



Dhiva - Manage Lists

A List is a preset of values within an attribute that can be used as a Filter. Users can manually select, dynamically filter, or import a file with a list of items. Under the Manage Lists option, you can perform the following tasks:

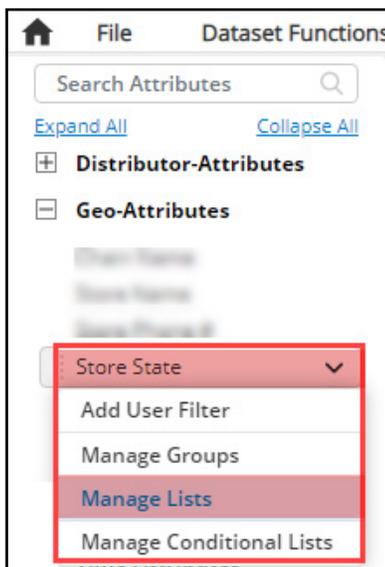
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Create List

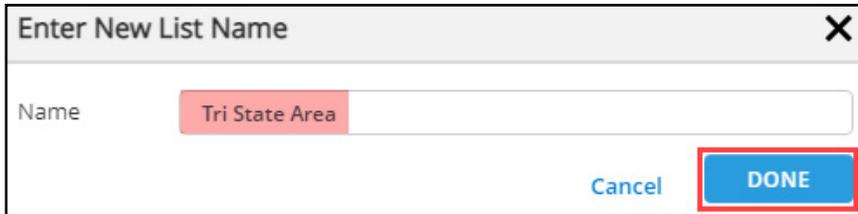
You can select multiple items in an attribute and create a List. For example, for the Store State attribute, you may create a list of your favorite states, such as Arizona, California, and Florida and use it as a report Filter. The same example is demonstrated below:

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

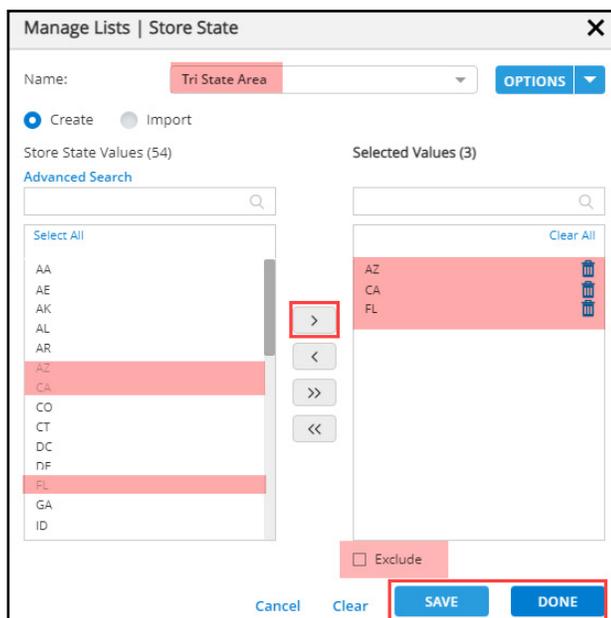
Step 2: Click the down arrow and select the **Manage Lists** option.



Step 3: Enter an appropriate List Name (for example, Tri State Area) in the **Enter New List Name** dialog box and click **Done**.



Step 4: Select the desired items (for example, AZ, CA and FL) from the left side of the **Selection Panel** and click the right-pointing arrow to move them 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. Use the left-pointing arrow to remove selections from the list. Select the **“Exclude”** checkbox to include all but the selected item(s).

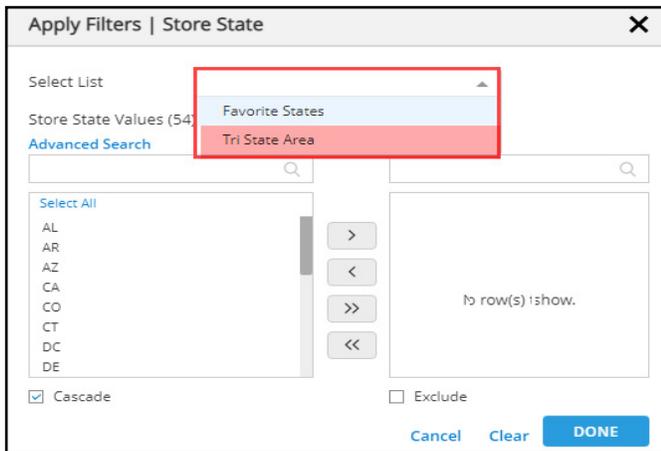
Step 5: Click **Save**. The system displays the message ‘List created successfully.’

