



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:

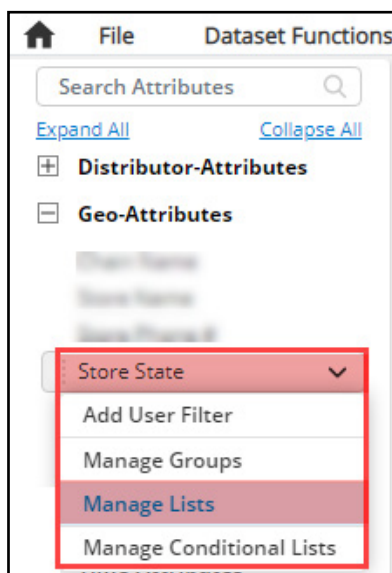
- [Create List](#)
- [Import List](#)
- [Dynamic List](#)
- [Copy / Edit / Delete List](#)

Create List

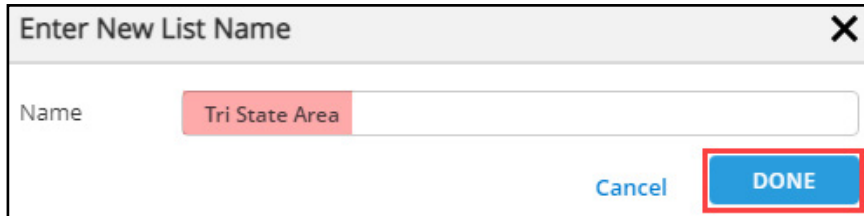
You can select multiple items in an attribute and create a List. For example, for the Store State attribute, you may create a list of your favorite states, such as Arizona, California, and Florida and use it as a report Filter. The same example is demonstrated below:

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

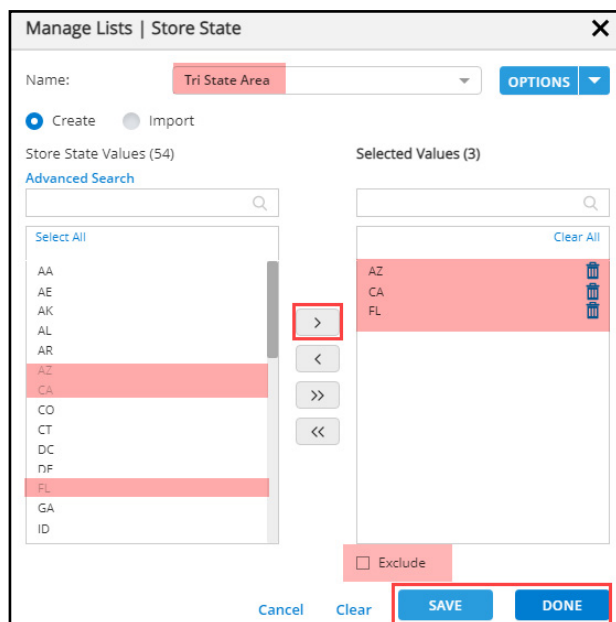
Step 2: Click the down arrow and select the **Manage Lists** option.



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

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

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.

A dialog box titled "Manage Lists | Store State" with a close button (X) in the top right corner. It features a "Name:" dropdown menu set to "Tri State Area" and an "OPTIONS" button. Below this are radio buttons for "Create" (selected) and "Import". The main area is divided into two panels: "Store State Values (54)" on the left and "Selected Values (3)" on the right. The left panel has a search bar and a list of state abbreviations (AA, AE, AK, AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, ID). The right panel also has a search bar and shows the selected states: AZ, CA, and FL. Between the panels are navigation arrows: a right-pointing arrow (highlighted with a red box), a left-pointing arrow, a double right-pointing arrow, and a double left-pointing arrow. At the bottom, there is an "Exclude" checkbox and four buttons: "Cancel", "Clear", "SAVE" (highlighted with a red box), and "DONE" (highlighted with a red box).

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).

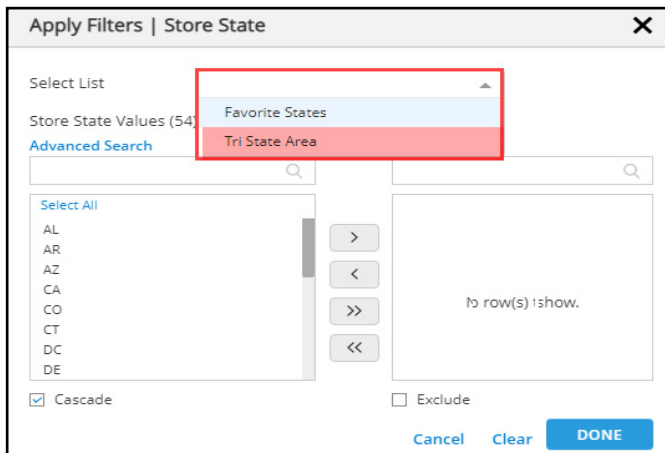
Step 5: Click **Save**. The system displays the message 'List created successfully.'

