

## Subsets: Using Search Criteria

1. On the PowerPlay Web toolbar, click the **Custom Subsets** button.

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 In the Custom Subset Name box, enter a name for the category subset. This name will appear as an alternate drill-down path in the dimension viewer. For this example, you will leave the name as Custom Subset1.

Custom Subset Name: Custom Subset 1 Dimension: All Accounts Create a Custom Subset that is a static list of categories: Select Categories Create a dynamic Custom Subset that is based on a rule: Define Rule by Search Criteria Define Rule by Measure Value	Custom Subset 1 Dimension: All Accounts Create a Custom Subset that is a static list of categories: Select Categories Create a dynamic Custom Subset that is based on a rule: Define Rule by Search Criteria	Create Custom S		
Dimension: All Accounts Create a Custom Subset that is a static list of categories: Select Categories Create a dynamic Custom Subset that is based on a rule: Define Rule by Search Criteria Define Rule by Measure Value	Dimension: All Accounts Create a Custom Subset that is a static list of categories: Select Categories Create a dynamic Custom Subset that is based on a rule: Define Rule by Search Criteria Define Rule by Measure Value	Custom Subset Na	ime:	
All Accounts • • • • • • • • • • • • • • • • • • •	All Accounts ••••• Create a Custom Subset that is a static list of categories: • Select Categories Create a dynamic Custom Subset that is based on a rule: • Define Rule by Search Criteria • Define Rule by Measure Value	Custom Subset 1		
Create a Custom Subset that is a static list of categories: Select Categories Create a dynamic Custom Subset that is based on a rule: Define Rule by Search Criteria Define Rule by Measure Value	Create a Custom Subset that is a static list of categories: Select Categories Create a dynamic Custom Subset that is based on a rule: Define Rule by Search Criteria Define Rule by Measure Value	Dimension:		
<ul> <li>Select Categories</li> <li>Create a dynamic Custom Subset that is based on a rule:</li> <li>Define Rule by Search Criteria</li> <li>Define Rule by Measure Value</li> </ul>	<ul> <li>Select Categories</li> <li>Create a dynamic Custom Subset that is based on a rule:</li> <li>Define Rule by Search Criteria</li> <li>Define Rule by Measure Value</li> </ul>	All Accounts	*	
	Cancel Back Next Finish	Select Categor Create a dynamic	ies Custom Subset that is based on a rule:	

 Next, from the Dimension list, you will select the Dimension on which you want to create the category subset. For this example, click the **Dimension** list. Select **All Flexfields** (College/Dept/Flex) from the list.

Dimension:	
All Accounts	-
Create a Custom Sut	t that is a s

- 4. Click the Define Rule by Search Criteria option.
- 5. Click the **Next** button.
- 6. Click the **Add** object.

Create Custom Subset By Name Search (Al Search Definitions:	Flexfields (College/Dept/Flex))
	Add
Number of Results: 0	
Cancel Back Next Finish	

 In the Search String list, click Contains, Begins with, or Ends with to define the appropriate search criteria, and then type the text you want to search for. Click the Search String list.

Edit Definition: Search String:					
Contains	-				
Choose a Starting P	it	for y	our S	earch:	

- 8. Click the **Begins with** list item.
- 9. Click in the Search String: text entry field. For this example, enter 27.
- 10. Accept the **All Flexfields** as the starting point for the search.

All Flexfields	(College/Dept/Flex)	-
😐 🛄 -		
		*
Select a scoping	option for your search:	

11. Next, use the drop down menu to select the scope of your search.

scoping option for your search:	
only Immediate Children of selection	-
Cancel	1000
	only Immediate Children of selection

12. Click the Search All Descendants of selection option

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- 13. Click the **OK** button.
- 14. You can add, edit and delete subsets if needed. Click the **Next** button.
- 15. The **Results Set** box gives you an opportunity to review the search results.

Results Set:	
2701	<b></b>
270 1BLK - HSC-IT NEXTEL BB EQUIP REPLACE	
270 1CNS - HSC-IT CNS NON BURC COMP TIME	
2701T32 - T32 BIO & EMR INFECT DISEASES	
270 1ADOB - HSC-IT ADOBE ACROBAT PRO	
4 2701COMP - HSC-IT COMPUTERS	
270 1HNIN - INSTALLATIONS	
270 1HNMA - PORT MAINTENANCE	
270 1HNPH - IP TELEPHONY	
270 1HNRE - RESALE	
270 INEXT - HSC-IT NEXTEL BLACKBERRY SVC	-
Remove Re-enable Select	All Deselect A

- 16. To remove a search result from the category subset, click the result and then click Remove. To return the search result to the category subset, click the result and click Re-enable. Categories that are returned in the result set based on the search criteria are dynamic. If there are changes in the data source, the returned result set reflects those changes.
- 17. If you want to add categories that were not returned in the result set, in the Available Categories list, select the categories and then click the Add to Custom Subset button. These categories are static. If you modify the subset search criteria 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.
- 18. Click the **Finish** button.



19. The **Custom Subset** appears in the Dimension Line and can be selected from there.

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Ipdate: Thursday, August 04, 2011 UFLOR by Expense	e Account ac	oss Fisc	al Years	C.													
Expenses * All Dates * Accounting Period	Type 🛩 Bud	lget Per	iod 🕶	62XXX	XXX HU	IMAN R	ESOUR	RCES -	All But	dget Re	ference	s - A	Employ	ees (UFID/Name	e) -		
4 Custom Subset 1 - All Funds (by Ledger Gro	oup) - All S	ources	of Fund	s - Al	Progra	ms 🛩	AI CRIS	S (IFAS	Only) -	Oper	/ NonOr	per Fun	ds 🕶		10	ÞI	1
General Ledger Actuals *	0				-			20									
General Leuger Actuars =																	
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General Ledger Actuals as values	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	All Dates			
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ALLEXP - ALL EXPENSES (2) - BUDGET ONLY	Get	Data															
EXPREV - ALL EXPENSES & REVENUES																	
DIRECT - DIRECT COSTS (3) - BUDGET ONLY																	
500000 - SALARY EXP (4) - BUDGET ONLY																	
500005 - SALARY EXP (5) - BUDGET ONLY																	
500006 - SALARY EXP (6) - BUDGET ONLY																	
511000 - FACULTY-EARNINGS (PRE FBP)																	