



Enterprise Data Warehousing

Sales Execution

msa

Trade Program Management

Market & Consumer Insights

Dhiva

Training Exercise Guide

Business Use Case 2 Declining Brand Share Alert Report

Contents

Introduction to Document.....3

Business Case 2: Declining Brand Share Alert Report3

 Key Learnings/ Takeaways.....3

 Key Attributes to Work With3

 Steps to Perform.....4

 1. Open the Report Template.....4

 2. Add Filters.....4

 3. Create Report Layout5

 4. Add Measures.....5

 5. Generate Report.....6

 6. Add Alerts and Color Conditions6

 7. Generate a Report and Set Filter.....9

 8. Schedule Alert Report..... 11

Additional Resources..... 11

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 2: Declining Brand Share Alert Report

How do I find a list of stores where a selected brand share is declining in the current four weeks versus that of the previous four weeks?

Key Learnings/ Takeaways

Through this exercise, you will learn to:

- Use color conditions/conditional formatting
- Create an alert on a report
- Filter a report on metric values
- Schedule a report based on pre-defined alerts

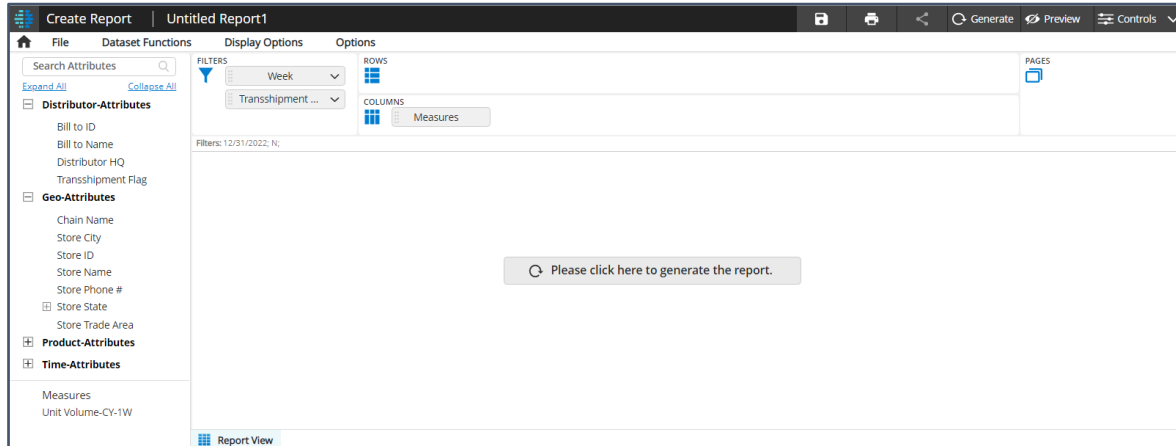
Key Attributes to Work With

- Week
- Brand Family
- Store Name
- 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.



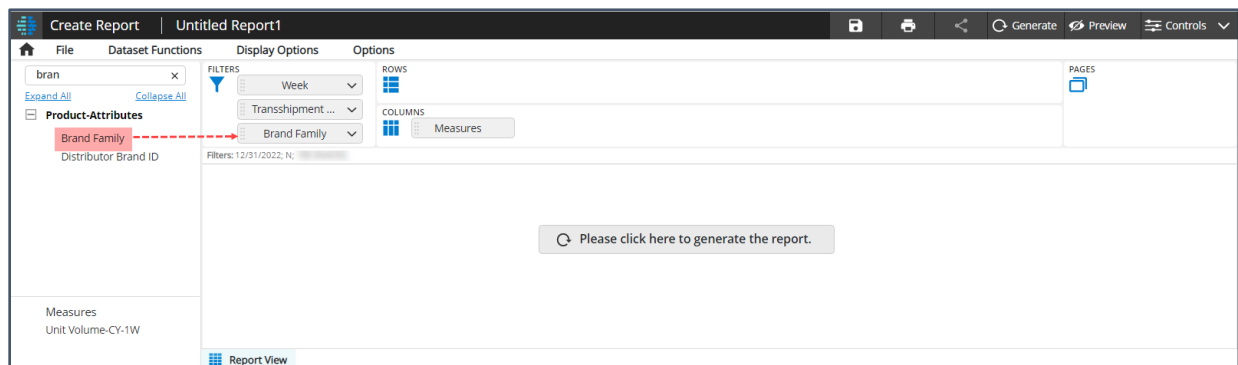
Note: Domains can be set up with default attribute selection and filters as shown in the above screenshot.

