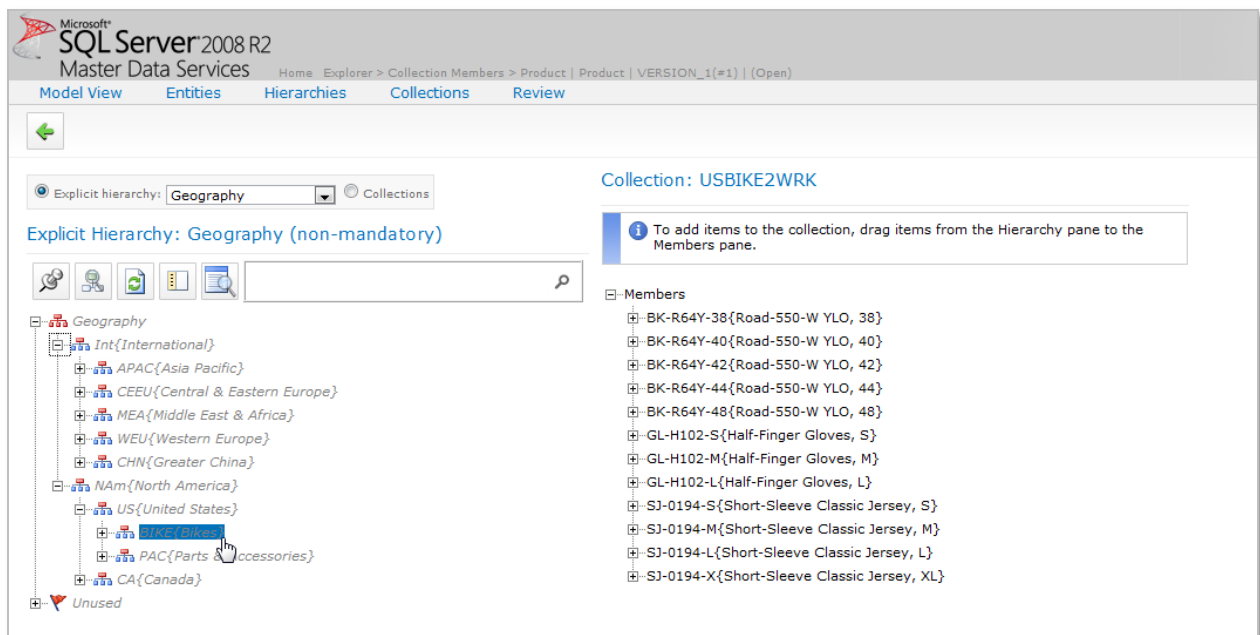


Master Data Services Training Guide

Creating Collections



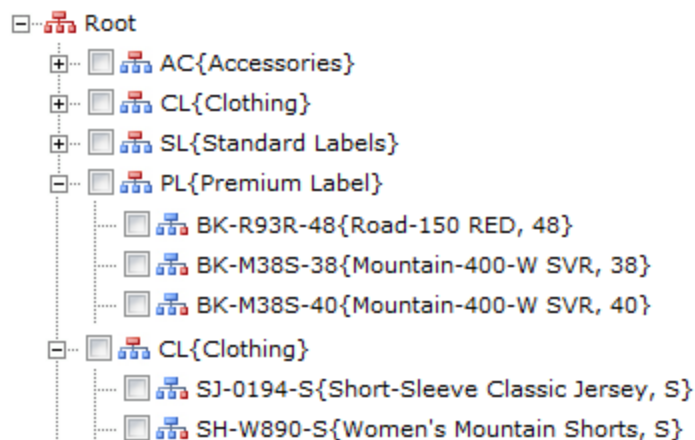
Portions developed by Profisee Group, Inc.

