Dhiva

Training Exercise Guide

Business Use Case 4
Store Voids

Contents

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 4: Store Voids

What stores are carrying my Manufacturer ("Manufacturer X") and our Category (i.e. Health and Beauty) but are not selling my largest Brand Family ("Brand Family Y") over the last 13 weeks? Also, what is the total Category unit volume for these stores in this period, and what is the unit volume for each of the Manufacturers and Brand Families in these stores?

Key Learnings/ Takeaways

Through this exercise, you will learn to:

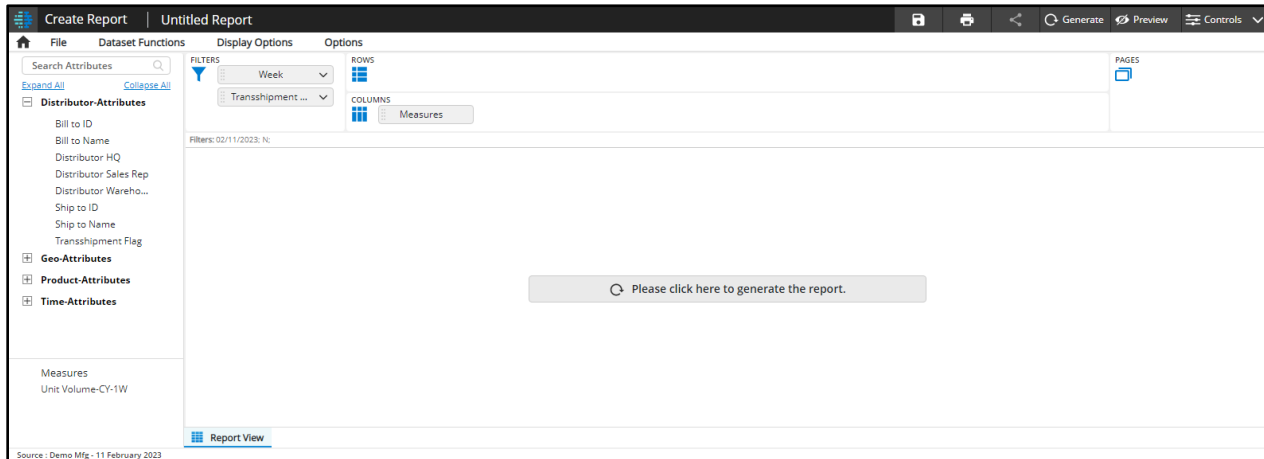- Create a Conditional List
- Filter using a Conditional List

Key Attributes to Work With

- Category
- Manufacturer
- Brand Family
- Store ID /MSA Retail Number
- Store Name
- Store State
- 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 **Category** attribute in the left-hand side panel and drag it to the **Filters** area.

2)   Once you drop the attribute onto **Filters**, you will be prompted to select the desired **Category**. Here we select **Health & Beauty**. Then, click the **Done** button.
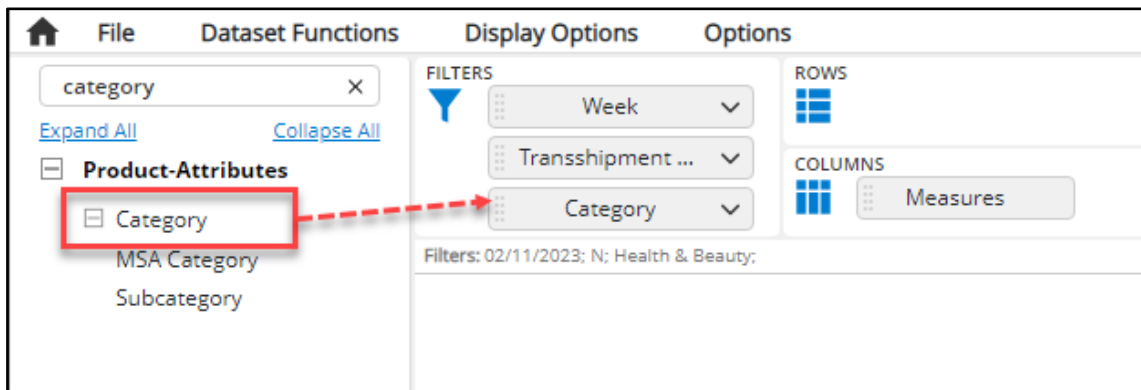
3)   Click on the **Week** dropdown arrow in the **Filters** area and select the **Modify** option.