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.

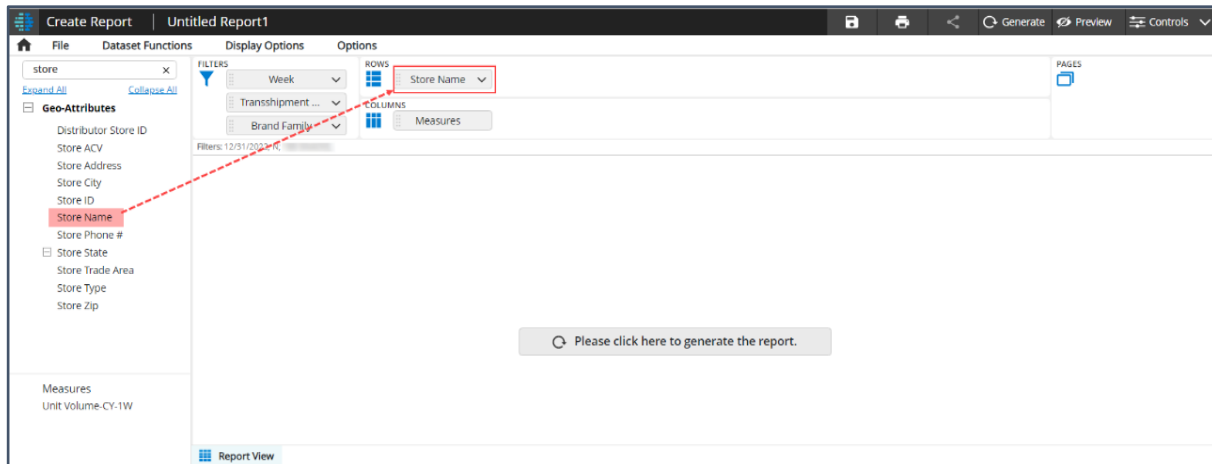
Note: This step may not be required if your client's default template is already set to the current Relative Week.

- 2) Search for the **Brand Family** attribute in the left-hand side panel and drag it to the **Filters** area.
- 3) Once you drop the attribute onto **Filters**, you will be prompted to select the desired **Brand Family** and then click the **Done** button.



3. Create Report Layout

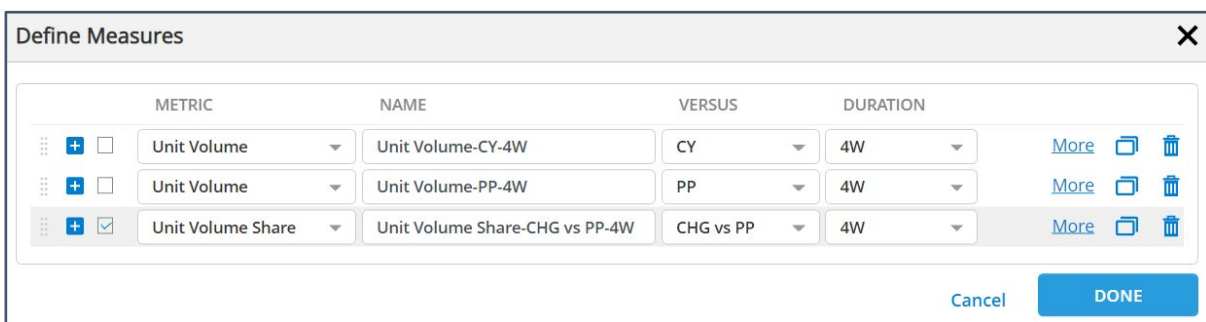
Search for the **Store Name** attribute in the left-hand side panel and drag it onto the **Rows** area.



4. Add Measures

Click the **Measures** attribute in the **Columns** area to select the desired measures in the **Define Measures** pop-up window shown below.

- 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 **4W** (Four Weeks) option.
- iv. Click the plus sign **+** to make a copy of the measure. Then under the **Versus** dropdown menu, change **CY** to **PP** (Prior Period).
- v. Click the plus sign **+** of the second measure to make a copy. Under the **Metric** dropdown menu, select **Unit Volume Share** and under the **Versus** dropdown menu, select **CHG vs PP**.
- vi. Click the **Done** button to exit the **Define Measures** dialog box.



