

**NABCA**

# **Spectre 101**

**“DIY” Series**  
**QuickViews**

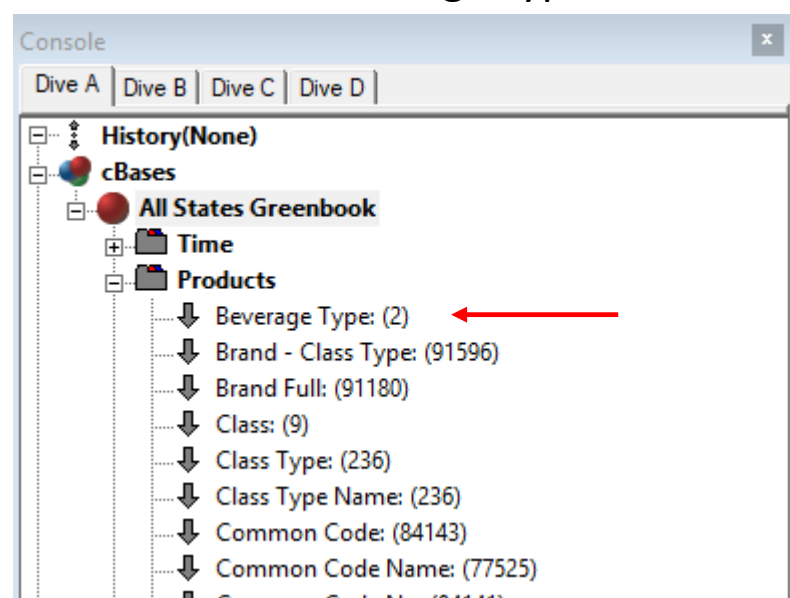
# Purpose

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**

ProDiver

File Edit Organize Display Window Help

Beverage Type [All States Greenbook-Dive A]

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	<b>1</b>
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	

Edit Dimension QuickView

Name: Beverage Type **3**

Data

Source: Model Model: All States Greenbook

Dimension: Beverage Type

Dependencies: <None> Edit...

Population Order: All Values, Dimension Values - Sort Up, Named Groups Edit...

Limits: <None> Edit...

Display

Display Type: Pulldown

Label Type: Dimension

Behavior

Activation: Selection Change

Load Value: Saved

☒ Automatically associate with new Dive Windows

OK Cancel

Copy Window

Copy Cell Contents

Edit Column...

Select Columns...

Select All

Flip Axes

Sort Up

Sort Down

Find... Ctrl+F, F3

Edit Window Info...

Convert to QuickView...

Convert Parents to QuickViews...

Copy Calculation Reference

Copy Reporter Reference Item

Copy Window Dive Reference String

Create User Defined Dimension...

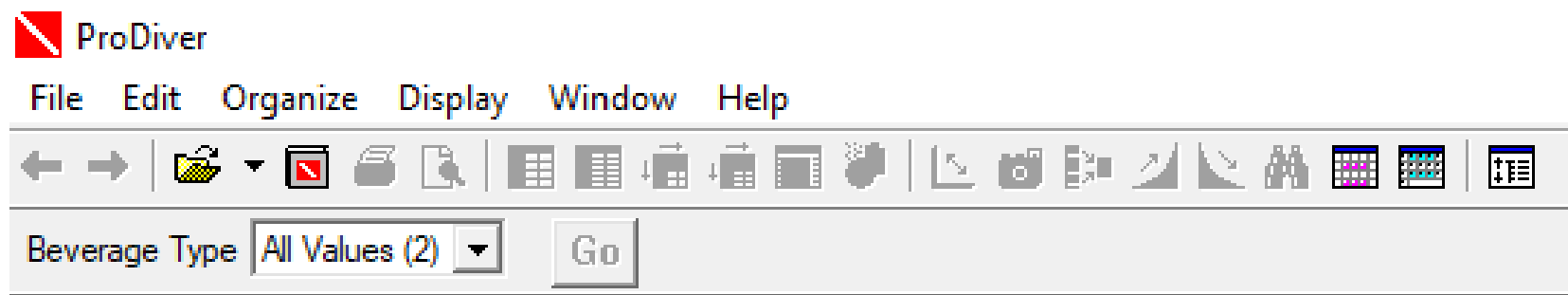
Edit User Defined Dimension...