Collections Overview

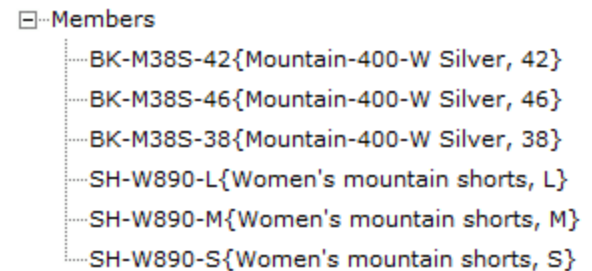
Important Terminology

A collection is a user-defined combination of existing hierarchy members or other collections. Collections can even combine members from multiple hierarchies. They do not represent complete hierarchies; rather they are subsets of members. Collections “break the rules” of hierarchies, providing a much more flexible means to “pick and mix” members across hierarchies and collections to support additional analysis requirements that the existing hierarchies do not support. For example, an employee who is responsible for Women’s Mountain Bikes and Women’s Mountain Shorts could create a collection that only contains these members.

Explicit Hierarchy: Product Management



Collection of Women’s Mountain Bikes & Shorts



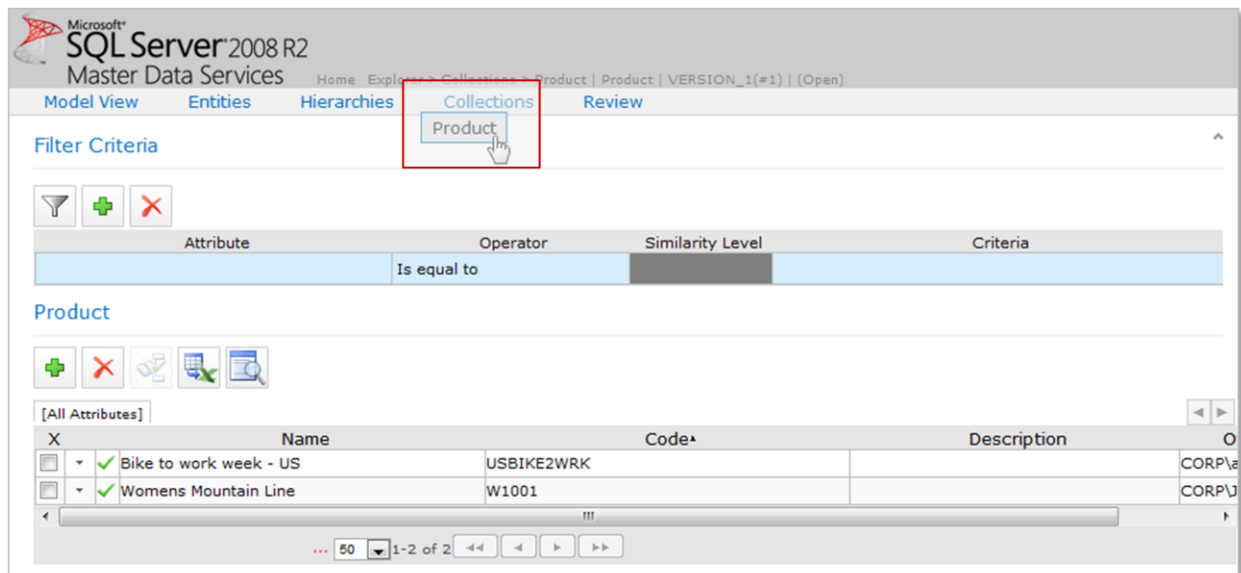
The use of collections is primarily designed to support downstream reporting, analysis and modeling capabilities (multidimensional cubes, data marts, etc.).

Note:

Collections can be created from entities that have at least one explicit hierarchy (as designated by the model administrator).

Collection Explorer

Collections are accessible via either the Explorer navigation menu or from the Model View page within the Explorer.



Like the Entity Explorer and Hierarchy Explorer, the Collection Explorer contains a Filter Criteria pane to sift through long lists of collections. The buttons to manage the list of collections are also similar to the buttons available through other Explorer functions (add, delete, apply business rules, export to Excel and view metadata).

