Dimensional INSIGHT

DiveTab iPad User Guide

DiveTab iPad 1.8 User Guide

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60 Burlington Mall Road, Burlington, Massachusetts 01803

www.dimins.com

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Contents

Introduction to DiveTab **1**

DiveTab Applications 1

Distributor Advisor 1

Program Advisor 2

Supplier Advisor 3

Requirements 3

Getting Started **5**

Installing DiveTab 5

Opening and Connecting 11

Navigating 13

Logging Out 16

Using DiveTab Offline 17

Page Types **19**

Menu Pages 19

Submenus 20

Data Pages 22

A Closer Look at Data Pages 24

Bookmarks 27

Dive Dimensions 28

MultiColumns 30

QuickViews 34

Subsets 37

DivePort Pages 38

Document Pages 40

Export Pages 41
Presentation Pages 43
Repository Pages 46
Stamp Pages 48
Editing a Stamp Page 50
Using a Stamp 55
Web Pages 58
About Using Data Pages 61
Adding and Removing MultiColumns 62
Adding Bookmarks 66
Changing the Text Size 70
Creating Subsets 73
Diving on Data Values 80
Editing Dimensions and Columns 89
Switching Dimensions 92
Using QuickViews 94
Sharing Data Using the Output Button 97

Introduction to DiveTab

DiveTab is the Dimensional Insight tablet-based mobile technology that provides rapid access to your data and secondary information from a central location. DiveTab works with the DiveLine server to ensure secure, controlled distribution of your data and other resources, and provides mobile users access to structured data and unstructured content.

If you have any further questions or concerns, contact DI Customer Support for assistance:

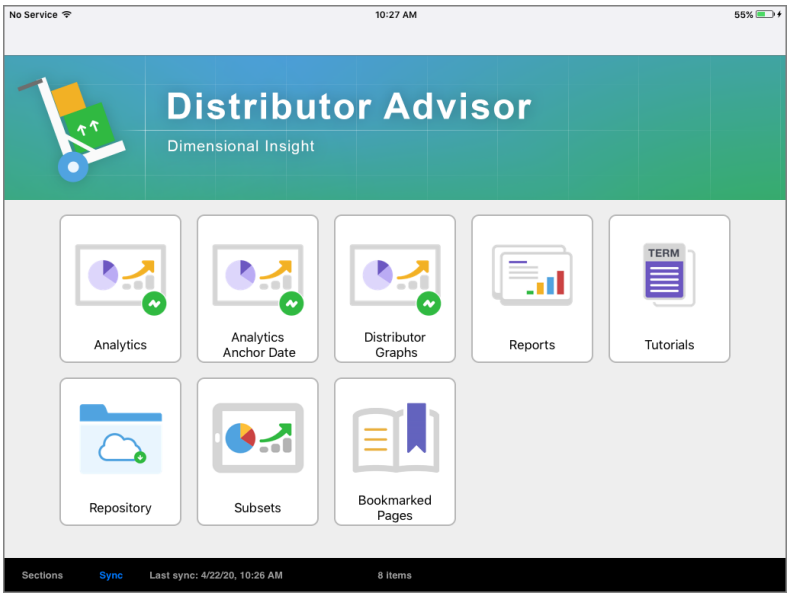
- North America: 920-436-8299 or **support@dimins.com**
- United States: **https://www.dimins.com/customer-support/**
- China: +86 20-8129-6052
- Denmark: +49 711 490 04-218
- Netherlands: +31 (0) 88-514 88 00
- Outside of the United States: **https://www.dimins.com/international/**

DiveTab Applications

Dimensional Insight has several applications built with DiveTab available on the Apple store. These DiveTab applications allow you to immediately start analyzing data without having to build from scratch. The functionality for DiveTab is applicable to all applications built with DiveTab.

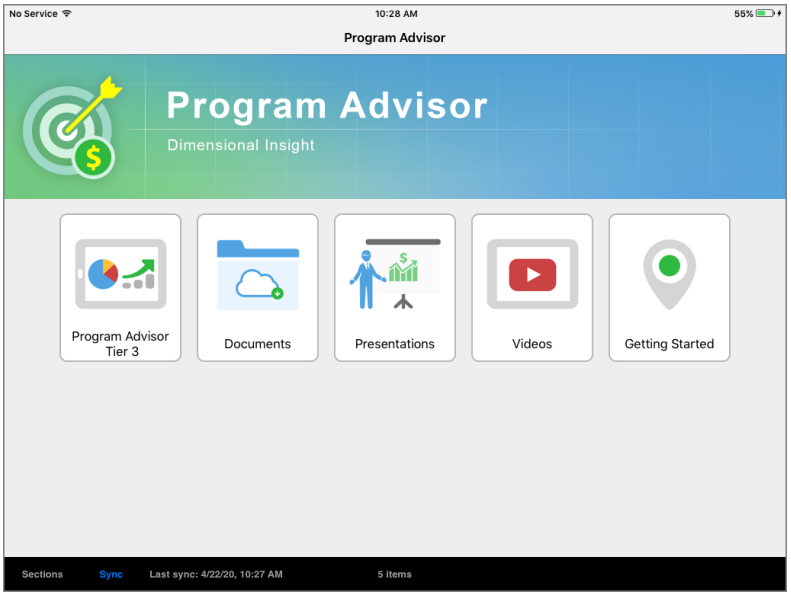
Distributor Advisor

Distributor Advisor helps improve productivity by enabling easy access to current information. Using mobile technology, Distributor Advisor users have immediate and secure access to conduct sales data analysis and review sales metrics, financial data, and promotion performance figures in the field. Quick availability of this information helps to improve account management and provides direction to capitalize on growth opportunities.



Program Advisor

Program Advisor helps manage sales programs and other goal-oriented initiatives more profitably and efficiently by automating everything from goal assignments to tracking actuals to calculating payouts to reporting the results. Sales representatives and sales support staff gain access to the information required to manage programs, promotions, incentives, placements, quotas, and goals.



Supplier Advisor

Supplier Advisor helps improve the productivity of sales teams while reducing the cost of selling. This application makes it easier for sales representatives to access and conduct data analysis and review KPI sales metrics in real time, whether they are connected or disconnected from the Internet.

Requirements

The DiveTab client on the iPad requires the following:

- An iPad, the mobile digital device produced by Apple Inc.
- iOS version 8.0 or later
- 64-bit iPad for offline mode
- A minimum of 32 GB of storage on the iPad for the DiveTab application and related data files
- An iTunes account for the App Store
- A license for the DiveTab application, issued and installed on your DiveTab site on the DiveLine server
- Access to the Internet

Getting Started

This section focuses on the basics of using DiveTab, such as getting the client, connecting to your site, and exploring the data.

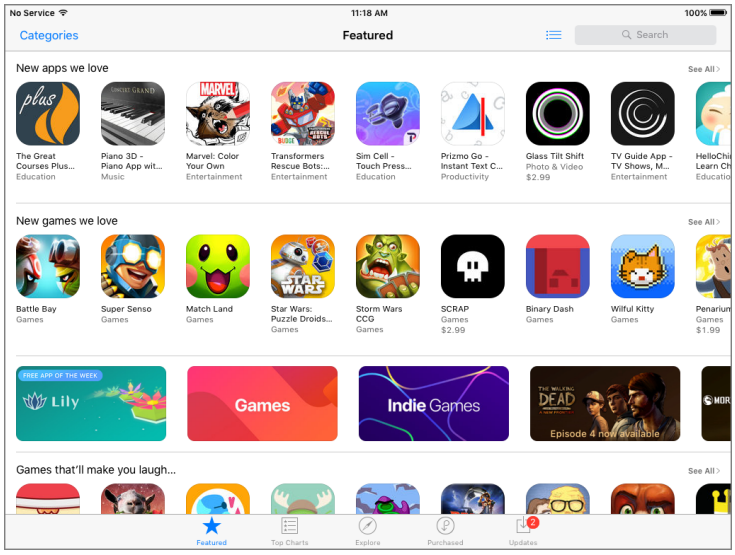
Installing DiveTab

DiveTab is available as an application on the App Store. The initial download of the application is free, as are subsequent updates.

Downloading the DiveTab application

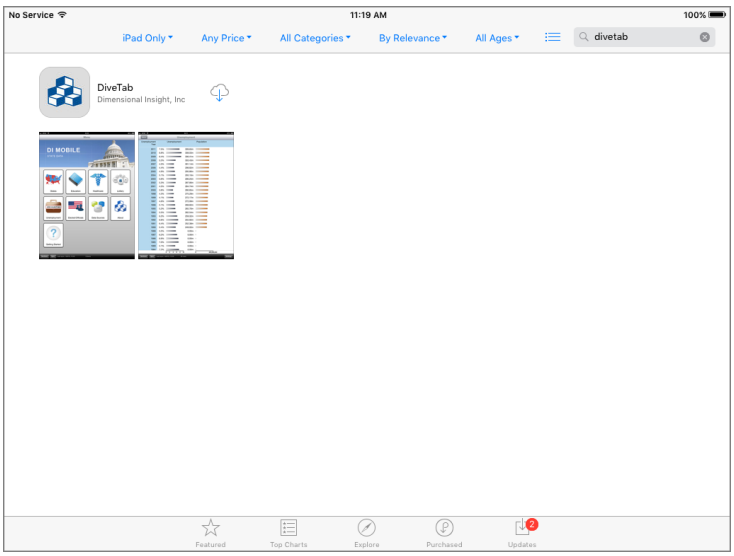
1. Tap the App Store icon.

   The App Store application opens.

2. Search for DiveTab by name, or search by the company name, Dimensional Insight, Inc.

The search results display.



3. Tap the DiveTab icon.

A window detailing more information about the application opens.

4. Tap the download icon, , to download. This might take several minutes.

   The application downloads.

5. After the application finishes downloading, return to the menu and tap the DiveTab icon, or tap **OPEN**.

   The DiveTab application opens, and synchronizes with the demo site.

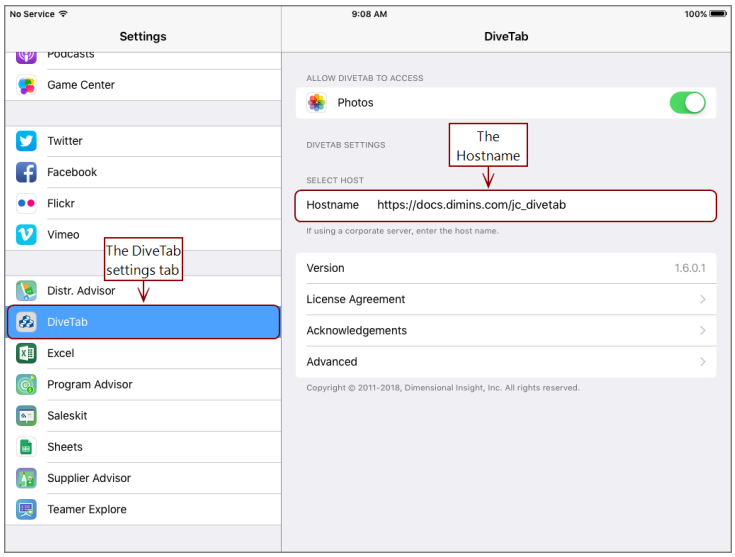
NOTE: The DiveTab application displays basic sample data if a hostname is not specified. Wait until the synchronization is completed before navigating. This might take several minutes.

Connecting to your DiveTab site

1. From the home page, locate and tap the **Settings** icon.

2. In the Settings pane on the left, scroll until you find DiveTab.
3. Tap **DiveTab**.

   The DiveTab information opens in the pane on the right.



NOTES: The DiveTab panel contains the following attributes and options in the Settings application.

- **Photos**—Allows the DiveTab application to access Photos on the iPad.
- **Hostname**—Specifies a URL for a DiveTab server. This path is initially blank.

  NOTE: As of DiveTab 1.6 and later, connections to the host server now require Perfect Forward Secrecy (PFS). If you see the message *SSL error: Secure connection to server cannot be made*, upgrade Apache Tomcat and Java to the latest supported versions.
- **Version**—Displays the current version of the DiveTab application loaded on this device.
- **License Agreement**—Displays the software license agreement.
- **Acknowledgments**—Lists copyrighted materials that require acknowledgment in the source code.
- **Advanced**—Opens the Advanced panel with additional options.
  - **Sample Data**—Turns on to display sample data.
  - **Developer**—Adds a Section with information about downloaded data.
  - **Allow multiple hosts**—Allows the caching of data from multiple hosts.

NOTE: As of iOS 10.3, **Allow self-signed hosts** is no longer an option. If a self-signed host is required, there are several ways to install a self-signed root certificate on the iOS device.

- Use Mobile Device Management (MDM).
- Send an email with the certificate to the user, open the email on the device, and install the certificate.
- Access the certificate on a website by using the Safari web browser, and install the certificate.
- Use Apple Configurator 2.

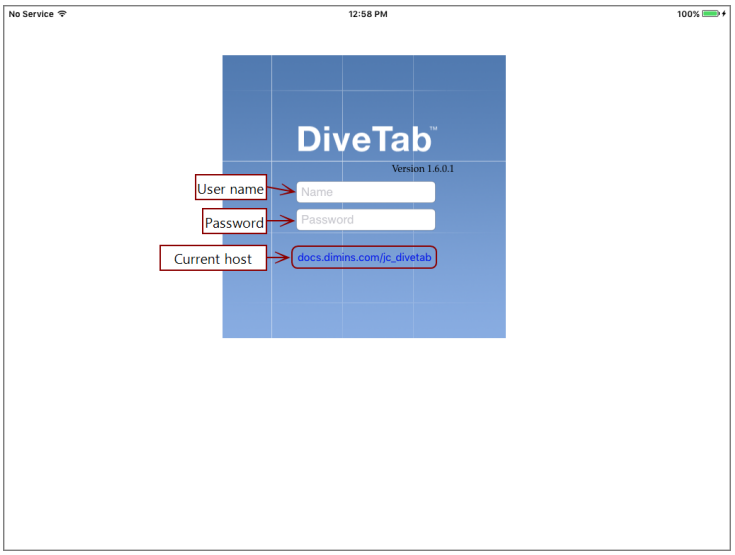
For iOS 10.3 and later, the user has to enable trust for the certificate via the Settings application, under **General** > **About** > **Certificate Trust Settings**.

The user can remove the certificate via the Settings application, under **General** > **Profiles**.

CAUTION: Allowing self-signed certificates is not recommended.

4. In the **Select Host** text box, enter the hostname for your DiveTab site. For example, https://demo.dimins.com/jc_divetab.
5. Open the DiveTab application.

   The Logon screen appears.

