NABCA

Diver Platform® powered by Spectre®

Quickviews

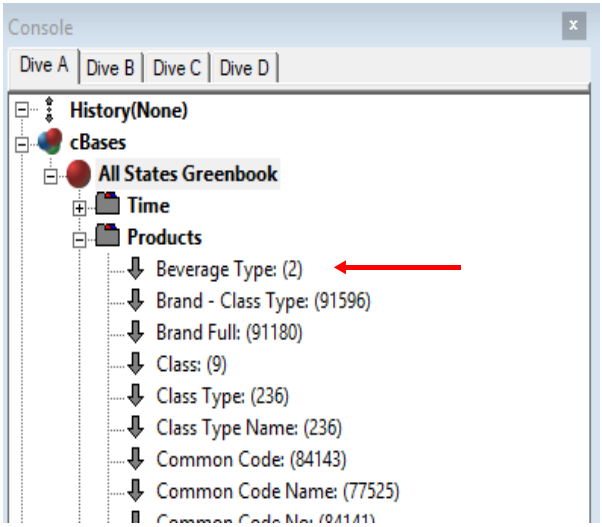
"DIY" Series

QuickViews

Purpose

QuickViews (QV) are essentially filters applied to large amounts of data in a DiveBook that allows the user to limit the amount a data being viewed or to directly view particular data sets. An example of this would be to open a Greenbook DiveBook and apply a QuickView to Beverage Type to view only "Spirits".

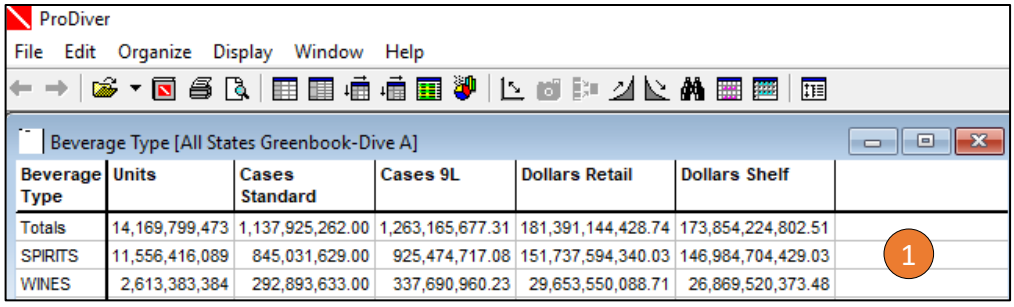
There are 3 types of QuickViews. Pulldown, Picklist and Combobox, Featured in this document will be the most commonly used, Pulldown and Picklist.