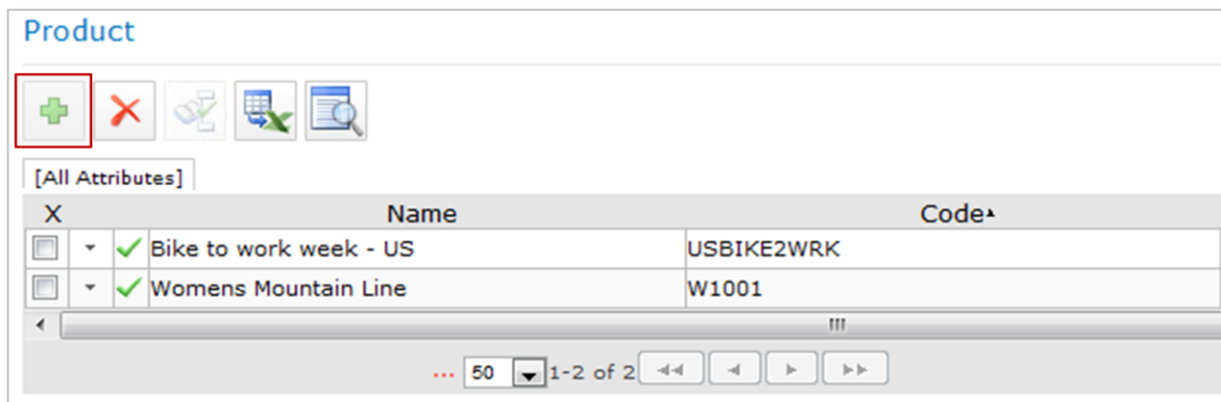
Walk-through: Create a Collection

Scenario | *An analyst needs to analyze data pertaining to women's mountain bikes and women's mountain shorts. A collection needs to be created for analysis of the Women's Mountain Line.*

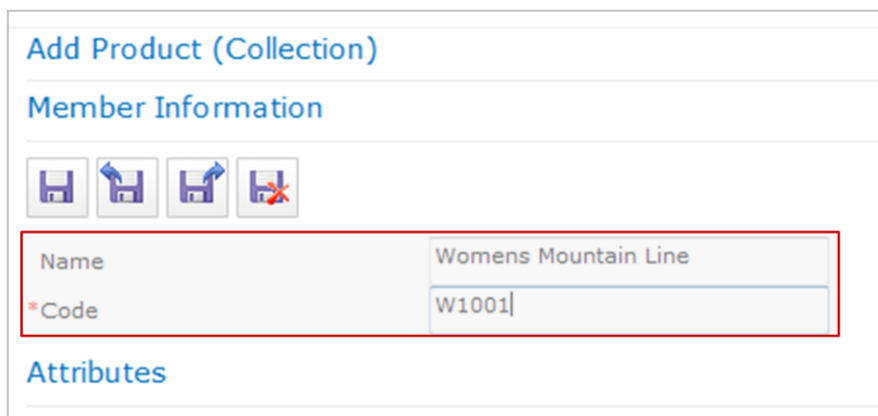
From the Collections drop-down menu, select Product collections.



To build a new collection, click on the Add collection button.





Provide a Name and Code for the new collection. This example creates the Womens Mountain Line collection with code W1001. Click Save.



Once the collection is saved, its attributes (such as description and owner) can be edited.

Edit Product (Collection)


Member Information

Name Womens Mountain Line

* Code W1001

Attributes



[All Attributes]

Display:






☒ Code ☐ Code {Name} ☐ Name {Code}

Description Owner_ID CORP\JohnLe

* Required

To add members to a collection, from the Collection Explorer, open the action menu associated with the new collection. Select Edit members from the drop-down menu.


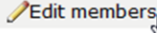
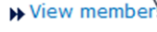

Product

[All Attributes]

X	Name	Code*
<input type="checkbox"/>	Bike to work week - US	USBIKE2WRK
<input checked="" type="checkbox"/>	Womens Mountain Line	W1001

50 1-2 of 2


   

Use the radio button to select members from explicit hierarchies or (other) collections.