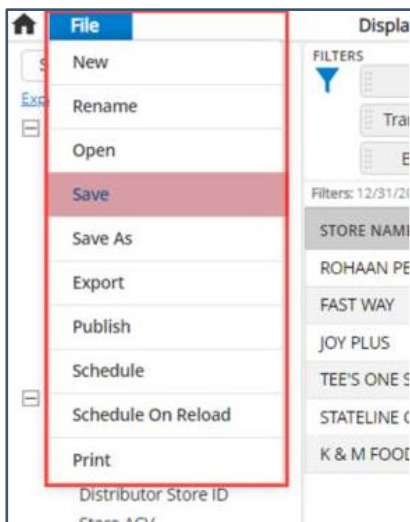
You will return to the **Create Report** screen.

5. Generate Report

- 1) Click the **Generate** button to generate the report.

STORE NAME	UNIT VOLUME-CY-4W	UNIT VOLUME-PP-4W	UNIT VOLUME SHARE-CHG VS PP-4W
ROHAAN PETROLEUM	10.0	11.0	-0.4%
FAST WAY	8.0	12.0	-1.5%
JOY PLUS	4.0	5.0	-0.4%
TEE'S ONE STOP	3.0	6.0	-0.5%
STATELINE CARTON STATION	2.0	2.0	-0.0%
K & M FOOD MART INC.	1.0	2.0	-0.4%
JOINER GROCERY	1.0	1.0	0.0%
SPEED X	1.0	1.0	0.0%
(C&C) DOUGLAS COMPANIES - CONWAY	0.0		
CIRCLE K TEXAS # 04046	0.0		
SMOKER FRIENDLY # 1104	0.0		
SMOKER FRIENDLY # 1125	0.0		
SMOKER'S PARADISE PLUS	0.0		
SMOKER FRIENDLY # 1153	0.0		
RAMBOS CONVENIENT STORE	0.0		
TOBACCO SUPERSTORE # 0012	0.0		

- 2) Click the **File** menu and select the **Save** option.
For example, you may name the report as 'Declining Unit Volume Share_Jan2023'.



6. Add Alerts and Color Conditions

- 1) To add a color condition for values that have a declining unit volume share, click the **Dataset Functions** menu and select the **Alerts & Color Conditions** option.



- 2) Enter appropriate name for a new color condition (for example, type in '*Declining Volume Share*') and click the **Done** button.

Enter New Color Condition Name

Name: Declining Volume Share

Cancel DONE

- 3) Under the **Apply This Color To Measure Cells** section, select the **Background Color** option and choose any desired color (for example, select **Red** to symbolize decline) to highlight cells in the report.

Manage Alerts & Color Conditions

Name: Declining Volume Share

OPTIONS

Apply This Color To Attribute Cells

Text Color

Apply This Color To Measure Cells

Text Color

☒ Background Color

☐ Marker

- 4) Under the **For These Attribute Values** section, click the **Measures** dropdown menu and select the **Unit Volume Share-CHG vs PP-4W** option. This is to set the color condition to be applied to the selected column only.

Manage Alerts & Color Conditions

Name: Declining Volume Share

OPTIONS

EXPRESSION

Apply This Color To Attribute Cells

Text Color

Apply This Color To Measure Cells

Text Color

☒ Background Color

☐ Marker

Alert Trigger

☐ Enable ☐ Linked Reports ☐ Analyze

Message:

For These Attribute Values

Store Name

Measures

Select All Clear All

Unit Volume-CY-4W

Unit Volume-PP-4W

☒ Unit Volume Share-CHG vs PP-4W

Unit Volume Share-CHG vs PP-4W

Using These Conditions

FILTERS SELECTION

Select Filters

OPERATOR COMPARE TO VALUE AND/OR

= Value 0

Cancel SAVE DONE

- 5) Under the **Using These Conditions** section, click the **Select Filters** field.

- 6) In the **Select Filters** pop-up window, click the **Measures** dropdown menu, select the **Unit Volume Share-CHG vs PP-4W** option, and then click the **Done** button.