Commit User Defined Dimension

Close User Defined Dimension

**2**

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 one 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 GO 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

The screenshot shows the ProDiver application window with the 'State [All States Greenbook-Dive A]' table displayed. The table has columns for State, Units, Cases Standard, Cases 9L, Dollars Retail, and Dollars Shelf. A red circle with the number 4 is overlaid on the table header area.

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

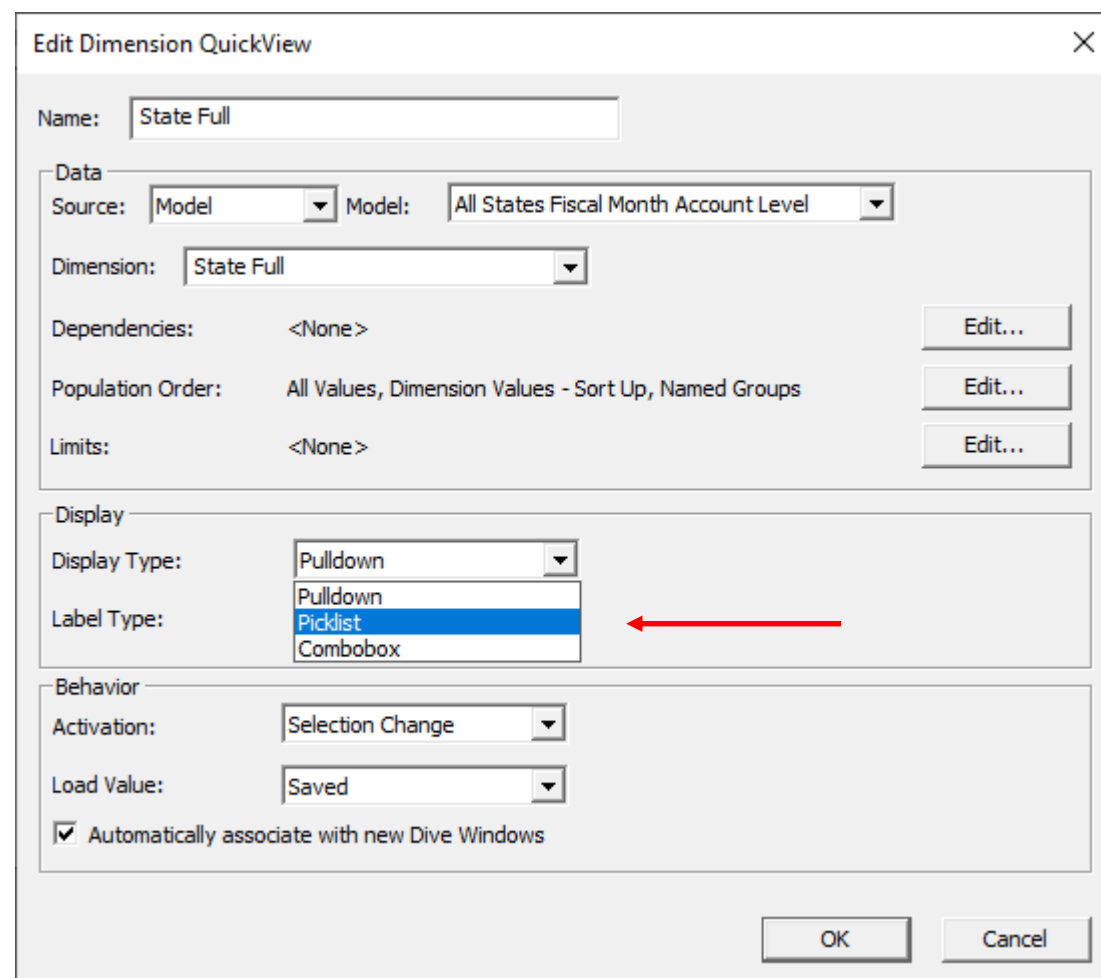
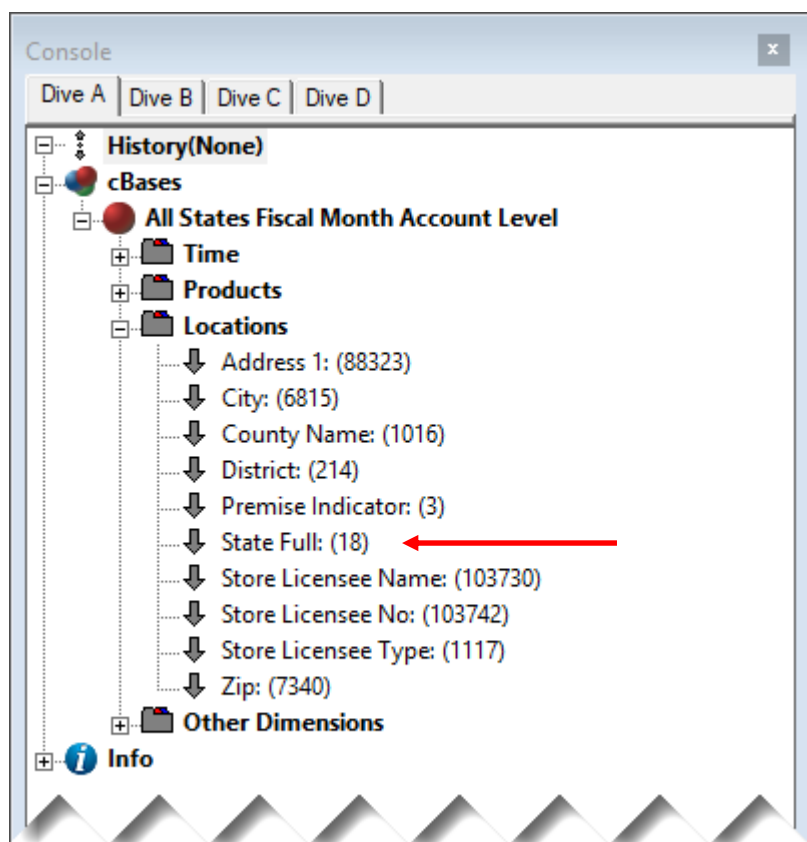
The screenshot shows the ProDiver application window with the 'State [All States Greenbook-Dive A]' table displayed. The table has columns for State, Units, Cases Standard, Cases 9L, Dollars Retail, and Dollars Shelf. The 'Beverage Type' dropdown is set to 'SPIRITS', 'DISCUS Major Category' is set to 'DOMESTIC WHISKEY', and 'DISCUS Minor 1' is set to 'STRAIGHT'. A red circle with the number 5 is overlaid on the table header area.