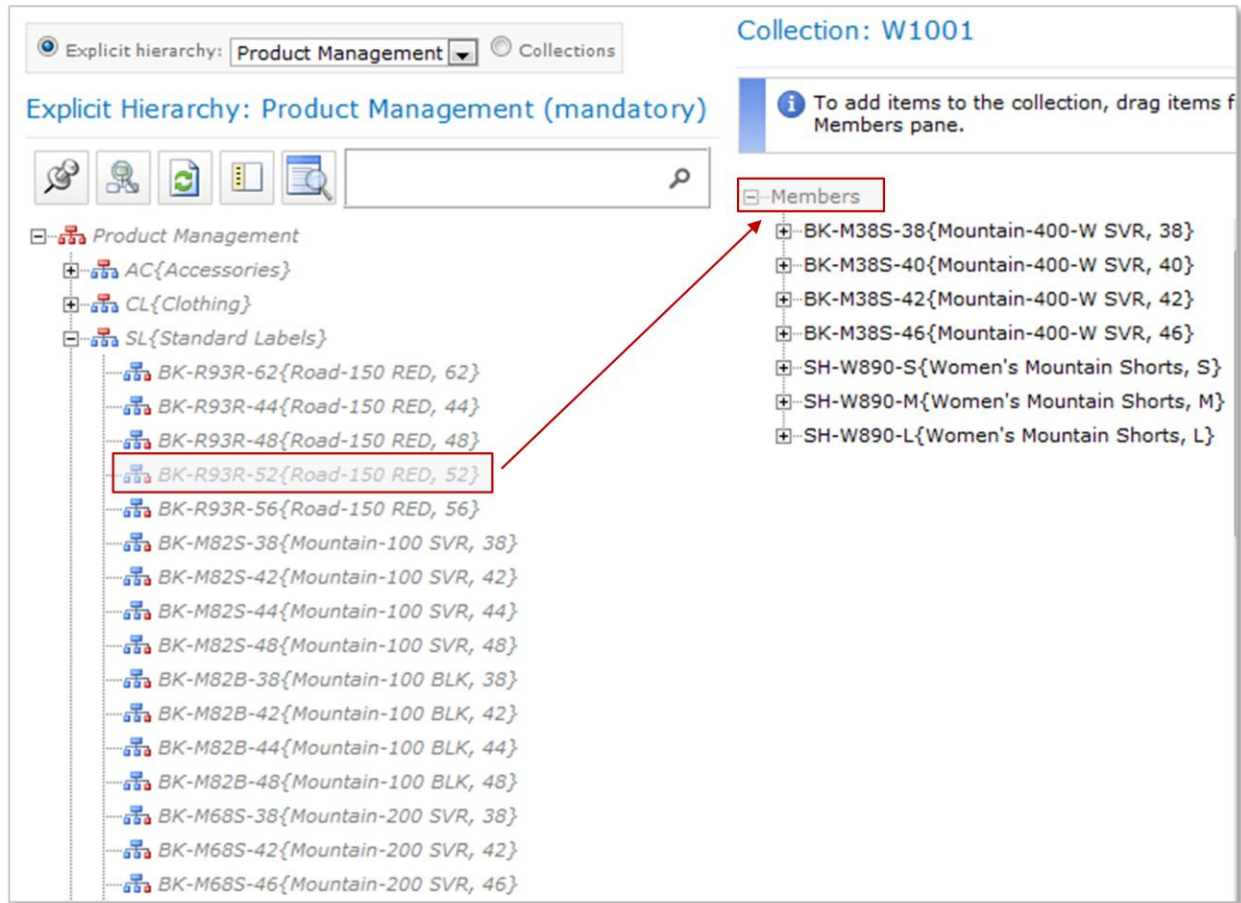
☒ Explicit hierarchy: Product Management ☐ Collections