4)   In the popup window, select the current week (for example, **02/11/2023**) 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.
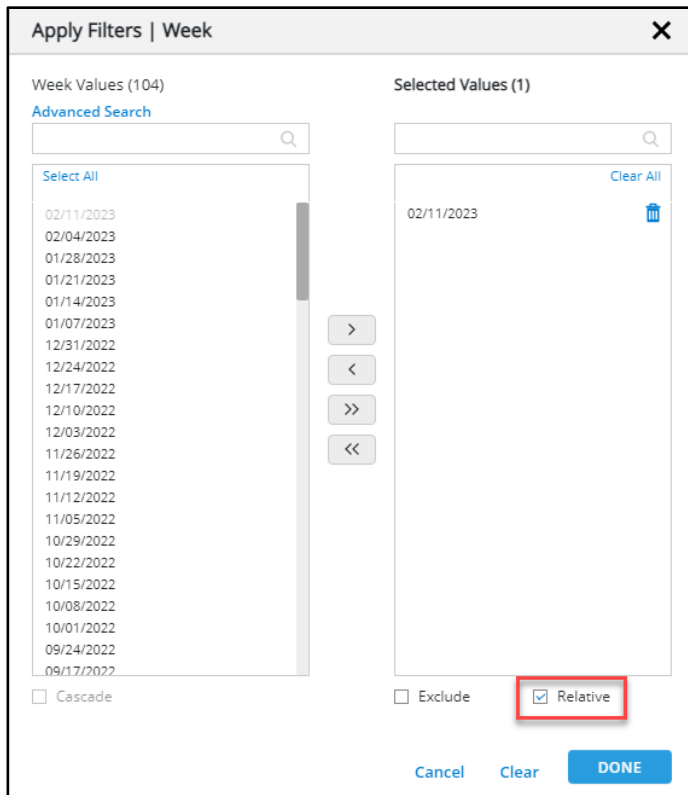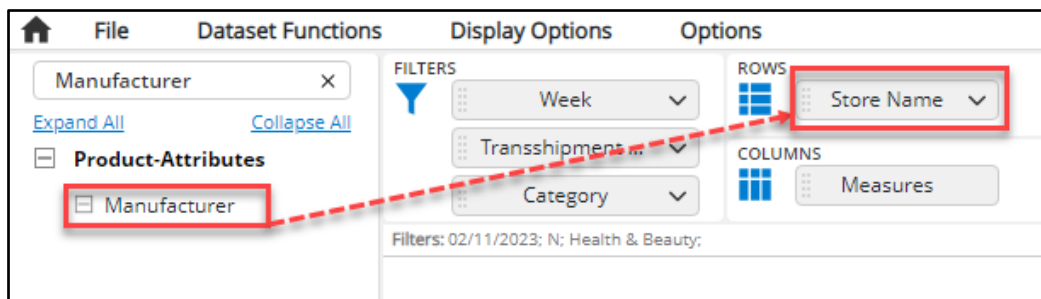
3. Create Report Layout
1) Search for the **Store State** attribute in the left-hand side panel and drag it onto the **Pages** area.

2) In the left-hand side panel, locate attribute **Store Name** and drag it onto **Rows**.
3) Search for attribute **Manufacturer** and drag it on top of **Store Name** in the **Rows** section.

4) In the Hierarchy pop-up window, enter suitable name (for example, 'Stores to Mfr to BF') in the **Name** textbox and select the **Replacement** option. Click **Done** to exit this pop-up window.

