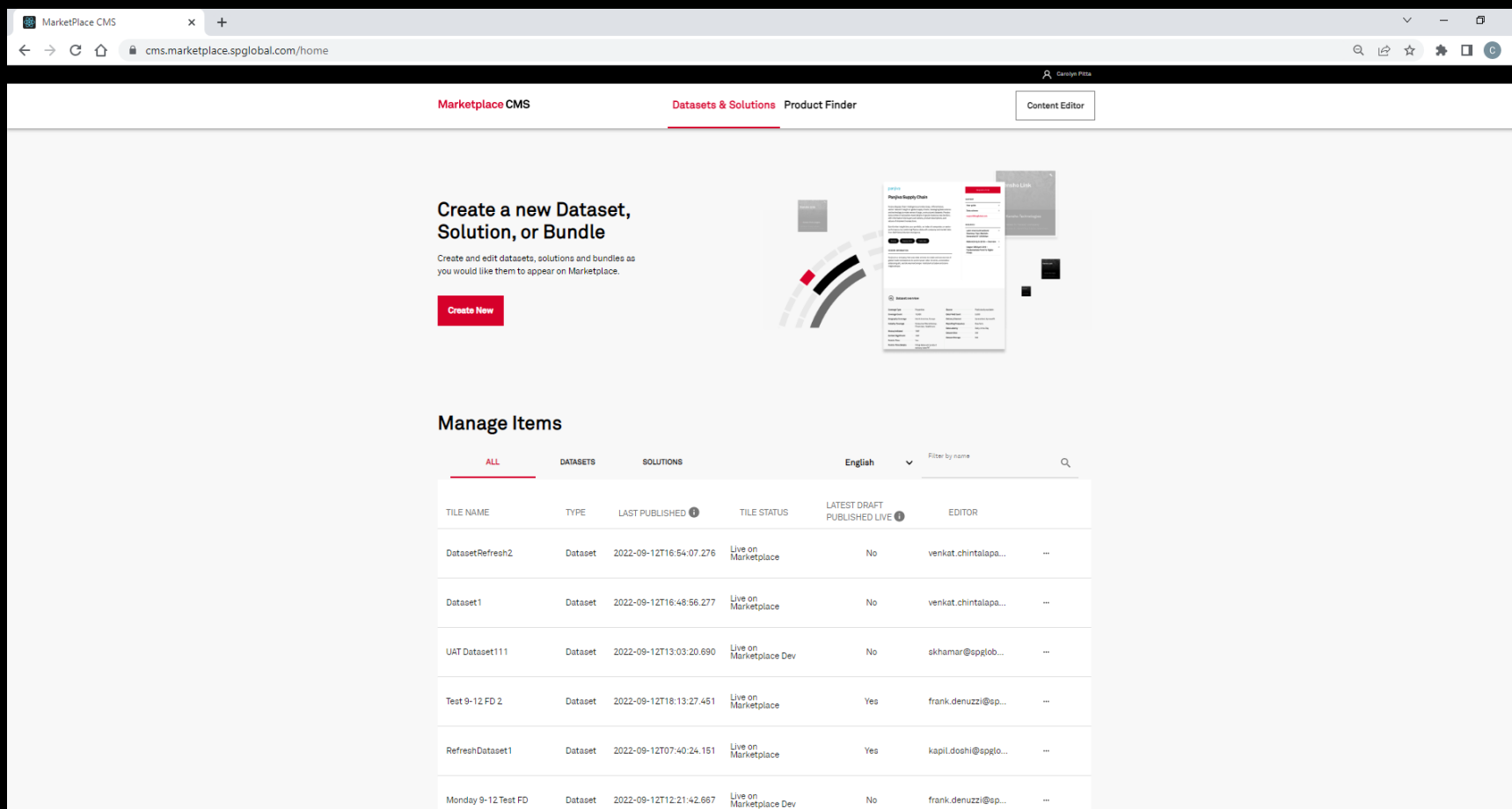


# S&P Global Marketplace Content Management System (CMS) User Guide

# 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](#).



The screenshot displays the Marketplace CMS application interface. At the top, there are navigation tabs for 'Marketplace CMS', 'Datasets & Solutions', 'Product Finder', and 'Content Editor'. The main content area features a 'Create a new Dataset, Solution, or Bundle' section with a 'Create New' button and a preview of a 'People Supply Chain' tile. Below this is a 'Manage Items' section with a table of items. The table has columns for 'Tile Name', 'Type', 'Last Published', 'Tile Status', 'Latest Draft Published Live', and 'Editor'. The items listed include 'DatasetRefresh2', 'Dataset1', 'UAT Dataset111', 'Test 9-12 FD 2', 'RefreshDataset1', and 'Monday 9-12 Test FD'.

TILE NAME	TYPE	LAST PUBLISHED	TILE STATUS	LATEST DRAFT PUBLISHED LIVE	EDITOR
DatasetRefresh2	Dataset	2022-09-12T16:54:07.276	Live on Marketplace	No	venkat.chintalapa...
Dataset1	Dataset	2022-09-12T16:48:56.277	Live on Marketplace	No	venkat.chintalapa...
UAT Dataset111	Dataset	2022-09-12T13:03:20.690	Live on Marketplace Dev	No	skhamar@spglob...
Test 9-12 FD 2	Dataset	2022-09-12T18:13:27.451	Live on Marketplace	Yes	frank.denuzzi@sp...
RefreshDataset1	Dataset	2022-09-12T07:40:24.151	Live on Marketplace	Yes	kapil.doshi@spglo...
Monday 9-12 Test FD	Dataset	2022-09-12T12:21:42.667	Live on Marketplace Dev	No	frank.denuzzi@sp...

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.

The screenshot displays the Marketplace CMS Hub interface. At the top, there's a navigation bar with 'Marketplace CMS' and 'Datasets & Solutions'. The main content area features a 'Create a new Dataset, Solution, or Bundle' section with a 'Create New' button. Below this is a 'Manage Items' section with a table of datasets. The table has columns for Tile Name, Type, Last Published, Tile Status, Latest Draft Published Live, and Editor. The table lists several datasets with their respective statuses and editors.

TILE NAME	TYPE	LAST PUBLISHED	TILE STATUS	LATEST DRAFT PUBLISHED LIVE	EDITOR
DatasetRefresh2	Dataset	2022-09-12T16:54:07.276	Live on Marketplace	No	venkat.chintalapa...
Dataset1	Dataset	2022-09-12T16:48:56.277	Live on Marketplace	No	venkat.chintalapa...
UAT Dataset111	Dataset	2022-09-12T13:03:20.690	Live on Marketplace Dev	No	skhamar@spglob...
Test 9-12 FD 2	Dataset	2022-09-12T18:13:27.451	Live on Marketplace	Yes	frank.denuzzi@sp...
RefreshDataset1	Dataset	2022-09-12T07:40:24.151	Live on Marketplace	Yes	kapil.doshi@spglo...
Monday 9-12 Test FD	Dataset	2022-09-12T12:21:42.667	Live on Marketplace Dev	No	frank.denuzzi@sp...

# Marketplace CMS: Create Datasets, Bundles, Or Solutions

## Overview

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

The screenshot displays the Marketplace CMS interface. The browser address bar shows `cms.marketplace.spglobal.com/home`. The user is logged in as Carolyn Pitta. The navigation bar includes 'Marketplace CMS', 'Datasets & Solutions', 'Product Finder', and a 'Content Editor' button. The main content area features a 'Create a new' modal window. The modal has a title 'Create a new:' and three columns: 'Dataset' (with a sub-header 'Create a new dataset'), 'Dataset Bundle' (with a sub-header 'Create a new dataset bundle - the individual datasets you plan to bundle together must be created before you can bundle them. Solutions can not be included in a bundle'), and 'Solution' (with a sub-header 'Create a new solution. Solutions include delivery platforms, data tools and other products we offer to support our clients use of big data.'). Below these columns are three buttons: 'New Dataset', 'New Bundle', and 'New Solution'. A red box labeled '1' highlights the 'Create New' button on the main page, with an arrow pointing to the modal. A red box labeled '2' highlights the 'New Dataset' button in the modal, with an arrow pointing to a text box on the right. The text box contains the text: 'Selecting "New Dataset", "New Bundle", or "New Solution" opens the Dataset Editor, Bundle Editor, or Solution Editor'. The bottom of the page shows a navigation bar with 'ALL', 'DATASETS', 'SOLUTIONS', and 'English'.

# 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

**Manage Items**

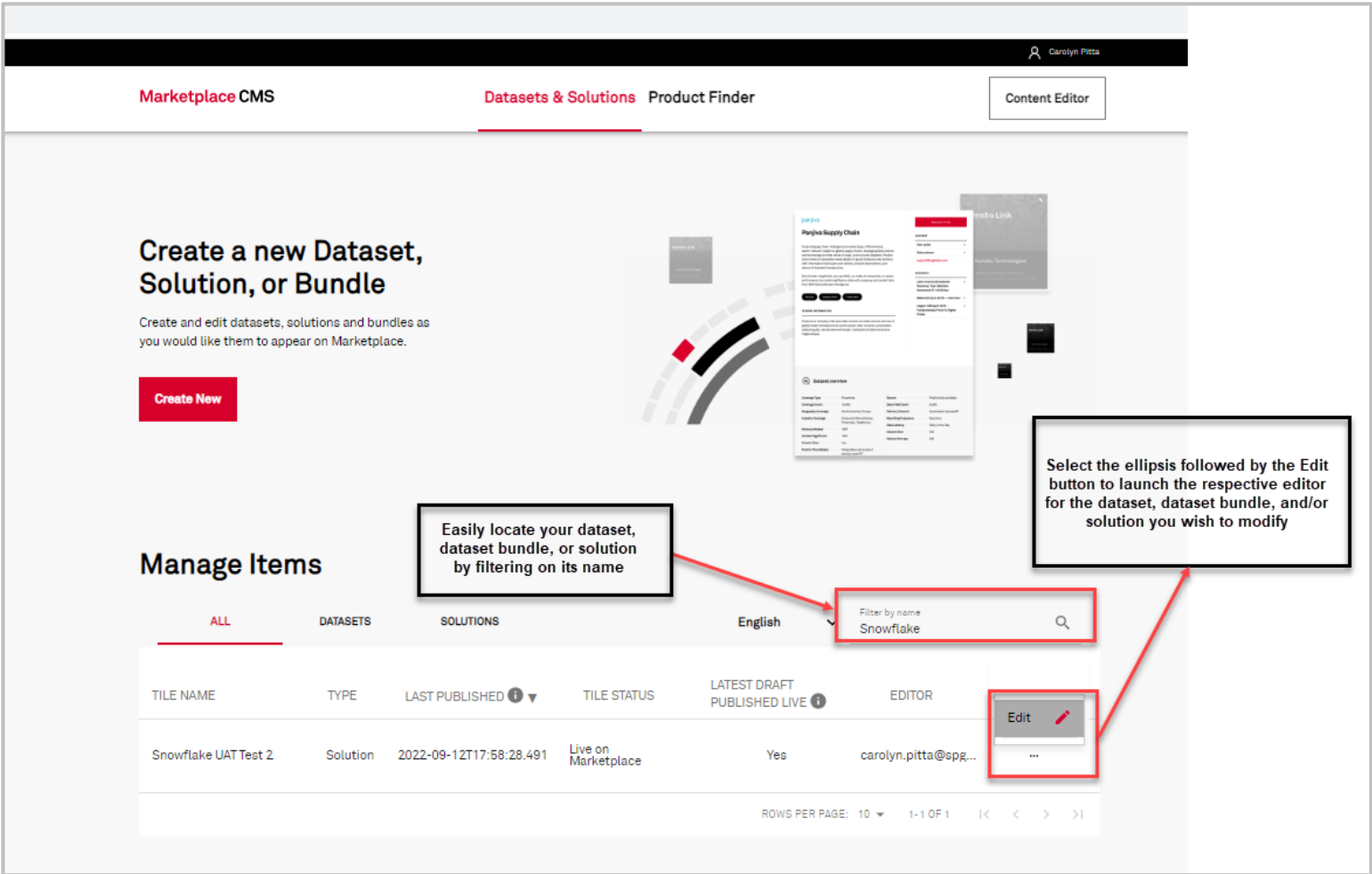
ALL DATASETS SOLUTIONS English Filter by name

TILE NAME	TYPE	LAST PUBLISHED	TILE STATUS	LATEST DRAFT PUBLISHED LIVE	EDITOR	
Platts LNG Daily (Alpha)	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Trucost Carbon Earnings a...	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Trucost Paris Alignment	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
IPquery Patent & Tradema...	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Platts Market Data - Shipp...	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Platts Petrochemical Ana...	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Market Intelligence News	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
BitSight Security Ratings	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Greenwich Money in Motio...	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Platts Global Integrated E...	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...
Commodity Movements Dr...	Dataset	2022-09-08 08:00 PM	Live on Marketplace	Yes	k.manajigari@spg...	...