Step 6: Click **Done**.

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

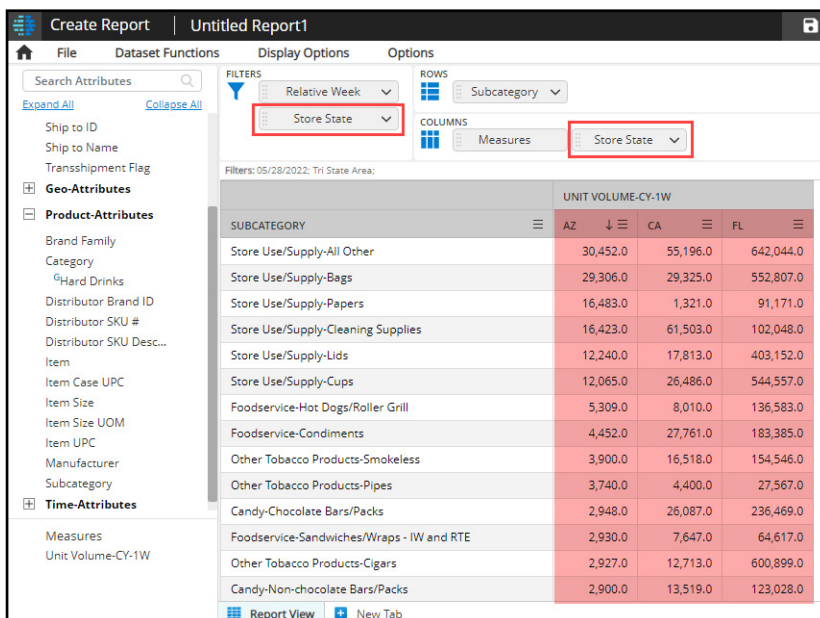
Step 7: On the **Create Report** screen, drag the list attribute from the left panel onto the **Filter** area.

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 |

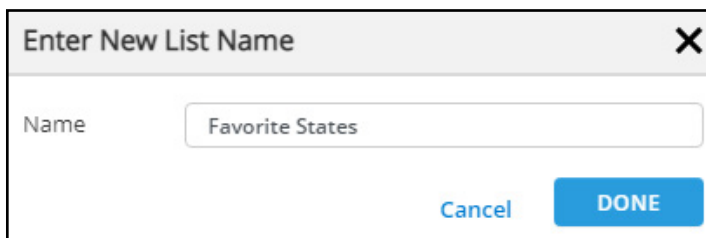
Import List

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.

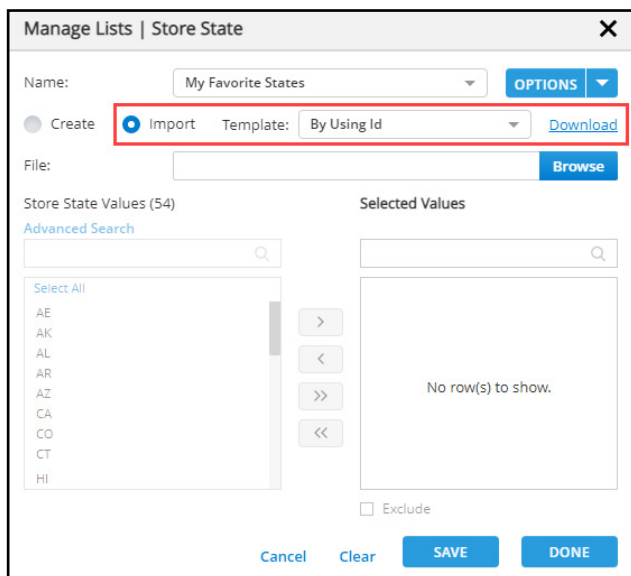
Step 3: Enter an appropriate List Name (for example, Favorite States) in the **Enter New List Name** dialog box and click **Done**.

A dialog box titled "Enter New List Name" with a close button (X) in the top right corner. It contains a text input field labeled "Name" with the text "Favorite States" entered. At the bottom, there are two buttons: "Cancel" and "DONE".

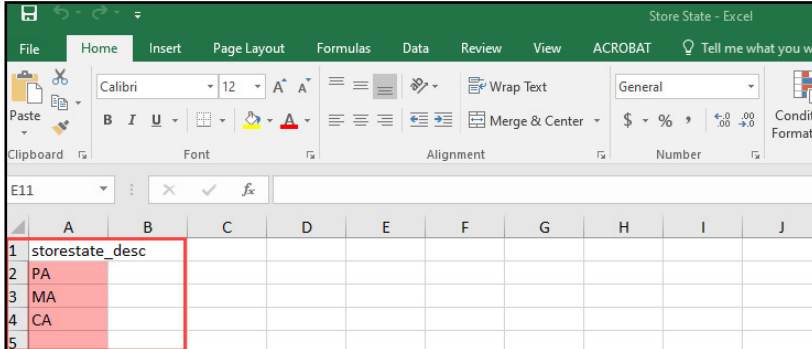
Step 4: In the **Manage List** dialog box, select the **Import** option.