5) Similarly, find the **Brand Family** attribute and drag it on top of the 'Stores to Mfr to BF' **Hierarchy** in the **Rows** section. Click **Done** in the Hierarchy pop-up window.

4. Add Measures

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

    i.   Under the **Duration** dropdown menu for **Unit Volume**, select the **13W** option.

    ii.   Click **Done** to return to report display.

5. Create a Conditional List

1) Search for the **Store ID** attribute in the left-hand side panel, click the down arrow and select the **Manage Conditional Lists** option.

*Note: If the attribute "**MSA Retail Number**" is available, best practice is to use it for creating the Conditional List instead of "**Store ID**". If using "**MSA Retail Number**", still place "**Store Name**" on the report in order to display store information.*
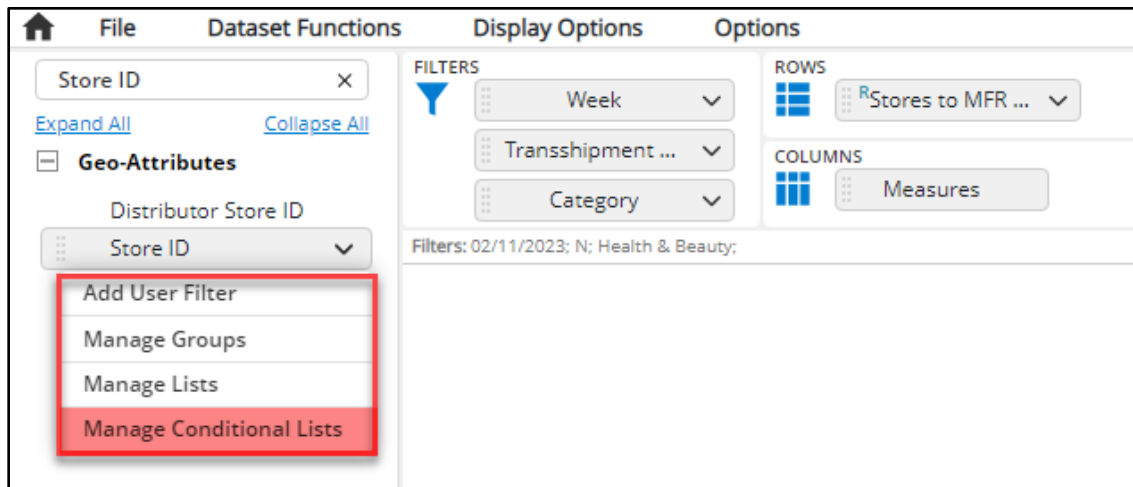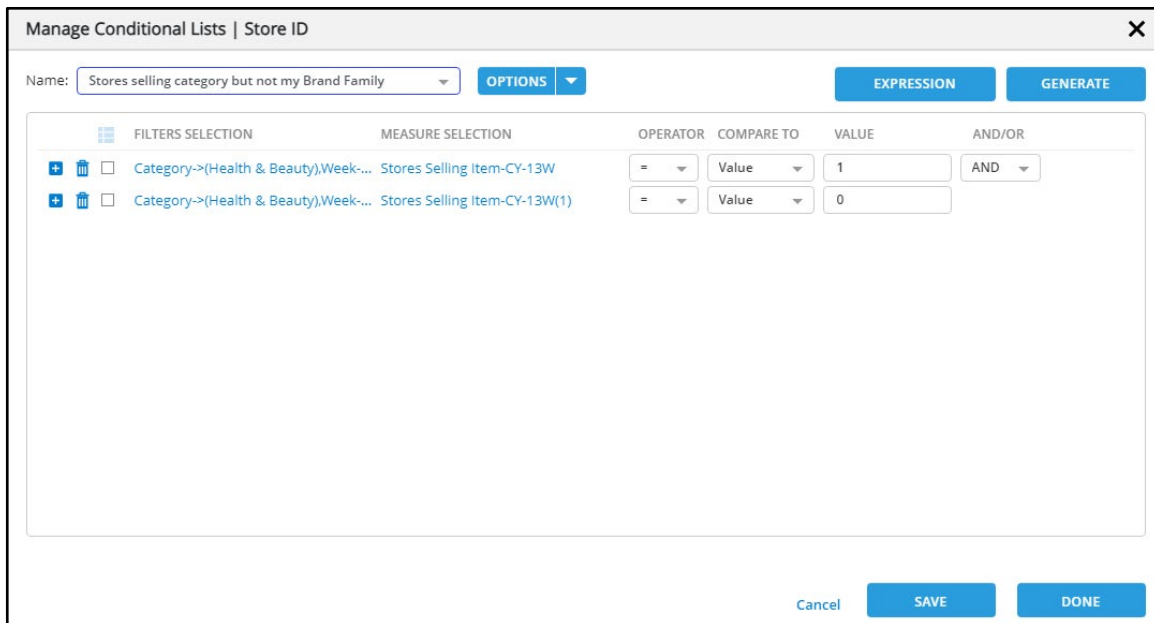