# 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

The screenshot shows the 'Dataset Editor' interface in a browser window. The URL is 'cms.marketplace.spglobal.com/dataset-editor'. The user is logged in as 'Carolyn Pitta'. The page has a navigation bar with a home icon and the text '/ Dataset Editor'. There are three buttons: 'Save draft', 'Publish to Preview', and 'Publish to Live'. A sidebar on the left lists several tabs: GENERAL (selected), OVERVIEW, VISUALISATION, SAMPLE DATA, DATA DICTIONARY, MASTER TRIAL AGREEMENT, SUPPORT AND RESEARCH, RELATED, NOTEBOOKS, and INTERNAL RESOURCES. The main content area is titled 'General' and contains a 'Name and Description' section with the following fields: 'Dataset Title \*', 'Short Description \*', a rich text editor with a toolbar (Normal, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo), 'Long Description \*', 'Date Added \*' with a calendar icon, and 'Search Tags' with a dropdown menu and an 'Add New' button.

## 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	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Dataset Title:*</b> Name of dataset as it will appear in the Marketplace; char limit 100 and should not be a duplicate of an existing dataset</li> <li><input type="checkbox"/> <b>Short Description:*</b> : Overview of dataset/data included ;char limit 255. Short description is the description which appears on the tile</li> <li><input type="checkbox"/> <b>Long Description:*</b> In-Depth Overview found in the Dataset Details page on the Marketplace; char limit 2000 <i>Note: The application will not publish duplicate datasets which have the same title, short description, and long description</i></li> <li><input type="checkbox"/> <b>Date Added*:</b> Date when dataset is added to the Marketplace. Appears in the top right corner of the Dataset Details page <ul style="list-style-type: none"> <li>▪ If future dated, tile will reflect “Coming Soon” until that date in both the details page and the Marketplace Dataset page until that date</li> <li>▪ “Recently Added” will reflect on the tile for tiles which were added within 90 days of this field</li> </ul> </li> <li><input type="checkbox"/> <b>Search Tags:</b> 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</li> <li><input type="checkbox"/> <b>Category:</b> Determine which Dataset filter category the Dataset Tile should be classified under</li> <li><input type="checkbox"/> <b>Trial Button Title:*</b> Allows for the customization of the button which launches the ‘Request More Information’ form (generally, for datasets, this button is entitled “Request More Information”)</li> </ul>
Tile Image	<ul style="list-style-type: none"> <li><input type="checkbox"/> Background Image which appears on the Tile. (Image added should be consistent with the type of industry the dataset belongs to)</li> </ul>
Provider Details*	<ul style="list-style-type: none"> <li><input type="checkbox"/> Dataset Provide/Vendor Details (S&amp;P global Market Intelligence, S&amp;P Global Commodity Insights, S&amp;P Global Mobility, S&amp;P Global Engineering Solutions, S&amp;P Global Ratings, S&amp;P Dow Jones Indices, S&amp;P Global Sustainable1). Adding the provider should automatically add the provider logo and vendor description to the Marketplace tile</li> </ul>
Message Box Fields	<ul style="list-style-type: none"> <li><input type="checkbox"/> Adds Banner Message to top of the Dataset Profile for any special alerts (e.g. Release Notes, Enhancements)</li> <li><input type="checkbox"/> <b>Message Type: Alert or Recently Updated</b> <ul style="list-style-type: none"> <li>▪ When <b>Alert</b> is selected, fields to be completed are Alert Title (e.g. Release Notes) and Alert Description <ul style="list-style-type: none"> <li>➢ <b>Alert Title:</b> Banner Title; char limit 100</li> <li>➢ <b>Alert Description:</b> Description which summarizes the alert that will appear in the dataset; char limit 255</li> </ul> </li> <li>▪ When <b>Recently Updated</b> is selected, the fields to be completed are Date Added, Enhancement Description, and/or Enhancement Link <ul style="list-style-type: none"> <li>➢ <b>Data Added:</b> Date material update was released for dataset. (ONLY RECENT ENHANCEMENTS WITHIN LAST 3 MONTHS).</li> <li>➢ <b>Enhancement Description:</b> 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)</li> <li>➢ <b>Enhancement Link:</b> Provide the direct link URL to the release notes document on the Support site for the dataset's specific enhancement.</li> </ul> </li> </ul> </li> </ul>

\*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

**General Tab/Name and Description Section: Dataset Title field**  
**General Tab Date Added Field:**  
 "Coming Soon" appears when tile is published with a future date  
 "Recently Added" appears when new tile is published within 90 days of this date  
**General Tab: Provider Details Section**

**General Tab Name and Description Section: Short Description Field**

# CMS Dataset Editor Field Mapping to Dataset Details Page

▲ / Datasets / S&P Global (China) Ratings

**S&P Global**  
Market Intelligence

Added on 07/21/2022

**S&P Global (China) Ratings**

**"Date Added" field**

**Request More Information**

**"Trial Button Title" field**

**General Tab 'Name and Description' Section: Dataset Title, Long Description, Provider Detail fields**

Credit & Risk Solution: The *S&P Global (China) Ratings* dataset provides Credit Ratings information of the domestic issues from China within Corporates, Financial Institutions and Structured Finance (Global Issuers & Structured Finance (GISF)).

This includes:

- Investment in Chinese domestic bonds and markets
- Capital calculations (credit risk adjustments to the market risk factor) for Chinese entities
- Qualitative inputs for clients within and outside China risk benchmarking, which are not available in the credit model for example: Credit approval and risk management
- Streamlined table design to support the addition of future data without the need of migrating to a new file version
- Provides information on the latest file update date for better data reconciliation and support
- Available in both English and Chinese language

**VENDOR INFORMATION**

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

Overview   Sample Data   Data Dictionary   Related Dataset

# Marketplace CMS Dataset Editor Overview Tab

Section	Description
<b>Primary Entity Type</b>	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)
<b>Coverage</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Geography:</b> Geographic Coverage of the dataset which also impacts the Geography filter when filtering on Datasets from the Marketplace homepage and Datasets Page.               <ul style="list-style-type: none"> <li>▪ <b>Options:</b> United States and Canada, Latin America and Caribbean, Africa, Asia-Pacific, Europe, Middle East                   <ul style="list-style-type: none"> <li>➤ Choose all that apply. "Global" will reflect in the dataset when all regions are selected</li> </ul> </li> </ul> </li> <li><input type="checkbox"/> <b>Industry:</b> Industries covered by the dataset which also impacts the Industry filter when filtering on the homepage and Datasets pages               <ul style="list-style-type: none"> <li>▪ <b>Options:</b> All, Financials, Real Estate, Energy and Utilities, Materials, Healthcare, Industrials, Consumer, and Technology, Media, and Telecommunications).</li> </ul> </li> <li><input type="checkbox"/> <b>Coverage Count:</b> total count of entities</li> <li><input type="checkbox"/> <b>Earliest Significant Coverage:</b> Earliest year where there is significant coverage for analysis</li> <li><input type="checkbox"/> <b>Earliest Record:</b> Year of first record in the dataset</li> </ul>
<b>Point in time</b>	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
<b>Data Source</b>	Source of dataset content; where was the content collected from; char limit 255
<b>Delivery</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Field Count:</b> Field Count - number of distinct fields within database</li> <li><input type="checkbox"/> <b>Delivery Channel:</b> Delivery channels for the dataset (valid values: API, Cloud, Desktop, Feed)</li> <li><input type="checkbox"/> <b>Delivery Platform:</b> Delivery methods for dataset (e.g. API, ClariFi, Marketplace Extract, Marketplace Workbench, S&amp;P Capital IQ, S&amp;P Capital IQ Pro, Snowflake, XpressAPI, XpressFeed, Ratings 360, Marketplace Workbench, FTP, Data Lake etc)</li> <li><input type="checkbox"/> <b>Reporting Frequency:</b> 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)</li> <li><input type="checkbox"/> <b>Dataset Latency:</b> how often the dataset is updated (e.g. 15,000 companies covered)</li> <li><input type="checkbox"/> <b>Dataset Size:</b> size of the dataset in GB</li> </ul>
<b>Linked Identifier</b>	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.spglobal.com/en/datasets/trucost-environmental-(46)#dataset-overview

Trial Agreements Information

Overview Visualization Sample Data Data Dictionary Related Dataset

**Overview**

Primary Entity Type — Company

Coverage Count — 16800+

Geographic Coverage — Global

Industry Coverage — Consumer, Energy and Utilities, Financials, Healthcare, Industrials, Materials, Real Estate, Technology, Media & Telecommunications

History Initiated — 2002

Earliest Significant Coverage — 2016

Point In Time — No

Data Source — The data comes from a variety of sources, including company annual reports, direct disclosures, scientific literature, and an array of national, international, and industry databases, industry “top-down” data, as well as sector-specific “bottom-up” data.

