Dhiva - Manage Conditional Lists

A Conditional List is a dynamic list of attribute items that meet the criteria of the expression statement(s). It is similar to an IF THEN statement in programming languages. The list of items included in a Conditional List is updated with each data refresh.

Under the **Manage Conditional Lists** option, you can perform the following tasks:
- Create Conditional List
    - Add Conditional List to Report
- Copy / Edit / Delete Conditional List
- Grouping Within a Conditional List
    - Creating the Multi-Statement Conditional List with Grouping
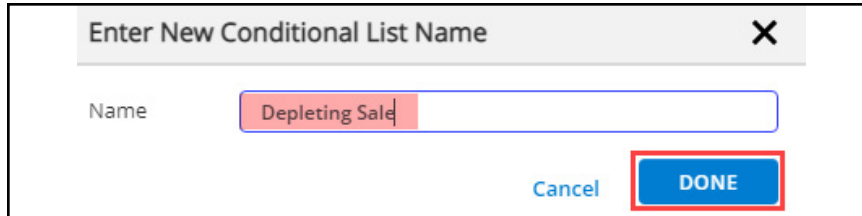
Create Conditional List

For a Conditional List, first you create a list, and then specify conditions. When a Conditional List is selected, the system generates a report with the data fulfilling the condition(s). For example, you may wish to generate a store names report where the sale of a particular product is declining. The same example is demonstrated below:

Step 1: On the **Create Report** screen, select the desired attribute (for example, **Geo-Attribute** >> **Store Name**) in the **Attribute** panel.
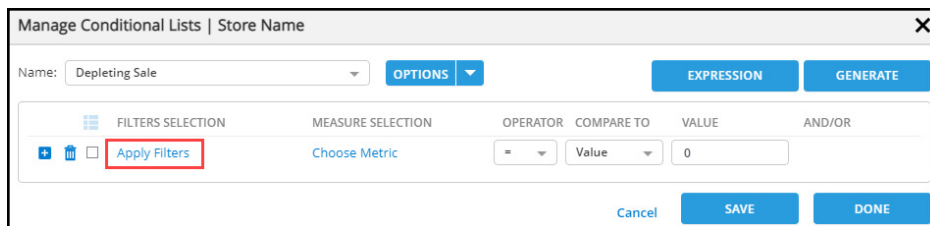Step 2: Click the down arrow and select the **Manage Conditional Lists** option.
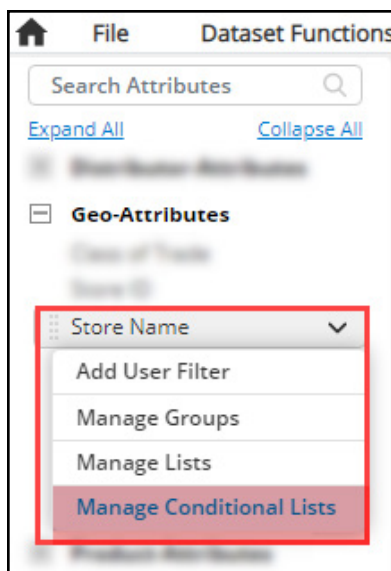
Step 3: Enter an appropriate name (for example, Depleting Sale) in the **Enter New Conditional List Name** dialog box and click **Done**.
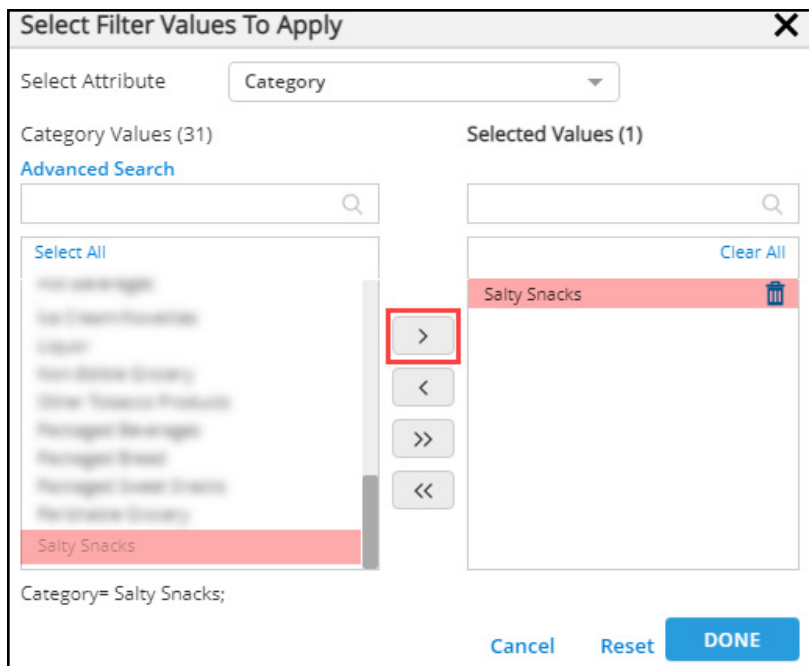
Step 4:In the **Manage Conditional Lists** dialog box, click the **Apply Filters** link.