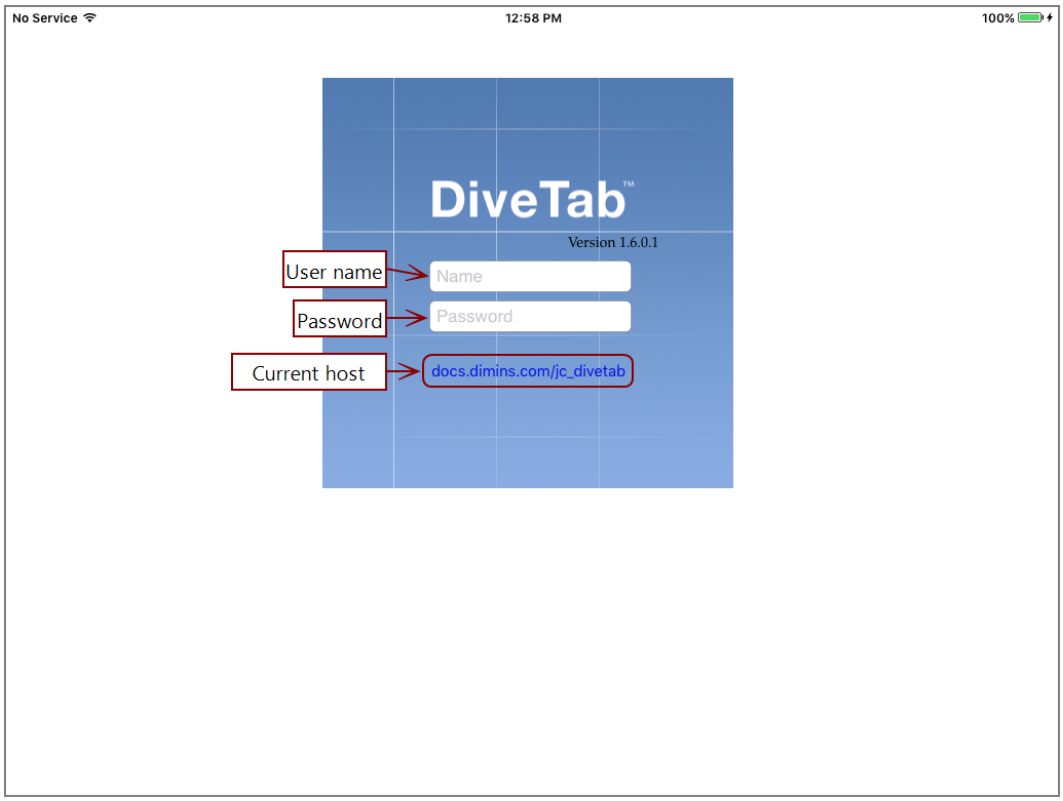


Opening and Connecting

When connecting to your DiveTab site for the first time, you need to enter a host name, username, and password to open the client.

1. Tap the DiveTab icon.

   The DiveTab client opens.

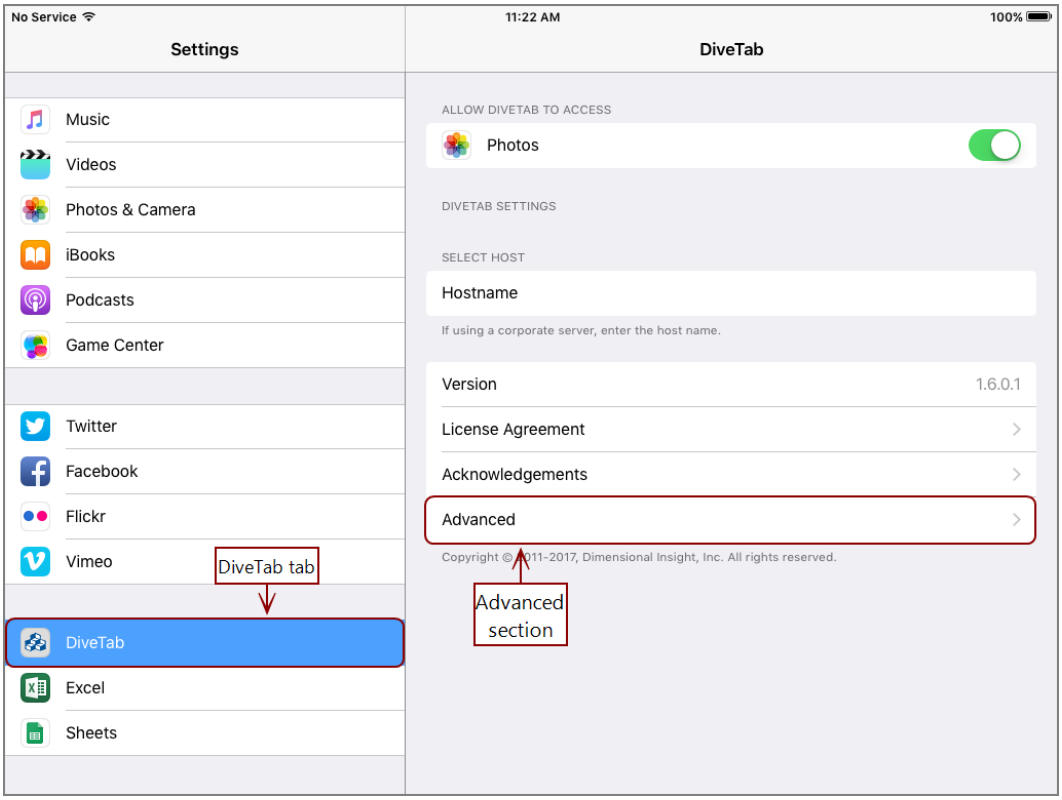
   The current host name indicates the DiveLine server where the DiveTab site is located.

   NOTE: The host name that appears is set in the Settings application. For more information, see *To connect to your DiveTab site* of Installing DiveTab on page 5.

2. If you want to keep the current host, skip to **Step 3**. If you need to change the current host, do one of the following:

- Tap the current host name, and select a host name from the list.
- Tab the current host name, select the + button, and enter a new host name.

NOTE: If you cannot add or choose a new host name, your current settings do not allow multiple host names. Open the **Settings** application, find the **DiveTab** section, and go to the **Advanced** panel. Tap **Allow multiple hosts**. For more information, see Installing DiveTab on page 5.



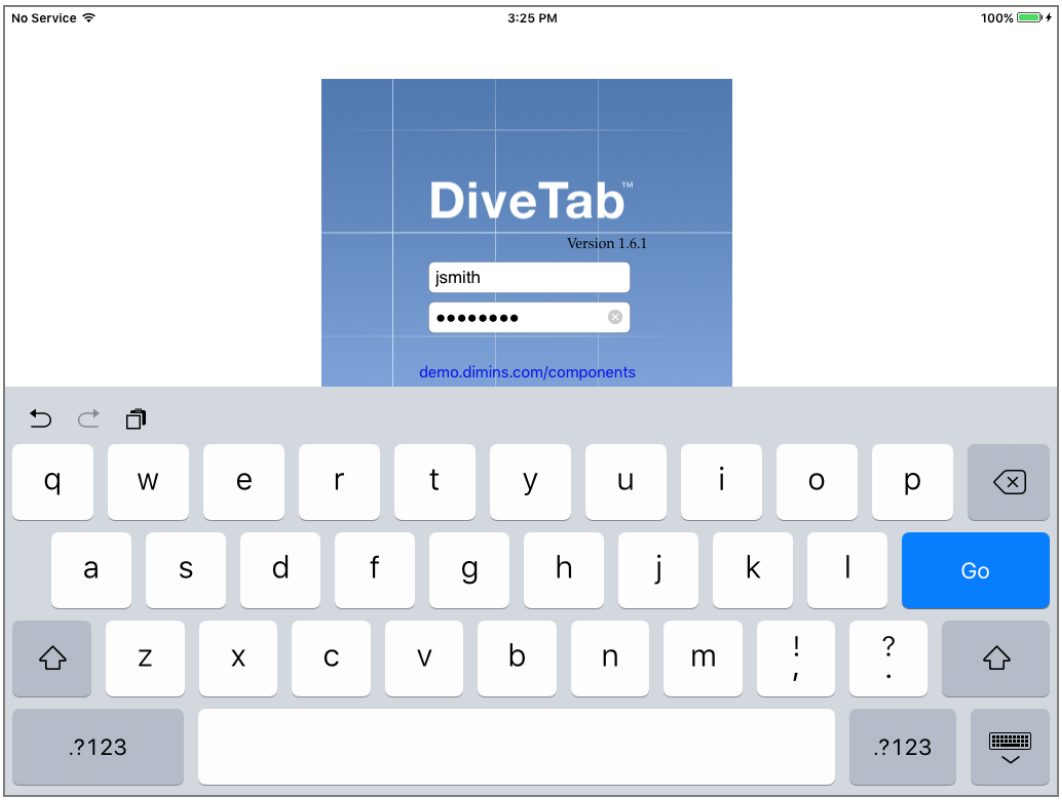
3. In the first text box, enter your user name.

   NOTE: Your user name might already be entered if you recently used the DiveTab application.

4. In the second text box, enter your password.

   CAUTION: When entering your password, the individual letters are displayed. Connect to DiveTab before presenting to other individuals.

5. Select **Go** from the keyboard to log on to the DiveTab site.

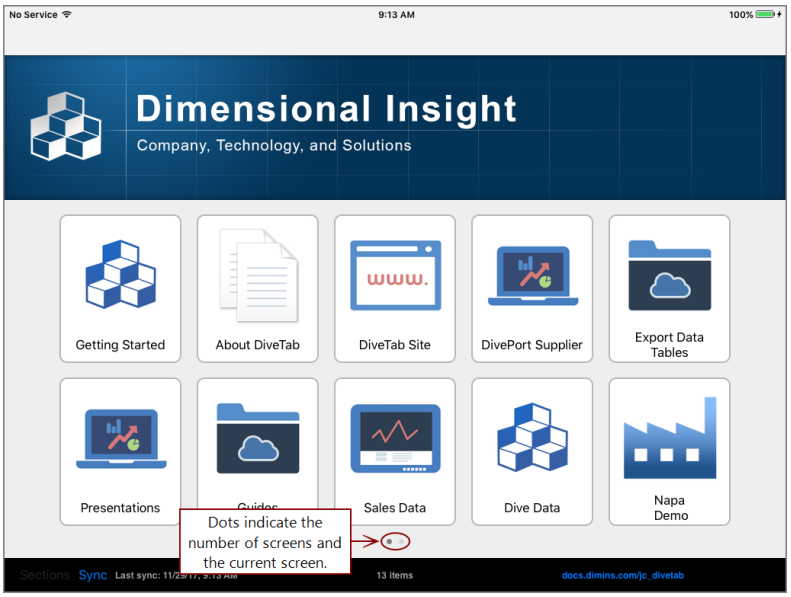


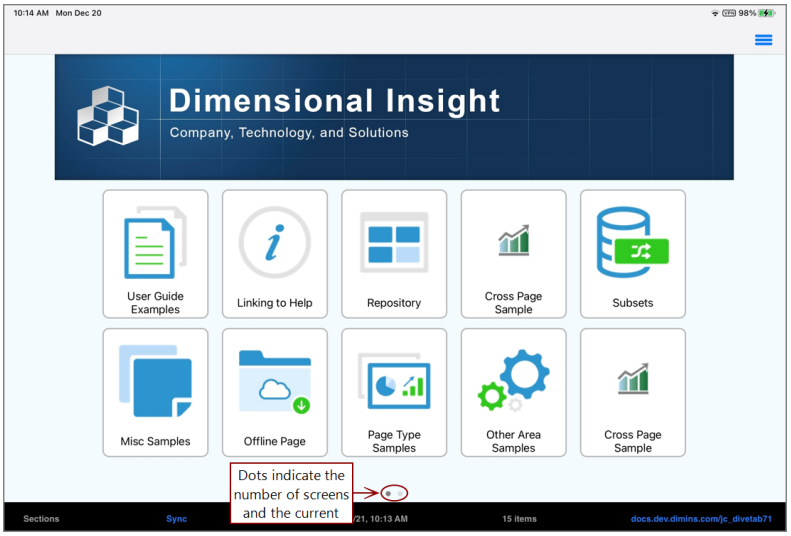
NOTE: First access triggers synchronization automatically. On subsequent visits, tap the **Sync** button on the lower left to apply recent application updates and refresh cached data.

Navigating

After logging into the DiveTab site, the main menu, or landing page, displays.

Here is an example of a main menu page.





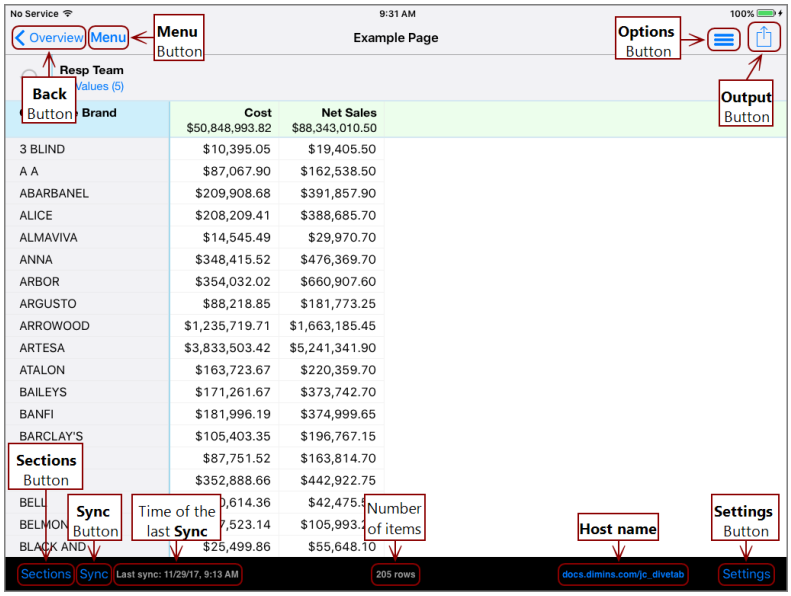
If there are more buttons than can be displayed on the screen, you can swipe left or right to view the other screens. The presence of more than one screen shows up as dots in the center of the page, below the buttons. The number of dots indicates the number of screens, and the darker shaded dot indicates which screen is currently being viewed.

The main menu page usually contains a series of buttons. Each button can lead to submenu and content pages, of which there are eight types:

- Menu Pages
- Data Pages

- DivePort Pages
- Document Pages
- Export Pages
- Presentations
- Repositories
- Web Pages

Here is an example of a Data page.



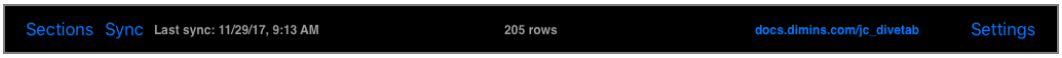
NOTE: The **Menu** button returns to the main menu page. If you have navigated more than one level, you see a **Back** button (with the previous page name) to go back one level.

In the gray bar along the top of the page, there are three or four buttons: **Menu**, the back button (if present), **Options**, and **Output**.

- **Options** gives options to bookmark data pages, edit dimensions for ad hoc pages, and save subsets. For more information, see Adding Bookmarks on page 66, Editing Dimensions and Columns on page 89, and Creating Subsets on page 73.

- **Output** provides ways to share the data, either as a *pdf* file or an Excel spreadsheet. For more information, see Sharing Data Using the Output Button on page 97.

In the black bar along the bottom of the page, there are several buttons and indicators: **Sections**, the **Sync** button, the time of the last sync, the number of items, the host name, and the **Settings** button.



- **Sections** opens a list of various data pages to choose from. You can also configure it from the **Settings** to show metadata.
- **Sync** allows the DiveTab client on your device access to the data on the server, keeping DiveTab synchronized.
- **Last Sync** information indicates when the most recent synchronization was performed.
- The number of items indicates the number of items, or buttons, on the main menu. For tabular pages, repositories, and export pages, it displays the number of data rows.
- The host name is the location of the host server site for the DiveTab project. If the host name is too long, the name is truncated using an ellipses. For example, *divetab.dimins.com/distributor-dev* becomes *divetab.dimins.../distributor-dev*.
    - If multiple hosts are allowed in the DiveTab settings, tap the hostname to see the full name under a list of **Recent Hosts**.
    - If multiple hosts are not allowed, tap the hostname to temporarily view the current user name.
- **Settings** allows you to change the text size. For more information, see Changing the Text Size on page 70.