Field Count — 10s

Delivery Channel — API, Cloud, Desktop, Feed

Delivery Platform — ClariFI®, FTP, Marketplace Extract, Marketplace Workbench, S&P Capital IQ Pro, Snowflake, XpressAPI, Xpressfeed™

Reporting Frequency — Daily

Dataset Latency — Daily

Dataset Size (GB) — 1

**Overview Tab: Primary Entity Type drop down field**

**Overview Tab: Data Source Details Field**

**Overview Tab: Coverage Section: Geography, Industry, Earliest Significant Coverage, & Earliest Record fields**

**Overview Tab: Delivery Section: Field Count, Delivery Channel, Delivery Platform, Reporting Frequency, Dataset Latency, & Dataset Size Fields**

**Overview Tab: Point In Time Yes/No Field**

# Marketplace CMS Dataset Editor Tabs: Visualizations

## Visualization Field Instructions

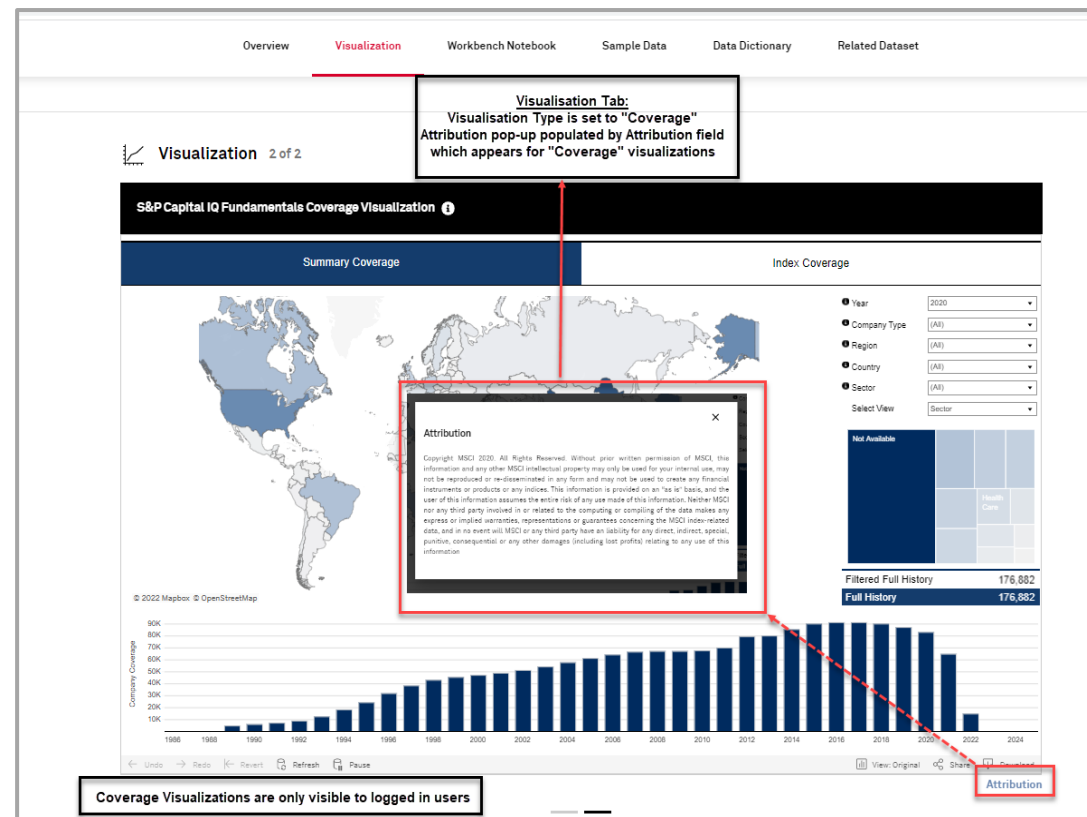
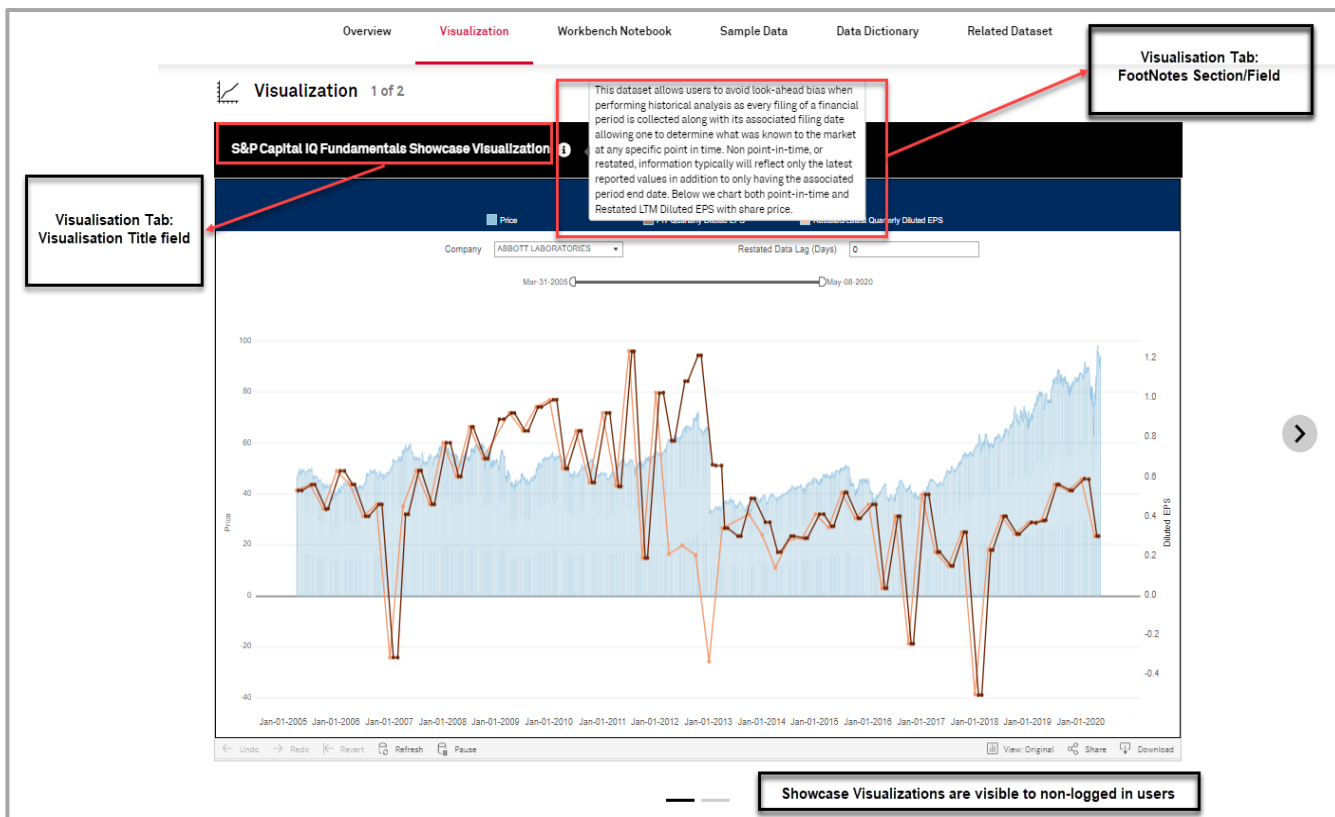
- ❑ If the dataset has a visualization(s) associated with it, for each visualization, add the Visualization Title which will appear in the dataset profile, Upload the Visualization(s) which will appear in the profile, select the Visualization Type (Showcase or Coverage), and Footnotes (e.g. populates the tooltip which appears next to the title of a Visualization)
  - ❑ Visualization Title should be the name of the dataset plus its visualization type (e.g. "Machine Readable Transcripts Showcase Visualization")
  - ❑ Visualization file must be a twbx 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

The screenshot shows the 'Visualisation' tab in the Dataset Editor. The left sidebar contains navigation options: GENERAL, OVERVIEW, VISUALISATION (selected), SAMPLE DATA, DATA DICTIONARY, MASTER TRIAL AGREEMENT, SUPPORT AND RESEARCH, RELATED, NOTEBOOKS, and INTERNAL RESOURCES. The main content area is titled 'Visualisation' and contains two visualization entries. The top entry is titled 'Machine Readable Transcripts Showcase Visualization' and has a file named 'machine-readable-transcripts-public.twbx' uploaded. The bottom entry is titled 'Machine Readable Transcripts Coverage Visualization' and has a file named 'Transcripts (1).twbx' uploaded. Both entries have a 'Visualization Type' dropdown menu (Showcase for the first, Coverage for the second) and a 'Footnotes' section with radio buttons for 'Existing Footnote' and 'New Footnote', and a text input field for the footnote content. A 'Footnote' dropdown menu is also present. At the bottom, there is an 'Add another visualisation' button. Annotations with red boxes and arrows point to various fields and buttons, providing instructions on how to use them.

Annotations:

- Top right: Add Visualization Title which will appear as in the dataset tile. The title should be the name of the Dataset along with the visualization type. (ex. "Machine Readable Transcripts Showcase Visualization")
- Top left: Adding a footnote adds a tooltip to the Visualization in the dataset which will reflect the text. You can select an Existing footnote or create a new footnote.
- Top middle: Upload the Visualization file (must be a twbx file)
- Top right: Deletes the visualization along with its details from the dataset)
- Bottom left: Select the Visualization Type: Showcase - or - Coverage Showcase visualizations are available to all users whereas Coverage visualizations will only be available to logged in users.
- Bottom right: Add as many visualizations as you'd like. The order in which the visualization is added/appears in CMS reflects the order in which it'll appear in the dataset. You can easily rearrange the visualizations after adding

# 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	<input type="checkbox"/> 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	<input type="checkbox"/> 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)

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

1	conm	gvkey	datadate	coifnd_id	cyearq	item	valuei	effdate	thrudate
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	IBADJIO	-0.55	8/7/2019 16:00	9/3/

