



## 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:

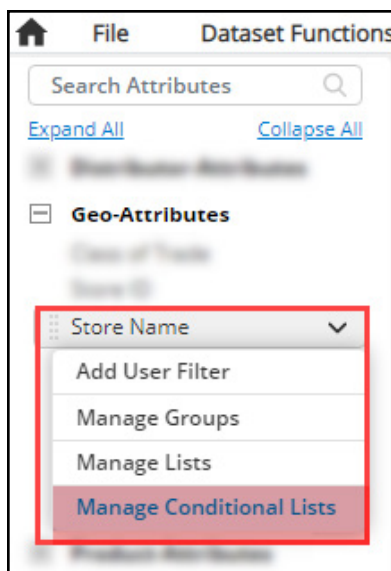
- [Create Conditional List](#)
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- [Copy / Edit / Delete Conditional List](#)
- [Grouping Within a Conditional List](#)
  - [Creating the Multi-Statement Conditional List with Grouping](#)

### Create Conditional List

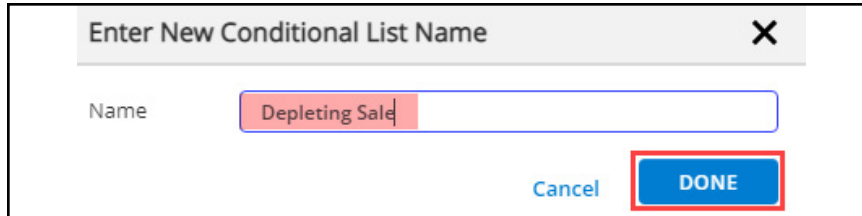
For a Conditional List, first you create a list, and then specify conditions. When a Conditional List is selected, the system generates a report with the data fulfilling the condition(s). For example, you may wish to generate a store names report where the sale of a particular product is declining. The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

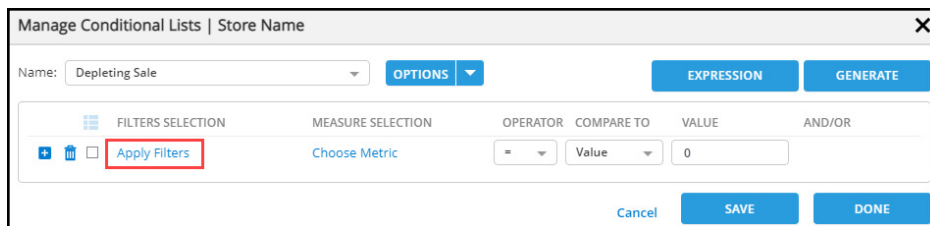


Step 3: Enter an appropriate name (for example, Depleting Sale) in the **Enter New Conditional List Name** dialog box and click **Done**.



The dialog box titled "Enter New Conditional List Name" has a close button (X) in the top right. It contains a text input field labeled "Name" with the text "Depleting Sale" entered. Below the input field are two buttons: "Cancel" and "DONE". The "DONE" button is highlighted with a red border.

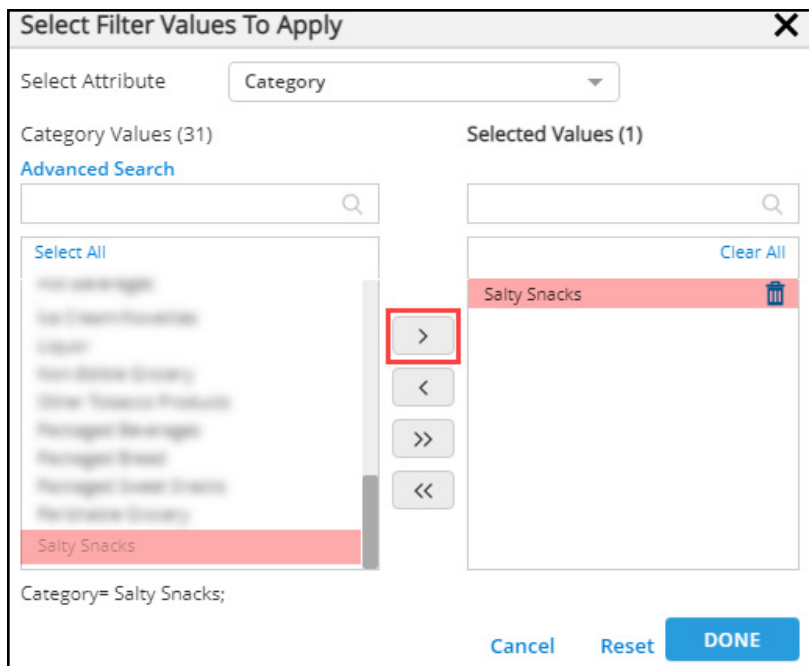
Step 4: In the **Manage Conditional Lists** dialog box, click the **Apply Filters** link.