Collection: W1001

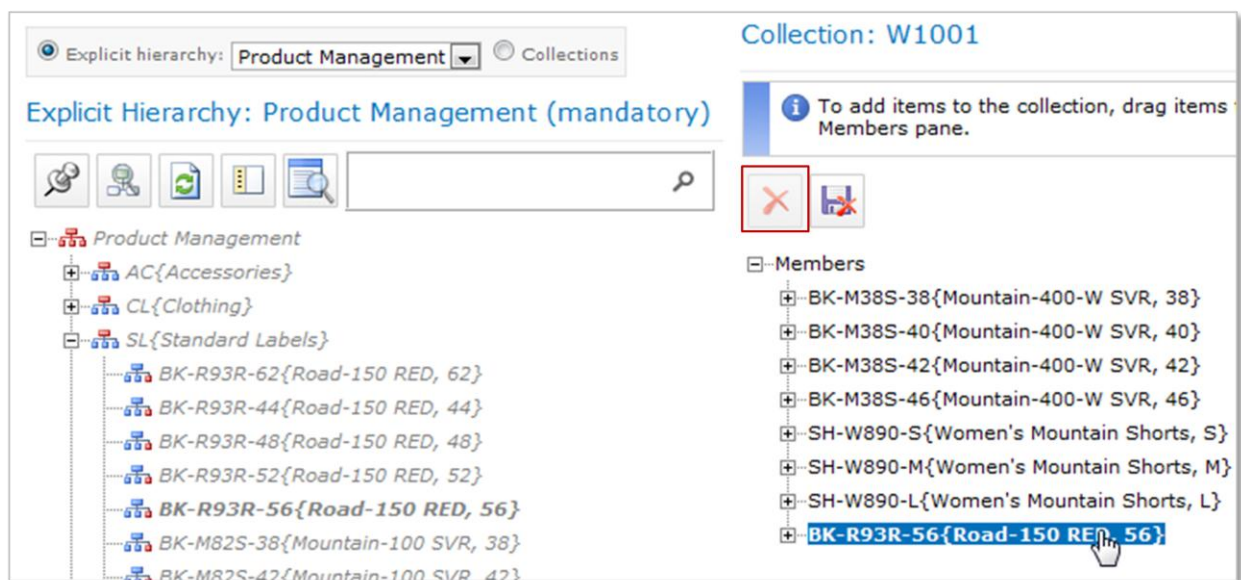
Explicit Hierarchy: Product Management (mandatory)

 To add items to the collection, drag items from Members pane.

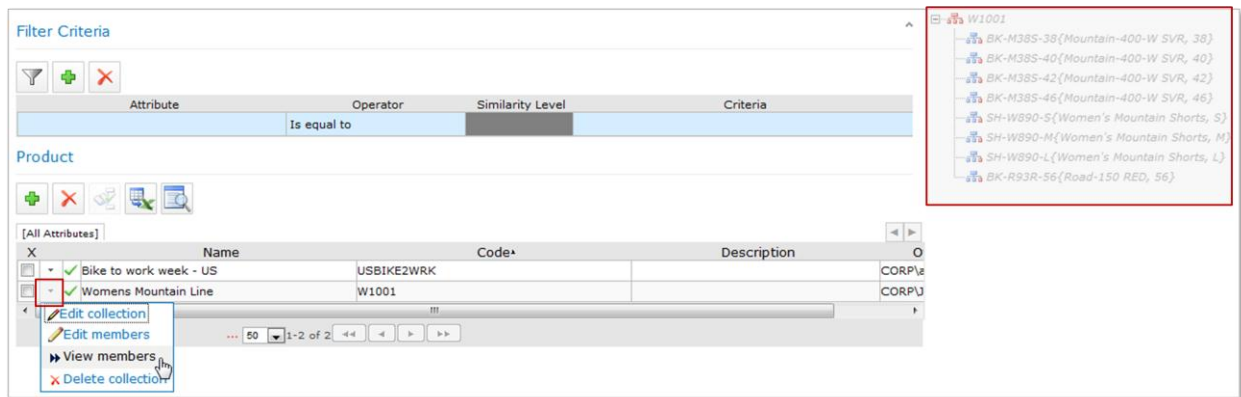
Drag members from the Hierarchy pane on the left and drop onto the Members pane on the right.



To remove a member from a collection, select the desired member from the Members pane on the right and click the Delete member button.



Collection members may be viewed directly from the Collection Explorer screen. Open the action menu associated with the desired collection. Select View members from the drop-down menu. The collection members are listed on the right side of the screen.