Step 6: Click **Done**.

While generating a new report, you can use this list in filters, rows, or columns as needed as demonstrated further.

Step 7: On the **Create Report** screen, drag the list attribute from the left panel onto the **Filter** area.

Step 8: In the **Apply Filters** dialog box, choose the desired list (for example, Tri State Area) from the **Select List** dropdown box and click **Done**.



Step 9: Drag the desired attributes onto the Rows, Columns, and Pages as needed and click the **Generate Report** button.

Running a report with an attribute List (for example, Tri State Area) will provide the results for the items that match the selected criteria as shown in the below screenshot.

SUBCATEGORY	UNIT VOLUME-CY-1W		
	AZ	CA	FL
Store Use/Supply-All Other	30,452.0	55,196.0	642,044.0
Store Use/Supply-Bags	29,306.0	29,325.0	552,807.0
Store Use/Supply-Papers	16,483.0	1,321.0	91,171.0
Store Use/Supply-Cleaning Supplies	16,423.0	61,503.0	102,048.0
Store Use/Supply-Lids	12,240.0	17,813.0	403,152.0
Store Use/Supply-Cups	12,065.0	26,486.0	544,557.0
Foodservice-Hot Dogs/Roller Grill	5,309.0	8,010.0	136,583.0
Foodservice-Condiments	4,452.0	27,761.0	183,385.0
Other Tobacco Products-Smokeless	3,900.0	16,518.0	154,546.0
Other Tobacco Products-Pipes	3,740.0	4,400.0	27,567.0
Candy-Chocolate Bars/Packs	2,948.0	26,087.0	236,469.0
Foodservice-Sandwiches/Wraps - IW and RTE	2,930.0	7,647.0	64,617.0
Other Tobacco Products-Cigars	2,927.0	12,713.0	600,899.0
Candy-Non-chocolate Bars/Packs	2,900.0	13,519.0	123,028.0

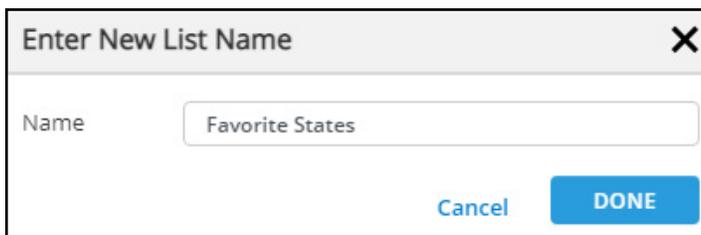
Import List

Instead of creating a list, you can also import a list into Dhiva by using a template. An example to import a list of your favorite Store States is demonstrated below:

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

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

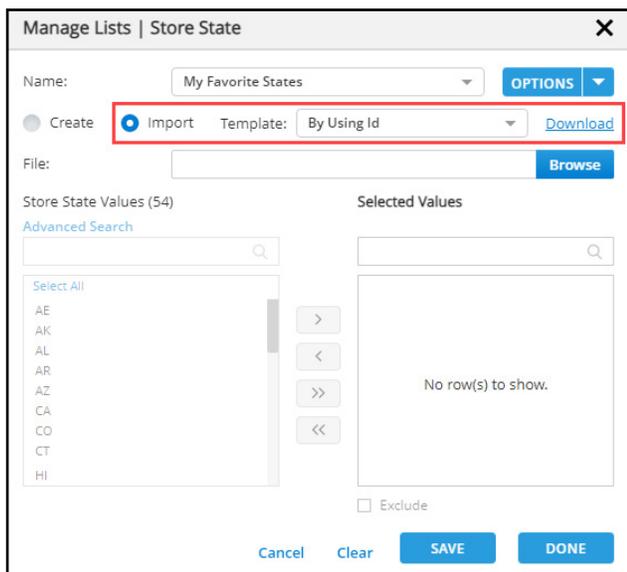
Step 3: Enter an appropriate List Name (for example, Favorite States) in the **Enter New List Name** dialog box and click **Done**.