The dialog box titled "Manage Conditional Lists | Store Name" has a close button (X) in the top right. It contains a "Name:" dropdown menu with "Depleting Sale" selected. To the right of the dropdown is an "OPTIONS" dropdown menu. Further right are two buttons: "EXPRESSION" and "GENERATE". Below these is a table with columns: FILTERS SELECTION, MEASURE SELECTION, OPERATOR, COMPARE TO, VALUE, and AND/OR. The "FILTERS SELECTION" column contains a link "Apply Filters" which is highlighted with a red border. The "MEASURE SELECTION" column contains a link "Choose Metric". The "OPERATOR" column contains a dropdown menu with "=" selected. The "COMPARE TO" column contains a dropdown menu with "Value" selected. The "VALUE" column contains a text input field with "0" entered. The "AND/OR" column is empty. At the bottom of the dialog box are three buttons: "Cancel", "SAVE", and "DONE".

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**).



The dialog box titled "Select Filter Values To Apply" has a close button (X) in the top right. It contains a "Select Attribute" dropdown menu with "Category" selected. Below the dropdown are two sections: "Category Values (31)" and "Selected Values (1)". The "Category Values (31)" section has an "Advanced Search" link and a search input field. Below the search field is a list of category values, with "Salty Snacks" highlighted. The "Selected Values (1)" section has a "Clear All" link and a search input field. Below the search field is a list of selected values, with "Salty Snacks" highlighted. Between the two lists are four buttons: ">", "<", ">>", and "<<". The ">" button is highlighted with a red border. At the bottom of the dialog box are three buttons: "Cancel", "Reset", and "DONE".

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**.

The 'Define Measures' dialog box contains a table with the following data:

METRIC	NAME	VERSUS	DURATION
Unit Volume	Unit Volume-CY-13W	CY	13W

Buttons at the bottom: Cancel, DONE. A red box highlights the first row of the table.

Step 14: Select < from the **Operator** dropdown list.

Step 15: In the **Compare To** dropdown list, select **Condition**. This will create the second condition.

The 'Manage Conditional Lists' dialog box shows a configuration for 'Depleting Sales'. It includes a table with the following data:

FILTERS SELECTION	MEASURE SELECTION	OPERATOR	COMPARE TO	VALUE	AND/OR
Category->(Salty Snacks),Week->{...	Unit Volume-CY-13W	<	Condition		

Buttons at the bottom: Cancel, SAVE, DONE. A red box highlights the 'OPERATOR' and 'COMPARE TO' columns.

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**.

The 'Define Measures' dialog box now contains two rows of measures:

METRIC	NAME	VERSUS	DURATION
Unit Volume	Unit Volume-CY-13W	CY	13W
Unit Volume	Unit Volume-PY-13W	PY	13W

Buttons at the bottom: Cancel, DONE. A red box highlights the second row of the table.

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

The image shows two screenshots from the MSA software interface. The top screenshot is the 'Manage Conditional Lists | Store Name' dialog box. It has a 'Name' dropdown set to 'Depleting Sales', an 'OPTIONS' button, an 'EXPRESSION' button (highlighted with a red box), and a 'GENERATE' button. Below these is a table with columns: FILTERS SELECTION, MEASURE SELECTION, OPERATOR, COMPARE TO, VALUE, and AND/OR. The table contains two rows of filter expressions. At the bottom are 'Cancel', 'SAVE', and 'DONE' buttons. The bottom screenshot is the 'Expression' sub-dialog, which displays the condition: 'Condition: ( (Unit Volume-CY-13W) Filters: (Salty Snacks, 05/28/2022) < (Unit Volume-PY-13W) Filters: (Salty Snacks, 05/28/2022) )'. It has a 'DONE' button at the bottom right.

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**.

The image shows the 'Define Measures' dialog box. It has a table with columns: METRIC, NAME, VERSUS, and DURATION. There are two rows of measures. The first row has 'Unit Volume' as the metric, 'Unit Volume-CY-13W' as the name, 'CY' as the versus, and '13W' as the duration. The second row has 'Unit Volume' as the metric, 'Unit Volume-PY-13W' as the name, 'PY' as the versus, and '13W' as the duration. To the right of each row are 'More', 'Copy', and 'Delete' icons. At the bottom are 'Cancel' and 'DONE' buttons.