**Compustat Snapshot Data**

**S&P Global Market Intelligence**

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

# Marketplace CMS Dataset Editor Field Mapping to Marketplace Tiles

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

Sample data ⓘ

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  
functionalitiy**

**Sample Data Tab:  
Sample data download File  
upload functionality**

# Marketplace CMS Dataset Editor Tab: Data Dictionary Data Section

**Data Dictionary**

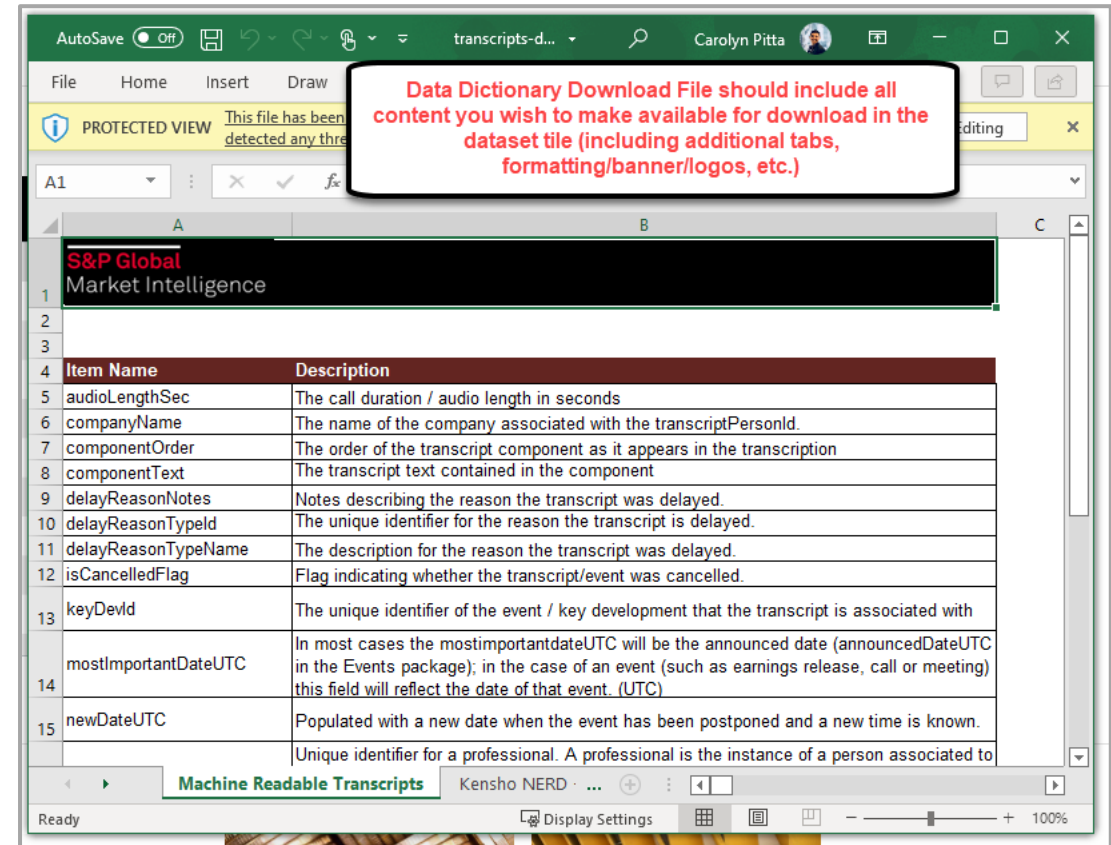
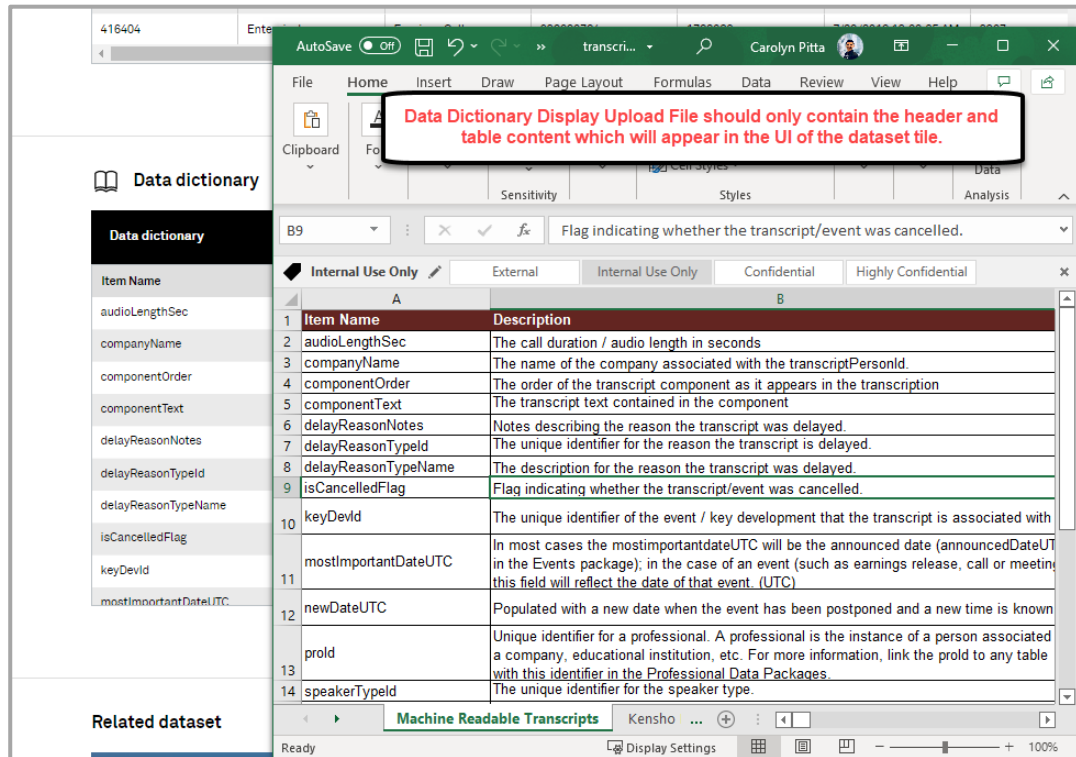
Data Dictionary Display File Upload:

Data Dictionary Display File

Data Dictionary Download File Upload:

Data Dictionary Download File

Field	Field Description
Data Dictionary Display File Upload	<input type="checkbox"/> 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	<input type="checkbox"/> 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

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 ...
FRITDA 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
<b>Master Trial Agreement</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> 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.               <ul style="list-style-type: none"> <li><input type="checkbox"/> 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"</li> </ul> </li> </ul>
<b>Support and Research</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Support Links:</b> 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"</li> <li><input type="checkbox"/> <b>Resource Links:</b> 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</li> <li><input type="checkbox"/> <b>Support Email:</b> Email contact to receive support for dataset and will reflect under "Support" within the dataset profile. If email address is not provided, then <i>support.datafeed.mi@spglobal.com</i> will display by default <i>Note: when uploading a file, switch from "Custom Files" to "All Files" from the file explorer window to see all of your files</i></li> </ul>
<b>Related</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Add existing datasets which are related to the dataset and will reflect under Related datasets in the dataset profile</li> </ul>
<b>Notebooks</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> 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)</li> </ul>
<b>Internal Resources</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Internal Resource links added are only visible to internal S&amp;P Global users who are connected to VPN under the Internal Resources section of the dataset profile</li> <li><input type="checkbox"/> Provide Internal Resource Name, Resource Link, and/or internal resource document for each internal resource for the dataset           <ul style="list-style-type: none"> <li><input type="checkbox"/> When uploading a file, switch from "Custom Files" to "All Files" from the file explorer window</li> <li><input type="checkbox"/> When adding email address contacts, prefix the email address with 'mailto:' [example: mailto:taylor.swift@test.com]</li> </ul> </li> </ul>

# CMS Dataset Editor Field Mapping to Dataset Details Page

★ / Datasets / Machine Readable Transcripts

**S&P Global**  
Market Intelligence

## Machine Readable Transcripts

**Kensho NERD Now Available on Transcripts**

You now have access to the power of Kensho NERD on Machine Readable Transcripts to identify company names and aliases mentioned during earnings calls while also specifying the mention location in the transcript.

The Machine readable for machine-  
Leverage Ma ies  
including da s Easily  
combine data from earnings, M&A, guidance, shareholder, company conference presentations and special calls with traditional datasets to develop proprietary analytics. You can rely on:

- Seamless link between the Speaker ID to the S&P Global Estimates and Professionals database to help identify sell-side analysts' revisions.
- Intraday updates via a feed or streaming XML messages for details on calls scheduled for transcription.
- 11,000+ entities under coverage with history going back up to 2004.

The dataset leverages the power of Kensho NERD to identify company names and aliases mentioned during earnings calls and specifies the mention location in the transcript

[Awards]

- 2019 Data
- 2020 Data

**VENDOR INFO**

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

**Request More Information**

### SUPPORT

User Guide and Data Schema [↗](#)

Data Queries [↗](#)

[support.datafeed.mi@spglobal.com](mailto:support.datafeed.mi@spglobal.com)

### RELATED RESEARCH AND INSIGHTS

Research Code on GitHub [↗](#)

Natural Language Processing, Part I: Primer [↗](#)

Natural Language Processing – Part II: Stock Selection [↗](#)

Natural Language Processing – Part III: Feature Engineering [↗](#)

Their Sentiments Exactly: Sentiment Signal Diversity Creates Alpha Opportunity [↗](#)

TWIML Podcast: NLP for Equity Investing with Frank Zhao [↗](#)

### INTERNAL RESOURCES

Product Codes [↗](#)

Dataset by Delivery Channel [↗](#)

Contact the Product Manager: Kevin Zacharuk [↗](#)

DMS SOU [↗](#)

API SOU [↗](#)

Trial Agreements Information [↗](#)

**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

The screenshot displays the 'Workbench Notebook' interface with a red box highlighting the notebook content. The notebook title is 'Trucost Unpriced Carbon Cost Notebook'. The content includes Python code for data visualization and an SQL query to create a temporary view named 'carbondatasets'. A red box highlights the SQL query, and an arrow points from it to a callout box: 'Notebooks Tab: Attribution drop down populates the text box which appears when selecting "Attribution" link under the Notebook'. Another arrow points from the notebook content to a callout box: 'Notebooks Tab: Notebook HTML File Upload/select button'. A third arrow points from the notebook content to a callout box: 'Notebooks Tab: Notebook Title field'. A red button labeled 'Available on Workbench' is visible in the top right. A modal window titled 'Attribution' is open, displaying a copyright notice for MSCI 2020.

Overview Visualization **Workbench Notebook** Sample Data Data Dictionary

Workbench Notebook

Notebooks Tab: Notebook Title field

Available on Workbench

Trucost Unpriced Carbon Cost Notebook

```
import pandas as pd
import plotly.express as px
import plotly.io as pio
import plotly.graph_objects as go

from sklearn.manifold import TSNE
from sklearn.cluster import KMeans

pio.templates.default = "simple_white"

2. Load Carbon Pricing Datasets S&P Global 1200

%sql CREATE
OR REPLACE TEMPORARY VIEW carbondatasets AS (
select
  cast(comp.companyId as INT) companyId,
  comp.companyName Company,
  cast(crp.fiscalYear as INT) FinancialYear,
  st.subTypeValue Sector,
  ct.country Country,
  ct.region Region,
  cast(mc.marketCap as double) marketCap,
  TO_Date(crp.extractionDate) DateOfExtraction,
  di.dataItemName DataItem,
  crpf.scenarioLevel ScenarioLevel,
  cast(crpf.forecastYear as INT) ForecastYear,
  cast(crpfd.dataItemValue as double) Value
from
  truncostcarbearningsrisk.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.identifierType=1
```

Notebooks Tab: Notebook HTML File Upload/select button

Attribution

Notebooks Tab: Attribution drop down populates the text box which appears when selecting "Attribution" link under the Notebook

Attribution

Copyright MSCI 2020. All Rights Reserved. Without prior written permission of MSCI, this information and any other MSCI intellectual property may only be used for your internal use, may not be reproduced or re-disseminated in any form and may not be used to create any financial instruments or products or any indices. This information is provided on an "as is" basis, and the user of this information assumes the entire risk of any use made of this information. Neither MSCI nor any third party involved in or related to the computing or compiling of the data makes any express or implied warranties, representations or guarantees concerning the MSCI Index-related data, and in no event will MSCI or any third party have a liability for any direct, indirect, special, punitive, consequential or any other damages (including lost profits) relating to any use of this information


# Marketplace CMS Dataset Editor Field Mapping to Marketplace Dataset Profile

Overview
Visualization
Workbench Notebook
Sample Data
Data Dictionary
Related Dataset

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 ...
FRITDA at Risk	Indicates that a company's earnings before interest, tax, depreciation and amortizati

[Download](#)


**Related dataset**



**S&P Capital IQ Fundamentals**

— Market Intelligence


Standardized fundamental data for global public companies as well as thousands of



**Trucost Physical Risk**

— Sustainable1


Trucost's Physical Risk dataset asesses company exposure to seven climate change



**Trucost Environmental**

— Sustainable1

Complete environmental performance profiles for over 16,800 companies.



