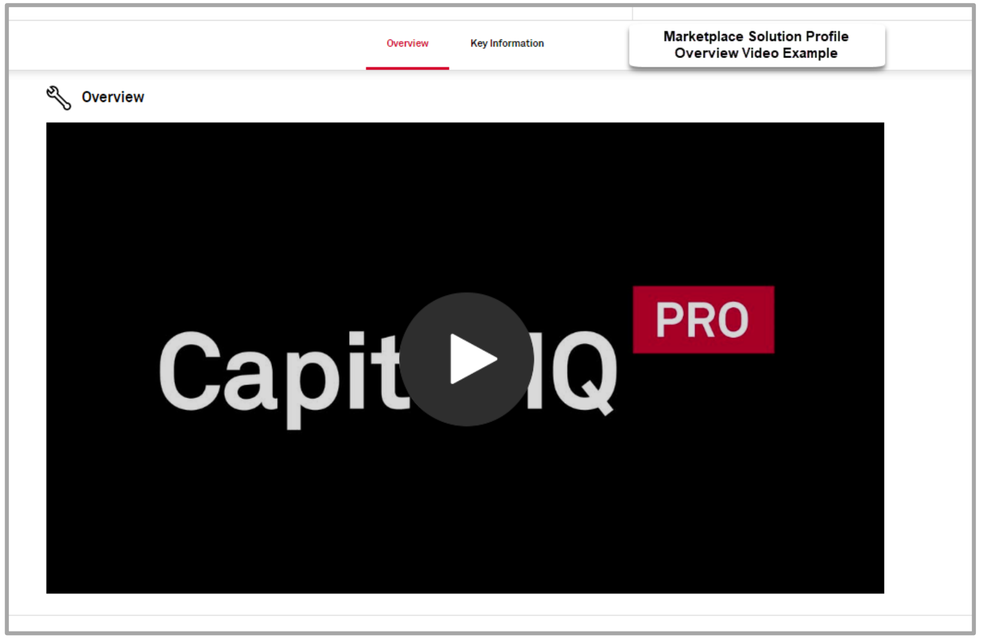
CMS Solution Editor Overview & Demo Tab





Field Description/Instructions

- ❑ Overview Image: Default image which would be used if there is no video or other media to display on the profile page
- ❑ Overview Video: Unique identifier as provided by Vidyard.com. Vidyard.com hosts our informational and promotional videos. This will be the UUID for the demo video.
- ❑ Overview Brochure:
- ❑ **Solution Demo: This field is currently configured for Kensho Solution Demo links only**



CMS Solution Editor Tabs

Tabs	Description
Master Trial Agreement	❑ We have an option for our potential clients to accept any trial agreement electronically on the Request a trial form which may speed up the sales process in order to provide a trial for our clients. Selecting the Master Trial Agreement enables this form in the Request for More Information Form. ❑ Please note that you must also select the Master Trial Agreement Tooltip to add the following disclaimer language to the form: "Users are not required to agree to the Trial Agreement in order to submit a Request for Trial"
Support & Research	❑ Support Links: Add Support Resource Name, Support Resource Name, and/or Support Document for each support document for the dataset. Each support resource should reflect in the Solution profile under "Support" ❑ Resource Links: Add Research Resource Name (e.g. Research Article Title), Research Website URL, and/or Research document for each publicly available research article related to the dataset. Each Research article should reflect under "Related Research and Insights" of the Solution profile ❑ Support Email: email contact to receive support for dataset and will reflect under "Support" within the Solution profile ❑ *Note: when uploading a file to Support Links or Resource Links, switch from “Custom Files” to “All Files” from the file explorer window to see all of your files*
Internal Resources	❑ Internal Resource links added are only visible to internal S&P Global users who are connected to VPN under the Internal Resources section of the Solution profile ❑ Provide Internal Resource Name, Resource Link, and/or internal resource document for each internal resource for the Solution ▪ When uploading a file, switch from “Custom Files” to “All Files” from the file explorer window ▪ When adding email address contacts, prefix the email address with ‘mailto:’ [example: mailto:taylor.swift@test.com]

CMS Solution Support & Research and Internal Resources