

Enterprise Reporting: PowerPlay Toolbar



Subsets



You can define subsets of categories in PowerPlay Web Explorer based on specified criteria. When you create custom subsets of your data, you can isolate, explore, and analyze specific elements of your data.

Create a Subset of Categories


You can define subsets of categories based on specified criteria. Subsets help you isolate, explore, and analyze specific elements of your data.

You can create subsets by search criteria, by measure value, or by individual category selection. You can also create a subset for a dimension directly from a crosstab. After you create the subset, it appears in the dimension viewer in the dimension you used to create the subset.

Subsets can be dynamic, meaning that they are updated whenever a change in the cube data affects the categories in the subset. For example, you are a manager and you want to analyze certain expenses in your department, you create a subset defined by search criteria that Account Codes begin with "77." As more transactions are added to the cube that meet the search criteria, they are added to the subset dynamically.

If you create a subset by individual category selection, it can contain categories from multiple levels, but only categories in the same dimension. You cannot nest a subset within the dimension from which it was derived or within another subset if both subsets are from the same dimension.

Steps Using Search Criteria or Measure Value

1. Click the custom subsets button  .
2. Type a name for the subset.
3. Select the dimension on which to create the subset.
4. Define the search criteria or measure value:
 - To define search criteria, click Define Rule by Search Criteria and click Next. Click Add and create the search definition by providing the search string, starting category to search, and scope of category levels. Click OK.
 - The search string is not case sensitive.
 - You can define more than one search definition. You can also edit and delete existing definitions in the Create Custom Subset by Name Search dialog box.When you finish defining the search definitions, click Next.


- To define a measure value, click Define Rule by Measure Value and click Next. Define the measure value by choosing the measure on which you want to base the rule, values you want returned, category, and scope of category levels you want to search. You can also apply dimension filters, if appropriate. When you finish defining the measure value, click Next.
5. Review the search results.
 - To remove a search result from the subset, click the result and click Remove. To return the search result to the subset, click the result and click Re-enable.
 - Categories that are returned in the result set based on the subset rule are dynamic. If there are changes in the data source, the returned result set reflects those changes, and they are identified by a binocular icon .
 6. If you want to add categories that were not returned in the result set, in the Available Categories list, select the categories and click the add to custom subset button.
 - These categories are static. If you modify the subset rule or if there are changes in the data source and a different result set is returned, these additional categories are still included in the subset and remain until you delete them.
 7. Click Finish.

In the dimension viewer, the subset appears as a new category.

You can rename, edit, or delete the subset using commands on the right-click menu when you select the subset.

Steps Using Category Selection



1. Click the custom subsets button  .
2. Type a name for the subset.
3. Select the dimension on which you want to create the subset.
4. Click Select Categories and click Next.
5. Select the categories you want to appear in the subset and click the add to custom subset button.
6. Click Finish.

In the dimension viewer, the subset appears as a new category. The categories are static and remain in the subset until you delete them.

You can rename, edit, or delete the subset using commands on the right-click menu when you select the subset.

Steps Using a Dimension in a Report

1. Select rows or columns you want to include in the subset.
2. Right-click in the heading area of a selected row or column and click Create Custom Subset.

You can rename, edit, or delete the subset using commands on the right-click menu when you select the subset.