



Enterprise Data Warehousing

Sales Execution

msa

Trade Program Management

Market & Consumer Insights

Dhiva

Training Exercise Guide

Business Use Case 3

Top 5 Manufacturers by Category by Chain

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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 3: Top 5 Manufacturers by Category and Chain

How do I create a report on top 5 manufacturers (by volume) within a category for a selected timeframe by chain?

Key Learnings/ Takeaways

Through this exercise, you will learn to:

- Add User Filters to a report to enable consumer personalization.
- Use the “More” feature for metrics, specifically the Rank function.
- Conditional List using Rank function.
- “Configure Filters” on Conditional Lists.

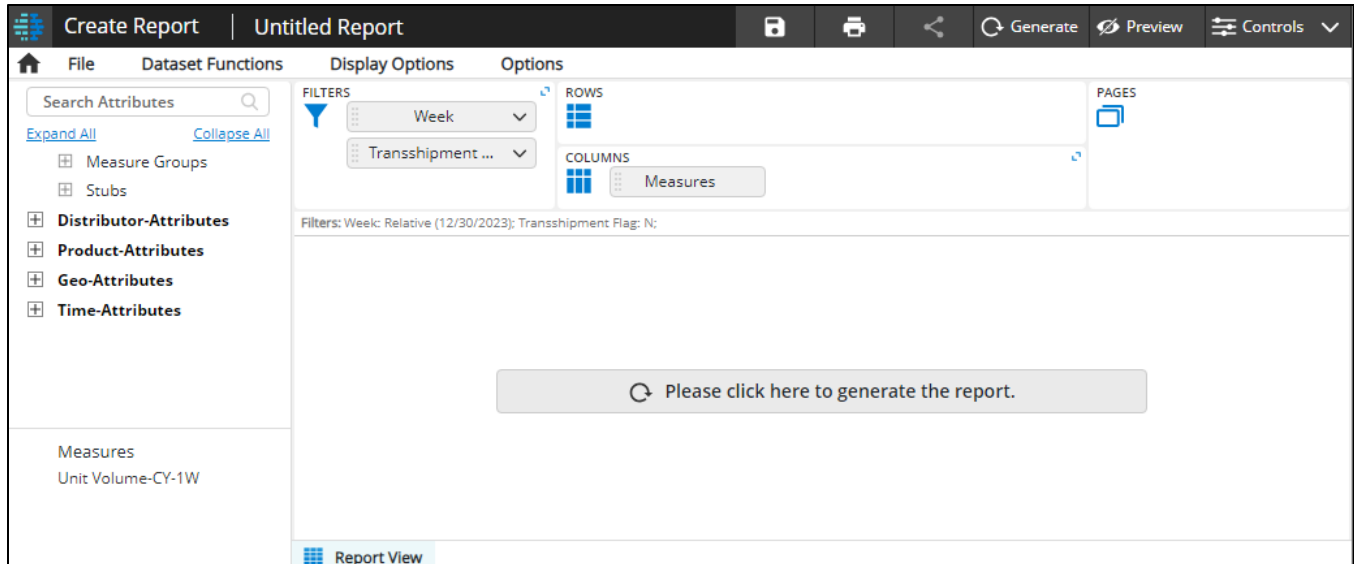
Key Attributes to Work With

- Category
- Manufacturer
- Chain 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.



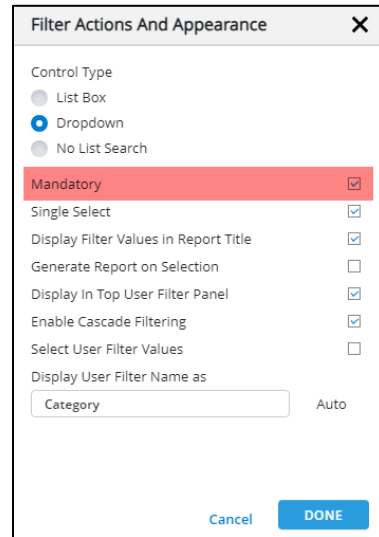
Note: Domains can be set up with default attribute selection and filters as shown in the above screenshot.

2. Add Filters

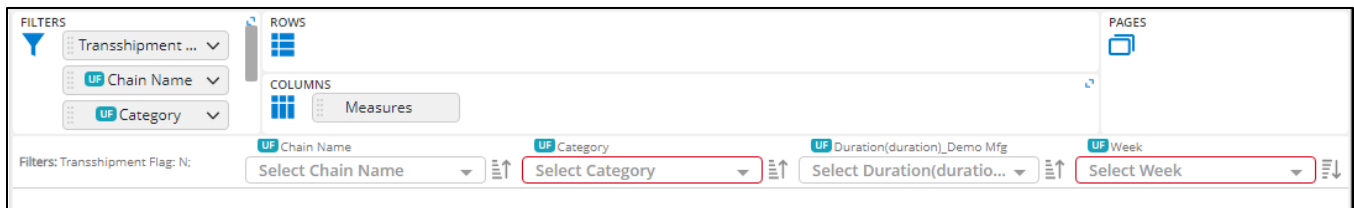
- 1) Remove **Week** from the **Filters** area if it is selected by default.



