



Dhiva - Manage Lists

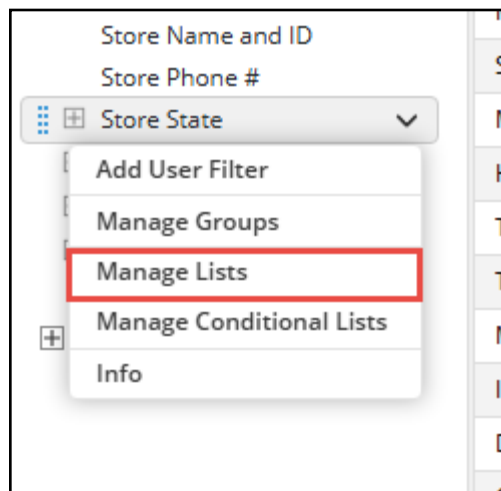
A List is a preset of values within an Attribute that can be used as a Filter or added to the Report layout on rows, columns or pages. Users can manually select, dynamically filter, or import a file with multiple items. Under the Manage Lists option, you can perform the following tasks:

- [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, then use it as a Report Filter. An example is demonstrated below.

1. On the **Create Report** screen, locate the desired Attribute (for example, **Store State**) in the Attribute panel.
2. Click the down arrow and select the **Manage Lists** option.



Note: If a user hasn't created a List before, a pop-up will prompt them to name the first one they create. Otherwise, select **New** from the options menu in the top-right corner.

Manage Lists | Store State

Name: Select List

Description: Please enter a description up to 300 characters.

OPTIONS

New

Create Import

Select List(s)

Store State Values (0)

Advanced Search Create Conditional List

No row(s) to show.

No row(s) to show.

Set as Global Exclude

Cancel Clear SAVE SAVE AS DONE

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

Enter New List Name

Name Tri-State Area

Cancel DONE

4. Select the desired Attribute values (for example, **AZ**, **CA** and **FL**) in the left side of the selection panel and click the single arrow pointing to the right to move them to the right side of the panel.

Manage Lists | Store State

Name: **OPTIONS**

Description:

☒ Create ☐ Import

Select List(s):

Store State Values (56) **Advanced Search** **Create Conditional List**

Select All

NV
NY
OH
OK
OR
PA
PR
RI
SC
SD
TN
TX
UT
VA
VI
VT
WA
WI
WV
WY

☐ Set as Global

Selected Values (3)

OH
PA
WV

Clear All

☐ Exclude

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

Note: Press the **Shift** key to select multiple adjacent items in an Attribute. As the left-pointing arrows remove selection(s) from the List, use the right-pointing arrows to add selection(s) to the List. The Exclude checkbox in this window may be used to include all but the selected item(s).

5. Click **Save**. The system will display the message "List created successfully".
6. Click **Done**.

While generating a new Report, users can use this List in filters, rows, columns, or pages as needed as demonstrated below.

7. On the **Create Report** screen, drag the List (**Tri-State Area**) from the left-hand panel onto the **Filters** area.
8. Drag the desired Attributes onto the rows, columns, and pages as needed and then click the **Generate Report** button.

Running a Report with a List (for example, Tri-State Area) as a Report filter and placed on rows/columns will return data for only the values in the List while also separating by value (not as an aggregate) as shown in the below screenshot.

Note: If the system Attribute on which the List was created has Display Attributes configured, the additional Attributes will not show when the List is on rows. The original Attribute must be placed on rows for the additional Attributes to be displayed.

The screenshot shows the 'Create Report' interface for 'Untitled Report1'. The left-hand panel lists various attributes under 'Distributor-Attributes', 'Product-Attributes', 'Geo-Attributes', and 'Time-Attributes'. The 'Tri-State Area' list is highlighted in the 'Filters' section. The 'Rows' and 'Columns' sections also show the 'Tri-State Area' list. The 'Measures' section shows 'Unit Volume-CURR-1W'. The main table displays data for 'SUBCATEGORY' and 'UNIT VOLUME-CURR-1W' across different states (OH, PA, WV). The table is filtered by 'Tri-State Area'.