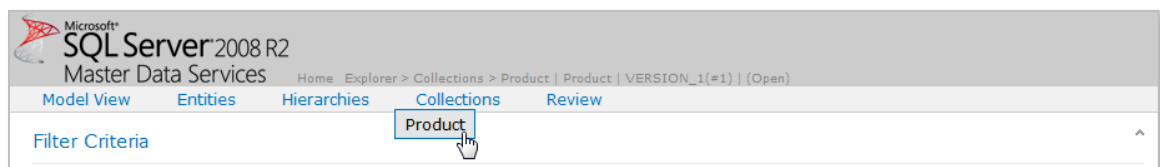
Student Exercises



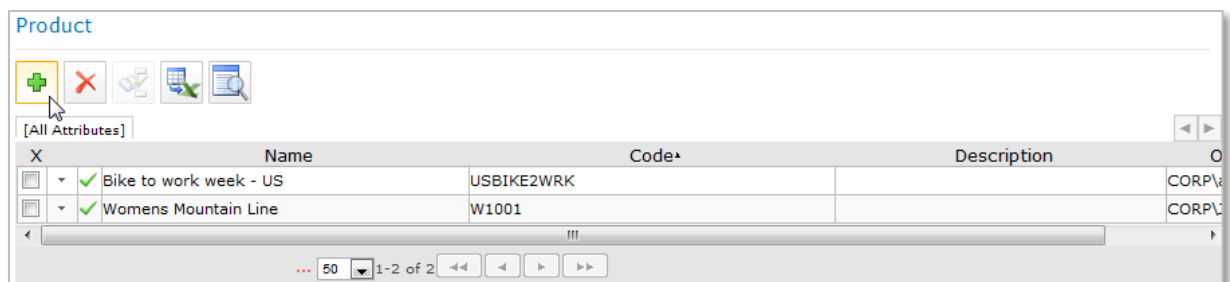
Exercise 1: Create a Collection

Scenario | An LOB analyst holds responsibility for women's mountain bikes and women's mountain shorts and needs to create a collection of data for use in a data mart application. Create a collection that gathers the appropriate bikes from the Standard Labels category and the appropriate shorts from the Clothing category.

1. In the Explorer functional area, click on Collections and select Product.



2. Click Add to create a new collection.



3. Enter a Name and Code. Use Womens Mountain Line and code W1001.


Add Product (Collection)

Member Information

Name: Womens Mountain Line

Code: W1001

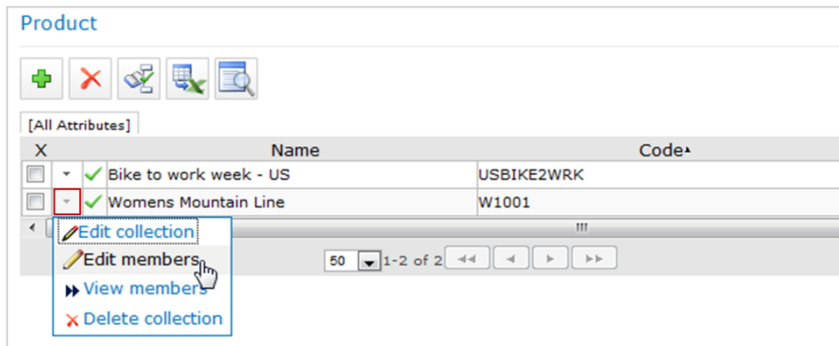
Attributes

4. Click the Save and Go Back  button to return to the collections list.
A collection has now been created; however, it is empty as you have yet to assign members to it.