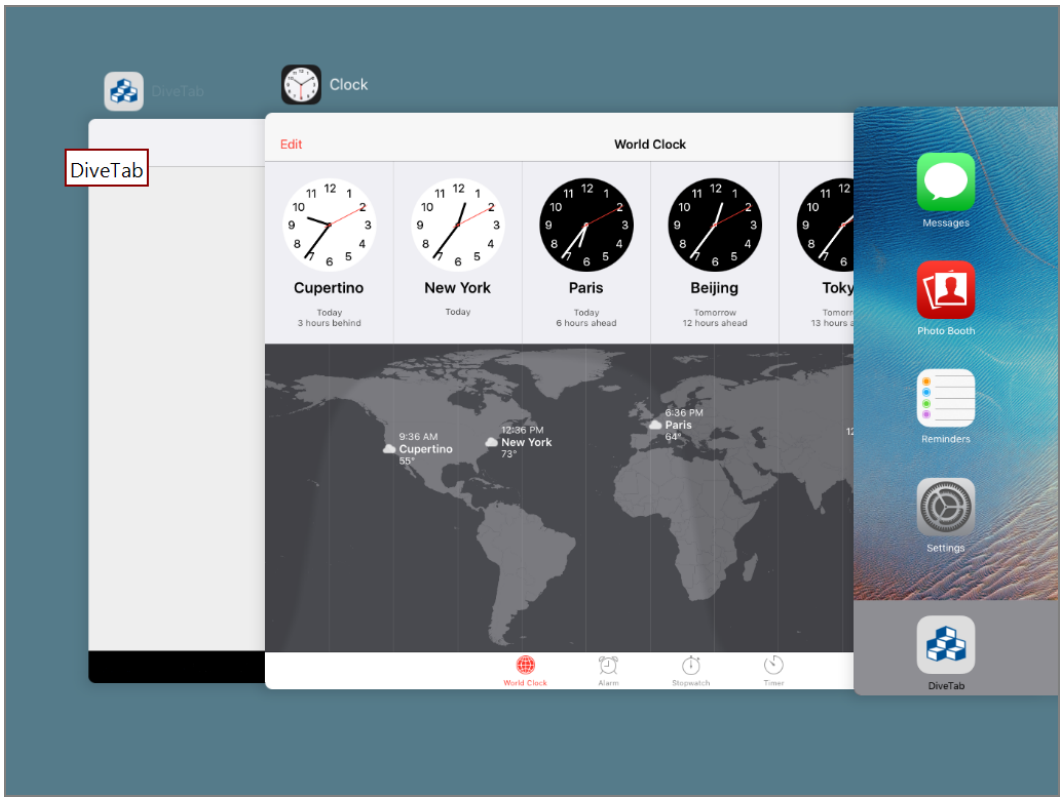
Logging Out

Make sure to log out of DiveTab at the end of your session. If your DiveTab site is not configured to automatically log out, you stay logged on, which takes up resources on the DiveLine server.

Closing the DiveTab application forces a logout action.

1. Double-press the iPad Home button.

   Current apps appear as a series of windows.



2. Swipe the DiveTab app upwards to close it.

Using DiveTab Offline

NOTE: A 64-bit iPad is required for working offline.

DiveTab pages can be configured for use offline, also known as Airplane Mode. This allows you to use the DiveTab application without access to the server or the internet. The application developer must design a data page for offline use.

IMPORTANT: Perform an initial **Sync** to cache the data while you are still online.

Keep the following in mind when planning to use DiveTab offline:

- Presentations and documents made available in their own areas and not stored in a repository are automatically accessible without an internet connection after the initial **Sync**.
- Files stored in a repository are accessible when they are downloaded locally to your device.
- Web pages cannot be accessed without an internet connection.

- Static data pages, such as Report pages without parameters or QuickViews, and Overview pages, are immediately available for viewing. Ad Hoc pages, Cross pages, Central pages, any pages containing QuickViews or parameters, and pages linked from the initial page are not immediately available for viewing. If these pages are accessed with an internet access, they are cached locally on your device and become available for offline use.

  NOTE: This means that selecting dimension value Crowe for Report Page 1, leading to the Central page Resp Team : Crowe can be accessed again when in Airplane Mode. However, since dimension value Higbee for Report Page 1 was never selected and never cached, it cannot be accessed in Airplane Mode.

  - For Ad Hoc pages, dimcount dimensions cannot be dived upon unless the results have been cached.
  - QuickView selections must be accessed and cached for a page to use that particular QuickView selection later but become single-select only once offline.
- Central pages are available offline after being previously cached. All of the values are cached, so when preload=true, they are all preloaded.
  - With no filters, it takes minimal time, but with too large of a cBase to download, the preload will take longer. Remove the tag if the cBase is more than 200 Megabytes to minimize the preload-sync time.

In short, information can be made available for offline use when it is stored, or cached, on your device.

Page Types

Menus contain buttons, which link to different types of pages. These pages contain additional information in the form of data or other content pages, or are menu pages containing more buttons.

There are eight types of pages:

- Menu Pages below contain buttons that link to additional pages, and include the main menu and submenus.
- **Data Pages** present data in a tabular or free form layout.
- **DivePort Pages** open a DivePort site within the DiveTab client.
- **Document Pages** display a chosen file, such as a *pdf* or *doc* file.
- **Export Pages** contain tabular pages for export.
- **Presentation Pages** contain presentations.
- **Repository Pages** contain lists of files for download.
- **Web Pages** link to a website using the client browser.

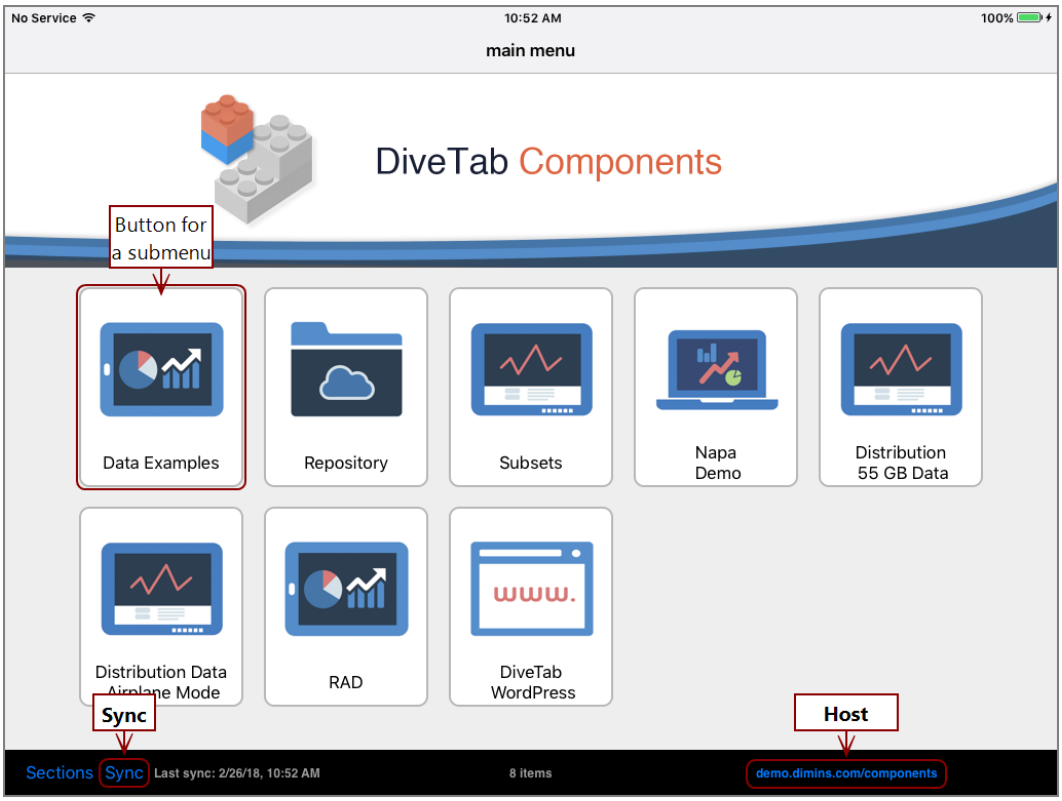
There are two other pages that you can use, depending on whether these options are utilized: Bookmarked Pages and Subsets.

For more information, see Bookmarks on page 27 and Subsets on page 37.

Menu Pages

Menu pages are used in the DiveTab application to organize content. The top-level menu typically includes a banner to identify the application, with buttons that lead to additional information. This information contains pages or additional menu pages, called **submenus**.

Here is an example of a main menu.



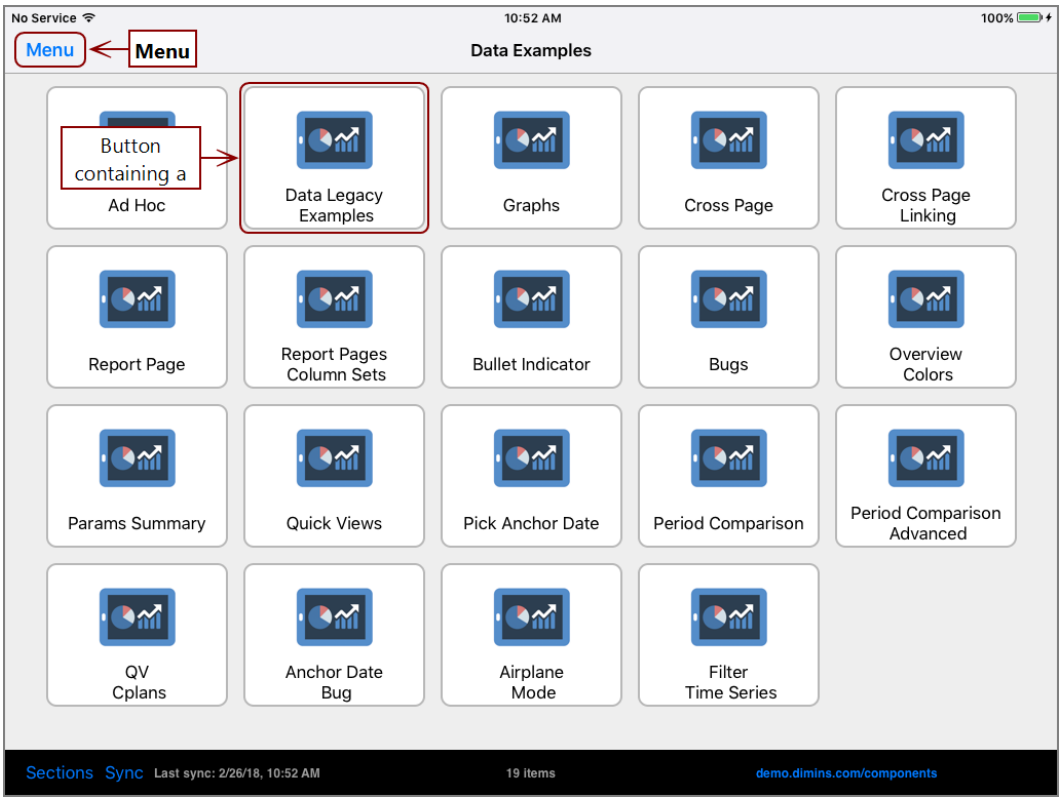
The **Sync** button on the bottom left synchronizes the DiveTab client with the data on the server.

The current host name on the lower right indicates the DiveTab site location.

Submenus

Menus can contain additional menu pages, or submenus, within the main menu. There is no limit on the number of submenu pages.

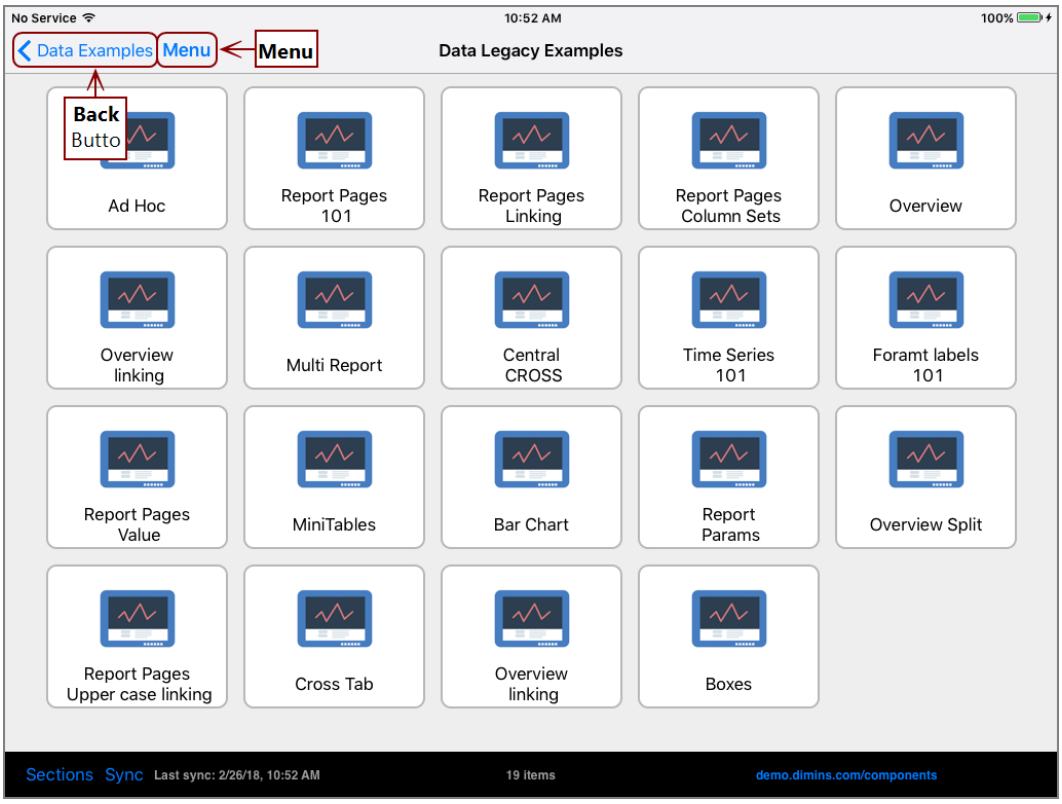
Here is an example of a submenu in the Data Examples button. It contains various pages linked to additional information, including another submenu.



Notice the **Menu** button in the top left. The Menu button returns you to the main menu.

NOTE: The **Menu** button is present on all pages except the main menu.

Here is an example of a submenu contained within a submenu.



Notice the button in the upper left, next to the **Menu** button. This is the **Back** button. The **Back** button changes to reflect the title of the previous page.

NOTE: If there is more than one degree of separation between the main menu and the current page, the **Back** button appears.