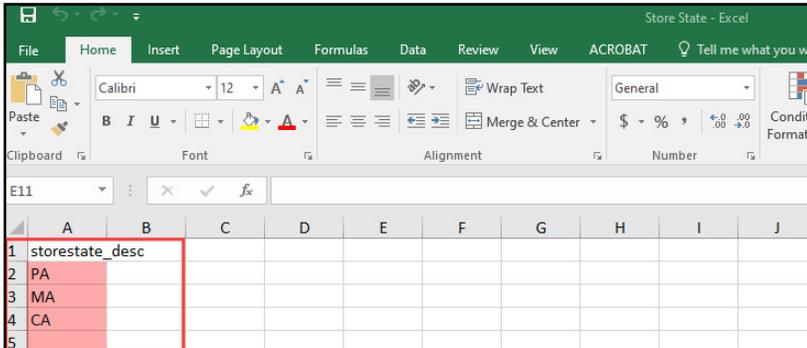
Step 4: In the **Manage List** dialog box, select the **Import** option.

Step 5: Select the **'By Using ID'** or **'By Using Name'** from the template dropdown menu depending on how you would like to enter values into the template.

Step 6: Click the **Download** link to download the corresponding template. In this example, you will download the **Store State.xlsx** file on your desktop.

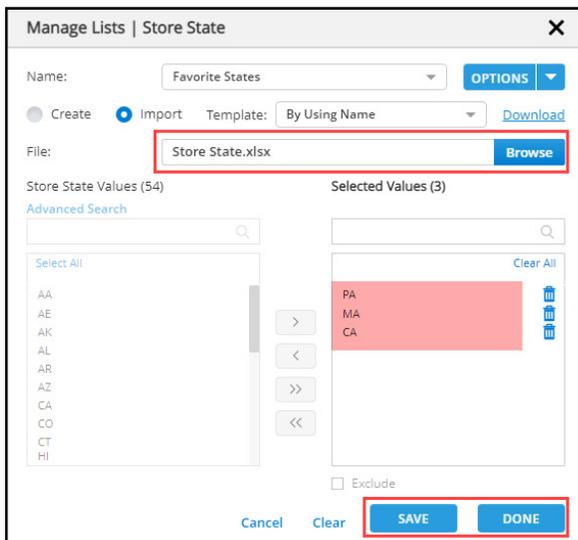


Step 7: Open the file and click the **Enable Editing** button to enter the relevant data (for example, frequently visited store states) in the desired column.



Step 8: Once done, save the import file in Excel and close the file.

Step 9: In the **Manage List** dialog box, click the **Browse** button to navigate to the import file location and click the **Open** button to load the file.



Step 10: Click the **Save** button to save the list.

Step 11: Click the **Done** button to close the **Manage Lists** dialog box.

While generating a report using the list you just created, choose the appropriate List Name from the **Apply Filter** dialog box as mentioned in the 'Create a List' procedure steps 7 to 9.

Running a report with an attribute List (for example, Favorite Area) will provide the results for the items that match the selected criteria as shown in the below screenshot.

The screenshot shows the 'Create Report' interface for 'Untitled Report1'. The 'FILTERS' section includes 'Relative Week' and 'Store State'. The 'ROWS' section includes 'Hard Drinks'. The 'COLUMNS' section includes 'Measures' and 'Store State'. The table below shows the results for 'UNIT VOLUME-CY-1W' for 'HARD DRINKS'.

HARD DRINKS	UNIT VOLUME-CY-1W		
	CA	MA	PA
All Others	573,838.9	3,374,261.4	11,748,966.8
Wine&Beverages	30.0	348.0	2,123.0
Liquor&Beer	1.0	431.0	114.0

Dynamic List

Dynamic List allows users to save and apply criteria defined through the advanced search features in the manage lists window to create dynamic lists which will update when data is refreshed.

- Step 1: On the **Create Report** screen, select the desired attribute (for example, **Geo-Attributes >> Store ID**) in the **Attribute** panel.
- Step 2: Click the down arrow and select the **Manage List** option.
- Step 3: Create a new list and enter an appropriate **List Name** (for example, Stores in my chain).

The screenshot shows the 'Enter New List Name' dialog box. The 'Name' field contains the text 'Stores in my chain'. There are 'Cancel' and 'DONE' buttons at the bottom.

Step 4: In the **Manage List** dialogue box, select the **Advanced Search** option.