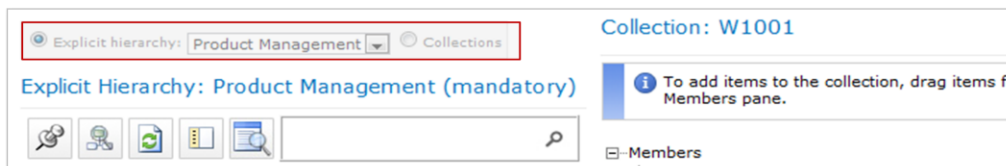


Exercise 2: Assign Members to a Collection

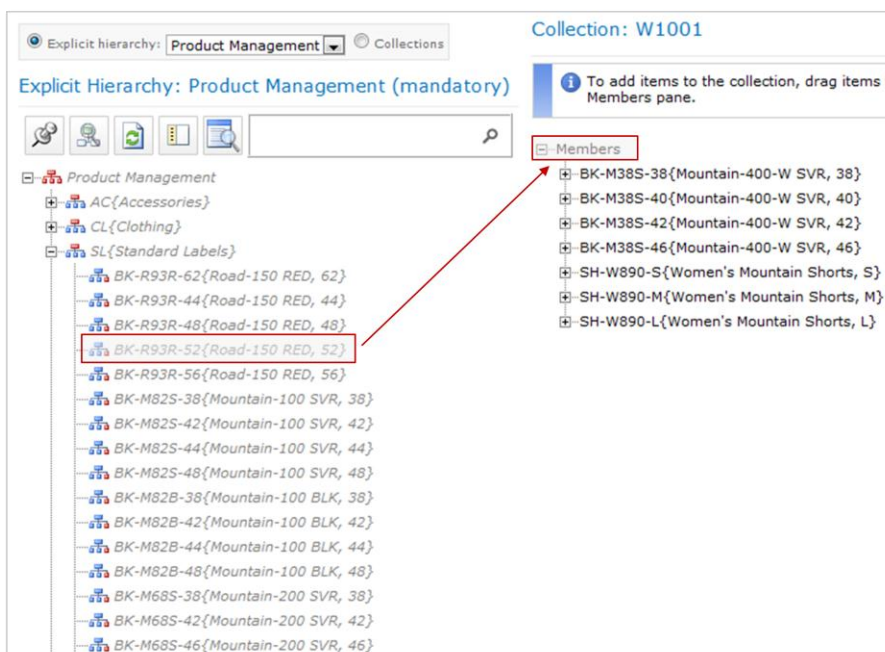
1. Once you have created a collection, click on the action menu to the left of the collection in the collection list.
2. Select Edit members from the drop-down menu.



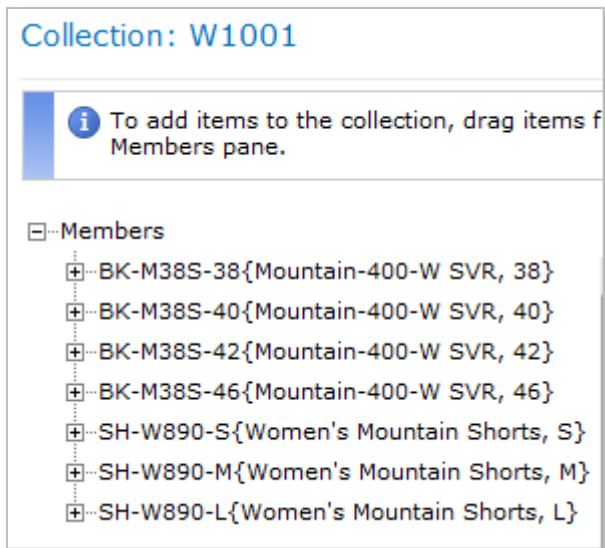
3. A collection can be created from explicit hierarchies or other collections. Select the appropriate radio button to choose the desired hierarchy or collection from which to gather members. For this example, use the Product Management explicit hierarchy.



4. The available members are listed on the left. Select a member and drag it to the Members pane on the right.



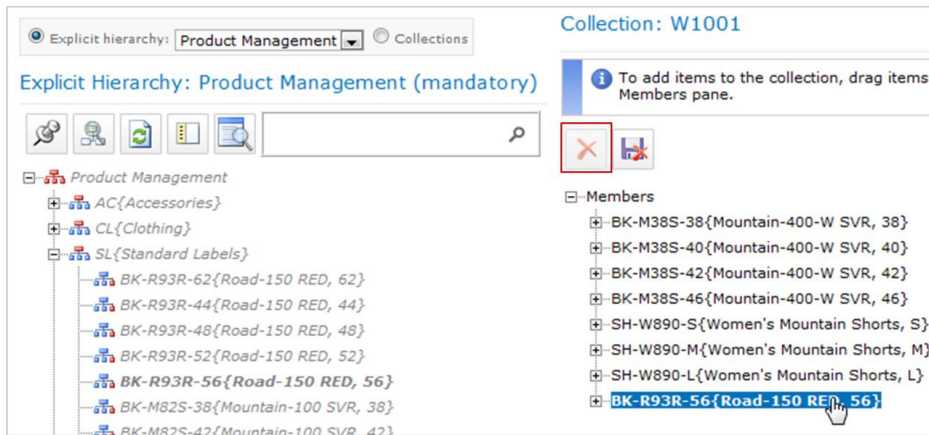
5. Continue adding members until the collection is complete.
6. The right side of the screen now displays all the selected members of your collection.