SUBCATEGORY	OH	PA	WV
Other Tobacco/ Nicotine Products-Cigars			
Store Use/Supply-Bags			
Other Tobacco/ Nicotine Products-Smokeless			
Other Tobacco/ Nicotine Products-Smokeless Tobacco Alternatives			
Store Use/Supply-Cups			
Hot Dispensed Beverages-Bulk / PC Creamers			
Candy-Chocolate Bars/Packs			
Store Use/Supply-All Other			
Store Use/Supply-Lids			
Candy-Repacked Peg Candy			
Candy-Change Makers/Penny Counter Goods/Bulk Candy			
Packaged Sweet Snacks-Snack Cakes/Pastries			

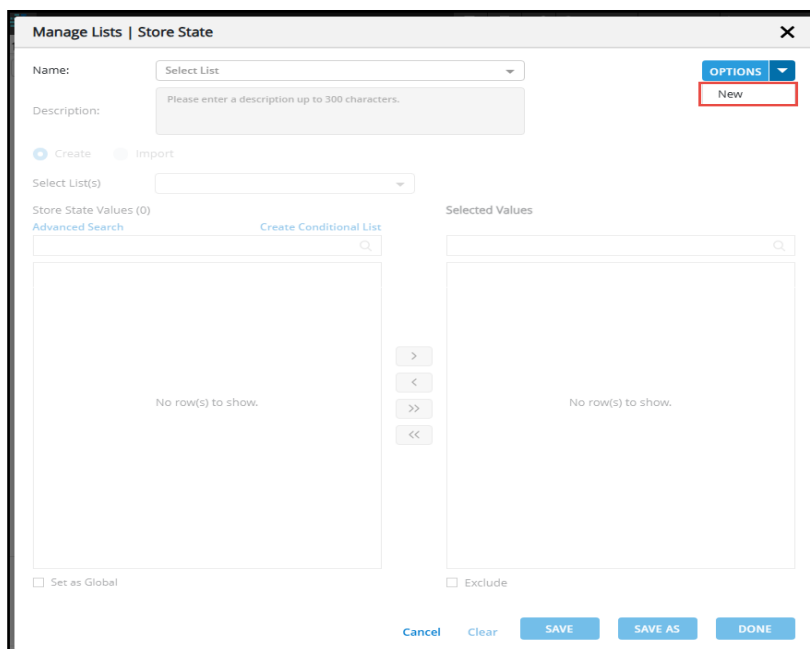
Source: Demo Mfg - 07 February 2026 Rows = 198

Import List

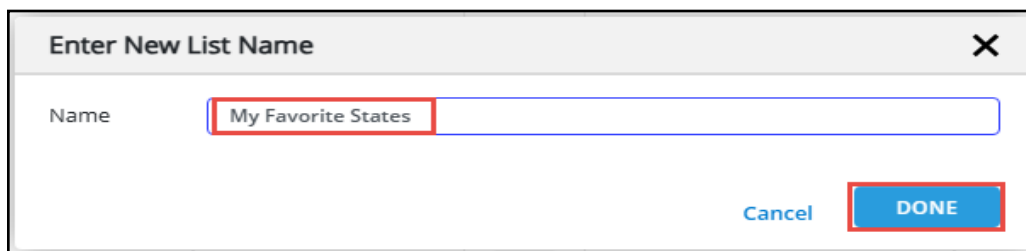
Instead of creating a hand-selected List, you can also import a List into Dhiva by using a template. An example of importing a List is demonstrated below.

1. On the **Create Report** screen, locate the desired Attribute (for example, **Store State**) in the Attribute panel.
2. Click the down arrow and select the **Manage Lists** option.

Note: If a user hasn't created a List before, a pop-up will prompt them to name the first one they create. Otherwise, select **New** from the options menu in the top-right corner.



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



4. In the **Manage Lists** dialog box, select the **Import** option.
5. Select the **By Using ID** or **By Using Name** options from the template dropdown menu depending on how you would like to enter values into the template.

Note: In most cases, “By Using Name” is the best practice.

6. Click the **Download** link to download the corresponding template. In this example, users should download the **Store State.xlsx** file onto their desktop.

7. Open the file and click the **Enable Editing** button to enter the relevant data (for example, favorite store states) in the first column.

8. Once done, save the import file in Excel and close the file.
9. In the **Manage Lists** dialog box, click the **Browse** button to navigate to the import file location and click the **Open** button to load the file.

Manage Lists | Store State

Name: **OPTIONS**

Description:

☐ Create ☒ Import Template: **Download**

File: **Browse**

Store State Values (56) **Create Conditional List**

Advanced Search

Select All

AA
AE
AK
AL
AR
AZ
CA
CO
CT
DC
DE
FL
GA
HI

☐ Set as Global

Selected Values (3)

PA
MA
CA

☐ Exclude

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

10. Click the **Save** button to save the List.
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 a List (for example, My Favorite States) as a Report Filter placed on rows/columns will return data for only the values in the List. The data will be separated by value as shown in the below screenshot.