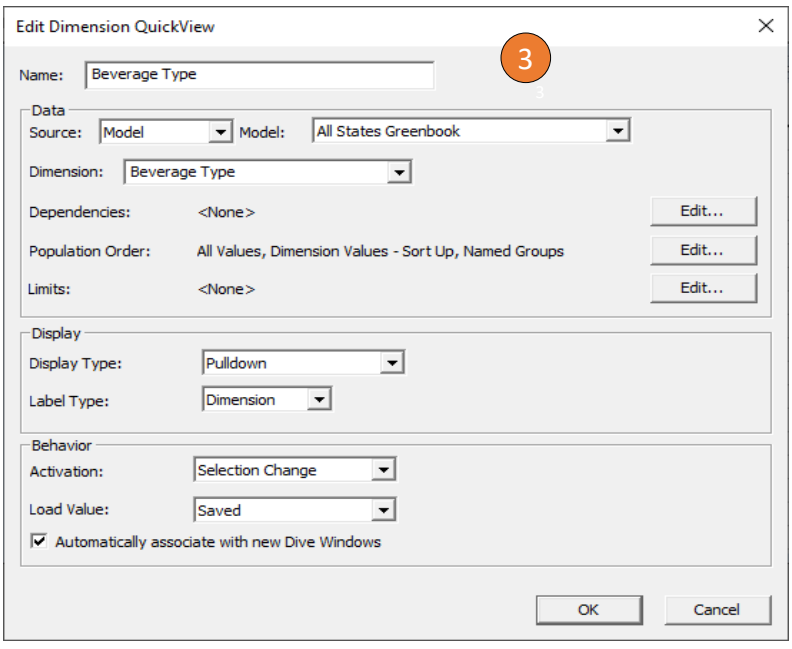
CREATING A PULLDOWN QUICKVIEW

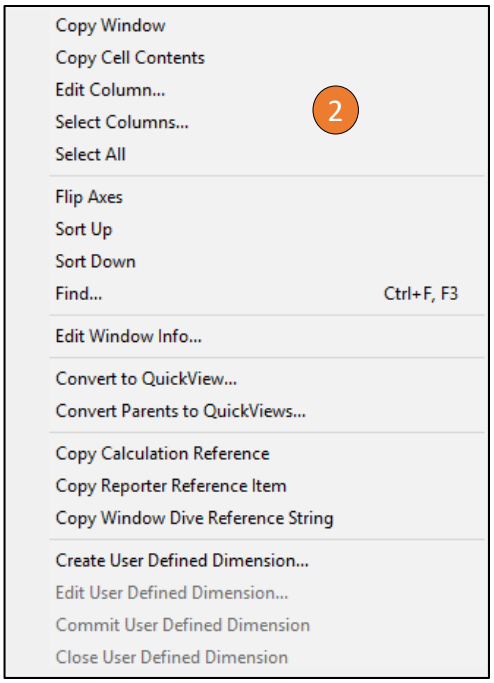
1. Open the All States Greenbook and dive on Beverage Type in the console.

This brings up the starting tabular (1) showing the initial dive. By right clicking anywhere in the tabular it will bring up a menu selection. (2) In this menu choose "Convert to QuickView". This action will display the QuickView Dialogue Box. (3)



Beverage Type	Units	Cases Standard	Cases 9L	Dollars Retail	Dollars Shelf
Totals	14,169,799,473	1,137,925,262.00	1,263,165,677.31	181,391,144,428.74	173,854,224,802.51
SPIRITS	11,556,416,089	845,031,629.00	925,474,717.08	151,737,594,340.03	146,984,704,429.03
WINES	2,613,383,384	292,893,633.00	337,690,960.23	29,653,550,088.71	26,869,520,373.48



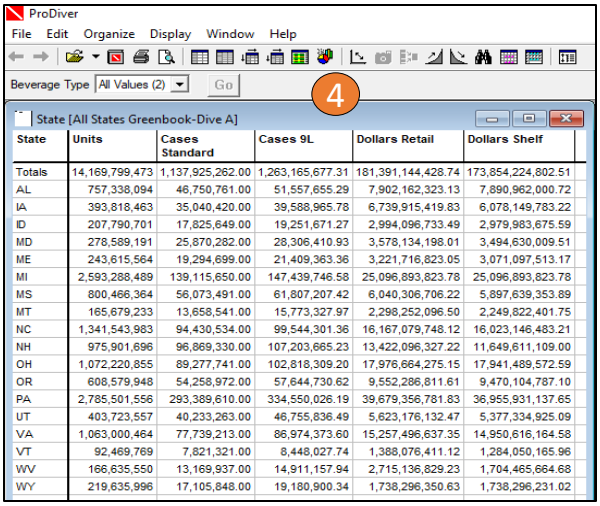


2. In the Quickview dialogue box the name of the Quickview and the Dimension will automatically be the dimension that you dived on.

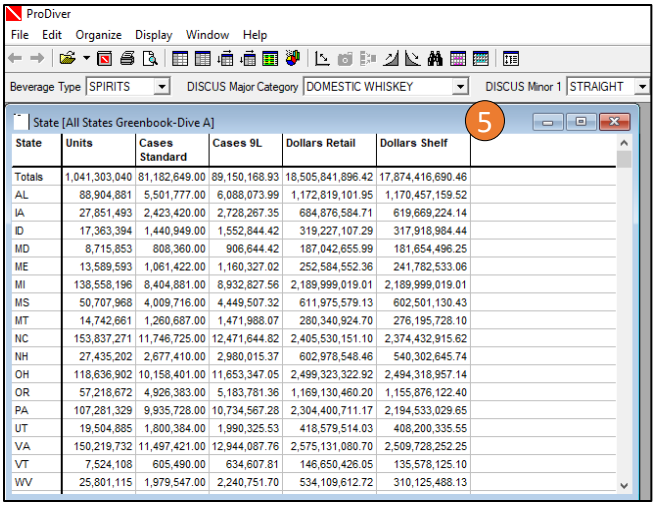
   - Choose a Quickview type. For this part of the exercise choose “Pulldown” which will create a Pulldown menu above the Tabular showing the available options. In this example it is Spirits or Wine. A Pulldown Quickview allows the user to choose <u>one</u> selection within the Quickview. 4

3. Next dive on a different dimension from the console. For this example we have chosen “State”. After this loads you can use the Quickview to choose Spirits and click <u>GO</u> so that all results are now focused only on this beverage type. Any addition such as MultiTabs or new columns such as CMTY, R12 etc can be added. The filter applied with the Quickview will remain in place until changed by the user.