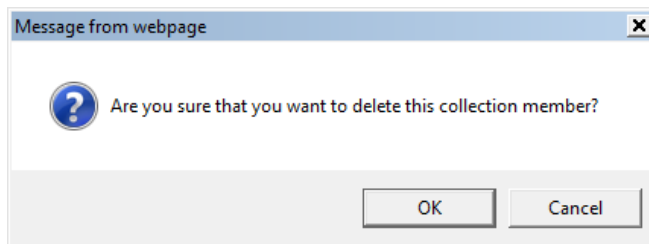


Exercise 3: Delete Collection Members

1. Using the collection you created from the previous exercise, click on a member (or add an erroneous member to the collection first, then select it for deletion).
2. A Delete button will appear above the Collection Members area. Click the Delete button.



3. When prompted to confirm your deletion, select OK.





Exercise 4: Create a Collection of Collections

Scenario | *The LOB analyst responsible for the women's mountain bikes and women's mountain shorts lines needs to create another collection of members that adds women's tights for periodical reporting purposes. Create a collection of collections that combines the previous Womens Mountain Line collection with the appropriate tights from the Clothing category of the Product Management hierarchy.*

1. From the Collections Explorer screen click the Add button to add a new collection.
2. Fill in the Name and Code of the new collection and click "Save and go back".

Add Product (Collection)

Member Information

Icons: Save, Save with Arrow, Save with X, Delete

Name: Womens Bikes-Shorts-Tights

*Code: W1002

3. On the Collection Explorer page, find the new collection and click the action menu on the far left of the grid. Select Edit members from the drop-down menu.
4. From the Collection Members page, select the Collections radio button located on the top, left side of the screen. This displays the available collections.

Explicit hierarchy: Bundle

Collections

Collection: W1002

To add items to the Members pane.

Members

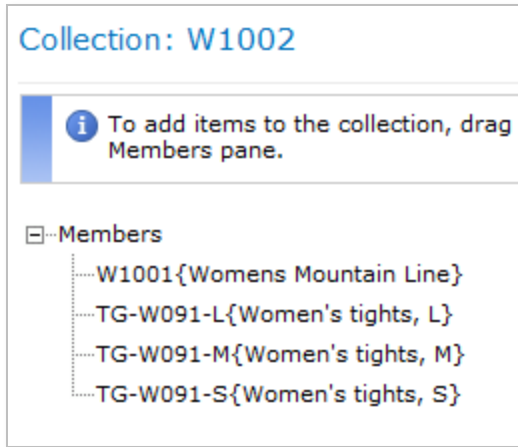
Collections

- 100{Bike Collection}
- PCL1{Product Collection 1}
- PCL2{Product Collection 2}
- PCL3{Product Collection 3}
- W1001{Womens Mountain Line}
- W1002{Womens Bikes-Shorts-Tights}

Members of W1001:

- BK-M38S-42{Mountain-400-W Silver, 42}
- BK-M38S-46{Mountain-400-W Silver, 46}
- BK-M38S-38{Mountain-400-W Silver, 38}
- SH-W890-L{Women's mountain shorts, L}
- SH-W890-M{Women's mountain shorts, M}
- SH-W890-S{Women's mountain shorts, S}

5. Drag and drop the desired collections (or individual members of a collection) to the Members pane on the right side of the screen.
6. Click on the Explicit Hierarchy radio button located at the top, left side of the screen to select the Product Management hierarchy. Navigate to the women's tights products within the Clothing category. Drag and drop the appropriate products to the Members pane.



Recap

Recap

- Overview of collections
- Functions of collections
- Exercises with collections