



# Dhiva - Best Practices

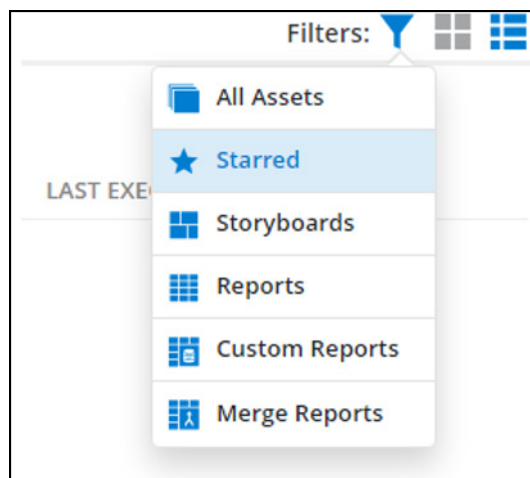
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This document contains some recommendations to help maximize efficiency and best utilize Dhiva features. These are recommendations, not guidelines, so users can decide what works best for their needs. As the application evolves, this document will be updated accordingly.

## Home Page

- Clear your browser cache often, especially if you see unusual behavior. This is important for internal users who visit multiple sites regularly.
- Use the “Refresh” option under the User Menu to refresh assets on the Home Page. For example, if a user doesn’t see an asset recently published to them, clicking “Refresh” may solve the issue.
- Users can “Star” their favorite assets to quickly find and keep track of important assets (i.e. commonly used Reports, assets for an upcoming meeting, etc.). To find starred assets easily, filter to Starred assets in the top right corner of the Home Page.



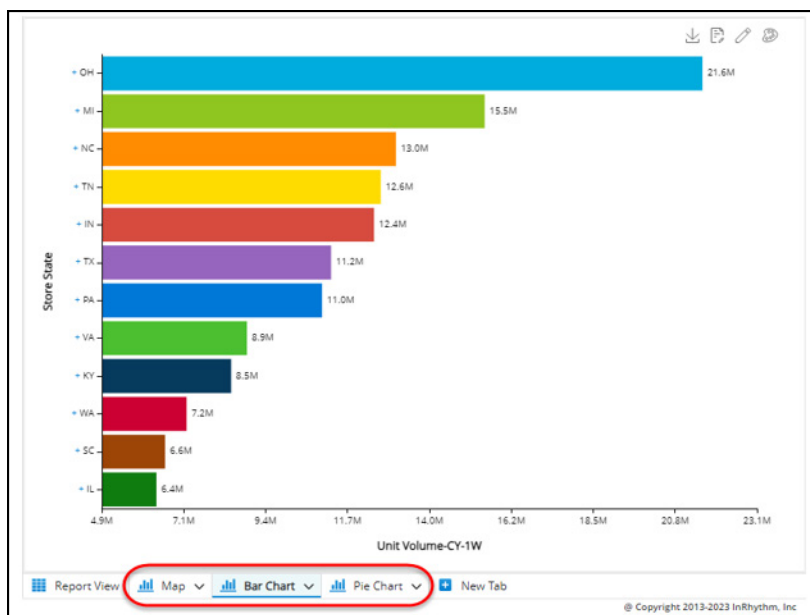
- “Open in New Tab” in the Asset Options menu on the Home Page (or “Open” in the File menu in the Report Layout window), allows users to open a report in a separate browser tab. When opening multiple sessions, it is recommended to have no more than 5 Dhiva tabs open at once to avoid performance issues. Having multiple Reports open allows users to easily compare data across Reports.

## Basic Report Features

- Reports/Storyboards on multi-category domains should either be filtered to a category or have the category attribute on the Report Layout. If category is a User Filter, then users should select the mandatory checkbox in the user filter options. This will prevent users from aggregating categories.
- When designing a Report Layout, attributes/hierarchies with the most values (Store Name, Item, etc.) should be placed on Rows in order to minimize hitting a display or export limit.
- When possible, filter on attribute code/number instead of title/name for attributes, as certain titles may not be unique. In addition, names may change which can cause those selected values to be invalid, whereas the code/number should not change. For example, filter on “Store ID” instead of “Store Name”. If names are not unique, the data will be aggregated and output under the same name.
- User Filters enable users to select custom filters instead of hard coding Filters; using multiple UFs allows users to select unique combinations of filters. [\[Reference “Apply User Filter” Quick Start Guide for more information\]](#)

## Charts/Storyboards

- Maps can only be created using Geo Attributes which are configured for mapping (State/Province, Store Name, etc.). The attribute(s) must be placed on Rows in the Report Layout in order to render a map. If a user wants to use drilling features within the report, create a Replacement Hierarchy on Rows.
- Rename chart tabs to indicate chart types. To rename a tab in a databook, click the arrow next to the tab name to access the dropdown menu, then select "Rename". Alternatively, simply double-click the tab name to start renaming the tab. Descriptive tab names will help to keep things organized when adding assets to a Storyboard.