- 2) Search for the **Chain Name** attribute in the left-hand side panel. Click on the arrow next to this attribute and select **Add User Filter** from the dropdown menu. On the **Filter Actions and Appearance** dialog box, click **Done** to accept the default selections.
- 3) Search for the **Category** attribute in the left-hand side panel. Click on the arrow next to the attribute and select **Add User Filter** from the dropdown menu. On the **Filter Actions and Appearance** dialog box, select **Mandatory** and click **Done**.



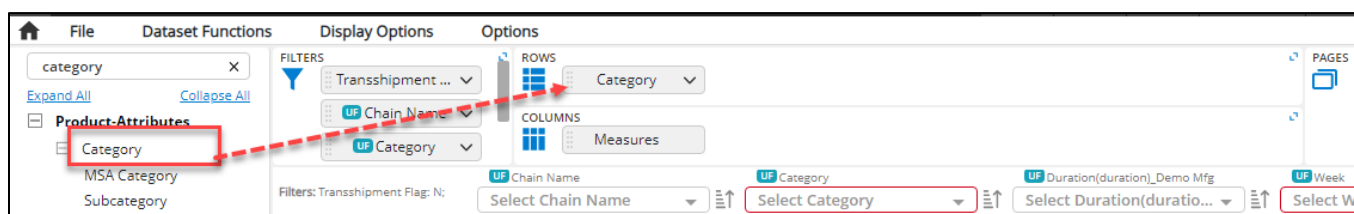
- 4) Locate **Measures** in the left-hand side panel towards the bottom. Click the dropdown arrow and select **Add Param User Filter**. For this example, we will select **Duration(duration)** and click **Continue**. On the **Filters Actions and Appearance** dialog box, click **Done** to accept the default selections.
- 5) Search for the **Week** attribute and select **Add User Filter**. On the **Filters Actions and Appearance** dialog box, select **Mandatory** and click **Done**.



Note: The Category and Week User Filters have a red outline indicating that a selection is required before generating the report. Best practice is to include a Category filter on a report for multi-category domains to prevent aggregation across categories. In this example, a category filter is needed to be carried through to the Conditional List. Another Best practice is to include a time filter to prevent aggregating across all time.

3. Create Report Layout

- 1) Search for the **Category** attribute in the left-hand side panel and drag it onto the **Rows** area.



4. Add Measures

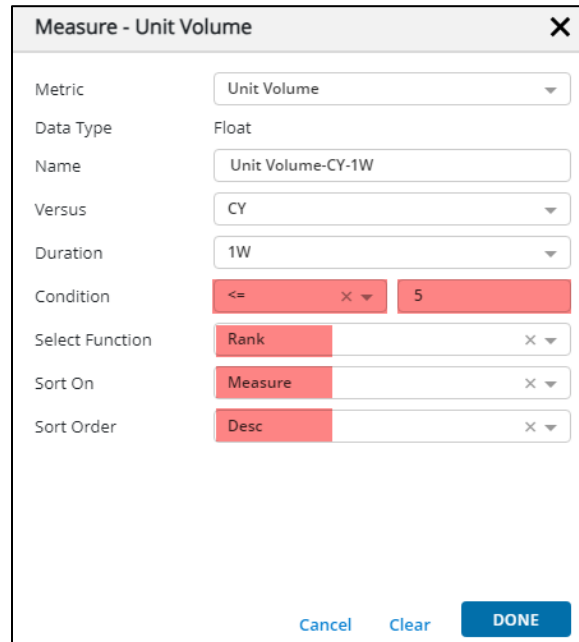
Click the **Measures** attribute in the **Columns** area and select the values as shown below in the **Define Measures** pop-up window.

- 1) Under the **Metrics** dropdown menu, select the **Unit Volume** option.
- 2) Under the **Versus** dropdown menu, select the **CY** option.
- 3) Under the **Duration** dropdown menu, select the **1W** option.
- 4) Click **Done**.

5. Create a Conditional List of Manufacturers based on Rank

- 1) Search for the **Manufacturer** attribute in the left-hand side panel, click the down arrow, and select the **Manage Conditional Lists** option.
- 2) Enter a desired name (for example, “Top 5 Manufacturers”) in the **Name** textbox and click the **Done** button.