**Trucost Paris Alignment**

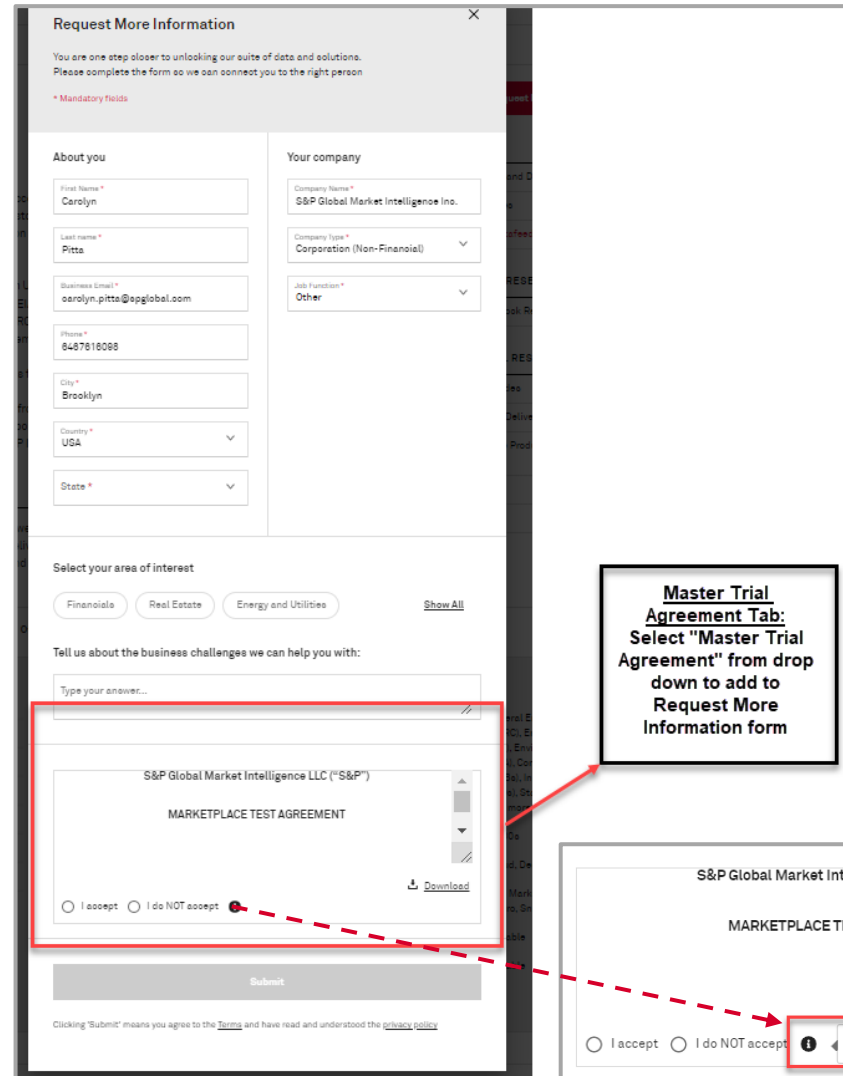
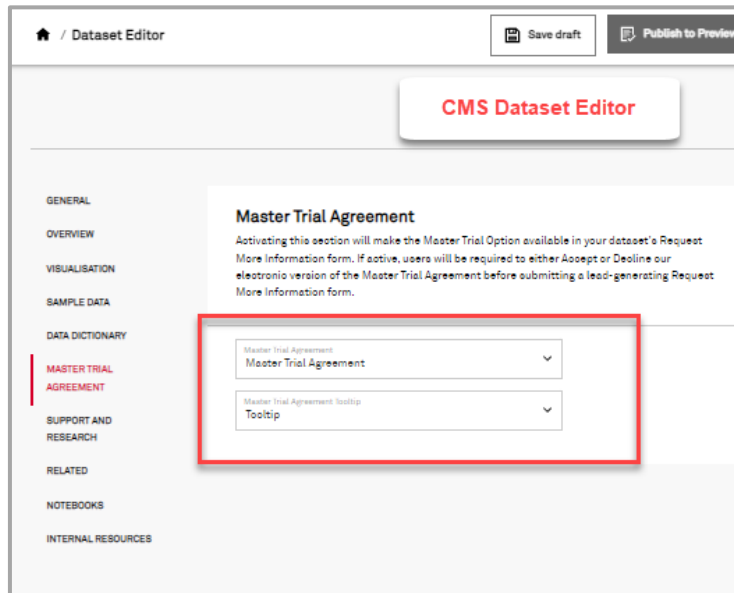
Company-level alignment with the Paris Agreement goal to limit global warming to well below 2°C from pre-industrial levels

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

[Try out this dataset](#)

[Request More Information >](#)

# Marketplace CMS Dataset Editor Field Mapping to Marketplace Dataset Profile



# CMS Bundle Editor

The screenshot displays the 'Bundle Editor' interface. At the top, there are three buttons: 'Save draft', 'Publish to Preview', and 'Publish to Live'. On the left, a sidebar lists various tabs: GENERAL (selected), DATASETS, MASTER TRIAL AGREEMENT, RESEARCH LINKS, SUPPORT DOCUMENTS, VISUALISATION, RELATED, ALERT, SUPPORT EMAIL, and INTERNAL RESOURCES. The main content area is titled 'General' and contains the following fields:

- Name and Description:**
  - Bundle Title \*
  - Short Description \*
  - A rich text editor with a toolbar (Normal, Bold, Italic, Underline, Link, Unlink, Bulleted List, Numbered List, Indent, Undo, Redo) and a code view button (</>).
  - Long Description\*
- Date Added \*:** 2022 / 08 / 16 (with a calendar icon)
- Trial Button Label \***

## 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
<b>Name and Description</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Bundle Title</b>*: Name of dataset bundle as it will appear on the Marketplace; char limit 100</li> <li><input type="checkbox"/> <b>Short Description</b>*: Short overview/synopsis of dataset/data bundle as it will appear in the tile; char limit 255</li> <li><input type="checkbox"/> <b>Long Description</b>*: In-Depth Overview found in the dataset bundle details page; char limit 2000</li> </ul> <p><i>Note: The application will not publish duplicate bundles which have the same title, short description, and long description</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Date Added</b>*: Date when dataset bundle is available for purchase           <ul style="list-style-type: none"> <li>▪ If future dated, tile will reflect “Coming Soon” until that date in both the details page and the tile until that date</li> <li>▪ “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</li> </ul> </li> <li><input type="checkbox"/> <b>Trial Button Label</b>: 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”)</li> </ul>
<b>Tile Image</b>	<input type="checkbox"/> Background Image which appears on the Tile. (Image added should be consistent with the type of industry the dataset bundle belongs to)
<b>Use Vendor Logos from dataset (yes/no)</b>	<ul style="list-style-type: none"> <li>• If yes, provider logo from dataset which are added to the bundle will be used</li> <li>• If no, the dataset provider logo must be uploaded</li> </ul>
<b>Vendor* Description</b>	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

**Bundle Editor**

Save draft | Publish to Preview | Publish to Live

**GENERAL**

**General**  
This section allows you to bundle, or group together, multiple datasets into one marketable or sellable package. This will create a single tile on Marketplace containing all the datasets you add to the bundle. Datasets added to bundles will still have their own tiles in Marketplace.

**Name and Description**

Bundle Title \*  
Cross Reference Services Bundle

Short Description \*  
Shared Data Layer that combines Business Entity Cross Reference Service (I

Normal | B | I | U | S | E | L | T | C | O | P | Y | P | A | S | T | E | M | P | L | E | T | E | X | T | A | S | S | E | T | S |

</>

To better manage credit risk exposure and assist with compliance requirements, financial institutions are seeking solutions that seamlessly integrate reference data for companies, securities and trading items. Institutions continue to look for ways to identify operational risks, reducing costs and inefficiencies from manually assimilating diverse data sets. In addition, a demand exists for cohesive data delivery solutions that improve data integration and minimize manual processes. In response, S&P Market Intelligence developed on its award-winning Shared Data Layer to create the Business Entity Cross Reference Service (BECRS). On the same platform, S&P Market Intelligence released Global Instruments Cross Reference Service (GICRS), Industry Sector Cross Reference Service (ISCRS) to provide a comprehensive Cross Reference data solution. All products are built on the backbone of the Shared Data Layer that links every identifier to the unique S&P Market Intelligence identifier "the S&P Market Intelligence Glue."

**[Awards]**

- These datasets were awarded the 2019 Inside Market Data/Inside Reference Data Award for Best Reference Data Initiative
- These datasets were awarded the 2022 Inside Market Data/Inside Reference Data Award for Best Reference Data Initiative

Date Added \*  
2019 / 01 / 10

Trail Button Label \*  
Request More Information

**Marketplace**  
S&P Global

Datasets | Solutions | Research | Support | Carolyn Pitta

Home / Datasets / Cross Reference Services Bundle

S&P Global Market Intelligence

**Cross Reference Services Bundle**

To better manage credit risk exposure and assist with compliance requirements, financial institutions are seeking solutions that seamlessly integrate reference data for companies, securities and trading items. Institutions continue to look for ways to identify operational risks, reducing costs and inefficiencies from manually assimilating diverse data sets. In addition, a demand exists for cohesive data delivery solutions that improve data integration and minimize manual processes. In response, S&P Market Intelligence developed on its award-winning Shared Data Layer to create the Business Entity Cross Reference Service (BECRS). On the same platform, S&P Market Intelligence released Global Instruments Cross Reference Service (GICRS), Industry Sector Cross Reference Service (ISCRS) to provide a comprehensive Cross Reference data solution. All products are built on the backbone of the Shared Data Layer that links every identifier to the unique S&P Market Intelligence identifier "the S&P Market Intelligence Glue."

**[Awards]**

- These datasets were awarded the 2019 Inside Market Data/Inside Reference Data Award for Best Reference Data Initiative
- These datasets were awarded the 2022 Inside Market Data/Inside Reference Data Award for Best Reference Data Initiative

**VENDOR INFORMATION**

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

Bundle Editor Trial Button Label field

Request More Information

Use Vendor logos from dataset: Yes No

**CMS: Bundle Editor**

Vendor Description

Normal | B | I | U | S | E | L | T | C | O | P | Y | P | A | S | T | E | M | P | L | E | T | E | X | T | A | S | S | E | T | S |

</>

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

# CMS Bundle Editor: Datasets Tab

**CMS Bundle Editor Datasets Tab**

**GENERAL**

**DATASETS**

Master Trial Agreement

Research Links

Support Documents

Visualisation

Related

Alert

Support Email

Internal Resources

**Datasets**

Select datasets you would like to add to your bundle.

Dataset\* Business Entity Cross Reference Service (BECRS)

Dataset\* Global Instruments Cross Reference Service (GICRS)

Dataset\* Industry Sector Cross Reference Service (ISCRS)

Add dataset

**Marketplace Bundle Profile Overview Section**

Overview 1 of 3

**Business Entity Cross Reference Service (BECRS)**

Primary Entity Type: Company  
 Coverage Count: 28,000,000  
 Geographic Coverage: Global  
 Industry Coverage: Consumer, Energy and Utilities, Financials, Healthcare, Industrials, Materials, Real Estate, Technology, Media & Telecommunications  
 History Initiated: 1980  
 Earliest Significant Coverage: 1992  
 Point In Time: No

Data Source: Publicly available sources including feeds from the SEC, SEDAR, ASX and RNS, regulatory agencies, company websites, direct company contact, exchange websites and news agencies

Field Count: 10s  
 Delivery Channel: API, Cloud, Feed  
 Delivery Platform: API, API Drive, Marketplace Workbench, Snowflake, XpressAPI, XpressFeed™  
 Reporting Frequency: Variable  
 Dataset Latency: Variable  
 Dataset Size (GB): 1

**Marketplace Bundle Profile Sample Data Section**

Sample data 2 of 3

**Global Instruments Cross Reference Service (GICRS)**

companyid	securityname	securitysubtypename	isofloode	issuedate	maturitydate	parvalue
688811	Eq Listing/trading Ap...	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Eq Listing/trading Ap...	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Shs Dematerialised	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Shs Dematerialised	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Shs Dematerialised	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Shs Dematerialised	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Shs Dematerialised	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Shs Dematerialised	Common Stock	ESVUFN	NULL	NULL	2.00000
688811	Shs Dematerialised	Common Stock	ESVUFN	NULL	NULL	2.00000

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**Marketplace: Bundle Profile Data Dictionary**

Data dictionary 3 of 3

**Industry Sector Cross Reference Service (ISCRS)**


Item Name	Description
companyid	Unique S&P Capital IQ company identifier; this links to the ciqCompany table in the S...
identifierTypeId	S&P Capital IQ's unique numeric value assigned to a type of identifier, such as GVKEY.
identifierTypeName	Unique identifier name, such as S&P GVKEY.
industryClassCode	This is the classification code for the industry classification system.
industryClassCodeDesc	The textual description of the industryClassCode.
industryClassCodeId	Unique numeric identifier assigned to the value and description of industry sector co...
industryClassLevel	This is the branch level of the industry classification tree, where 0 represents the top...
industryClassParentCodeId	The industryClassCodeId for the parent branch of the current branch.
industryClassTypeId	S&P Capital IQ's unique identifier to represent the industry classification (e.g., GIC= ...
industryClassTypeName	The textual description of the classification name (e.g., for &N75IC industry classifica...

