Dhiva

Training Exercise Guide

Business Use Case 1
Volume for Top Chains Report

Contents

Introduction to Document

Dhiva is a web-based query and visualization application that works with any device including mobile devices and with popular browsers including Chrome, Safari, Edge, and Firefox.

The goal of the training guide is to demonstrate how to create reports which will answer common business questions and create interactive visualizations which will enable users to slice, drill, and export data. In addition, the guide will also showcase how to leverage some useful features of the Dhiva application.

The Business Case/training example in this training guide uses the MSA Demo dataset. Please note that the attributes, measures, and default selections may differ on other datasets. Therefore, we recommend users make similar selections from their dataset.

It is recommended that the new users do the training examples in order beginning with Business Case 1 as the training examples are built on previously demonstrated features and gradually increase in complexity.

Business Case 1: Volume for Top Chains Report

How do I find my top Chains by volume and how much my volume is growing or declining Year-to-Date (YTD) vs Prior Year using Dhiva? Also, how do I drill down from the Chain to see the Distributor supplying the chain?

Key Learnings/ Takeaways

Through this exercise, you will learn to:

- Add attributes and measures to report
- Add filters and user filters
- Create a hierarchy
- Generate report
- Organize report data using grid column options

Key Attributes to Work With

- Manufacturer
- Chain Name
- Distributor HQ
- Distributor Warehouse
- Measures

Steps to Perform

1. Open the Report Template

From the **Home Page**, select the desired data domain on the right-hand side of the page to open the **New Report Template** as shown below:
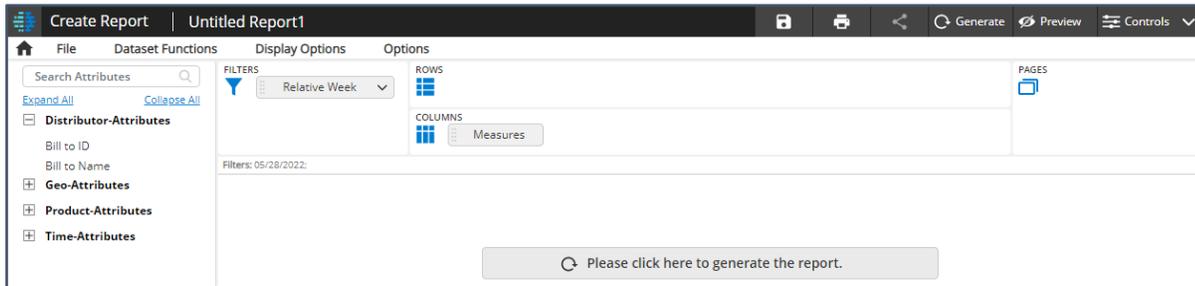

Note: *Domains can be set up with default attribute selection and filters as shown in the above screenshot. Although it is not filtered in this example, a best practice is to set filter on **Transshipment Flag** to **N** (No) as to not double count product.*

2. Add Filters

1) Search for the '**Week'** attribute in the left-hand side panel and drag it to the **Filters** area. When finished dragging, you will be prompted to select week value(s). Select the current week and the **Relative** checkbox. Click the **Done** button.

Note: This step may not be required if your client's default template is already set to the current Relative Week.