- 3) Under the **Measure Selection**, click the **Choose Metric** link to modify it. In the **Define Measures** pop-up window, select the **Unit Volume-CY-1W** options from the **Metric** dropdown menus to match the metric on the report.
- 4) In the same window, click the **More** link to define the Volume rank.
- 5) In the **Measure - Unit Volume** pop-up window, select the following options to create the top 5 manufacturers using the Rank Function
 - i. Select the **Rank** option from the **Select Function** dropdown menu.
 - ii. Select the **<=** operator from the **Condition** dropdown menu and enter “5” in the input box.
 - iii. To sort the data based on measures, select the **Measure** option from the **Sort On** dropdown menu.
 - iv. Select the **Descending** option from the **Sort Order** dropdown menu.



Measure - Unit Volume [X]

Metric: Unit Volume

Data Type: Float

Name: Unit Volume-CY-1W

Versus: CY

Duration: 1W

Condition: \leq 5

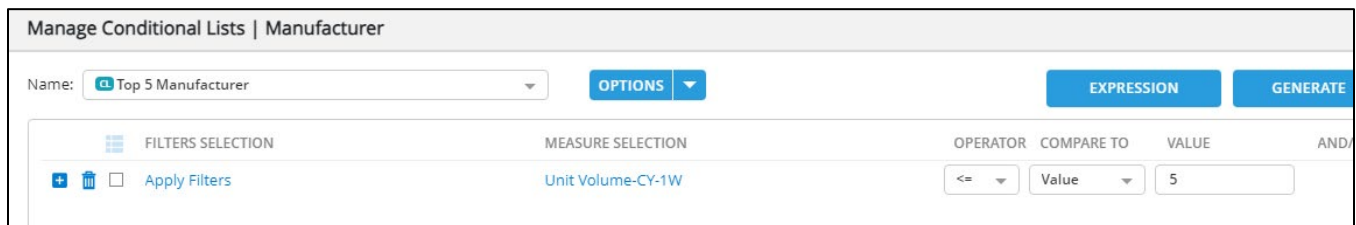
Select Function: Rank

Sort On: Measure

Sort Order: Desc

Buttons: Cancel, Clear, DONE

- v. Click the **Done** button to close the **Measure – Unit Volume** pop-up window.
- 6) Click the **Done** button to close the **Define Measures** pop-up window.
- 7) Select the **\leq Operator** and enter a **Value** of “5” as shown below.



Manage Conditional Lists | Manufacturer

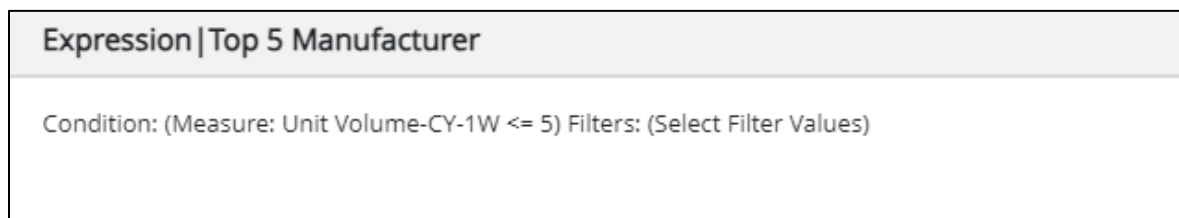
Name: Top 5 Manufacturer [OPTIONS]

Buttons: EXPRESSION, GENERATE

FILTERS SELECTION		MEASURE SELECTION	OPERATOR	COMPARE TO	VALUE	AND/OR
<input type="checkbox"/> Apply Filters		Unit Volume-CY-1W	\leq	Value	5	

Note: Leaving the apply filters area blank will allow for all report filters to be passed through as seen in the next step.

- 8) In the **Manage Conditional Lists** window, clicking the **Expression** button will display the criteria of your list (excluding conditions specified in the **More** window), and should look similar to the image below:



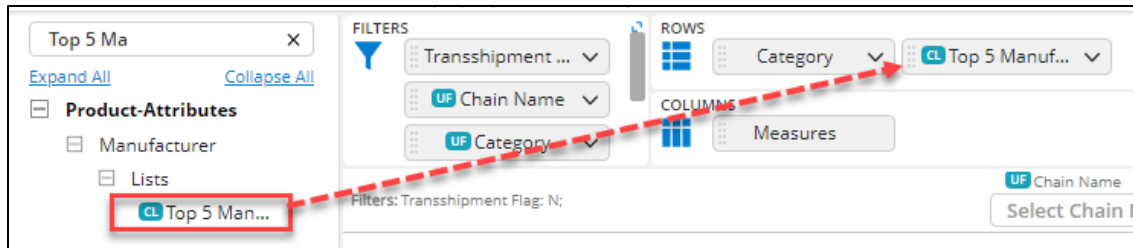
Expression | Top 5 Manufacturer

Condition: (Measure: Unit Volume-CY-1W \leq 5) Filters: (Select Filter Values)