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## 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(crpf.dataItemValue as double) value
from
trucostcarboneyarningsrisk.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 trucostcarboneyarningsrisk.tcCERPeriodForecast crpf on crpf.periodId = crp.periodId
join trucostcarboneyarningsrisk.tcCERPeriodForecastData crpfd on crpfd.periodForecastId = crpf.periodForecastId
join trucostcarboneyarningsrisk.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
```

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

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

Attribution

# CMS Bundle Editor Tabs to Marketplace Bundle Profile Mapping

Tabs	Description
<b>Research Links</b>	<ul style="list-style-type: none"> <li>❑ 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</li> </ul>
<b>Support Documents</b>	<ul style="list-style-type: none"> <li>❑ 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"</li> <li>❑ <i>Note: when uploading a file, switch from "Custom Files" to "All Files" from the file explorer window to see all of your files</i></li> </ul>
<b>Support Email</b>	<ul style="list-style-type: none"> <li>❑ Email contact to receive support for dataset and will reflect under "Support" within the dataset profile. If email address is not provided, then <a href="mailto:support.datafeed.mi@spglobal.com">support.datafeed.mi@spglobal.com</a> will display by default</li> </ul>
<b>Internal Resources</b>	<ul style="list-style-type: none"> <li>❑ Internal Resource links added are only visible to internal S&amp;P Global users who are connected to VPN under the Internal Resources section of the dataset profile</li> <li>❑ Provide Internal Resource Name, Resource Link, and/or internal resource document for each internal resource for the dataset                             <ul style="list-style-type: none"> <li>▪ When uploading a file, switch from "Custom Files" to "All Files" from the file explorer window</li> <li>▪ When adding email address contacts, prefix the email address with 'mailto:' [example: <a href="mailto:taylor.swift@test.com">mailto:taylor.swift@test.com</a>]</li> </ul> </li> </ul>

The screenshot shows the S&P Global Marketplace interface for the 'TCFD Analytics Suite' bundle. The page is titled 'Marketplace S&P Global' and includes navigation tabs for 'Datasets', 'Solutions', 'Research', and 'Support'. The breadcrumb trail indicates the path: 'Home / Datasets / TCFD Analytics Suite'.

Key sections of the profile are highlighted with red boxes and callouts:

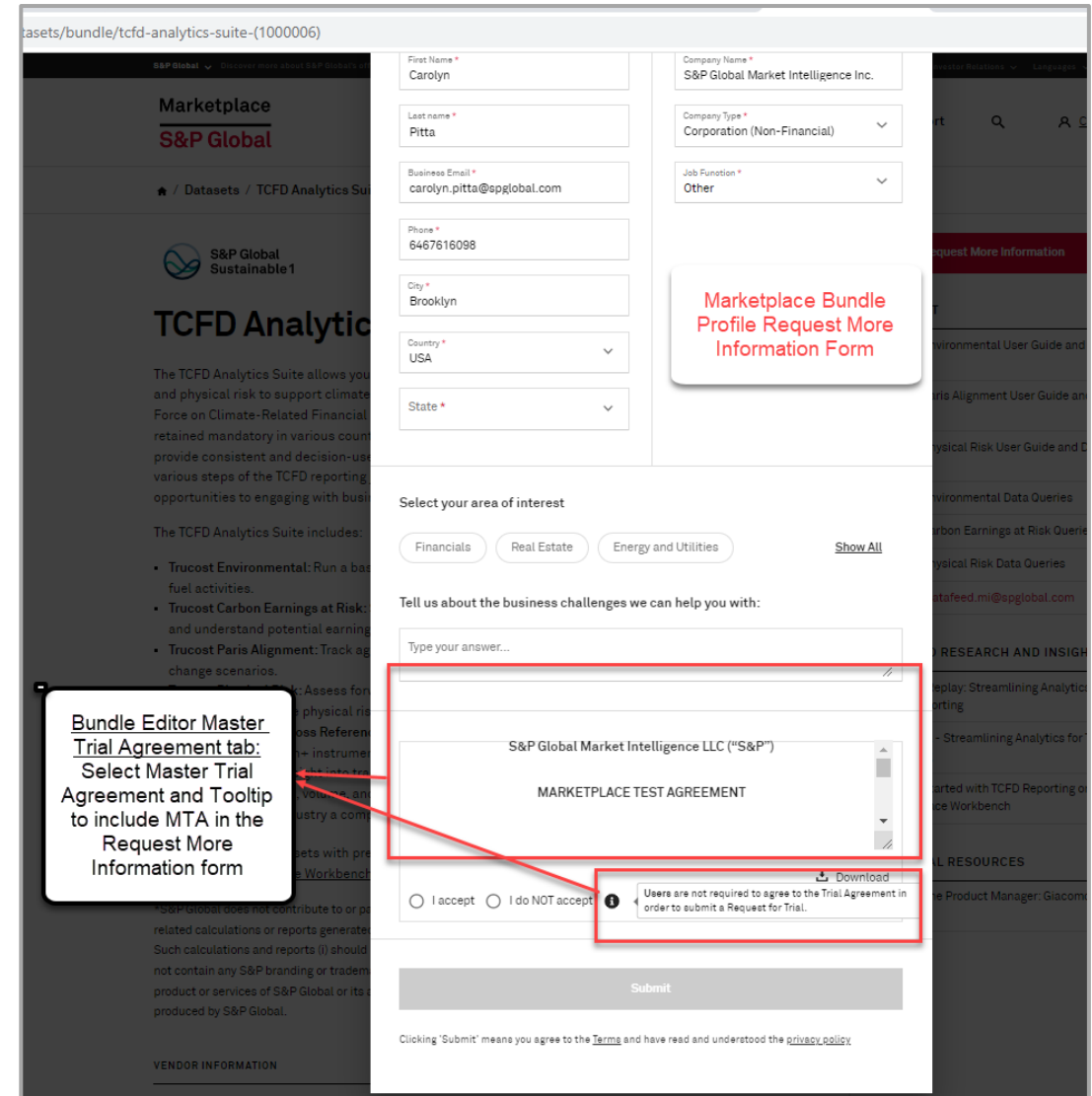
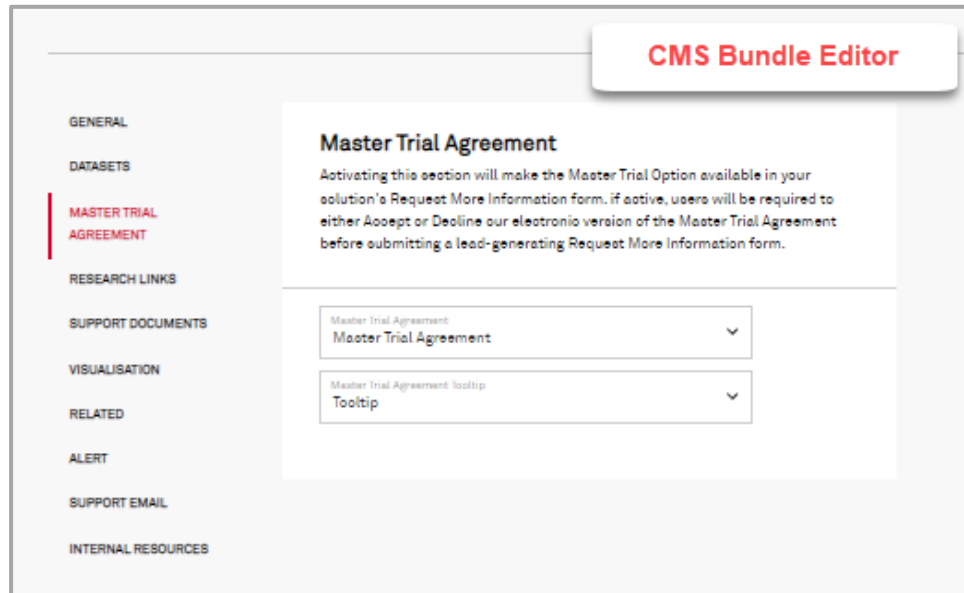
- Bundle Editor Support Documents tab:** Points to the 'SUPPORT' section, which lists various user guides and data queries (e.g., 'Trucost Environmental User Guide and Data Schema', 'Trucost Paris Alignment User Guide and Data Schema').
- Bundle Editor Support Email tab:** Points to the email address [support.datafeed.mi@spglobal.com](mailto:support.datafeed.mi@spglobal.com).
- Bundle Editor Research Links tab:** Points to the 'RELATED RESEARCH AND INSIGHTS' section, which includes links to webinars, blogs, and getting started guides.
- Bundle Editor Internal Resources tab:** Points to the 'INTERNAL RESOURCES' section, which includes a contact for the Product Manager: Giacomo Bareato.

The main content area describes the TCFD Analytics Suite, its purpose, and the data it includes. It also features a 'Request More Information' button and a 'Vendor Information' section at the bottom.

# 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: 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 Title 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

When adding visualizations to your bundle, you can either choose from existing visualizations - or - add new visualizations

TCFD Analytics Suite Showcase Visualization

Showcase visualizations are visible to non-logged in users while coverage visualizations are only available to logged in users

# CMS Solution Editor

The screenshot displays the CMS Solution Editor interface. At the top, there is a breadcrumb navigation showing a home icon and "/ Solution Editor". To the right of the breadcrumb are three buttons: "Save draft", "Publish to Preview", and "Publish to Live". On the left side, there is a vertical navigation menu with the following items: "PROFILE" (highlighted with a red bar), "KEY INFORMATION", "OVERVIEW AND DEMO", "MASTER TRIAL AGREEMENT", "SUPPORT AND RESEARCH", and "INTERNAL RESOURCES". The main content area is titled "Profile" and contains the sub-section "Name and Description". This section includes three input fields: "Solution Title \*", "Short Description \*", and "Long Description \*". Below the "Short Description" field is a rich text editor with a toolbar containing icons for text color, bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. The text editor contains the code "</>".

## 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	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Solution Title:</b>* Name as it should appear on the Marketplace of a service, tool, or capability offered (100 char limit)</li> <li><input type="checkbox"/> <b>Short Description:</b>* Short description of the service, tool, or capability at it should appear on the tiles in the catalog (255 char limit)</li> <li><input type="checkbox"/> <b>Long Description:</b>* long description of a service, tool, or capability offered which appears in the profile page (2000 char limit) <i>Note: The application will not publish duplicate solutions which have the same title, short description, and long description</i></li> <li><input type="checkbox"/> <b>Date Added:</b>* date as of which the service, tool, or capability is available to clients for purchase/subscription <ul style="list-style-type: none"> <li>▪ If future dated, tile will reflect “Coming Soon” until that date in both the details page and the tile until that date</li> <li>▪ “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</li> </ul> </li> <li><input type="checkbox"/> 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</li> <li><input type="checkbox"/> Marketplace Solution Current Version Number: Current version number for a given solution on the external marketplace</li> <li><input type="checkbox"/> <b>Trial Button Title:</b>* 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”)</li> </ul>
Tile Image	Image which reflects on the tile of the catalogue