Data Pages

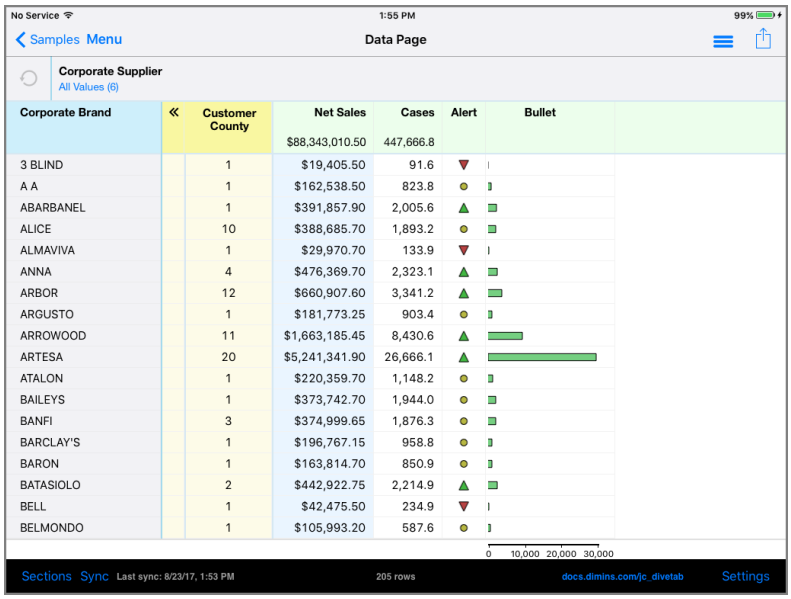
There are two types of data pages:

- Tabular
- Free-form

A tabular data page can include multiple dimensions, summaries, and information fields. Each column has standard and configurable context menus, accessible by tapping the column heading. This includes sorting values, finding values by prefix, adding columns, switching dimensions, and adding dimensions as MultiColumns. Tabular data pages have options for editing dimensions.

Sorting values and adding Rank, Percent, and Graph columns are typical context menu options. Adding and switching dimensions, as well as including expand columns, are configurable context menu options.

Here is an example of a tabular data page.

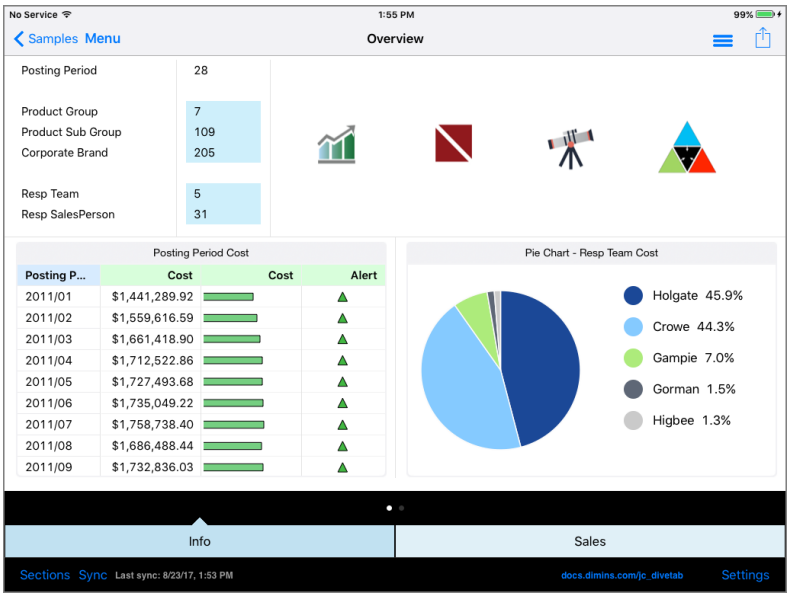


Here is another example of a different tabular page:

The free-form data page includes different methods of presenting data. This includes the use of charts, images, grids, and tables. Tables are simplified versions of tabular layout pages, and can be manipulated to fit alongside other information.

Creating a subset is a configurable option for linked free-form data pages.

Here is an example of a free-form data page.

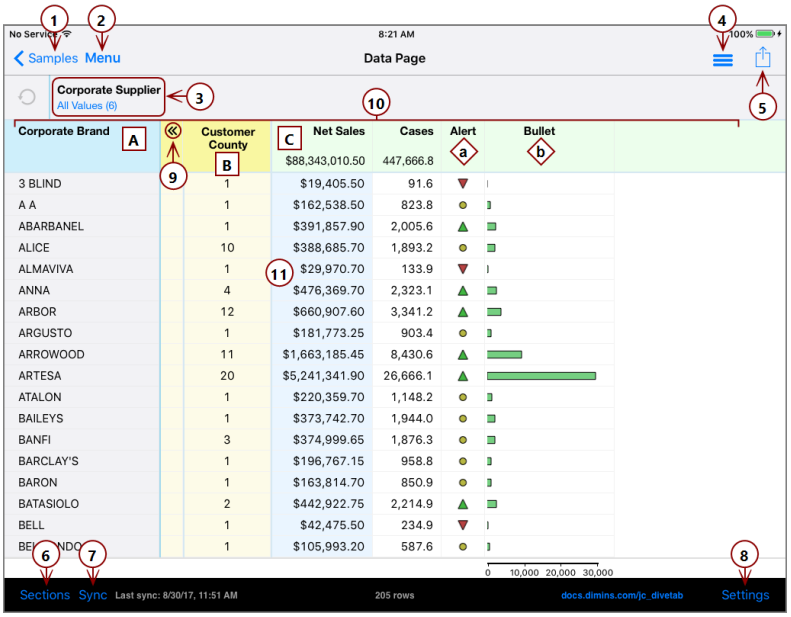


For Bar and Line charts the links are accessible through the chart values. For Pie charts, the links can be accessible through the legend and chart values.

A Closer Look at Data Pages

Data pages display data in a format specified by the developer. Data pages are versatile and have many functions that help you examine your data.

Reading a Tabular Data Page



1. The **Back Button** returns to the previous page.
2. **Menu** returns to the main menu.
3. **QuickViews** filter information by value.
4. The **Options Button** can add subsets and bookmarks, and edit dimensions.
5. The **Output Button** can share data through export, email, or print.
6. **Sections** leads to other Data Pages.
7. **Sync** synchronizes your DiveTab client data with the server data.
8. **Settings** changes the text size.
9. The chevron in the column headings indicate columns that can collapse and expand.
10. There are three column types: **Dimensions** (blue), **Dive Dimensions** (yellow), and **Summary** (green) columns.

    IMPORTANT: You can use the context menus for each column to further explore the data. Tap the column heading to open the context menu.

    A. Dimension columns contain string data. The context menu gives you options to sort, find a value prefix, and switch dimensions with Dive Dimensions.

    Sometimes dimension columns contain arrows. These arrows, , indicate that there is an option for diving on this value. Tap the icon to open the context menu, and choose a dimension to dive on.

    B. Dive Dimensions contain DimCount numbers for string data. The context menu gives you options to sort and switch Dimensions. Selecting the value allows you to dive into the data, and see the information represented by the DimCount.

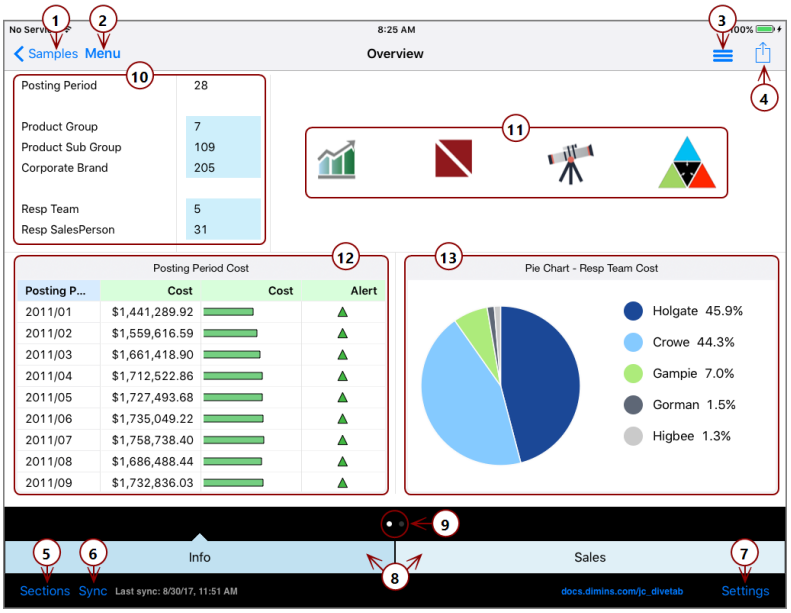
    C. Summary columns contain numerical data. The context menu gives you options to sort, expand, or collapse columns, and add a graph, rank, or percent column.

        a. Alerts display values as above, below, or between thresholds.

        b. Bullets show numerical information as a graphic, similar to bar columns.

11. Light blue-shaded cells indicate a link is present. Data page links typically lead to other data pages.

Reading a Free Form Data Page



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4. The **Output Button** can share data through export, email, or print.
5. **Sections** leads to other Data Pages.
6. **Sync** synchronizes your DiveTab client data with the server data.
7. **Settings** changes the text size.
8. **Tabs** divide the information into groups.
9. **Pages** divide the information across multiple pages. Each dot represents a page, with the lighter shaded dot representing the page currently being viewed.
10. **Grids** show specific values and data. Links are shaded light blue.
11. **Images** can be included. Images (such as a company logo) can be decorative or contain a link. This is determined by the developer.
12. **Tables** are simplified tabular data pages, and can include dimensions and summaries. Links are shaded light blue.
13. **Charts** can be included. They can appear as bar charts, line charts, and pie charts. Links might be included.

Bookmarks

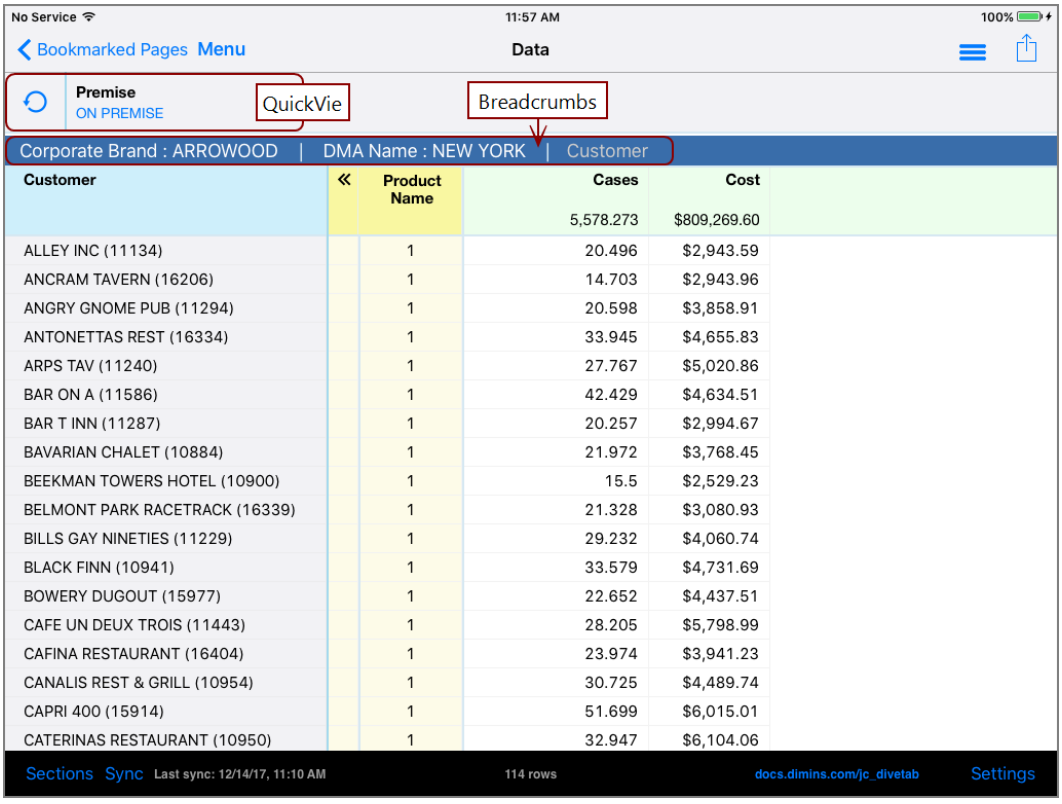
Bookmarks are used to save the current page for later access. They save the dive path and parameters in use, as well as QuickViews, which are remembered when viewing the bookmark. Bookmarks can be shared with other users by publishing them and selecting recipients. These bookmarks allow other users to view the same page with specific parameters and dives in place.

Bookmarks are created using the **Options** button, and accessed using the **Bookmarked Pages** button on the main menu.

NOTE: Bookmarks are tied to a user account. What is bookmarked on one device can be accessed from another device by the same user.

For example, the page Data is filtered using the QuickView Premise value ON PREMISE, and the Customer Dive Dimension value 114, for Corporate Brand ARROWOOD, and DMA Name NEW YORK. The resulting page is bookmarked.

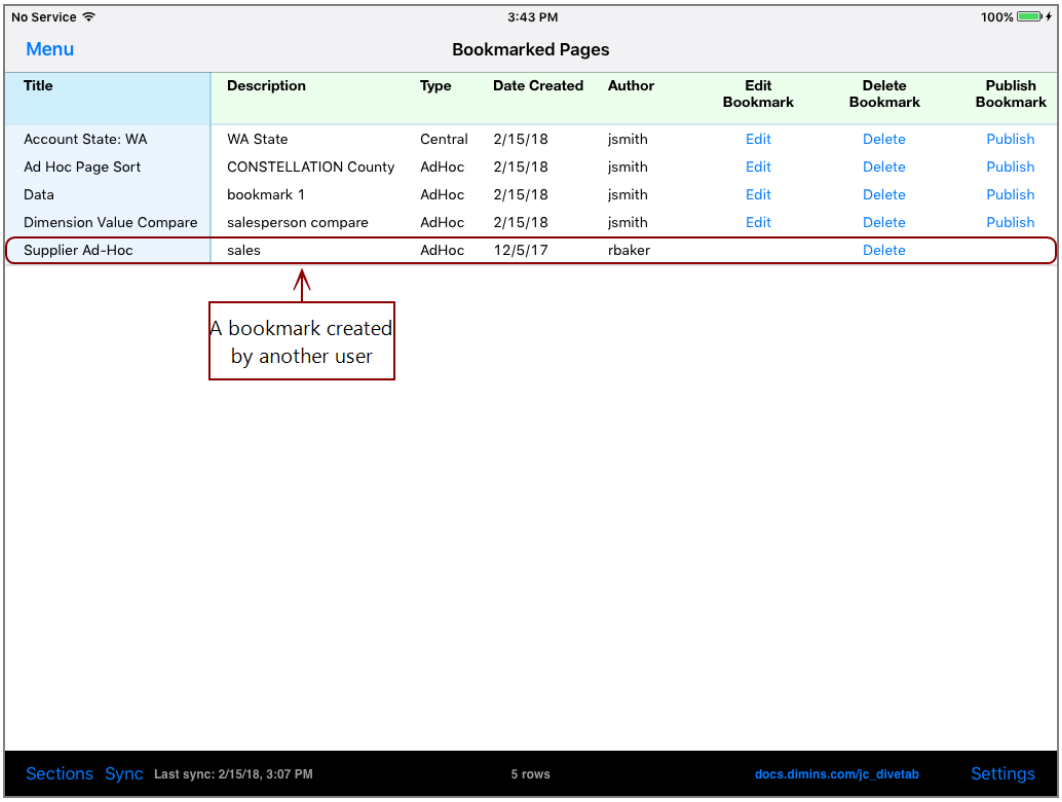
Here is the bookmarked page.



The **Back** button retraces the path taken to reach the page.

NOTE: If the bookmarked page is reached by diving, the Breadcrumbs bar appears with the dive path.

Here is an example of the Bookmarked Pages.