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 is 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**



ProDiver

File Edit Organize Display Window Help

Go

State Full **6**

DISCUS Major Category [All States Fiscal Month Account Level-Dive A]

DISCUS Major Category	Cases 9L R12TY	Cases 9L R12LY	R12 % Chg
Totals	9,951,557.83	9,707,204.91	2.52
BRANDY / COGNAC	2,069,067.53	2,072,382.28	-0.16
CACHACA	136,444.12	136,609.25	-0.12
CANADIAN	1,111.10	1,265.32	-12.19
COCKTAILS	1,246,812.89	1,224,161.36	1.85
CORDIALS	183,264.31	133,239.14	37.55
DOMESTIC WHISKEY	543,931.33	538,691.04	0.97
GIN	1,177,661.08	1,122,617.48	4.90
IRISH	311,784.59	305,622.36	2.02
NEUTRAL GRAIN SPIRIT	147,205.25	137,005.70	7.44
OTHER IMPORTED WHISKY	28,174.88	19,910.25	41.51
RUM	4,888.93	4,332.62	12.84
SCOTCH	709,533.48	699,931.78	1.37
TEQUILA	139,700.89	140,144.70	-0.32
VODKA	581,392.42	553,617.99	5.02
	2,670,585.02	2,617,673.64	2.02

- 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.**



2900 S. Quincy Street, Suite 800

Alexandria, VA 22206

Tel: 703.578.4200 | Fax: 703.824.3451

[www.nabca.org](http://www.nabca.org) | [nabca.info@nabca.org](mailto:nabca.info@nabca.org)