- Make sure you are on the correct tab when exporting, as only the tab currently being viewed will be exported. When charts are exported to Excel, data tables are automatically exported on a separate tab.
- Storyboards can be exported to PPT or PDF. To export a single report within a Storyboard, select “Full Screen” to open the report then navigate to the export options. The report then can be exported to Excel, PPT, CSV, or PDF.
- When creating Storyboards, default font sizes are typically recommended for online viewing to accommodate different devices and monitors. However, if the intent is to export to PowerPoint, changing the sizes may be necessary to display the data within the slide boundaries.

## Publishing

- When appropriate, publish assets to Groups instead of individual users, as all current members of the Group(s) will receive the published assets. If users are added or removed from the Group, their published assets List will change accordingly. This will promote consistency, as the List of published assets will automatically update when any users are added to/removed from the Group. When new users are added to the Group, they will automatically receive access to all Reports that have already been published to the Group. If a new Group is desired (i.e. Sale Team, NE Representatives, etc.) or user List of an existing Group needs to be modified, please contact your CR team to enter a request to add/modify users in a Group.
  - When reporting an issue, make sure to publish the related asset specifically to the MSA Client Relations and PE/PSHD Group.
  - Client team Groups can be created to share Reports with Groups of client users.

## Scheduling

- Schedule on Reload is recommended for Reports that are used regularly (weekly, monthly, quarterly). It is best to schedule the Reports to run on reload, so that the report is generated after the refresh and includes the most current data.
- Using Schedule on Reload in conjunction with the “Cache” export type will cache a report directly after each refresh.
- Use “Run as Offline” to cache a report on demand.
- Schedule a report On Reload with an Alert condition to notify specific users when certain conditions in the report are met. If the condition is satisfied, then push the report out to the selected users/Groups. Use the “On Alert” option instead of the “Always” option to only export the report when the condition is met. [\[Reference Business Use Case #2 for more information\]](#)

## Advanced Report Features

- When using Measure functions, it is recommended to rename metrics descriptively to reflect what they represent. This title is what will be visible in the report view.
- It is recommended to add the default filters from the report to Conditional List filters (for example: Transshipment Flag, Relative Week, etc.) to limit the results before generating the report.
- Using Advanced Search in combination with turning on the “Save And Apply Criteria” option allows users to create a Dynamic List that will update with each refresh. [\[Reference “Manage Lists” Quick Start Guide for more information\]](#)

- When a report is too large to view in a browser and the CSV download message is present, an Excel export may still be possible if it is within application limits. Instead of clicking the link to download to CSV, use the File menu and choose Export with Excel as the output type.

## Time/Measures

- Use the predefined (non-rolling) durations in metrics when possible. Using current week with predefined durations will run faster than using custom-defined duration selections because the predefined metrics are prebuilt for the current week. [\[Reference "Time & Measures" Reference Guide for more information\]](#)
- Using Versus measure options (i.e. PY, PP, etc.) will automatically calculate the lookback periods instead of manually creating them via Time attributes. [\[Reference "Time & Measures" Reference Guide for more information\]](#)

# Guidelines for Using Objects

When to use: [\[Reference each object's respective QSGs for more information\]](#)

- **Groups** are the best option for aggregating values and when a user wants to create an “All Others” subgroup.
  - o EX: Users may use a Group containing the top competitive manufacturers and an All Other subgroup (using the checkbox) in a category.
- **Lists** are best used for dynamic attribute filtering.
  - o EX: Dynamics Lists would be fit to create a filtered List of all 12-oz, 12.5-oz, and 13-oz “Party Size” salty snack items.
- **Conditional Lists** (like value filtering in G360) are best for filtering values based on an attribute/metric criterion such as “stores selling one brand and not another”.
  - o EX: Conditional Lists can generate a List of store voids where the stores are selling my competitor's brand and not my top brand.
- **Stubs** are best used to output values for multiple attributes at the same level, without creating a hierarchy or needing to drill. Stubs are available for use in other Reports.
  - o EX: Users may want to view a category across a Group of target states, by sub-categories, and by a Dynamic List of Distributor A's warehouses all in the same report view. The Stub would contain the state Group, sub-categories attribute, and the distributor warehouse List.
- **Stubs as User Filters** are recommended to select a custom List of Stubs (as some Stubs may not be appropriate from a business perspective in a specific report) to allow the user to change the scope of the report.
  - o EX: Within a selected category, a Stub UF can be used to change the view between different Stubs, such as a Group of trade classes, List of target manufacturers, and distributor headquarters attribute. This example would require separate Stubs per business focus. i.e.: a Group of desired trade classes, the manufacturers List, and the distributor headquarters attribute.

Functionality	Stacked Hierarchy (S)	Stub (ST)	Group/ Subgroups (G)
Can contain Lists, Groups, and Conditional Lists	✓	✓	✓
Is saved and can be re-used in other reports		✓	✓
Can be made global (by Admin) to share with others		✓	✓
Limit of contents	4	4	unlimited
Can be used as a User Filter		✓	✓
Can be used as a Report Filter			✓
Can be used in a hierarchy/made drillable			✓
Can cross dimensions (include Product attributes, Stores, etc.)			✓
Dataset Functions enabled	✓*	✓*	✓

✓\* = “New Attribute Values” not available as isn't practical for crossing dimensions