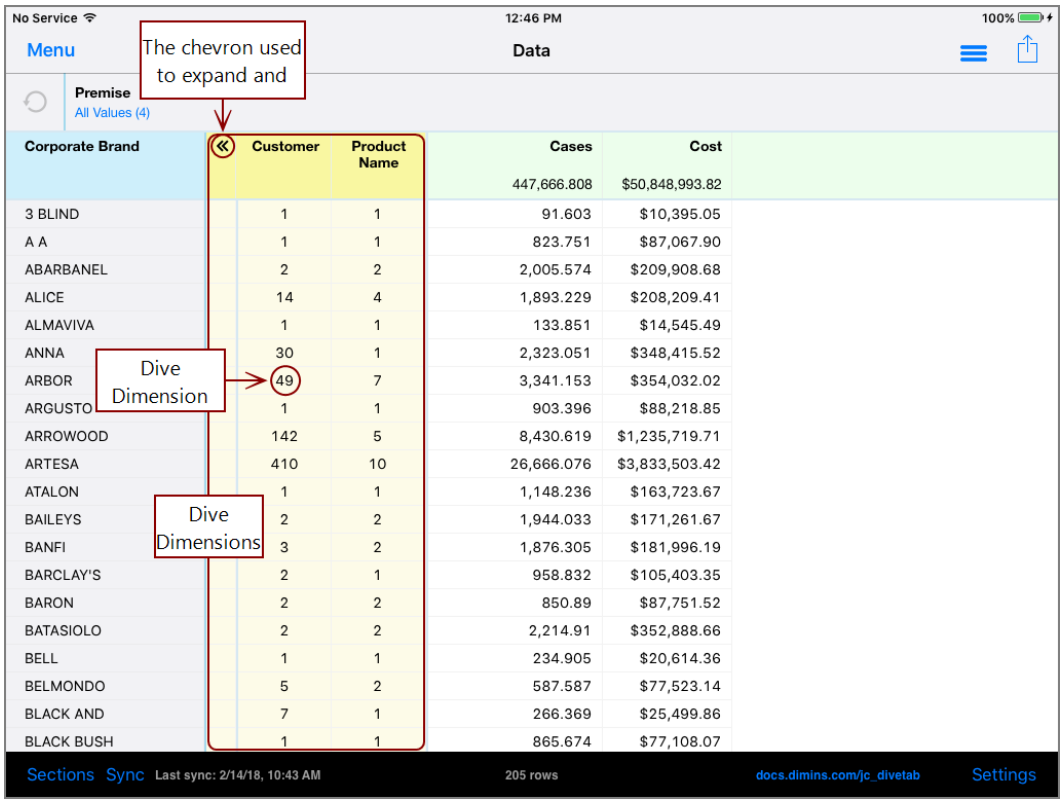
NOTE: You can edit your own bookmarks, but not the bookmarks shared with you by other users.

For more information, see Adding Bookmarks on page 66.

Dive Dimensions

The Dive Dimension displays how many values of that dimension correspond to a dimension value. Tapping the value allows you to view these values and dive on the data. Dive Dimensions are represented by yellow columns. They typically first appear as collapsed, though this can be configured differently by the developer. You use the chevron in the heading to expand the columns.

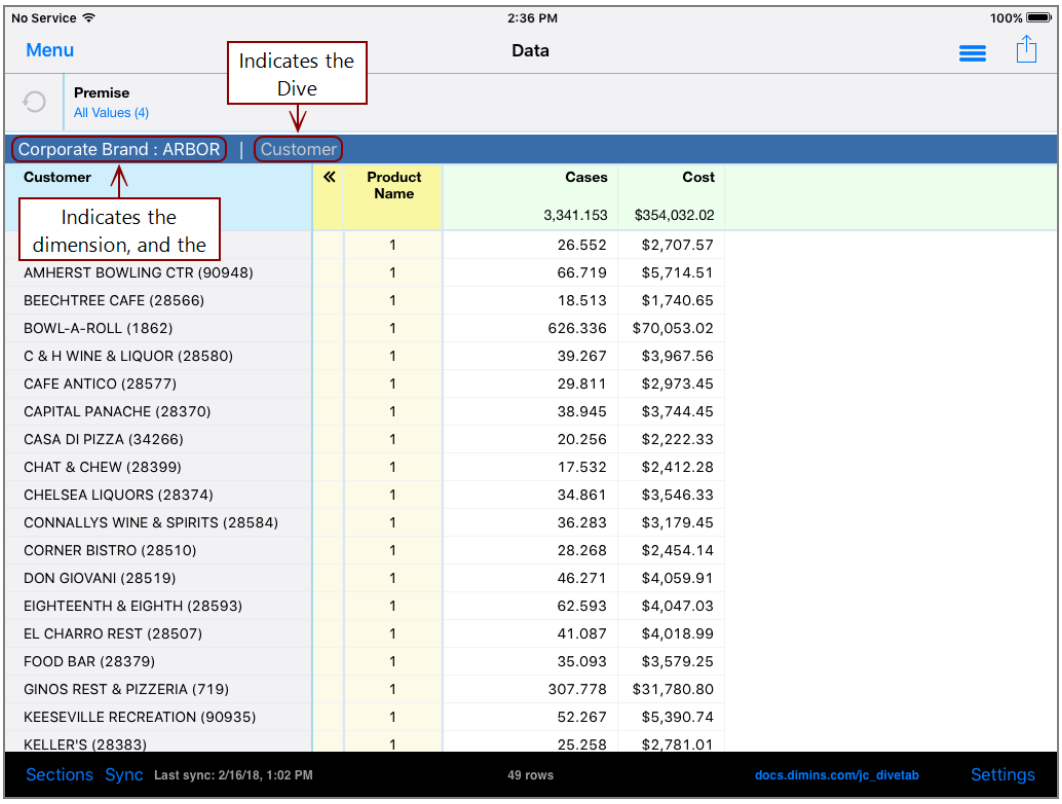
For this data page example, Dive Dimension *Customer* has value 49, which corresponds to Corporate Brand *ARBOR*. This means that ARBOR has 49 associated customers. The value, 49, is called a **DimCount**.



Corporate Brand	Customer	Product Name	Cases	Cost
			447,666.808	$50,848,993.82
3 BLIND	1	1	91.603	$10,395.05
A A	1	1	823.751	$87,067.90
ABARBANEL	2	2	2,005.574	$209,908.68
ALICE	14	4	1,893.229	$208,209.41
ALMAVIVA	1	1	133.851	$14,545.49
ANNA	30	1	2,323.051	$348,415.52
ARBOR	49	7	3,341.153	$354,032.02
ARGUSTO	1	1	903.396	$88,218.85
ARROWOOD	142	5	8,430.619	$1,235,719.71
ARTESA	410	10	26,666.076	$3,833,503.42
ATALON	1	1	1,148.236	$163,723.67
BAILEYS	2	2	1,944.033	$171,261.67
BANFI	3	2	1,876.305	$181,996.19
BARCLAY'S	2	1	958.832	$105,403.35
BARON	2	2	850.89	$87,751.52
BATASIOLO	2	2	2,214.91	$352,888.66
BELL	1	1	234.905	$20,614.36
BELMONDO	5	2	587.587	$77,523.14
BLACK AND	7	1	266.369	$25,499.86
BLACK BUSH	1	1	865.674	$77,108.07

You can dive on the Dive Dimension value, which shows the number of values specified. For example, Dive Dimension value 49 shows you the 49 Customers for Corporate Brand ARBOR. A context menu can switch Dimensions with Dive Dimensions.

Here is the resulting tabular page after diving on value 49.



See also:

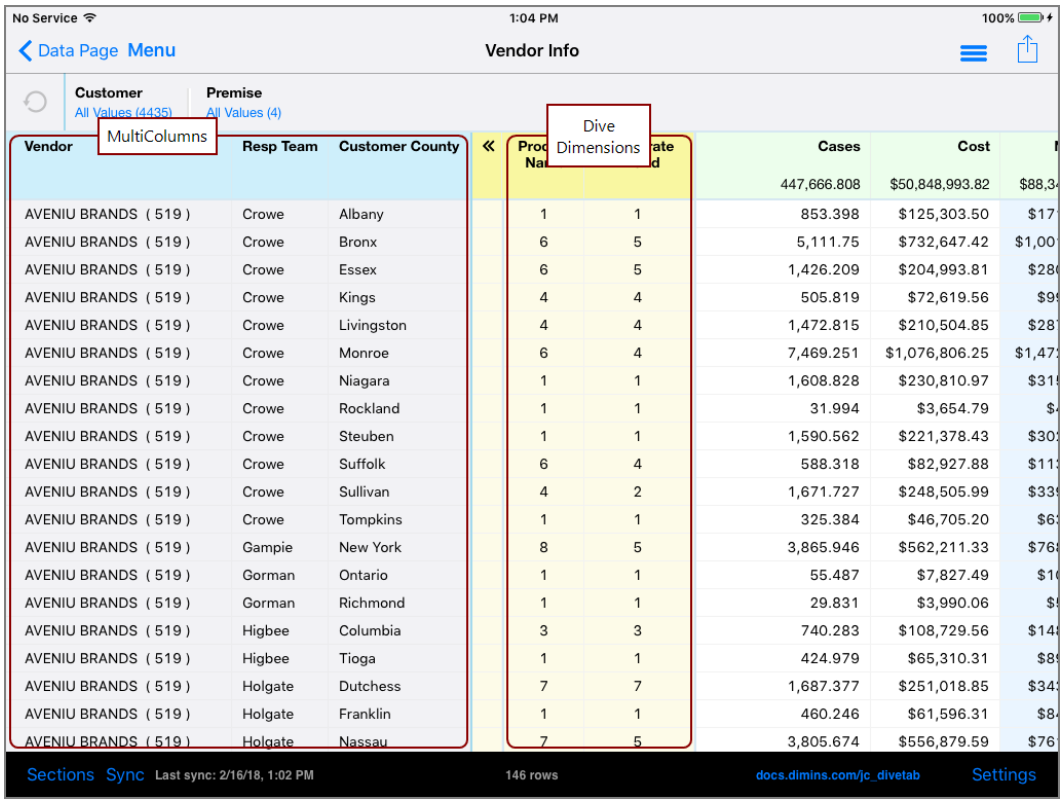
- Diving on Data Values on page 80
- Switching Dimensions on page 92

MultiColumns

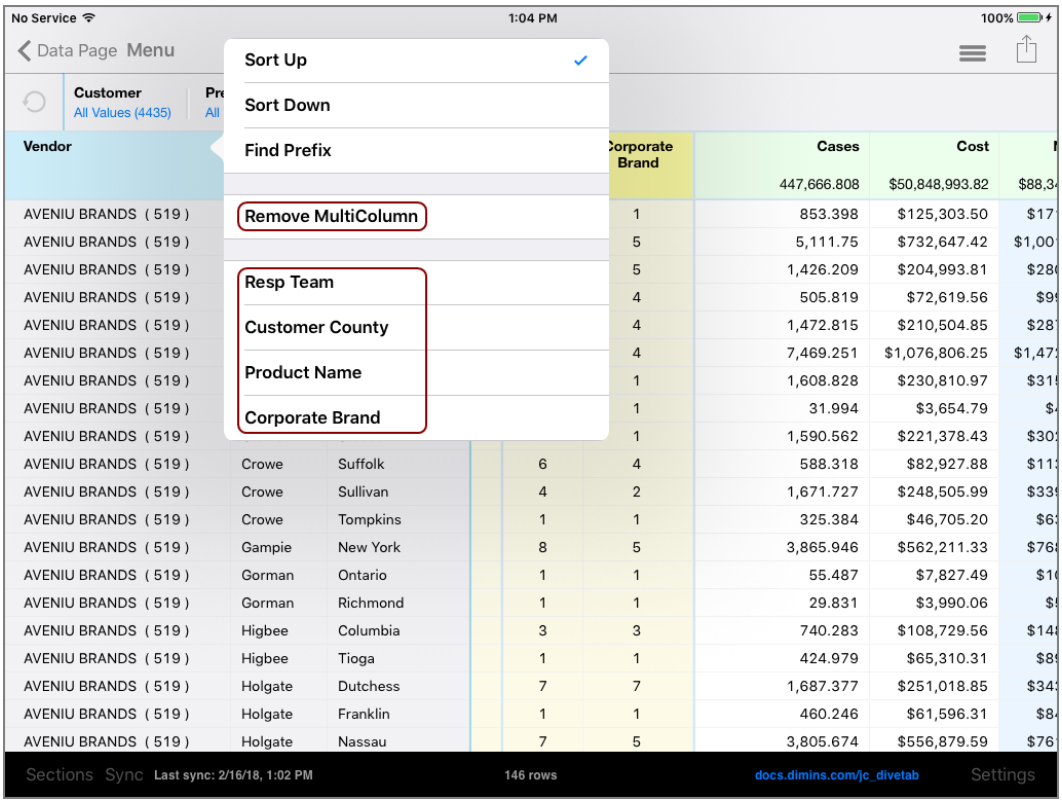
MultiColumns are dimensions (columns with blue headings), that can be switched with another dimension or Dive Dimension (columns with yellow headings). MultiColumns can be removed using the context menu and then appear as Dive Dimensions. Also, Dive Dimensions can be added as MultiColumns.

There are no limits on the number of Dive Dimensions or MultiColumns in use, and when editing dimensions any dimension can be used as a MultiColumn.

Here is an example of a data page with MultiColumns and Dive Dimensions.



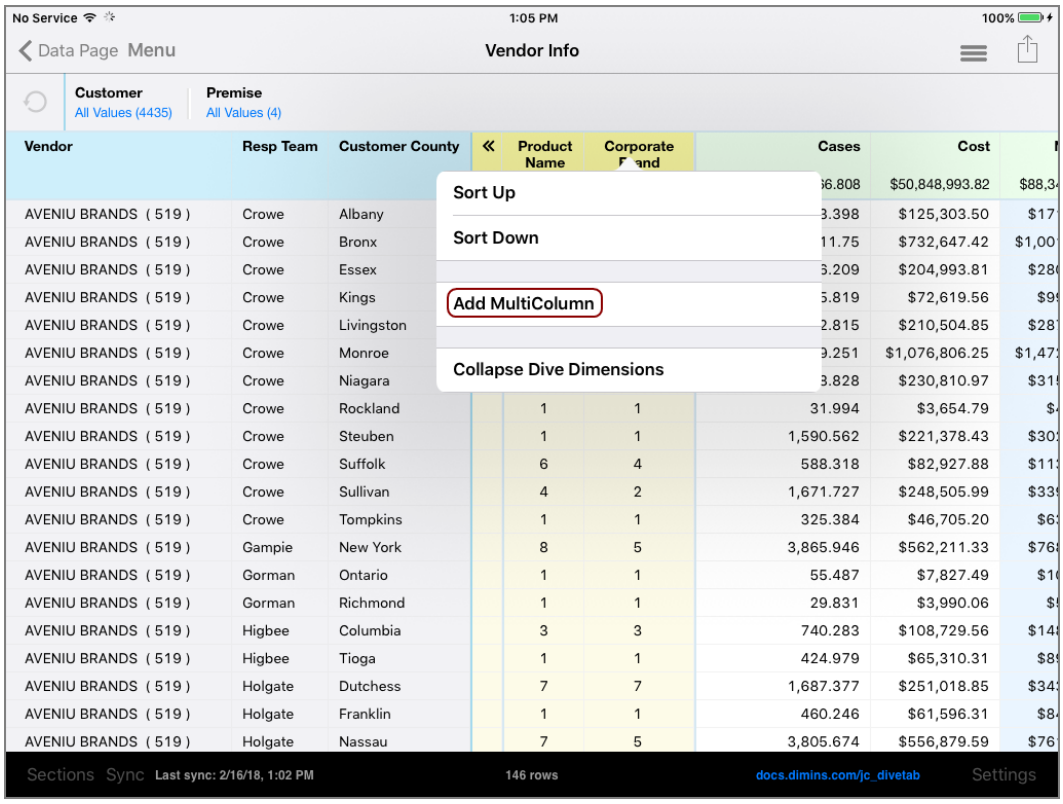
Here is an example of the context menu for the dimension.