Provider Details	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Select Data Provider:</b>* Service, tool, or capability Provide/Vendor Details (S&amp;P global Market Intelligence, S&amp;P Global Commodity Insights, S&amp;P Global Mobility, S&amp;P Global Engineering Solutions, S&amp;P Global Ratings, S&amp;P Dow Jones Indices, S&amp;P Global Sustainable1). Adding the provider should automatically add the provider logo and vendor description to the Marketplace tile</li> </ul>
Message Type	<ul style="list-style-type: none"> <li><input type="checkbox"/> Adds Banner Message to top of the Solution Profile</li> <li><input type="checkbox"/> <b>Message Type: Alert or Recently Updated</b> <ul style="list-style-type: none"> <li>▪ When <b>Alert</b> is selected, fields to be completed are Alert Title (e.g. Release Notes) and Alert Description <ul style="list-style-type: none"> <li>➢ Alert Title: Banner Title; char limit 100</li> <li>➢ Alert Description: Description which summarizes the alert that will appear in the dataset; char limit 255</li> </ul> </li> <li>▪ When Recently Updated is selected, the fields to be completed are Date Added, Enhancement Description, and/or Enhancement Link <ul style="list-style-type: none"> <li>➢ <b>Data Added:</b> 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]"</li> <li>➢ <b>Enhancement Description:</b> 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)</li> <li>➢ <b>Enhancement Link:</b> Provide the direct link URL to the release notes document on the Support site for the Solution’s specific enhancement.</li> </ul> </li> </ul> </li> </ul>

# CMS Solution Editor Profile to Marketplace Solution Profile Mapping

The CMS Solution Editor interface shows the following fields and sections:

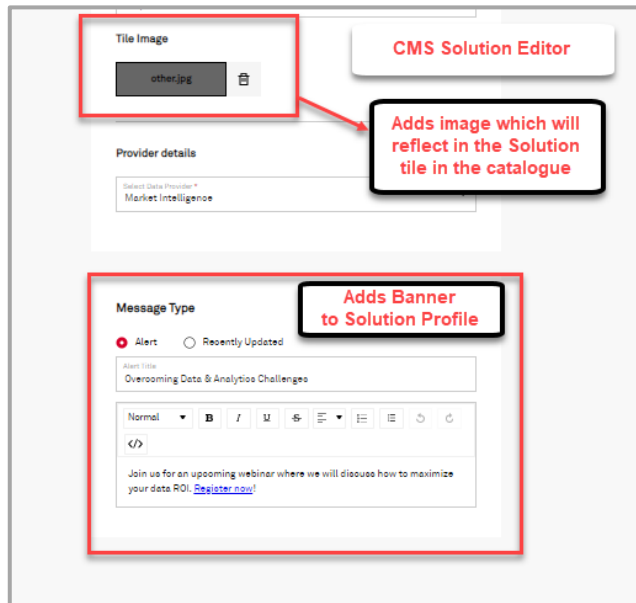
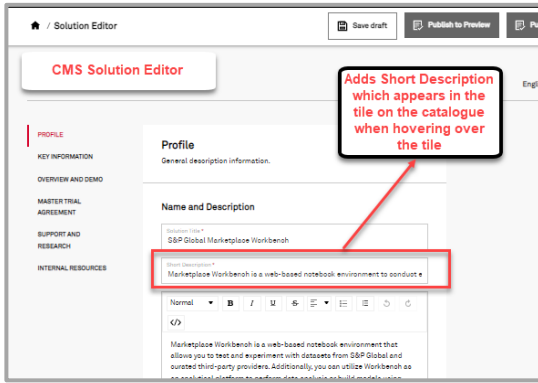
- Profile:** CMS Solution Editor
- Name and Description:**
  - Solution Title:** S&P Global Marketplace Workbench
  - Short Description:** Marketplace Workbench is a web-based notebook environment to conduct e
  - Long Description:** Marketplace Workbench is a web-based notebook environment that allows you to test and experiment with datasets from S&P Global and curated third-party providers. Additionally, you can utilize Workbench as an analytical platform to perform data analysis or build models using collaborative notebooks that support multiple languages, built-in data visualizations and automatic versioning. You and your team can easily analyze and review both pre-built S&P Global notebooks, or build your own, to better understand and see first-hand the value of various datasets or build advanced analytics. The notebook-based environment allows your team to work together and collaborate across notebooks in your company's own secure and scalable workspace. You can share notebooks and work with colleagues through real-time co-authoring, commenting, and automated versioning to simplify collaboration while maintaining control.
- Keywords:** 2021 / Q4 / 20
- Keyword Search Tags:** Data Analytics
- Marketplace Solution Current Version Number:**
- Trial Button Title:** Request More Information
- Tile Image:** other.jpg
- Provider details:** Select Data Provider: Market Intelligence

The Marketplace Solution Profile for 'S&P Global Marketplace Workbench' includes the following elements:

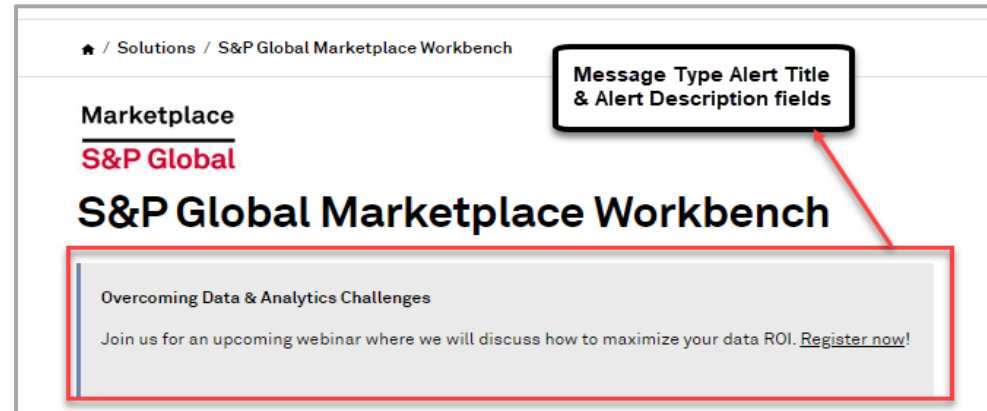
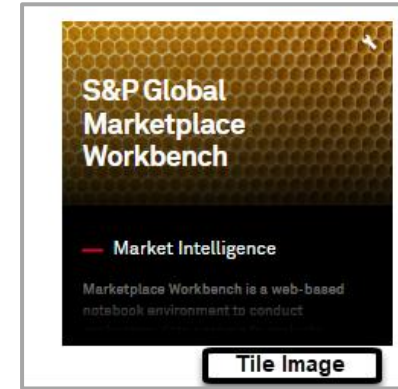
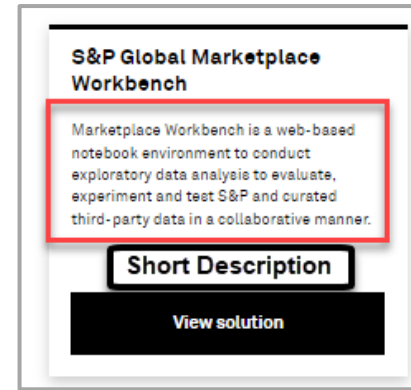
- Solution Title:** S&P Global Marketplace Workbench
- Provider Details:** S&P Global
- Long Description:** Marketplace Workbench is a web-based notebook environment that allows you to test and experiment with datasets from S&P Global and curated third-party providers. Additionally, you can utilize Workbench as an analytical platform to perform data analysis or build models using collaborative notebooks that support multiple languages, built-in data visualizations and automatic versioning. You and your team can easily analyze and review both pre-built S&P Global notebooks, or build your own, to better understand and see first-hand the value of various datasets or build advanced analytics. The notebook-based environment allows your team to work together and collaborate across notebooks in your company's own secure and scalable workspace. You can share notebooks and work with colleagues through real-time co-authoring, commenting, and automated versioning to simplify collaboration while maintaining control.
- Service Provider Information:** At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.
- Trial Button:** Request More Information
- Useful Links:**
  - Video: The Power of Trucoat Earnings at Risk Data with the Marketplace Workbench
  - Webinar Replay: Machine Readable Filings for Investment Insights
  - Case Study: An Investment Manager Discovers an Efficient Way to Identify Valuable Data
  - Video: Stock Price Prediction Using China Sentiment Analytics and the Marketplace Workbench
  - Video: Getting Started with TCFD Reporting on Marketplace Workbench