Note: If the system Attribute on which the List was created has Display Attributes configured, the additional Attributes will not show when the List is on rows. The original Attribute must be placed on rows for the additional Attributes to be displayed.

Dynamic List

Dynamic Lists allows users to save and apply criteria defined through the advanced search features in the Manage Lists window to create a list of values which will update when data is refreshed.

1. On the **Create Report** screen, locate the desired Attribute (for example, **Store ID**) in the Attribute panel.
2. Click the down arrow and select the **Manage Lists** option.
3. Create a new List and enter an appropriate List name (for example, "Stores in my Chain").

Enter New List Name

Name

Stores in my Chain

Cancel

DONE

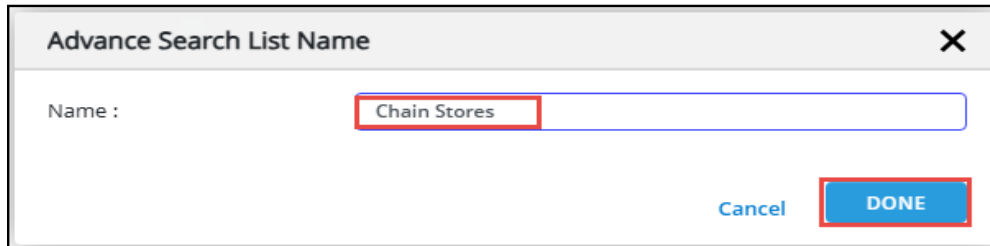
4. In the **Manage Lists** dialogue box, select the **Advanced Search** option.

5. Click **Add New Dependent Filter** then 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.
6. Toggle the Save Criteria option on, then click **Apply**. This will create a Dynamic List of the Store IDs in the selected Chain. which will update each time the data is refreshed.

If **Save** is selected instead, this will save the criterion to the current List as well as create a separate List saved to the Attributes panel.

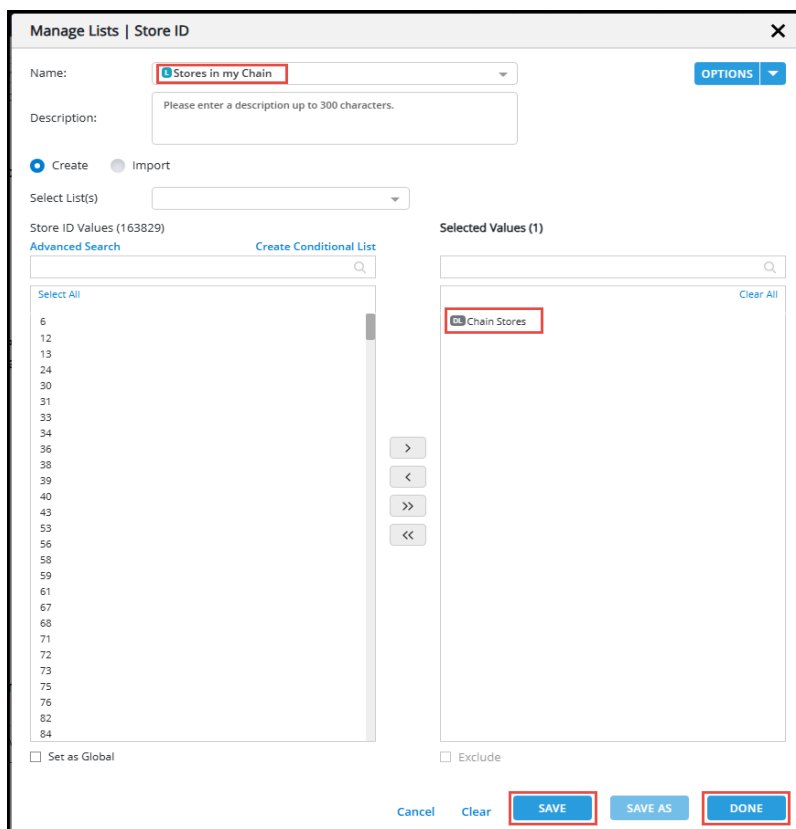
See the **Artifact Color/Access Quick Start Guide** for more information on these save options.

7. A dialogue box will prompt you to name this Dynamic List (for example, “Chain Stores”), and then click **Done**. The system will display the message “List created successfully”.