Notice that the dimension has a context-menu option to **Remove MultiColumn** and switch with another dimension or Dive Dimension.

NOTE: You view context menus for one column at a time.

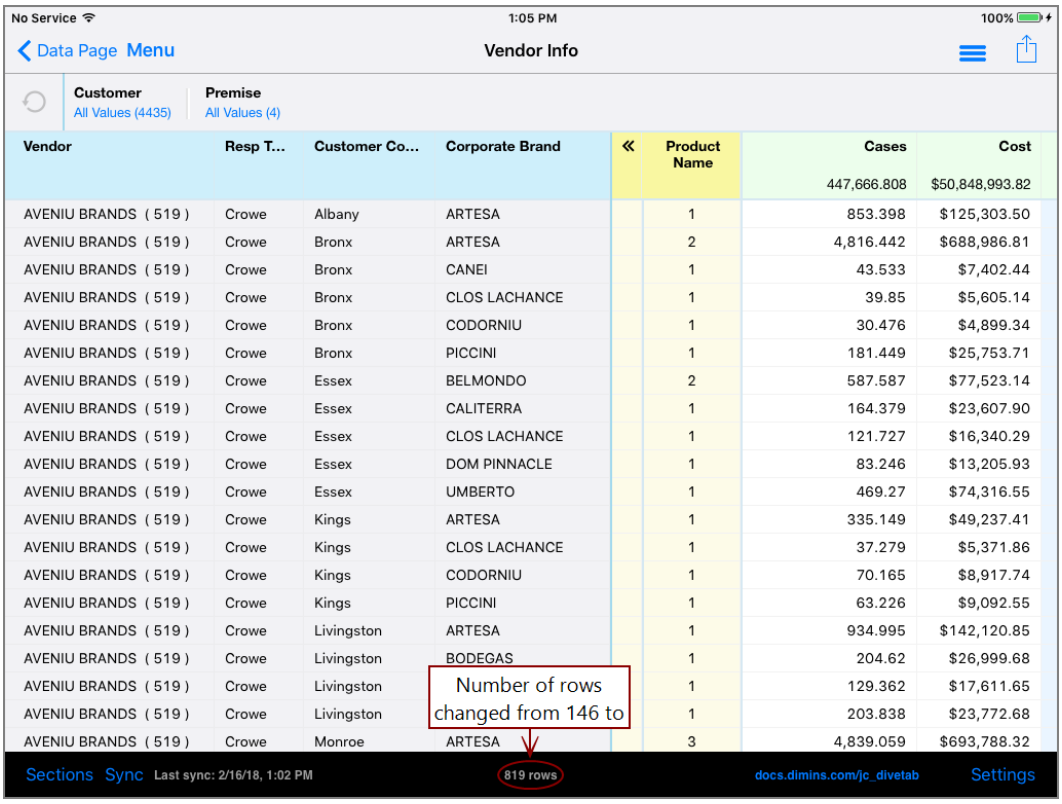
Here is an example of the context menu for a Dive Dimension.



The context menu for Dive Dimensions gives the option to add the Dive Dimension as a MultiColumn, making it a dimension.

NOTE: Typically if a Dive Dimension is not present, MultiColumns are not in use.

Here is the resulting page after Corporate Brand is added as a MultiColumn.



Vendor	Resp T...	Customer Co...	Corporate Brand	Product Name	Cases	Cost
					447,666.808	$50,848,993.82
AVENIU BRANDS (519)	Crowe	Albany	ARTESA	1	853.398	$125,303.50
AVENIU BRANDS (519)	Crowe	Bronx	ARTESA	2	4,816.442	$688,986.81
AVENIU BRANDS (519)	Crowe	Bronx	CANEI	1	43.533	$7,402.44
AVENIU BRANDS (519)	Crowe	Bronx	CLOS LACHANCE	1	39.85	$5,605.14
AVENIU BRANDS (519)	Crowe	Bronx	CODORNIU	1	30.476	$4,899.34
AVENIU BRANDS (519)	Crowe	Bronx	PICCINI	1	181.449	$25,753.71
AVENIU BRANDS (519)	Crowe	Essex	BELMONDO	2	587.587	$77,523.14
AVENIU BRANDS (519)	Crowe	Essex	CALITERRA	1	164.379	$23,607.90
AVENIU BRANDS (519)	Crowe	Essex	CLOS LACHANCE	1	121.727	$16,340.29
AVENIU BRANDS (519)	Crowe	Essex	DOM PINNACLE	1	83.246	$13,205.93
AVENIU BRANDS (519)	Crowe	Essex	UMBERTO	1	469.27	$74,316.55
AVENIU BRANDS (519)	Crowe	Kings	ARTESA	1	335.149	$49,237.41
AVENIU BRANDS (519)	Crowe	Kings	CLOS LACHANCE	1	37.279	$5,371.86
AVENIU BRANDS (519)	Crowe	Kings	CODORNIU	1	70.165	$8,917.74
AVENIU BRANDS (519)	Crowe	Kings	PICCINI	1	63.226	$9,092.55
AVENIU BRANDS (519)	Crowe	Livingston	ARTESA	1	934.995	$142,120.85
AVENIU BRANDS (519)	Crowe	Livingston	BODEGAS	1	204.62	$26,999.68
AVENIU BRANDS (519)	Crowe	Livingston		1	129.362	$17,611.65
AVENIU BRANDS (519)	Crowe	Livingston		1	203.838	$23,772.68
AVENIU BRANDS (519)	Crowe	Monroe	ARTESA	3	4,839.059	$693,788.32

See also:

- Switching Dimensions on page 92
- Adding and Removing MultiColumns on page 62
- Editing Dimensions and Columns on page 89

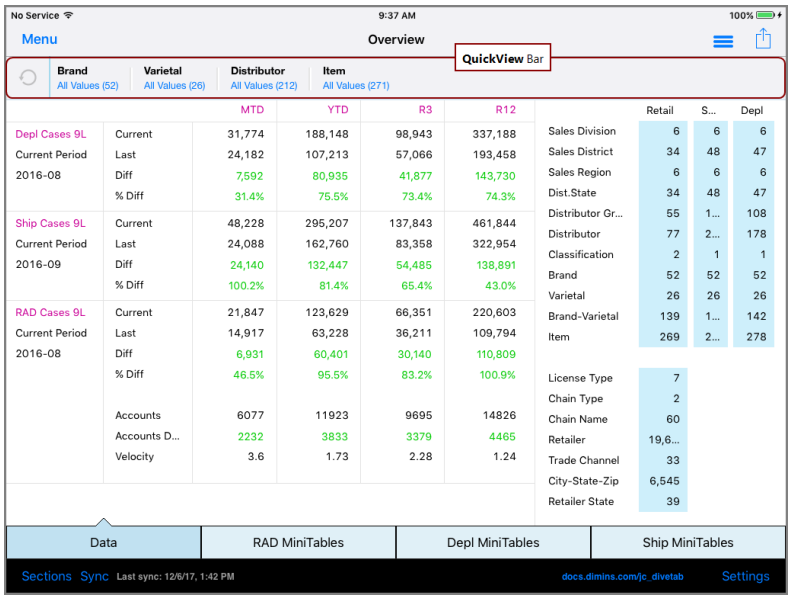
QuickViews

QuickViews are used to filter data by selecting specific values to view. Multiple QuickViews can be applied at the same time. Each QuickView is configured by the developer to allow for the selection of one or multiple values. They appear in a light gray bar at the top of the screen, beneath the menu button.

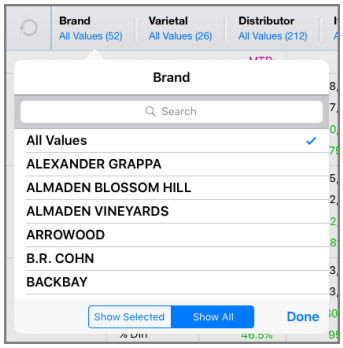
All data pages can include QuickViews.

NOTE: A 64-bit iPad and developer configuration is required to use QuickViews offline.

Here is an example of a QuickView.



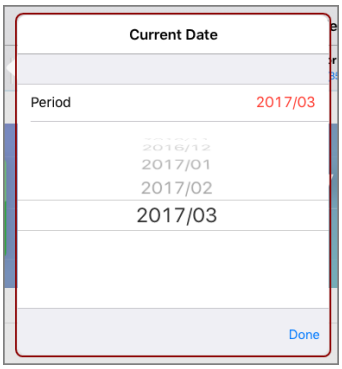
Here is an example of the Set QuickView dialog box used to choose values.



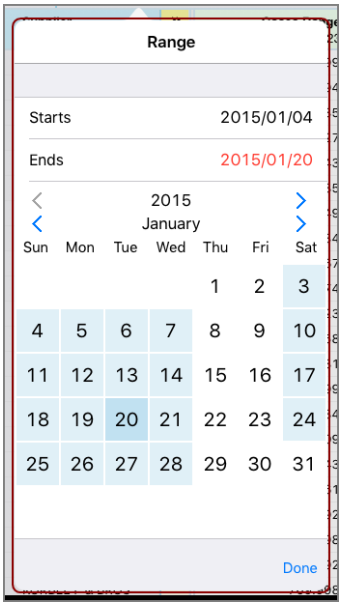
This QuickView type allows you to search for values using the search box. It returns values that contain your search term. It also allows you to Show Selected, hiding the values that are not selected. A QuickView can be limited to a single value or multiple values.

Other QuickView types use a drop-down list or a calendar to select a date or date range, and a single summary value.

Here is an example of a drop-down list in a **Set QuickView** dialog box.

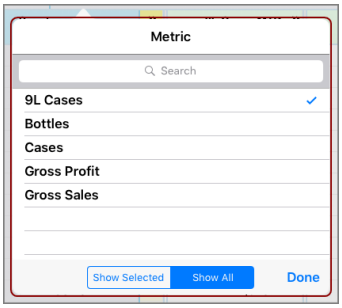


Here is an example of a calendar Set QuickView dialog box.



NOTE: The dates that are unavailable indicate no data for that calendar date.

Here is an example of a QuickView that changes the summary.



NOTE: You can only select one summary at a time.

When diving on data for a page, QuickViews carry to the resulting page. In other words, QuickViews apply to dive results.

For more information, see Using QuickViews on page 94.

Subsets

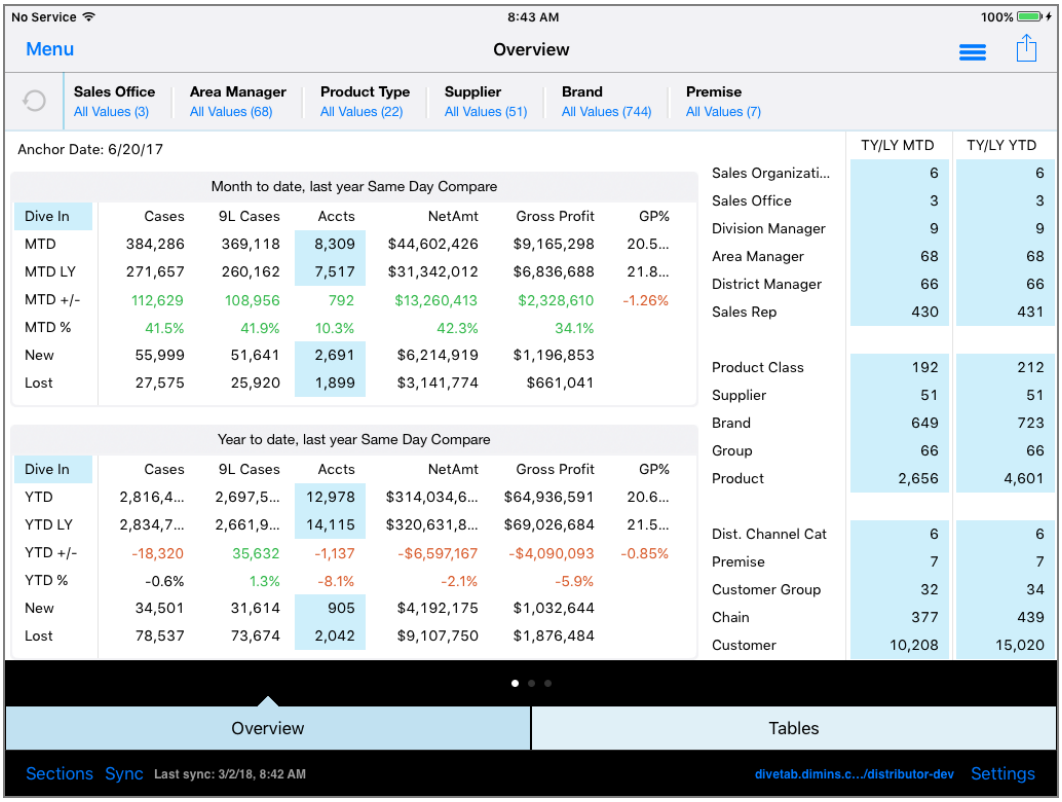
A subset takes the button and all its underlying content and filters out data that is irrelevant to a single value. Subsets save a single dimension value taken from a child free-form data page, and later applies it to the page and all linked or associated pages.

A subset is also only available to the user who created it.

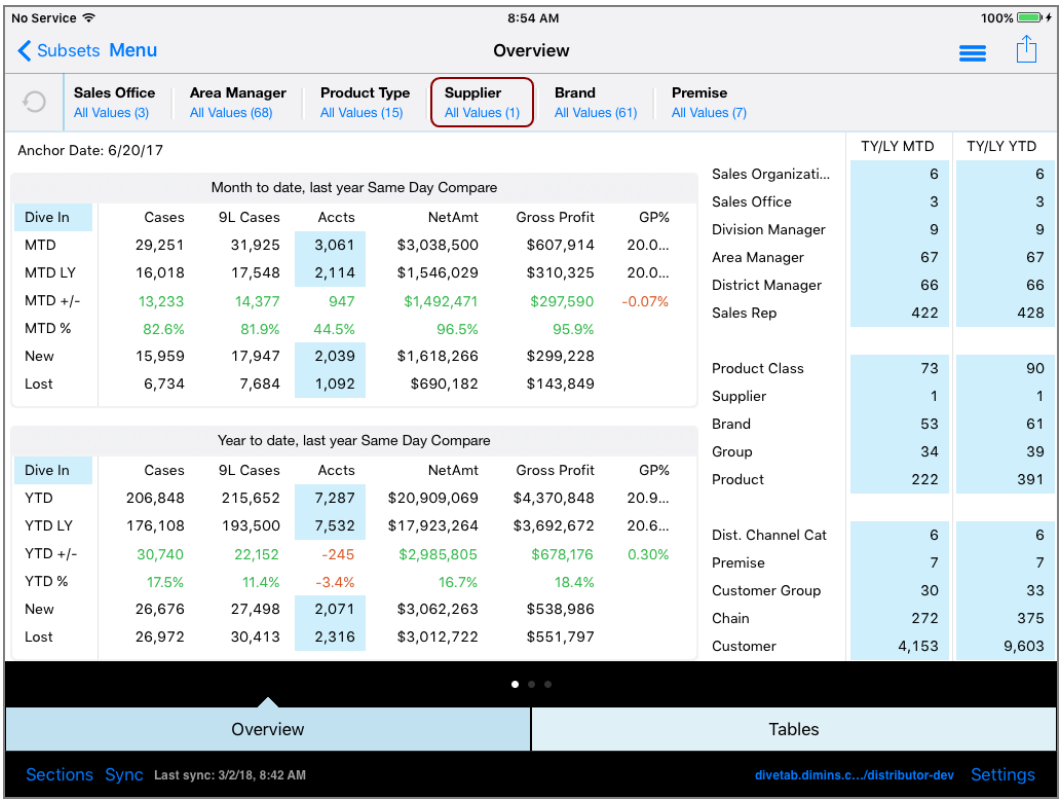
Bookmarks can save multiple filters for a specific data page of any type, and return to that specific data page with the filters applied. A subset filters with a single dimension value and applies that filter to all button content.