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.

Filters: 05/28/2022; Salty Snacks; Depleting Sales;

STORE NAME	UNIT VOLUME-CY-13W	UNIT VOLUME-PY-13W
...	121,181.0	214,683.0
...	100,612.0	138,209.0
...	77,896.0	126,745.0
...	76,820.0	106,767.0
...	71,999.0	81,028.0
...	71,047.0	91,246.0
...	62,601.0	91,752.0
...	62,150.0	81,559.0
...	53,333.0	74,210.0
...	47,745.0	60,379.0
...	47,709.0	66,331.0

## 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.

Manage Conditional Lists | Store Name

Name: Depleting Sale

OPTIONS

- New
- Copy
- Edit Name
- Delete

OPERATOR	COMPARE TO	VALUE	AND/OR
>	Value	100	


Cancel SAVE DONE

## 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 BF's**) 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.

Manage Conditional Lists | Store Name

Name:  OPTIONS EXPRESSION GENERATE

FILTERS SELECTION	MEASURE SELECTION	OPERATOR	COMPARE TO	VALUE	AND/OR
<input checked="" type="checkbox"/> Category->(Beer),Relative Week->(06/24/2023)	Stores Selling Item-CY-13W	=	Value	1	AND
<input checked="" type="checkbox"/> Category->(Beer),Relative Week->(06/24/2023)	Stores Selling Item-CY-13W	=	Value	0	OR
<input checked="" type="checkbox"/> Category->(Wine),Relative Week->(06/24/2023)	Stores Selling Item-CY-13W	=	Value	1	AND
<input checked="" type="checkbox"/> Category->(Wine),Relative Week->(06/24/2023)	Stores Selling Item-CY-13W	=	Value	0	AND

☐ Set as Global

Cancel SAVE DONE

Expression | Not Selling My Top BF's

Condition: (Measure: Stores Selling Item-CY-13W = 1) Filters: (Category: Beer; Relative Week: 06/24/2023; Manufacturer:  )

AND

Condition: (Measure: Stores Selling Item-CY-13W = 0) Filters: (Category: Beer; Relative Week: 06/24/2023; Manufacturer:  ; Brand Family:  )

OR

Condition: (Measure: Stores Selling Item-CY-13W = 1) Filters: (Category: Wine; Relative Week: 06/24/2023; Manufacturer:  )

AND

Condition: (Measure: Stores Selling Item-CY-13W = 0) Filters: (Category: Wine; Relative Week: 06/24/2023; Manufacturer:  ; Brand Family:  )

DONE

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.

FILTERS SELECTION		MEASURE SELECTION	OPERATOR	COMPARE TO	VALUE	AND/OR
<input checked="" type="checkbox"/>	Category->(Beer),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	1	AND
<input checked="" type="checkbox"/>	Category->(Beer),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	0	OR
<input type="checkbox"/>	Category->(Wine),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	1	AND
<input type="checkbox"/>	Category->(Wine),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	0	

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.

Manage Conditional Lists | Store Name

Name:

OPTIONS

EXPRESSION

GENERATE

FILTERS SELECTION		MEASURE SELECTION	OPERATOR	COMPARE TO	VALUE	AND/OR
<input checked="" type="checkbox"/>	Category->(Beer),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	1	AND
<input checked="" type="checkbox"/>	Category->(Beer),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	0	OR
<input checked="" type="checkbox"/>	Category->(Wine),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	1	AND
<input checked="" type="checkbox"/>	Category->(Wine),Relative Week->(06... Stores Selling Item-CY-13W		=	Value	0	

☐ Set as Global

Cancel
SAVE
DONE

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))

Expression | Not Selling My Top BFs

(
Condition: (Measure: Stores Selling Item-CY-13W = 1) Filters: (Category: Beer; Relative Week: 06/24/2023; Manufacturer: My Manufacturer)
AND
Condition: (Measure: Stores Selling Item-CY-13W = 0) Filters: (Category: Beer; Relative Week: 06/24/2023; Manufacturer: My Manufacturer) Brand Family: BF B
)
OR
(
Condition: (Measure: Stores Selling Item-CY-13W = 1) Filters: (Category: Wine; Relative Week: 06/24/2023; Manufacturer: My Manufacturer)
AND
Condition: (Measure: Stores Selling Item-CY-13W = 0) Filters: (Category: Wine; Relative Week: 06/24/2023; Manufacturer: My Manufacturer) Brand Family: BF W
)
)
My Manufacturer

DONE

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



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