The screenshot shows the 'Manage Alerts & Color Conditions' window. The 'Name' field is 'Declining Volume Share'. The 'Apply This Color To Measure Cells' section has 'Background Color' selected. The 'Alert' section has 'Enable' checked. The 'Message' field is empty. The 'For These Attribute Values' section has 'Store Name' and 'Measures' selected. The 'Using These Conditions' section has a table with columns: FILTERS SELECTION, OPERATOR, COMPARE TO, VALUE, AND/OR. The table contains one row: 'Unit Volume Share-CHG vs PP-4W', '<', 'Value', '0'. A 'Select Filters' pop-up window is open, showing a list of measures with 'Unit Volume Share-CHG vs PP-4W' selected. The 'Done' button is highlighted.

- 7) Select the appropriate **Operator** and enter the desired number in the **Value** field. (For example, select the < operator and enter 0 as value.)

The screenshot shows the 'Manage Alerts & Color Conditions' window. The 'Name' field is 'Declining Volume Share'. The 'Apply This Color To Measure Cells' section has 'Background Color' selected. The 'Alert' section has 'Enable' checked. The 'Message' field is empty. The 'For These Attribute Values' section has 'Store Name' and 'Measures' selected. The 'Using These Conditions' section has a table with columns: FILTERS SELECTION, OPERATOR, COMPARE TO, VALUE, AND/OR. The table contains one row: 'Unit Volume Share-CHG vs PP-4W', '<', 'Value', '0'. The 'Operator' and 'Value' fields are highlighted with a red box.

All report cells with negative (less than 0) Unit Volume Share Change will be highlighted in red.

- 8) In the same pop-up window, set an alert for the declining brand share by selecting the **Enable** checkbox under the **Alert** field.

- 9) Enter an appropriate alert message (for example, **Declining Store Shares**) in the **Message** textbox. This alert message will be sent out along with the report.

- 10) After you set the desired color conditions and alerts for a report, click the **Save** button to save the changes, then click **Done** to close the pop-up window. You will come back to the **Create Report** screen.

7. Generate a Report and Set Filter

- 1) To apply the changed report criteria, click the **Generate** button to re-generate a report.

STORE NAME	UNIT VOLUME-CY-4W	UNIT VOLUME-PP-4W	UNIT VOLUME SHARE-CHG VS PP-4W
ROHAAN PETROLEUM	10.0	11.0	-0.4%
FAST WAY	8.0	12.0	-1.5%
JOY PLUS	4.0	5.0	-0.4%
TEE'S ONE STOP	3.0	6.0	-0.5%
STATELINE CARTON STATION	2.0	2.0	-0.0%
K & M FOOD MART INC.	1.0	2.0	-0.4%
JOINER GROCERY	1.0	1.0	0.0%
SPEED X	1.0	1.0	0.0%
(C&C) DOUGLAS COMPANIES - CONWAY	0.0		
SMOKER FRIENDLY # 1126	0.0		
SMOKERS PARADISE #6	0.0		
SMOKER FRIENDLY # 1147	0.0		
SMOKER FRIENDLY # 1208	0.0		
CORNER STORE # 3943	0.0		
RAIDERS #2	0.0		
CIRCLE K TEXAS # 04046	0.0		
SMOKER FRIENDLY # 1104	0.0		
SMOKER FRIENDLY # 1125	0.0		
SMOKER'S PARADISE PLUS	0.0		
SMOKER FRIENDLY # 1153	0.0		
RAMBOS CONVENIENT STORE	0.0		
TOBACCO SUPERSTORE # 0012	0.0		

Note: The bell in top right on report grid symbolizes that an Alert has been added to this report. This symbol turns red if the report condition has been met, and grey if not.

- 2) You may filter your report to see only those stores where the Unit Volume Share is less than 0. For this, click the **Column Options** of the **Unit Volume Share-CHG VS PP-4W** column and select the **Filter** option from the dropdown menu.

Declining Unit Volume Share-Jan2023

File Dataset Functions Display Options Options

Search Attributes Expand All Collapse All

Distributor-Attributes

- Bill to ID
- Bill to Name
- Distributor HQ
- Distributor Sales Rep
- Distributor Wareho...
- Ship to ID
- Ship to Name
- Transshipment Flag

Geo-Attributes

- Chain Name
- Class of Trade
- Distributor Store ID
- Store ACV
- Store Address
- Store City
- Store ID
- Store Name
- Store Phone #
- Store State
- Store Trade Area