NOTE: Whether a linked free-form data page can create a subset is determined by the developer.

Here is the example Overview free-form data page.



Here is the same page with the subset, **Supplier: CONSTELLATION**, applied.



Notice the difference in numbers.

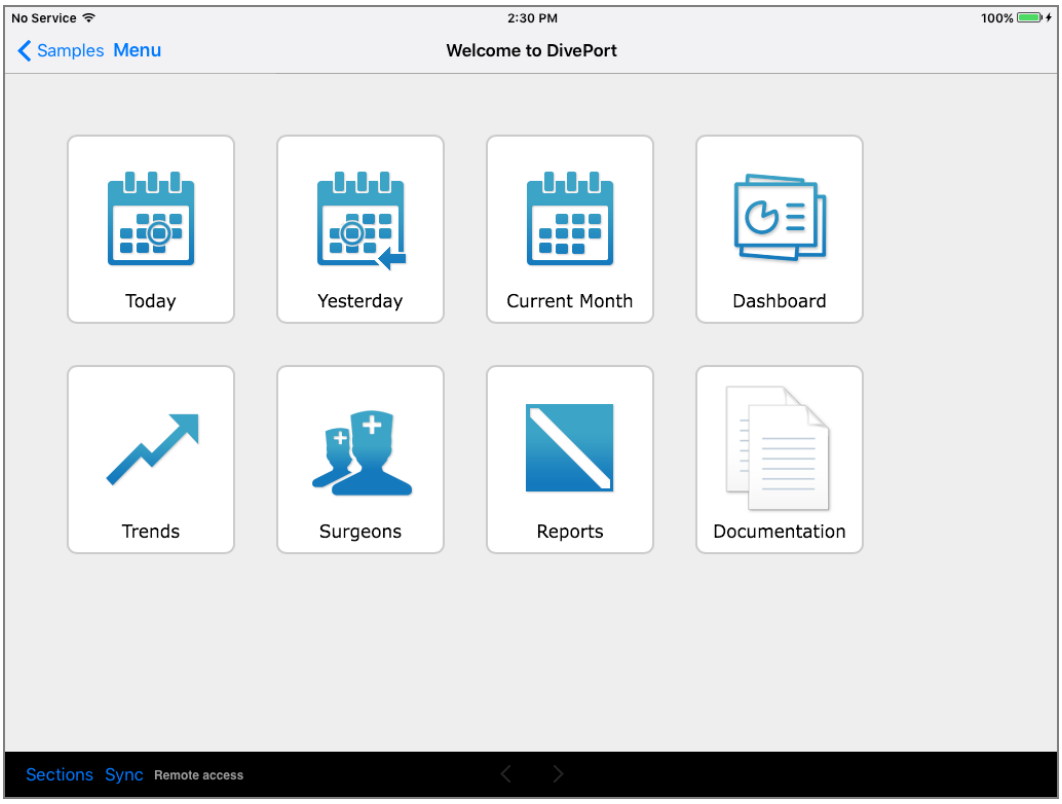
NOTE: The subset has the full functionality of the button content, but focuses on specific data.

For more information on creating, accessing, and deleting subsets, see Creating Subsets on page 73.

DivePort Pages

A DivePort page displays a DivePort application. It behaves similarly to a web page and can be navigated as it normally would in a browser. You might need to log on to DivePort, depending on configurations set by the developer. Keep in mind that DivePort usually displays in a larger window, so scrolling might be necessary to see the entire page.

Here is an example of a DivePort landing page.



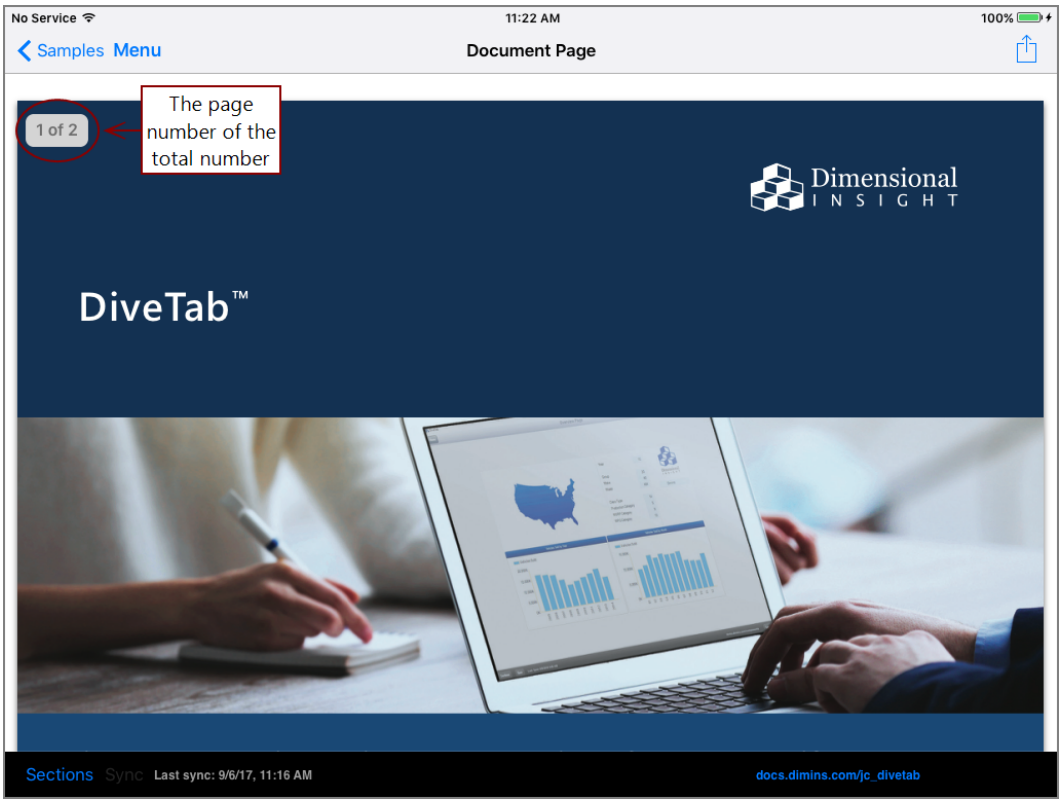
Use the navigation buttons on the top left to return to the menu page.

Here is an example of a DivePort data page.

Document Pages

A document page displays a single file that can be viewed by swiping up and down to view pages.

Here is an example of a document page.



The document initially fits the width of the screen. To zoom in, place two fingers close together on the screen and, keeping them on the surface, separate them. To zoom out, place two fingers far apart on the screen and, keeping them on the surface, bring them close together.

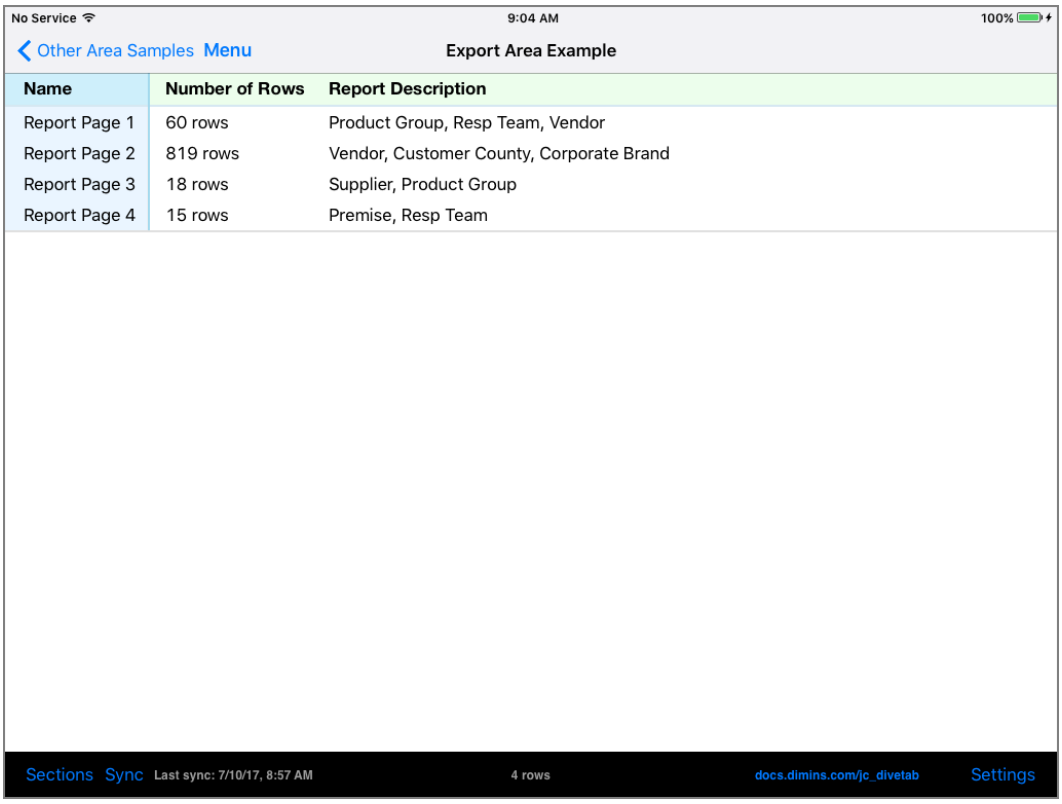
When moving through pages, the screen displays which page out of the total number of pages you are currently viewing.

NOTE: For iOS 10 and later, the **Menu** button does not appear. Use the **Back** button to return to the main menu.

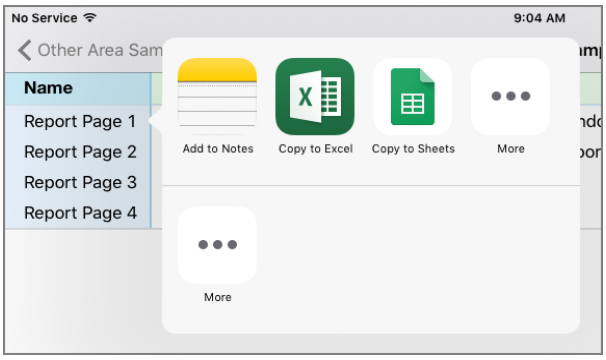
Export Pages

An Export page contains a list of simple tabular pages that are available for download.

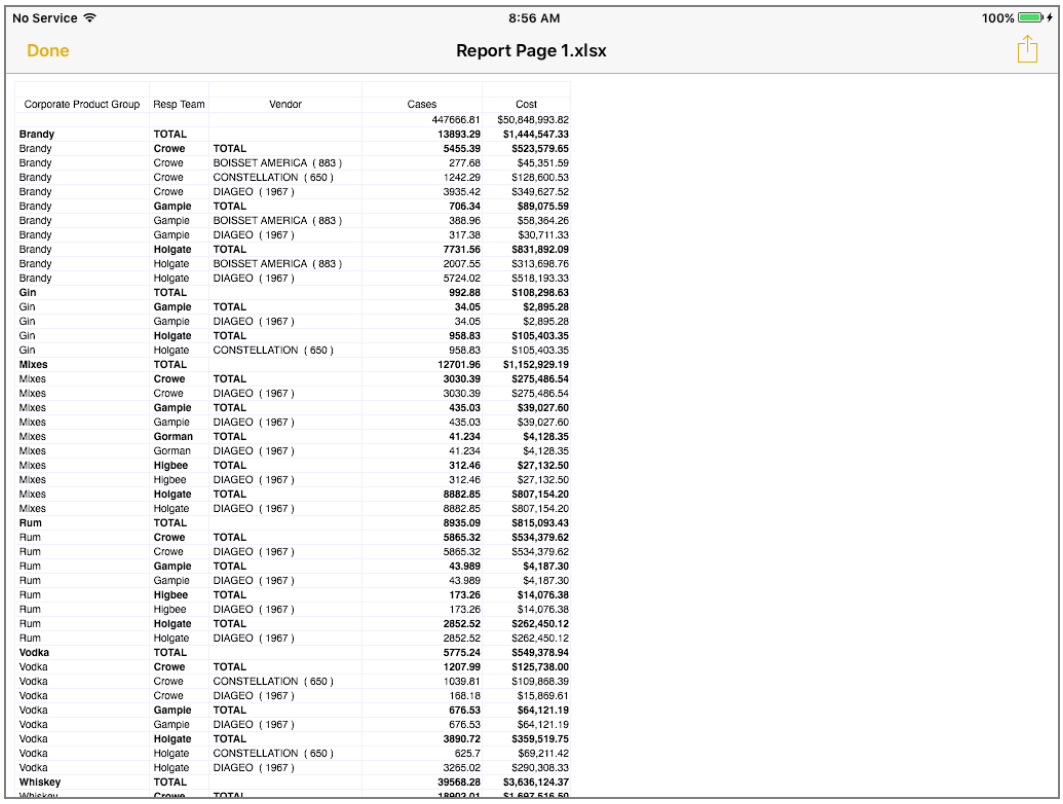
Here is an example of an export page.



Tap the page you want to export to bring up output options. The page is saved as an *xlsx* file.



Here is an example of an exported page, saved to and opened with the Notes application.