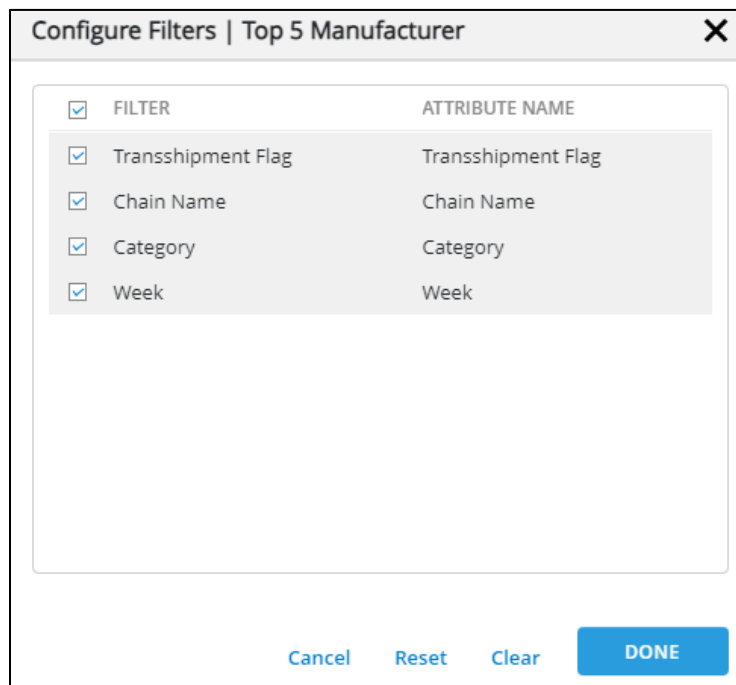
- 9) Click **Done** to close the **Expression** window.
- 10) Click **Save** to save the criteria, then click **Done** again to return to the **Report** screen.

6. Add Conditional List to Report Layout and Configure Filters

- 1) Locate the **Conditional List** you just created (“Top 5 Manufacturer”) in the left-hand panel and drag it in the **Rows** section next to Category.



- 2) Click the down arrow on the “Top 5 Manufacturer” Conditional List on Rows and select **Configure Filters** from the dropdown menu.
- 3) Select the **Transshipment Flag, Chain Name, Category, and Week** attributes, then click **Done**. Selecting these attributes allows them to be passed through the Conditional List. This means that the Conditional List will now consider these four filters when calculating the “Top 5 Manufacturers”, which results in the report displaying the top 5 Manufacturers within the selected Category and Chain Name for the selected Week.



7. Generate Report

- 1) Select a **Category** and **Week** from the User Filter dropdown menus as they are mandatory and must be populated before generating the report.
- 2) Select **13W** from the Duration(duration) User Filter dropdown menu.
- 3) Click the **Generate** button to generate the report based on the selected parameters.

Filters: Transshipment Flag: N; Category: Salty Snacks; Week: 12/30/2023; Duration(duration_Demo Mfg: 13W;

CATEGORY	TOP 5 MANUFACTURER	UNIT VOLUME-CY-13W
Salty Snacks	MANUFACTURER	18,052,105.0
Salty Snacks	MANUFACTURER	9,591,169.0
Salty Snacks	MANUFACTURER	7,620,046.0
Salty Snacks	MANUFACTURER	6,238,530.0
Salty Snacks	MANUFACTURER	5,191,389.0

Note: The report above displays the top 5 manufacturers within the Salty Snack category for the week 12/30/23 with a 13-week duration.

- 4) In the Chain Name User Filter dropdown menu, click the arrow and select the **7-Eleven** chain. Click the Generate button to repopulate for the selected Chain. Now the report is showing the top 5 manufacturers in the Salty Snack category based on volume of only 7-Eleven chains.

Filters: Transshipment Flag: N; Category: Salty Snacks; Week: 12/30/2023; Duration(duration_Demo Mfg: 13W; Chain Name: 7-ELEVEN

CATEGORY	TOP 5 MANUFACTURER	UNIT VOLUME-CY-13W
Salty Snacks	MANUFACTURER	1,362,500.0
Salty Snacks	MANUFACTURER	882,361.0
Salty Snacks	MANUFACTURER	740,851.0
Salty Snacks	MANUFACTURER	581,321.0
Salty Snacks	MANUFACTURER	461,931.0

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
- Manage Conditional Lists Quick Start Guide
- Apply User Filter Quick Start Guide
- Dhiva Advanced Measure Functions Reference Guide
- Dhiva User Guide