Step 5: In the **Select Filter Values To Apply** dialog box, select the desired attribute (for example, **Category**) from the drop-down menu.
Step 6: Optional - You may use the textbox to search for the desired item by text string or use the **Advanced Search** to limit the available list based on attribute values. (For example, **Salty Snacks**).

Step 7: Select the desired item (for example, **Salty Snacks**) from the left side of the **Selection Panel** and click the right-pointing arrow to move it to the right side of the panel.

*Note: Press the **Shift** key to select multiple adjacent items in an attribute, while press the **Ctrl** key to select multiple non-adjacent items in the attribute.*

Step 8: Select another attribute (for example, **Week**) from the **Select Attribute** dropdown box.
Step 9: Select and add the desired item (for example, **Current Relative Week**) to the right side of the panel as shown below:

*Note: Select the **Relative** checkbox in order to select the current relative week.*

Step 10: Click **Done**.
Step 11: In the **Manage Conditional List** dialog box, click the **Choose Metric** link to define measures.

Step 12: Select the appropriate option (for example, **Unit Volume**) from the **Metric** dropdown list.

Step 13: Select the appropriate values (for example, **CY** and **13W**) from the **Versus** and **Duration** dropdown lists respectively, then click **Done**.

Step 14: Select **<** from the **Operator** dropdown list.
Step 15: In the **Compare To** dropdown list, select **Condition**. This will create the second condition.

Step 16: Click **Apply Filters** link.
Step 17: Repeat steps 5, 6, and 7 to select **Salty Snacks** as a **Category**.
Step 18: Repeat steps 8, 9, and 10 to add **Week** attribute.
Step 19: Click the **Choose Metric** link to define the measure for the second clause.
Step 20: In the **Define Measures** dialog box, click the plus sign to duplicate the first measure.
Step 21: On the second measure, select appropriate values (for example, **PY** and **13W**) from the **Versus** and **Duration** dropdown lists respectively, then click **Done**.

Step 22: On the **Manage Conditional Lists** dialog box, click the **Expression** button to review the conditional expression.

Step 23: Click **Done** to return to the **Manage Conditional Lists** dialog box.
Step 24: Click **Save** to save the conditional list, then click **Done** to close the dialog box.
System will send a message, "Conditional List saved successfully."