2) Enter a desired name (for example, "**Stores Selling Category but not my Brand Family**") in the **Name** textbox and click the **Done** button.

3) In the **Manage Conditional Lists** pop-up window, click the **Apply Filters** link. In this scenario, the **Filters** on the **Conditional List** should match those that are output on the report.
4) Within the **Select Filter Values To Apply** pop up window, select **Week** from the Select Attribute dropdown list.
5) Select the current week (for example, **02/11/2023**) and use the single right arrow to add this value the right-side panel as a filter. Then, select the **Relative** checkbox to select the current week in the pop-up window.
6) After selecting week search for **Category** in the attribute selection dropdown and make a selection (for example, **Health and Beauty**).
7) Next, add **Manufacturer** in the attribute selection dropdown and select *Manufacturer X*.
8) Search **Transshipment Flag** and select **N**.

9) Click **Done** to close the **Select Filter Values To Apply** pop up window.
10) Under the measure selection select **Stores Selling Item-CY-13W** and click the **Done** button.
11) Under the operator select **"="**.
12) Under **Compare To**, select **Value** and enter "**1**" (one) as this **Value**. Setting this value to be 1 equates to "yes" and will return stores which are selling the selected Category and Manufacturer.

13) Click the plus sign ➕ to copy the selections that were made in the previous steps.
14) From the last dropdown on the first line, select **AND** to join these conditions.
15) For the second condition line, click on the **Filters Selection** link to modify. Search for **Brand Family** in the attribute selection list. Here, select *Brand Family Y*.
16) Click **Done** to close the **Select Filter Values To Apply** pop up window.
17) Set the **Value** for the second condition to be "**0**" (zero), which equates to "no", in order to return stores which are *not* selling this ***Brand Family Y***.
18) Click the **Expression** button to view your conditional list parameters.
19) Click the **Done** button to close the Expression window.

Combining both of these conditions will return a list of stores which are selling the selected Category and Manufacturer in the last 13 weeks and not selling the selected Brand Family in the same period.


20) Click **Save** to save this Conditional List, then **Done** and close the pop up window.