4. Additional Quickviews can be added to further enhance selection such as Major Category. 5



State	Units	Cases Standard	Cases 9L	Dollars Retail	Dollars Shelf
Totals	14,169,799,473	1,137,925,262.00	1,263,165,677.31	181,391,144,428.74	173,854,224,802.51
AL	757,338,094	46,750,761.00	51,557,655.29	7,902,162,323.13	7,890,962,000.72
IA	393,818,463	35,040,420.00	39,588,965.78	6,739,915,419.83	6,078,149,783.22
ID	207,790,701	17,825,649.00	19,251,671.27	2,994,096,733.49	2,979,983,675.59
MD	278,589,191	25,870,282.00	28,306,410.93	3,578,134,198.01	3,494,630,009.51
ME	243,615,564	19,294,699.00	21,409,363.36	3,221,716,823.05	3,071,097,513.17
MI	2,593,288,489	139,115,650.00	147,439,746.58	25,096,893,823.78	25,096,893,823.78
MS	800,466,364	56,073,491.00	61,807,207.42	6,040,306,706.22	5,897,639,353.89
MT	165,679,233	13,658,541.00	15,773,327.97	2,298,252,096.50	2,249,822,401.75
NC	1,341,543,983	94,430,534.00	99,544,301.36	16,167,079,748.12	16,023,146,483.21
NH	975,901,696	96,869,330.00	107,203,665.23	13,422,096,327.22	11,649,611,109.00
OH	1,072,220,855	89,277,741.00	102,818,309.20	17,976,664,275.15	17,941,489,572.59
OR	608,579,948	54,258,972.00	57,644,730.62	9,552,286,811.61	9,470,104,787.10
PA	2,785,501,556	293,389,610.00	334,550,026.19	39,679,356,781.83	36,955,931,137.65
UT	403,723,557	40,233,263.00	46,755,836.49	5,623,176,132.47	5,377,334,925.09
VA	1,063,000,464	77,739,213.00	86,974,373.60	15,257,496,637.35	14,950,616,164.58
VT	92,469,769	7,821,321.00	8,448,027.74	1,388,076,411.12	1,284,050,165.96
WV	166,635,550	13,169,937.00	14,911,157.94	2,715,136,829.23	1,704,465,664.68
WY	219,635,996	17,105,848.00	19,180,900.34	1,738,296,350.63	1,738,296,231.02



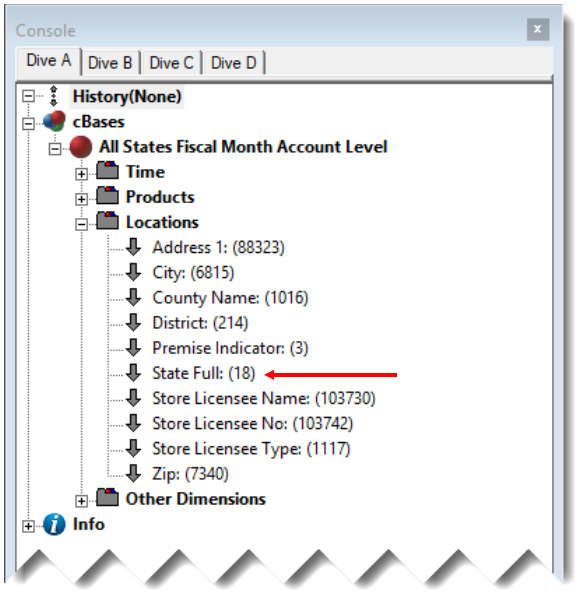
State	Units	Cases Standard	Cases 9L	Dollars Retail	Dollars Shelf
Totals	1,041,303,040	81,182,649.00	89,150,168.93	18,505,841,896.42	17,874,416,690.46
AL	88,904,881	5,501,777.00	6,088,073.99	1,172,819,101.95	1,170,457,159.52
IA	27,851,493	2,423,420.00	2,728,267.35	684,876,584.71	619,669,224.14
ID	17,363,394	1,440,949.00	1,552,844.42	319,227,107.29	317,918,984.44
MD	8,715,853	808,360.00	906,644.42	187,042,655.99	181,654,496.25
ME	13,589,593	1,061,422.00	1,160,327.02	252,584,552.36	241,782,533.06
MI	138,558,196	8,404,881.00	8,932,827.56	2,189,999,019.01	2,189,999,019.01
MS	50,707,968	4,009,716.00	4,449,507.32	611,975,579.13	602,501,130.43
MT	14,742,661	1,260,687.00	1,471,988.07	280,340,924.70	276,195,728.10
NC	153,837,271	11,746,725.00	12,471,644.82	2,405,530,151.10	2,374,432,915.62
NH	27,435,202	2,677,410.00	2,980,015.37	602,978,548.46	540,302,645.74
OH	118,636,902	10,158,401.00	11,653,347.05	2,499,323,322.92	2,494,318,957.14
OR	57,218,672	4,926,383.00	5,183,781.36	1,169,130,460.20	1,155,876,122.40
PA	107,281,329	9,935,728.00	10,734,567.28	2,304,400,711.17	2,194,533,029.65
UT	19,504,885	1,800,384.00	1,990,325.53	418,579,514.03	408,200,335.55
VA	150,219,732	11,497,421.00	12,944,087.76	2,575,131,080.70	2,509,728,252.25
VT	7,524,108	605,490.00	634,607.81	146,650,426.05	135,578,125.10
WV	25,801,115	1,979,547.00	2,240,751.70	534,109,612.72	310,125,488.13