Measures

- Unit Volume-CY-4W
- Unit Volume-PP-4W
- Unit Volume Share-CHG vs PP-4W

Filters: 12/31/2022, N

STORE NAME	UNIT VOLUME-CY-4W	UNIT VOLUME-PP-4W	UNIT VOLUME SHARE-CHG VS PP-4W
ROHAAN PETROLEUM	10.0	11.0	
FAST WAY	8.0	12.0	
JOY PLUS	4.0	5.0	
TEE'S ONE STOP	3.0	6.0	
STATELINE CARTON STATION	2.0	2.0	
K & M FOOD MART INC.	1.0	2.0	
JOINER GROCERY	1.0	1.0	
SPEED X	1.0	1.0	
(C&C) DOUGLAS COMPANIES - CONWAY	0.0		
SMOKER FRIENDLY # 1126	0.0		
SMOKERS PARADISE #6	0.0		
SMOKER FRIENDLY # 1147	0.0		
SMOKER FRIENDLY # 1208	0.0		

Column Options: Sort, Tooltip, Color, Hide, Filter, Top / Bottom, Custom Width, Auto Width, Reset Width, Clear All

- 3) In the **Filter** pop-up window, make the settings about the display of stores with declining Unit Volume Share as shown below.

Filter | Unit Volume Share-CHG vs PP... X

☒ Display ☐ Hide

Condition: Less Than

Value: 0

Cancel Clear DONE

- Select the **Display** option.
- Select the **Less Than** option from the **Condition** dropdown list.
- Enter **0** in the **Value** input box and click **Done** to close the pop-up window.

Per the filter, you will see a report of stores with declining volume share highlighted in red as shown below.

Declining Unit Volume Share-Jan2023

File Dataset Functions Display Options Options

Search Attributes Expand All Collapse All

Distributor-Attributes

- Bill to ID
- Bill to Name
- Distributor HQ
- Distributor Sales Rep
- Distributor Wareho...
- Ship to ID
- Ship to Name
- Transshipment Flag

Geo-Attributes

- Chain Name
- Class of Trade
- Distributor Store ID
- Store ACV
- Store Address
- Store City
- Store ID
- Store Name
- Store Phone #
- Store State
- Store Trade Area

Product-Attributes

- Measures
- Unit Volume-CY-4W
- Unit Volume-PP-4W
- Unit Volume Share-CHG vs PP-4W

Filters: 12/31/2022, N

STORE NAME	UNIT VOLUME-CY-4W	UNIT VOLUME-PP-4W	UNIT VOLUME SHARE-CHG VS PP-4W
ROHAAN PETROLEUM	10.0	11.0	-0.4%
FAST WAY	8.0	12.0	-1.5%
JOY PLUS	4.0	5.0	-0.4%
TEE'S ONE STOP	3.0	6.0	-0.5%
STATELINE CARTON STATION	2.0	2.0	-0.0%
K & M FOOD MART INC.	1.0	2.0	-0.4%

Report View New Tab

8. Schedule Alert Report

- 1) To schedule a report, click the **File** menu and select the **Schedule On Reload** option.

Note: You must save a report before you are able to schedule it.

STORE NAME	UNIT VOLUME-CY-4W	UNIT VOLUME-PP-4W	UNIT VOLUME SHARE-CHG VS PP-4W
ROHAAN PETROLEUM	10.0	11.0	-0.4%
FAST WAY	8.0	12.0	-1.5%
JOY PLUS	4.0	5.0	-0.4%
TEE'S ONE STOP	3.0	6.0	-0.5%
STATELINE CARTON STATION	2.0	2.0	-0.0%
K & M FOOD MART INC.	1.0	2.0	-0.4%

- 2) In the **Schedule On Reload** pop-up window, set the desired preferences for a report.
 - i. For example, choose **Excel** for the format to which this report should **Export As**.
 - ii. Depending on the site settings, select the **Email** checkbox, so that the report will be sent out as an attachment to the email.
 - iii. It is possible to have the report sent out with each data refresh or only when the alert condition is satisfied by selecting **Always** or **On Alert** respectively. In this case, we will select the **On Alert** option so that the email and report will only be sent when at least one store has negative Unit Volume Share Change.
 - iv. Select the desired recipients from the **Users/Groups** list to receive the scheduled alert report.
 - v. Click **Done** to close the pop-up window.

This report has now been scheduled to alert the user via email on the stores where the selected brand share is declining in the current four weeks versus that of the previous four weeks.

Additional Resources

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

- Create Report Quick Start Guide
- Dhiva User Guide