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.

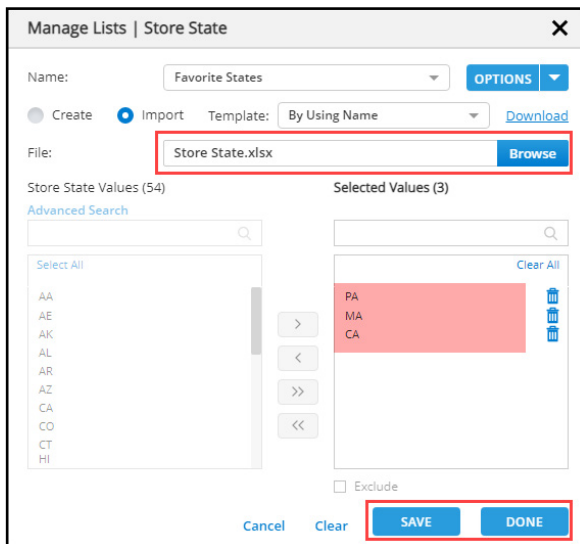
A dialog box titled "Manage Lists | Store State" with a close button (X) in the top right corner. It contains a "Name:" field with a dropdown menu showing "My Favorite States" and an "OPTIONS" button. Below this are radio buttons for "Create" and "Import" (selected), and a "Template:" dropdown menu showing "By Using Id" with a "Download" link. There is a "File:" field with a "Browse" button. Below these are two search bars: "Store State Values (54)" and "Selected Values". The "Store State Values" search bar has a list of state abbreviations (AE, AK, AL, AR, AZ, CA, CO, CT, HI) and a "Select All" link. The "Selected Values" search bar is empty and shows "No row(s) to show." At the bottom, there are buttons for "Cancel", "Clear", "SAVE", and "DONE".

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.

| UNIT VOLUME-CY-1W | | | |
|-------------------|-----------|-------------|--------------|
| HARD DRINKS | 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).

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

Manage Lists | Store ID

Name: **OPTIONS**

☒ Create ☐ Import

Select List(s):

Store ID Values (160127)

Advanced Search

Select All

2
3
6
7
9
11
12
13
15
19
20
22
24
28

>
<
>>
<<

Selected Values

No row(s) to show.

☐ Set as Global ☐ Exclude

Cancel Clear **SAVE** **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.

Advanced Search

☒ Filters ☐ Wild Card

Show Filtered Attributes ☒

Search Attributes

Bill to ID

Bill to Name

Chain Name

Class of Trade

Distributor Sales Rep

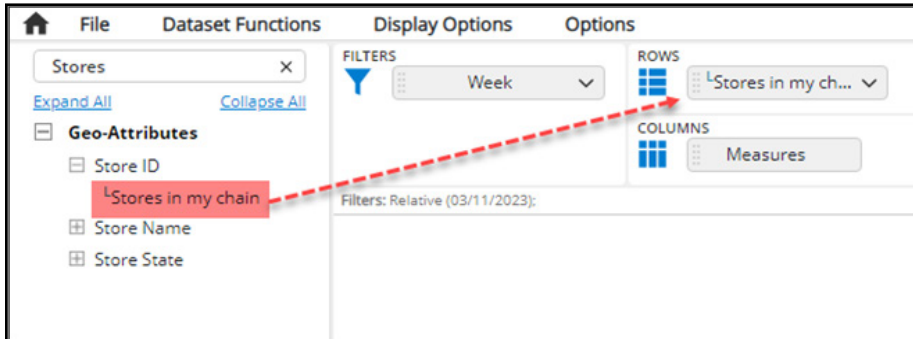
Ship to ID

Ship to Name

Save And Apply Criteria ☒

Cancel Clear **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 MSA software interface with the generated report. The report displays a list of Store IDs and their corresponding Unit Volume for the week of 03/11/2023. The report is titled 'STORES IN MY CHAIN' and 'UNIT VOLUME-CY-1W'. The data is presented in a table with columns for Store ID and Unit Volume.

| 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 |

Source: Demo Mfg - 11 March 2023

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.

Manage Lists | Store State

Name:

☒ Create ☐ Import

Select List(s)

Store State Values (56) **Advanced Search**

Select All

- AA
- AE
- AK
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE
- FL
- GA
- HI
- IA
- ID
- IL
- IN
- KS
- KY

☐ Set as Global

Selected Values (3)

- CO
- DC
- GA

☐ Exclude

Options

- New
- Copy
- Edit Name
- Delete

Cancel Clear **SAVE** **DONE**