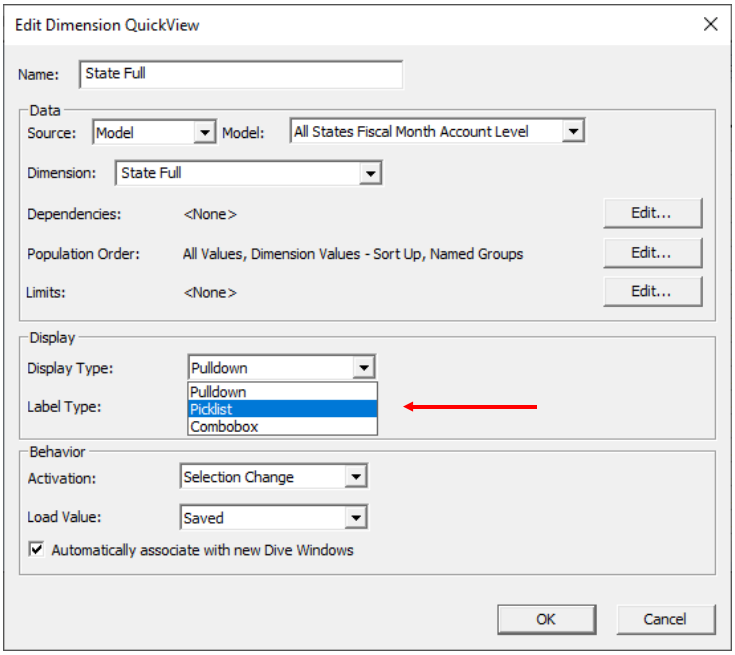
CREATING A PICKLIST QUICKVIEW

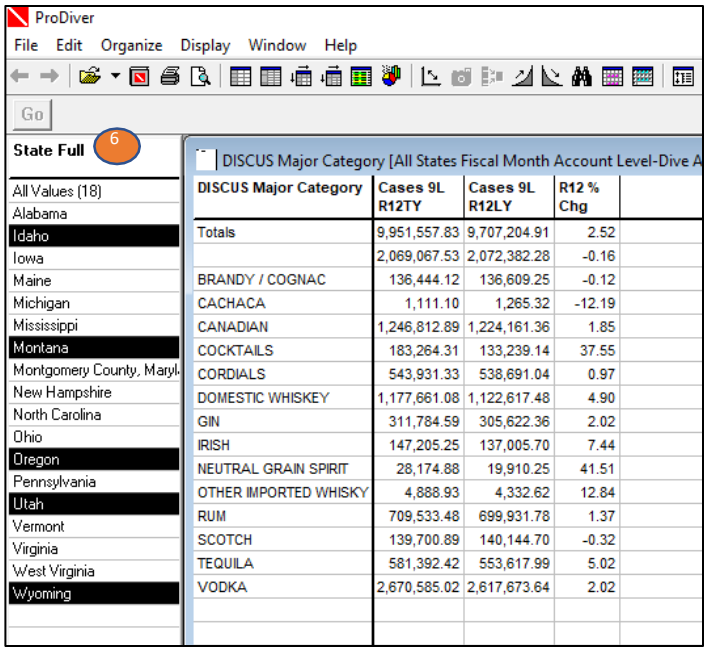
The difference with a Picklist Quickview its that it creates a list of options where one or more selections can be chosen to filter on.

1. Open a DiveBook Account Level Monthly/All States Fiscal Month Account Level and dive on State Full. Right click anywhere in the Tabular to open the menu and choose Convert to Quickview.

   - This time choose Picklist from the Display Type and remember to choose GO in the Activation section.
   - The Picklist will appear on the far-left side of the screen. 6







- The Picklist Quickview allows a user to create region (PacNW as example). After making any selection you need to click GO to activate.
- You can add additional Picklists and/or Pulldowns as needed.
- To remove a Quickview go to Edit (top left side of the screen), Edit Quickviews, choose the Quickview to remove or edit from the selection and click “delete”.
- The same process applies to changing a Pulldown to a Picklist

Don’t forget to save your marker as you go.

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