A dialog box titled "Advance Search List Name" with a close button (X) in the top right corner. It contains a label "Name :" followed by a text input field containing the text "Chain Stores". At the bottom right, there are two buttons: "Cancel" and "DONE".

After this step, you will see the following screen. Notice that the List is titled “Stores in my Chain” (as named in step 3), while the Dynamic List/criteria is titled as “Chain Stores” (as named in step 7). They can have the same name, but we made them differ for demonstration purposes.

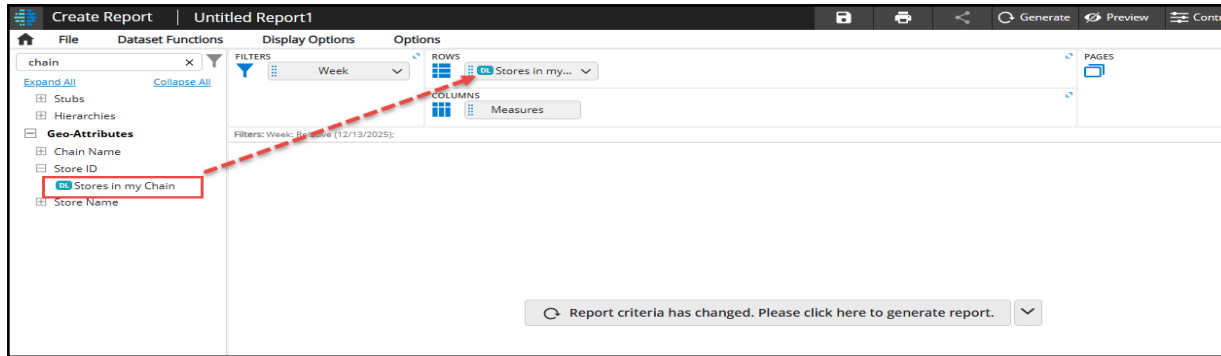


A screenshot of the "Manage Lists | Store ID" interface. The "Name:" field is set to "Stores in my Chain". The "Description:" field is empty with a placeholder "Please enter a description up to 300 characters." Below this, there are radio buttons for "Create" (selected) and "Import". A "Select List(s)" dropdown is also present. The main area is divided into two panes: "Store ID Values (163829)" on the left and "Selected Values (1)" on the right. The left pane has a search bar and a list of values from 6 to 84. The right pane has a search bar and a list containing "Chain Stores". At the bottom, there are checkboxes for "Set as Global" and "Exclude", and buttons for "Cancel", "Clear", "SAVE", "SAVE AS", and "DONE".

8. Click **Save**. The system will display the message “List created successfully”.
9. Click **Done**. This List will now be available in the Attributes panel to add to Reports.

While generating a new Report, users can use this List in filters, rows, columns, or pages as needed as demonstrated below.

10. Drag the List that was just created on Store ID onto rows. Users can use Lists and Conditional Lists as Attributes on a Report. Standard Lists are indicated by an “L” icon, while Conditional Lists and Dynamic Lists are indicated by “CL” and “DL” icons respectively. Green icons represent Global Artifacts, blue icons represent personal Artifacts, and grey icons represent Report-specific Artifacts.



Generating the Report with the newly created List on rows will output the Store IDs associated with the selected Chain. This List will dynamically update as data is refreshed, whether a new store is added, or an existing store is removed from the Chain.

The screenshot shows the report output. The 'ROWS' section on the right now displays 'DL Stores in my...' with a red box around it. The table below has a header row with 'DL STORES IN MY CHAIN' (highlighted with a red box) and 'UNIT VOLUME-CURR-1W'. The table contains 10 rows of data, each with a Store ID in the first column and a corresponding volume value in the second column.

DL STORES IN MY CHAIN	UNIT VOLUME-CURR-1W
21718	
85249	
43031	
78375	
41484	
102903	
41482	
94478	
510366	
85188	
41449	

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 that you own. The procedure is demonstrated below.

1. Locate the desired Attribute in the Attribute panel.
2. Click the down arrow and select the **Manage Lists** option.
3. In the **Manage Lists** dialog box, select the appropriate List name from the **Name** dropdown menu.
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:

Description:

☒ Create ☐ Import

Select List(s)

Store State Values (56)

Advanced Search Create Conditional List

Select All

AA
AE
AK
AL
AR
AZ
CA
CO
CT
DC
DE
FL
GA
HI

> < >> <<

Selected Values (3)

OH
PA
WV

Clear All

☐ Set as Global ☐ Exclude

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