2) Search for the '**Category**' attribute in the left-hand side panel and drag it to the **Filters** area. When finished dragging, you will be prompted to select the category you would like to work on (for example, select '**Candy**') and click the **Done** button.
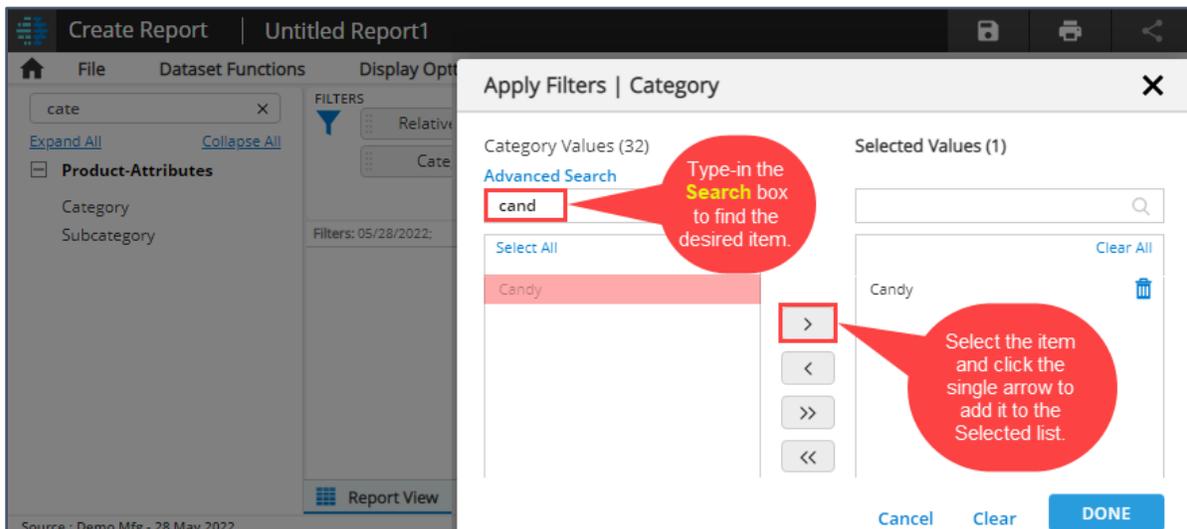
3) Search for the '**Manufacturer'** attribute in the left-hand side panel, click on it and select '**Add User Filter**' from the dropdown menu.
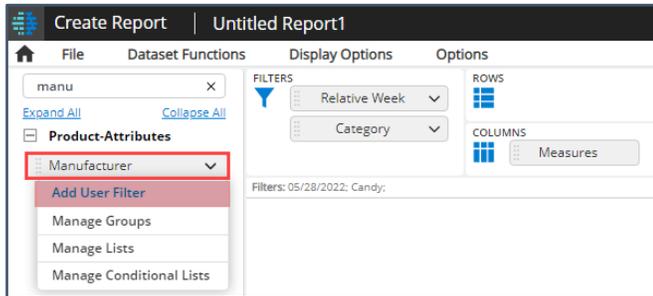
4) In the **Filter Actions and Appearance** dialog box, accept the default selections, then click **Done**.
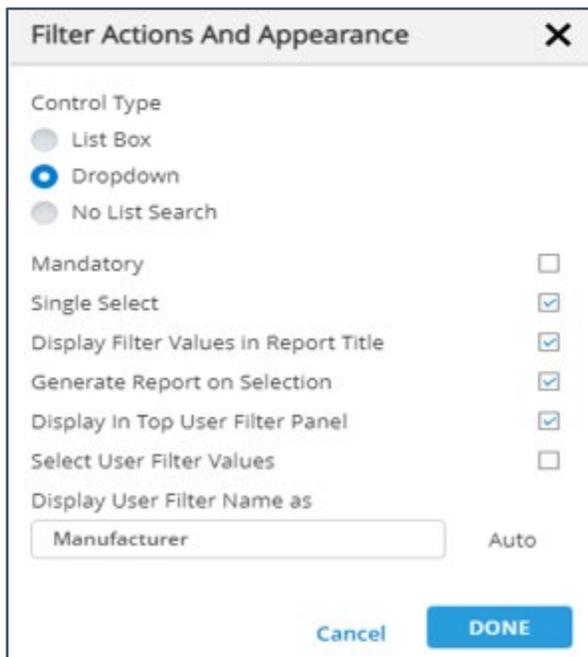
This will create a User Filter (indicated as **UF**) on the **Manufacturer** attribute to enable users to select the desired manufacturer.

3. Create a Hierarchy

1) Search and drag **Chain Name**, **Distributor HQ** and **Distributor Warehouse** to the **Rows** area.
2) To create a hierarchy, drag **Distributor HQ** on top of **Chain Name** and then add **Distributor Warehouse** on top of the two.
3) In the **Hierarchy** dialog box, drag the selected attributes into the desired order and edit the name to reflect the order, then select **Nested** as the type of the hierarchy.
4) Check the **Include Total** box to populate a total of chains with drill down enabled.
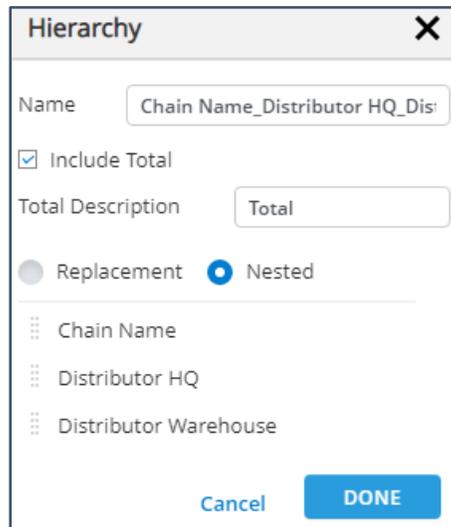
4. Add Measures

1) Click the **Measures** attribute in the **Columns** area.

  i. Under the **Metric** dropdown menu, select **Unit Volume**.
  ii. Under the **Versus** dropdown menu, select the **CY** (Current Year) option.
  iii. Under the **Duration** dropdown menu, select the **YTD** (Year-to-Date) option.
  iv. Click the plus sign to make a copy of the measure and change **CY** to **PY**.
  v. Click the plus sign of the second measure to make a copy and change **PY** to **% CHG vs PY**.
  vi. Click the **Done** button to exit the **Define Measures** dialog box.