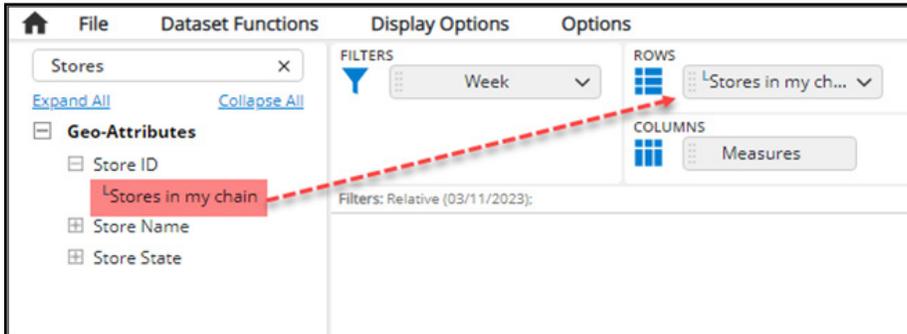
The screenshot shows the 'Manage Lists | Store ID' dialog box. At the top, there is a 'Name' field with a dropdown menu set to 'Stores in my chain' and an 'OPTIONS' button. Below this are radio buttons for 'Create' (selected) and 'Import'. A 'Select List(s)' dropdown is also present. The main area is divided into two sections: 'Store ID Values (160127)' and 'Selected Values'. The 'Store ID Values' section has a search bar and a list of values (2, 3, 6, 7, 9, 11, 12, 13, 15, 19, 20, 22, 24, 28). The 'Selected Values' section is currently empty and displays 'No row(s) to show.'. At the bottom, there are checkboxes for 'Set as Global' and 'Exclude', and buttons for 'Cancel', 'Clear', 'SAVE', and 'DONE'.

Step 5: Select the desired Attribute to filter (for example, Chain Name) and select the desired **Chain Name**. This will filter Store IDs down to the selected Chain.

Step 6: Select **Save and Apply Criteria** then click **Done**. This will create a dynamic list of the Store IDs in the selected Chain, which will update each time the data is refreshed.

The screenshot shows the 'Advanced Search' dialog box. At the top, there are radio buttons for 'Filters' (selected) and 'Wild Card'. Below this is a 'Show Filtered Attributes' toggle. A search bar for 'Search Attributes' is present. The main area contains several dropdown menus for filtering: 'Bill to ID', 'Bill to Name', 'Chain Name' (highlighted in red), 'Class of Trade', 'Distributor Sales Rep', 'Ship to ID', and 'Ship to Name'. At the bottom, there is a 'Save And Apply Criteria' toggle (highlighted in red) and buttons for 'Cancel', 'Clear', and 'DONE'.

Step 7: Users can now use Lists and Conditional Lists as attributes on a report. Drag the list that was just created on Store ID onto rows.



Generating the report with the newly created list on rows will output a list of Store IDs that will dynamically update as data is refreshed, if a new store is added, or an existing store is removed from the chain.

The screenshot shows the software interface with the report output table. The table has two columns: 'STORES IN MY CHAIN' and 'UNIT VOLUME-CY-1W'. The data is filtered for 'Relative (03/11/2023)'. The table is sorted by 'UNIT VOLUME-CY-1W' in descending order. The source is 'Demo Mfg - 11 March 2023'.

STORES IN MY CHAIN	UNIT VOLUME-CY-1W
267471	113,482.0
266831	78,208.0
265048	69,408.0
25047	67,719.0
26481	65,535.0
265871	65,387.0
265606	65,179.0
267382	61,830.0
267979	59,818.0
265545	59,643.0
269075	56,967.0
505641	56,677.0
265521	56,217.0
266197	54,992.0
267696	54,814.0

Copy / Edit / Delete List

Once you save a List you have created or imported, you will also see the options to copy, edit name, and delete a list. These options are available for any saved Lists. The procedure is mentioned below:

Step 1: Select the desired attribute in the **Attribute** panel.

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

Step 3: In the **Manage Lists** dialog box, 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 to perform the corresponding actions.

The screenshot displays the 'Manage Lists | Store State' dialog box. At the top, the title is 'Manage Lists | Store State' with a close button (X). Below the title, there is a 'Name:' field with a dropdown menu showing 'Tri State test'. To the right of this field is an 'OPTIONS' dropdown menu that is open, showing four options: 'New', 'Copy', 'Edit Name', and 'Delete'. Below the 'Name' field are two radio buttons: 'Create' (selected) and 'Import'. There is a 'Select List(s)' dropdown menu. Below that, there are two sections: 'Store State Values (56)' and 'Selected Values (3)'. The 'Store State Values' section has an 'Advanced Search' field and a list of state abbreviations from AA to KY. The 'Selected Values' section has a 'Clear All' button and a list of CO, DC, and GA, each with a trash icon. Between the two lists are four arrow buttons: '>', '<', '>>', and '<<'. At the bottom of the dialog, there are four buttons: 'Cancel', 'Clear', 'SAVE', and 'DONE'. There are also checkboxes for 'Set as Global' and 'Exclude'.