Add Conditional List to Report

On the **New Report Template** screen, there will be some default attributes appearing in the **Filters** and **Columns** area such as **Relative Week** in **Filters** and **Measures** in **Column**. You may add more attributes to generate a desired report. For example, you can generate a report to get the store names where the sale of salty snacks is declining for 13 weeks in the current year as compared to sales in the previous year for the same period (13 weeks). For this example, you will add attributes such as **Category**, **Store Names, Conditional List**, and **Measures** to the Filters, Rows, and Columns areas as demonstrated below:

Step 1: Drag the **Category** attribute from the left panel to the **Filters** area and select **Salty Snacks** from the list.
Step 2: Drag the **Store Name** attribute to the **Filters** area and select '**Depleting Sales**' from the **Select List** dropdown menu.
Step 3: Add the **Store Name** attribute in the **Rows** area.
Step 4: Click **Measures** to add the second measure and select the desired **Versus** and **Duration** (for example, **PY** and **13W**), then click **Done**.

Step 5: Click the **Generate Report** button.

The report will reflect the names of the stores where the sale of salty snacks is dropping in the current year compared to the previous year.

Copy / Edit / Delete Conditional List

Users can make a copy of a Conditional List, edit a Conditional List name or delete a saved Conditional List by following the procedure mentioned below:
Step 1: Select the desired attribute in the **Attribute** panel.
Step 2: Click the down arrow and select the **Manage Conditional Lists** option.
Step 3: Select the appropriate List name from the dropdown list.
Step 4: Click the **Options** dropdown menu and select the **Copy**, **Edit Name,** or **Delete** option.

Grouping within a Conditional List

Within a Conditional List, users have the option to include multiple expression statements connected by either "AND" or "OR" operators. Evaluation of the statements follows the standard rules for order of operations.

When a Conditional List contains 3 or more statements, it is recommended to apply grouping to ensure expected results. Grouping places parentheses around statements while compiling the query, resulting in that group of statements being evaluated first. When multiple groupings are present, they are evaluated from the innermost grouping and then expands outward to the outermost grouping.

Note: Grouping is not necessary when all statements are joined by the same logical conjunction (such as all "AND"s or all "OR"s), as the order of operations does not impact the results in such instances. However, when using a combination of logical conjunctions, grouping is recommended.

In order to create a group of statements, users need to select the checkbox next to the statements they want to be included in the group. When the checkboxes are checked for 2 or more **consecutive** statements, the Group icon ( ) will be enabled, allowing users to group the statements.

As shown in the screenshot below, if a grouping needs to be undone, users can "ungroup" the statements by clicking the "group" icon for the relevant grouping.

Create the Multi-Statement Conditional List with Grouping

When a Conditional List is selected, the system generates a report with the data fulfilling the condition(s). For example, a user might want to produce a report listing stores that are selling products from their manufacturer within both Category A and Category B. However, consider that they want to identify stores that haven't sold any items from their top brand families within those categories (Brand B in the Beer category and Brand W in the Wine category) during the past 13 weeks. This example is demonstrated below:

Note: We are using the **Store Name** attribute in the demo database in this example. We recommend using a store number attribute if available, to create a unique list of stores.

Step 1: On the Create Report screen, select the desired attribute (for example, Geo-Attribute >> Store Name) in the Attribute panel.

Step 2: Click the down arrow and select the Manage Conditional Lists option.

Step 3: Enter an appropriate name (for example, **Not Selling My Top BFs**) in the Enter New Conditional List Name dialog box or select New from the Options dropdown menu and then click Done.

Step 4: Create the required statements in a logical sequence. In order to group statements, they must be consecutive or sequential.

Step 5: Once all statements are finished, users can start grouping them as shown below. Notice the Grouping button ( ) is grey until a user selects multiple consecutive statements.

To do this, select the checkboxes next to the first two statements and then click the grouping button located above them. This action will result in the addition of a blue shading beside those statements.

Step 6: Select the checkbox for the third and fourth statements then click the group button. Blue shading will be added to the left side of the statements and users should see something like this.

Dhiva will evaluate the first two statements, followed by the last two, and conclude by combining them using the "OR" operator. We can better visualize this by viewing the **Expression**.

It other words, it reads:

((Statement1 AND Statement2)
                OR
 (Statement3 AND Statement4))

Step 7: Click Save and Done. This Conditional List is now ready to be added to a report.