5. Generate Report and Customize Output

1) Click the **Generate** button to generate the report.
2) Click the **Plus Sign** (+) next to **Total** to display the Chain Names.
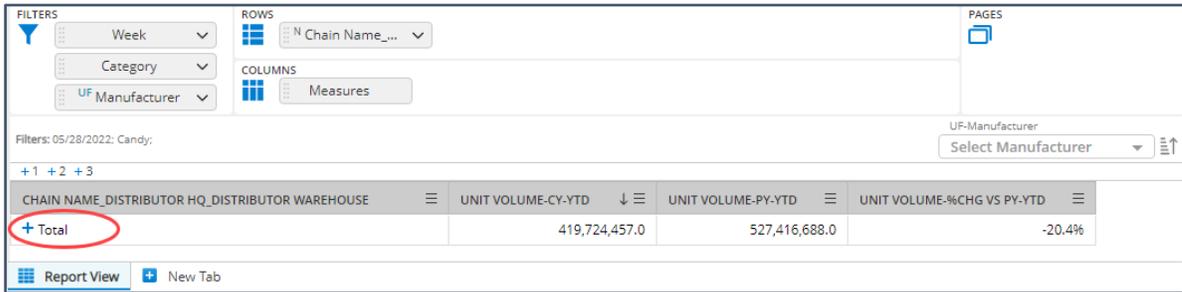
3) To view only the top number of chains in the report, click the **Column Options** ≡ icon on the **Unit Volume - CY - YTD** column and select the **Top/Bottom** option from the list.
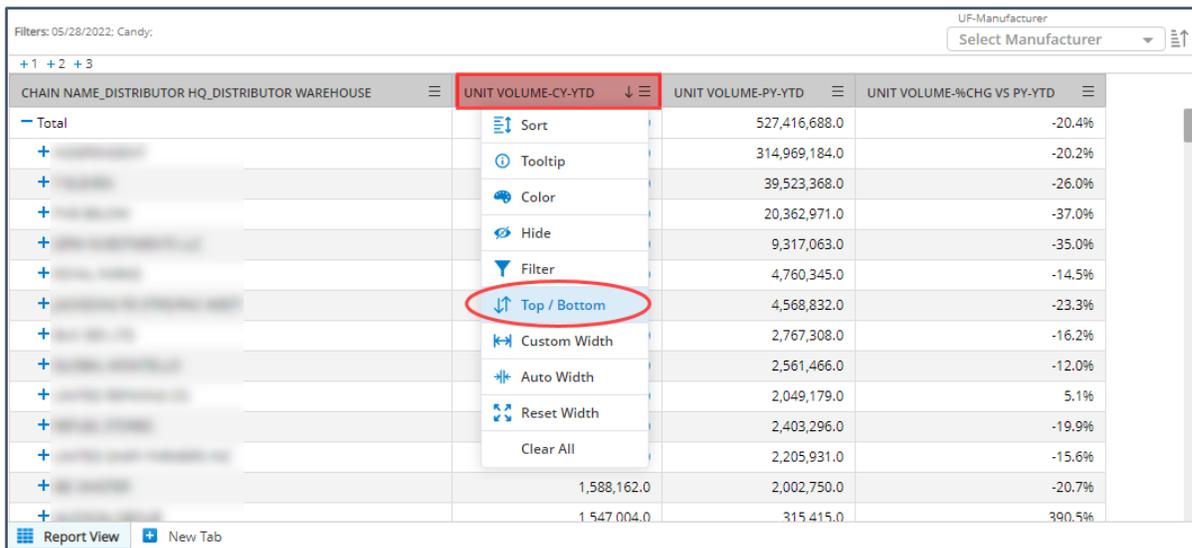
4) In the **Top/Bottom** dialog box, select the **Top** checkbox and enter the desired number (for example, **10**) in the **Value** textbox, then click **Done**.
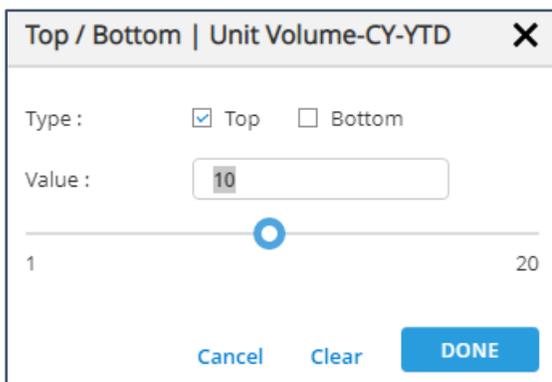
5) From the **UF Manufacturer** dropdown menu, select the desired Manufacturer to limit to that manufacturer's data.

Result Screen

Only the top 10 chains for the selected Manufacturer will be output. A default sort on the first data column will be applied resulting in Chains in descending order based on Unit Volume-CY-YTD data as shown in the below screenshot. Users can click the Plus Sign (+) to drill from a Chain Name to Distributor HQ(s) supplying the chain.

Additional Resources

Click the [Dhiva Support Documentation - Management Science Associates, Inc. (msa.com)](#) link to refer to the below mentioned quick start guides and the user guide.

- Create Report Quick Start Guide
- Create Hierarchy Quick Start Guide
- Apply User Filter Quick Start Guide
- Dhiva User Guide