6. Apply Conditional List to Report Filters
    1) In the left-hand side panel, locate the **Store ID** attribute where the **Conditional List** was created and drag it to the **Filters** area.
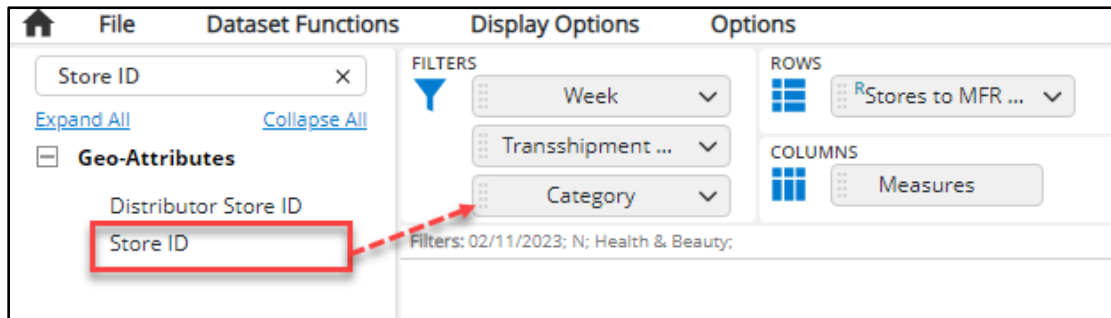
    2) Once you drop the attribute onto **Filters**, you will be prompted to select the desired values or a List/Conditional List. Here select the Conditional List that was created (in this case, **"Stores Selling Category but Not my Brand Family"**) in the **Select List** dropdown to populate the Store ID list.
    3) Click **Done** to apply this filter.
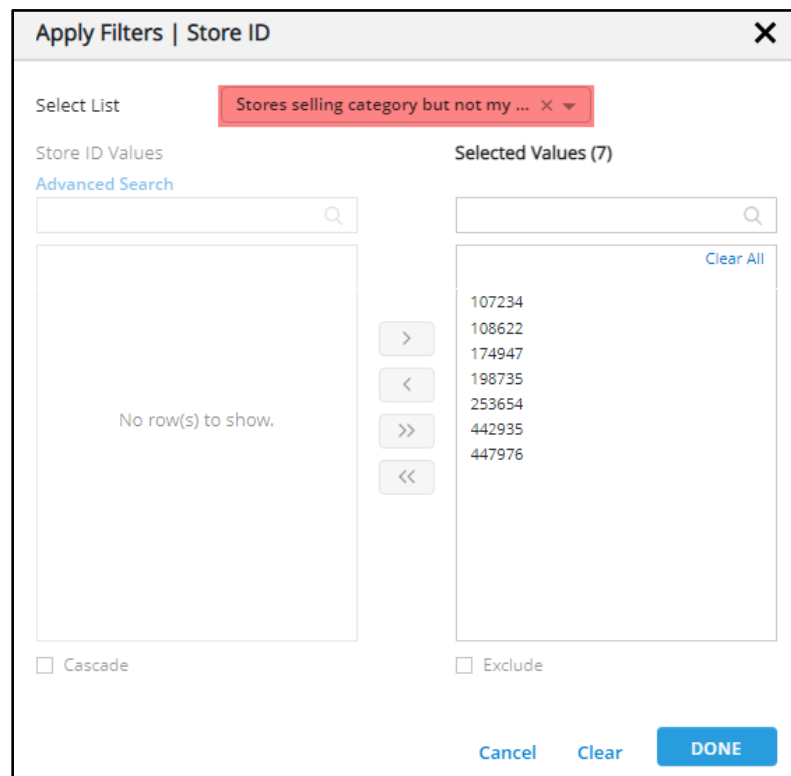
7. Generate Report

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

Shown in the report above are all the Stores which sell the **Category** of **Health and Beauty** and *Manufacturer X*, but do not sell *Brand Family Y* (in the last 13 weeks). The user also has the ability to drill into a given **Store Name** (using the "+" sign next to it) to view Unit Volume of the selected **Manufacturer and** its **Brand Families** in addition to those of competitors.

In the report grid, the user can switch between **Store States** on **Pages** to view the data of a particular state. When the report is exported to Excel, a file will be generated containing a tab for each State on the report.

Additional Resources

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

- Create Report Quick Start Guide
- Create a Hierarchy Quick Start Guide
- Manage Conditional List Quick Start Guide
- Manage Groups Quick Start Guide
- Manage Dynamic Groups Quick Start Guide
- Dhiva User Guide