  - Case Study: A Global Consulting Company Explores Data-Driven Strategies to Grow the Business
- Internal Resources:**
  - Workbench (S&P Global Use Only)
  - Datasets and Notebooks Available via Workbench
  - Product Codes
  - Dataset by Delivery Channel
  - Contact the Product Manager: Onik Kurkchian
  - Workbench Support
  - Workbench Newsletter Sign-up
  - Workbench Frequently Asked Questions
  - Workbench Salesforce Guide

# CMS Solution Editor Profile to Marketplace Solution Profile Mapping

## Marketplace CMS



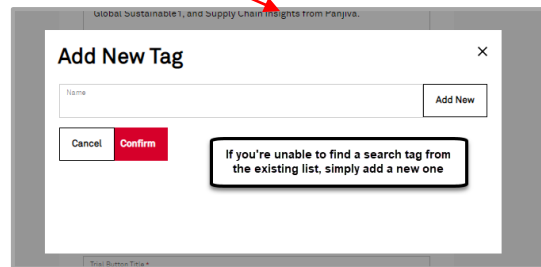
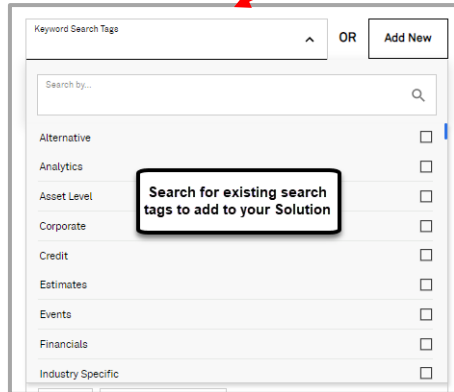
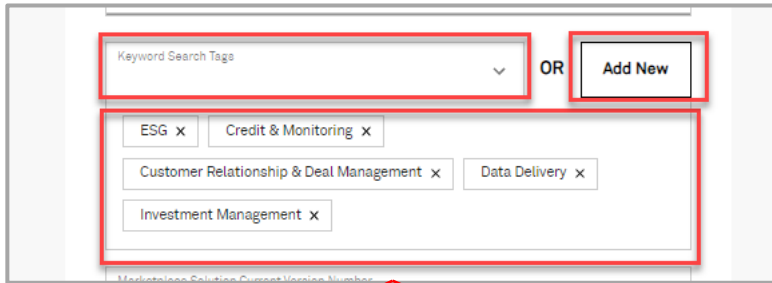
## Marketplace Solution Tile & Profile



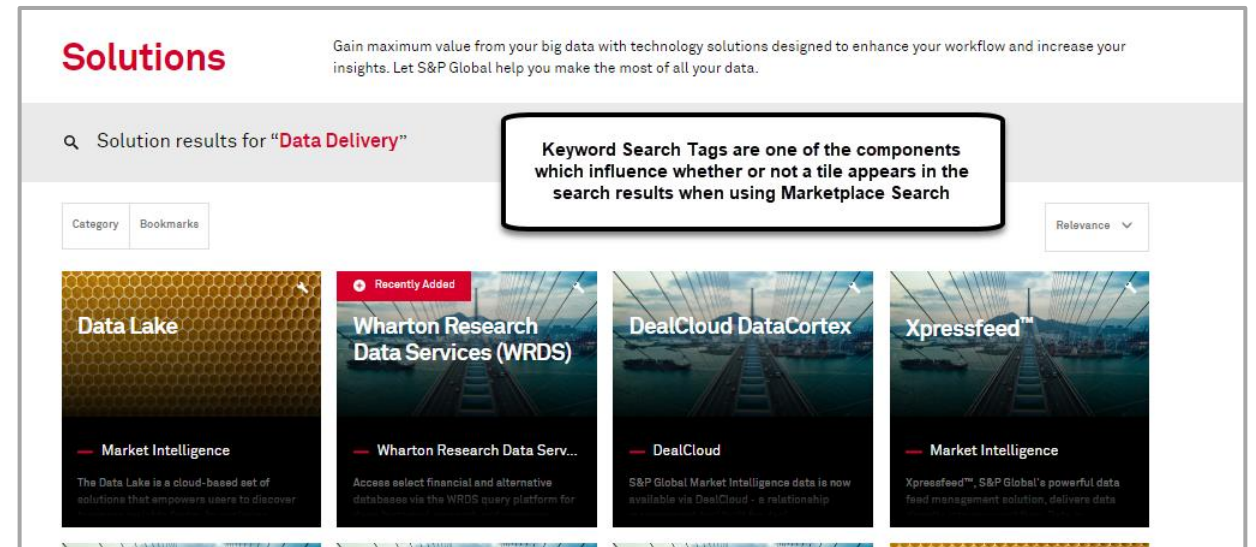
# Marketplace CMS Solution Editor Field Key Word Search Tags

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



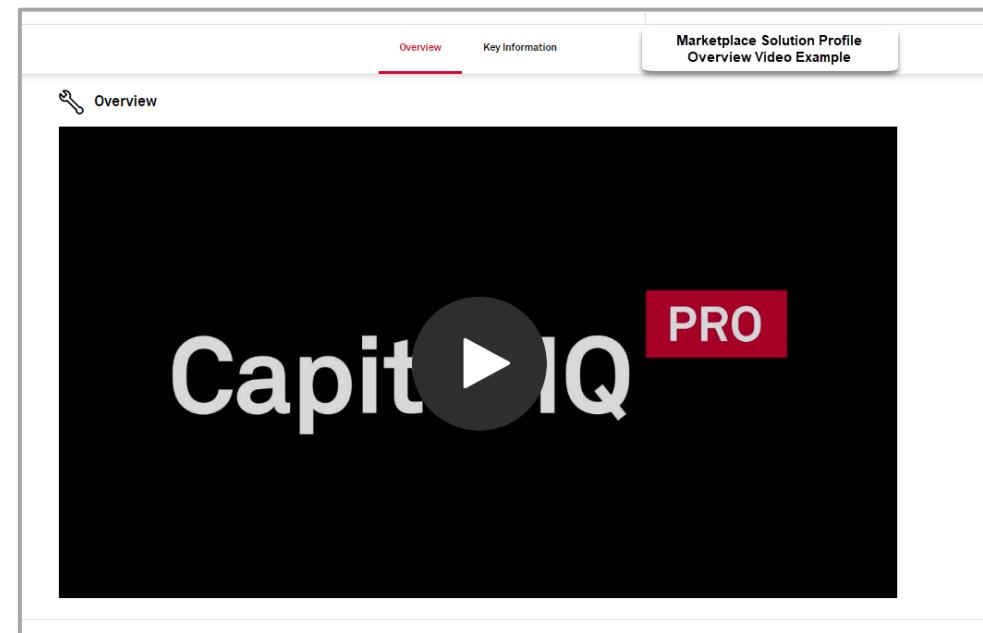
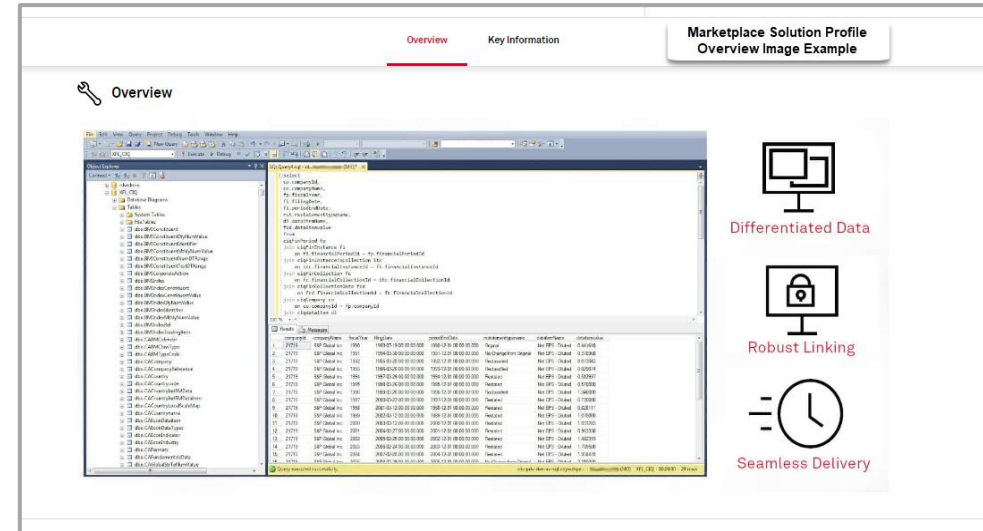
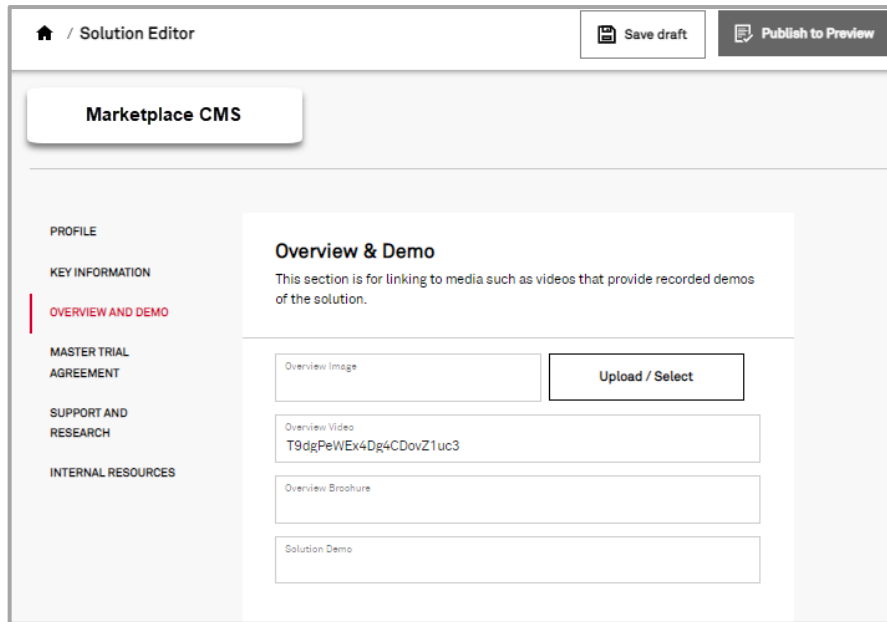
# CMS Solution Editor Key Information Tab

## 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
<b>Master Trial Agreement</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> 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.</li> <li><input type="checkbox"/> 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"</li> </ul>
<b>Support &amp; Research</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> 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"</li> <li><input type="checkbox"/> 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</li> <li><input type="checkbox"/> Support Email: email contact to receive support for dataset and will reflect under "Support" within the Solution profile</li> <li><input type="checkbox"/> <i>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</i></li> </ul>
<b>Internal Resources</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Internal Resource links added are only visible to internal S&amp;P Global users who are connected to VPN under the Internal Resources section of the Solution profile</li> <li><input type="checkbox"/> Provide Internal Resource Name, Resource Link, and/or internal resource document for each internal resource for the Solution             <ul style="list-style-type: none"> <li>▪ When uploading a file, switch from "Custom Files" to "All Files" from the file explorer window</li> <li>▪ When adding email address contacts, prefix the email address with 'mailto:' [example: mailto:taylor.swift@test.com]</li> </ul> </li> </ul>

# CMS Solution Support & Research and Internal Resources

The screenshot shows the 'Support & Research' section of the CMS Solution Editor. The left sidebar contains navigation tabs: PROFILE, KEY INFORMATION, OVERVIEW AND DEMO, MASTER TRIAL AGREEMENT, SUPPORT AND RESEARCH (highlighted), and INTERNAL RESOURCES. The main content area includes:

- Related Links:** A section with two entries. Each entry has a 'Title' field, a 'Website URL' field, and an 'Upload / Select' button. The first entry is 'Office Hours: Exploring ESG Data via WRDS' with URL 'https://pages.marketintelligence.spglobal.com/Office-Hours'. The second entry is 'Expand Your Perspectives with ESG Data & Research with WF' with URL 'https://www.spglobal.com/marketintelligence/en/document'. An 'Add link' button is at the bottom.
- Support Documents:** A section with one entry. It has a 'Document Name' field, a 'Website URL' field, and an 'Upload / Select' button. The entry is 'Learn More about WRDS' with URL 'https://spglobalmi.highpot.com/items/6f6163ffe2a3e97d14'. An 'Add Document' button is at the bottom.
- Support email:** A section with a 'Support email' field containing 'wrds-support@wharton.upenn.edu'.

Three callout boxes on the left provide instructions:

- Red box:** Adds links/documents to the Useful Links section of Solution Profile
- Red box:** Adds links/documents to the Documents section of Solution Profile
- Red box:** Adds support email contact which is found under Useful Links

The screenshot shows the public-facing solution page for 'Wharton Research Data Services (WRDS)'. The page includes the Wharton logo, a date 'Added on 08/26/2022', and a 'Request More Information' button. The main content area is divided into sections:

- Documentation & Useful Links Section:** A section titled 'DOCUMENTATION' with a link 'Learn More about WRDS'. Below it is a 'USEFUL LINKS' section with two links: 'Office Hours: Exploring ESG Data via WRDS' and 'Expand Your Perspectives with ESG Data & Research with WRDS'. At the bottom of this section is the email 'wrds-support@wharton.upenn.edu'.
- Internal Resources Section:** A section titled 'INTERNAL RESOURCES' with a link 'Contact the Product Manager: Rachanna Haffner'.

Two callout boxes provide instructions:

- Black box:** Documentation & Useful Links Section are populated by completing the Support & Research Tab fields of the Solution Editor
- Black box:** Internal Resources section of the solution profile is populated by the completing the Internal Resources tab of the Solution Editor

The screenshot shows the 'Internal Resources' section of the CMS Solution Editor. The left sidebar has the 'INTERNAL RESOURCES' tab highlighted. The main content area includes:

- Internal Resources:** A section with a note: 'Links added here are only visible to internal S&P Global users.' Below it is a 'Resources' section with one entry. It has an 'Internal Resource Name' field containing 'Contact the Product Manager: Rachanna Haffner' and a 'Resource Link' field containing 'mailto:rachanna.haffner@spglobal.com'. An 'Upload / Select' button and an 'Add More' button are at the bottom.

Two callout boxes provide instructions:

- Red box:** Adds Links, Documents, & Contact info to Internal Resources section of Solution Profile
- Red box:** Only visible to S&P Global Employees