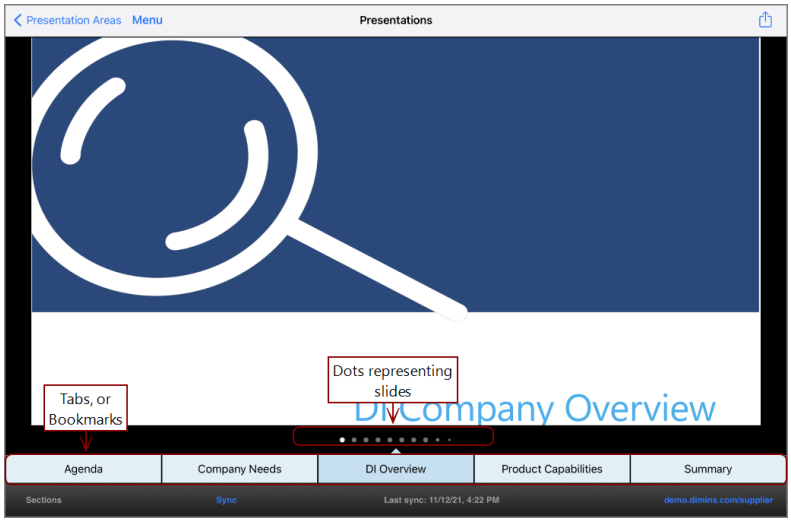


Corporate Product Group	Resp Team	Vendor	Cases	Cost
			447666.81	$50,848,993.82
Brandy	**TOTAL**		**13893.29**	**$1,444,547.33**
Brandy	**Crowe**	**TOTAL**	**5455.39**	**$523,579.65**
Brandy	Crowe	BOISSET AMERICA (883)	277.68	$45,351.59
Brandy	Crowe	CONSTELLATION (650)	1242.29	$128,600.53
Brandy	Crowe	DIAGEO (1967)	3935.42	$349,627.52
Brandy	**Gample**	**TOTAL**	**706.34**	**$89,075.59**
Brandy	Gample	BOISSET AMERICA (883)	388.96	$58,364.26
Brandy	Gample	DIAGEO (1967)	317.38	$30,711.33
Brandy	**Holgate**	**TOTAL**	**7731.56**	**$831,892.09**
Brandy	Holgate	BOISSET AMERICA (883)	2007.55	$313,698.76
Brandy	Holgate	DIAGEO (1967)	5724.02	$518,193.33
Gin	**TOTAL**		**992.88**	**$108,298.63**
Gin	**Gample**	**TOTAL**	**34.05**	**$2,895.28**
Gin	Gample	DIAGEO (1967)	34.05	$2,895.28
Gin	**Holgate**	**TOTAL**	**958.83**	**$105,403.35**
Gin	Holgate	CONSTELLATION (650)	958.83	$105,403.35
Mixes	**TOTAL**		**12701.96**	**$1,152,929.19**
Mixes	**Crowe**	**TOTAL**	**3030.39**	**$275,486.54**
Mixes	Crowe	DIAGEO (1967)	3030.39	$275,486.54
Mixes	**Gample**	**TOTAL**	**435.03**	**$39,027.60**
Mixes	Gample	DIAGEO (1967)	435.03	$39,027.60
Mixes	**Gorman**	**TOTAL**	**41.234**	**$4,128.35**
Mixes	Gorman	DIAGEO (1967)	41.234	$4,128.35
Mixes	**Higbee**	**TOTAL**	**312.46**	**$27,132.50**
Mixes	Higbee	DIAGEO (1967)	312.46	$27,132.50
Mixes	**Holgate**	**TOTAL**	**8882.85**	**$807,154.20**
Mixes	Holgate	DIAGEO (1967)	8882.85	$807,154.20
Rum	**TOTAL**		**8935.09**	**$815,093.43**
Rum	**Crowe**	**TOTAL**	**5865.32**	**$534,379.62**
Rum	Crowe	DIAGEO (1967)	5865.32	$534,379.62
Rum	**Gample**	**TOTAL**	**43.989**	**$4,187.30**
Rum	Gample	DIAGEO (1967)	43.989	$4,187.30
Rum	**Higbee**	**TOTAL**	**173.26**	**$14,076.38**
Rum	Higbee	DIAGEO (1967)	173.26	$14,076.38
Rum	**Holgate**	**TOTAL**	**2852.52**	**$262,450.12**
Rum	Holgate	DIAGEO (1967)	2852.52	$262,450.12
Vodka	**TOTAL**		**5775.24**	**$549,378.94**
Vodka	**Crowe**	**TOTAL**	**1207.99**	**$125,738.00**
Vodka	Crowe	CONSTELLATION (650)	1039.81	$109,868.39
Vodka	Crowe	DIAGEO (1967)	168.18	$15,869.61
Vodka	**Gample**	**TOTAL**	**676.53**	**$64,121.19**
Vodka	Gample	DIAGEO (1967)	676.53	$64,121.19
Vodka	**Holgate**	**TOTAL**	**3890.72**	**$359,519.75**
Vodka	Holgate	CONSTELLATION (650)	625.7	$69,211.42
Vodka	Holgate	DIAGEO (1967)	3265.02	$290,308.33
Whiskey	**TOTAL**		**39568.28**	**$3,636,124.37**

Presentation Pages

Presentation pages are files that display as slides and are organized using tabs or bookmarks. Presentations can be easily navigated by swiping left or right.

Here is an example of a presentation page.



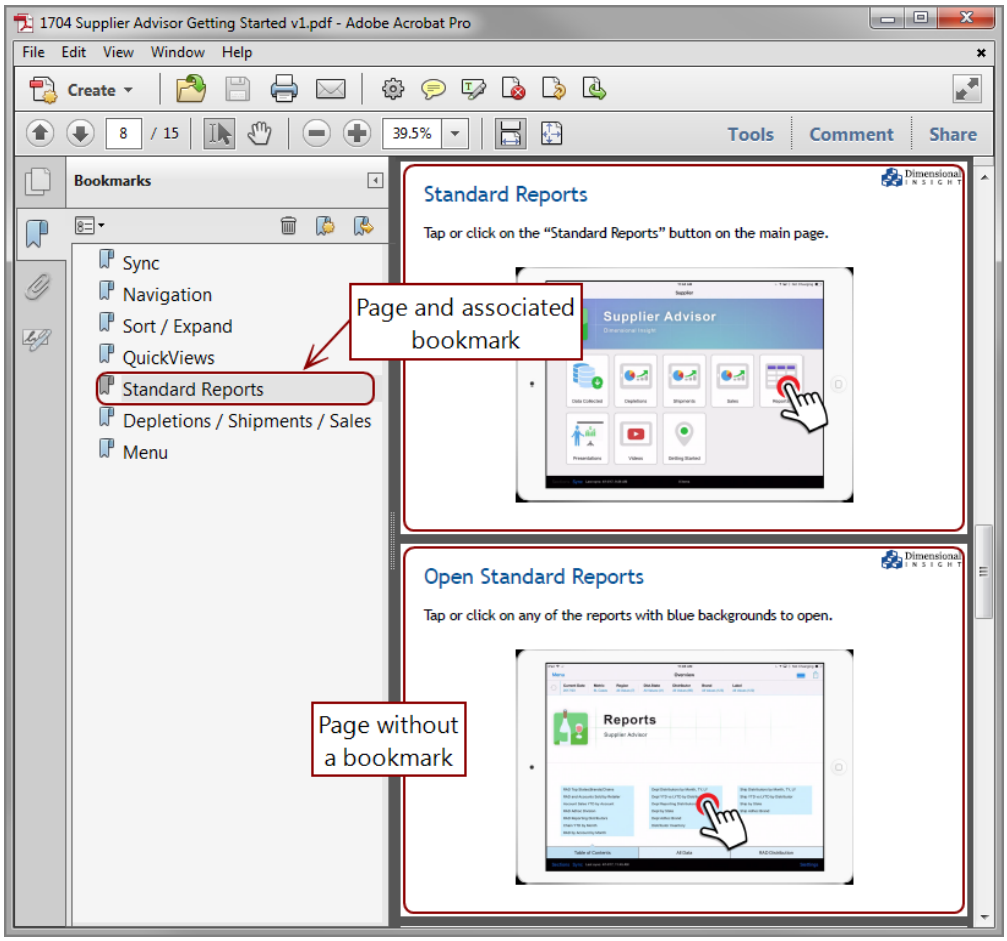
The tabs, or bookmarks, represent different sections in the presentation, while the dots in the bar above the tabs indicate the number of slides in the current section. The lighter shaded dot is the slide currently being viewed.

The header and footer are initially hidden when the presentation is opened. Tap the center of the screen to reveal them.

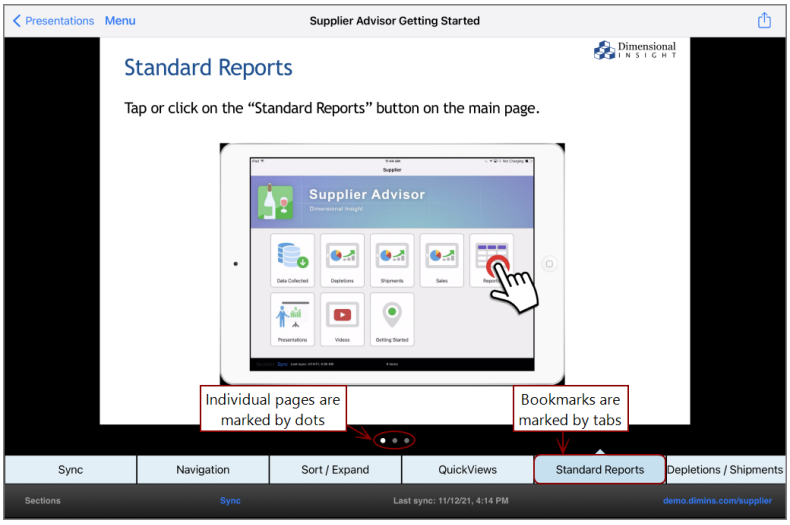
Here is how the presentation appears with header and footer hidden.

Presentation pages are *pdf* files, with the *pdf* bookmarks becoming tabs and the pages becoming slides.

Here is an example of a *pdf* file opened in Adobe Acrobat Pro.



Here is the same file as a presentation page in DiveTab.



Notice how dots represent the pages, and the tabs represent the bookmarks.

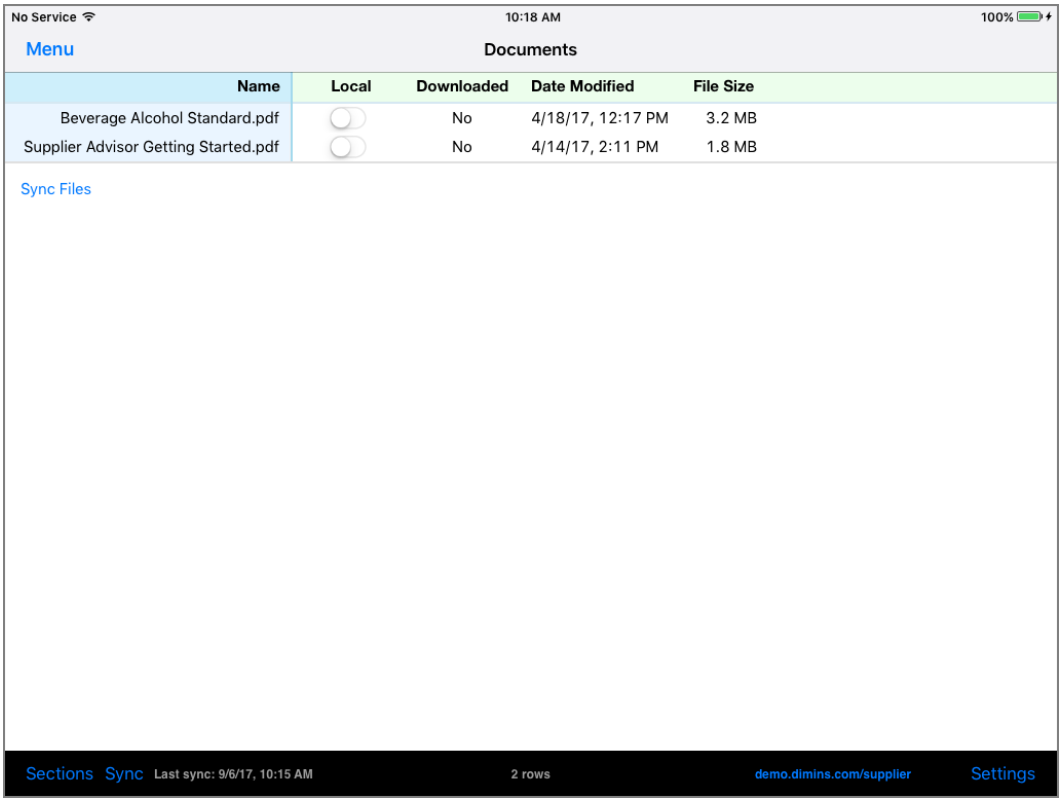
TIP: When you navigate away from the presentation and return in the same session, DiveTab recalls the last slide you viewed.

Repository Pages

A Repository page displays a list of files that are available for download.

NOTE: There is no limit on the file size, file type, or the number of files within the repository. However, *tga* files are not supported for viewing on iOS.

Here is an example of a repository page.

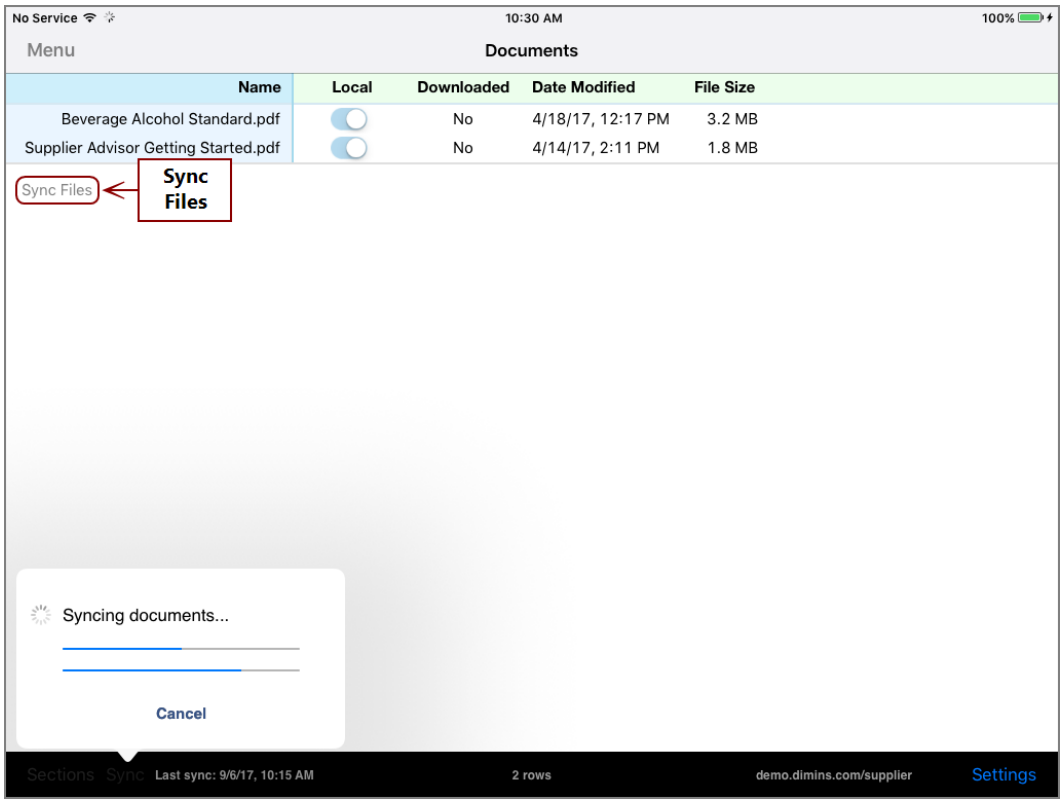


The name of the file is displayed in the first column, followed by information about whether the file is downloaded, when it was last modified, and the file size.

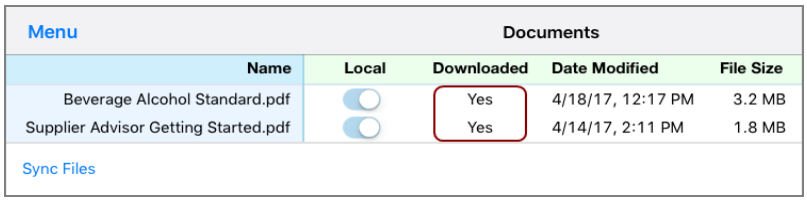
When you want to download the file, activate the switch for the Local column. Then, tap the **Sync Files** button to download the files to your device.

Alternatively, tap the name to download and view the file directly.

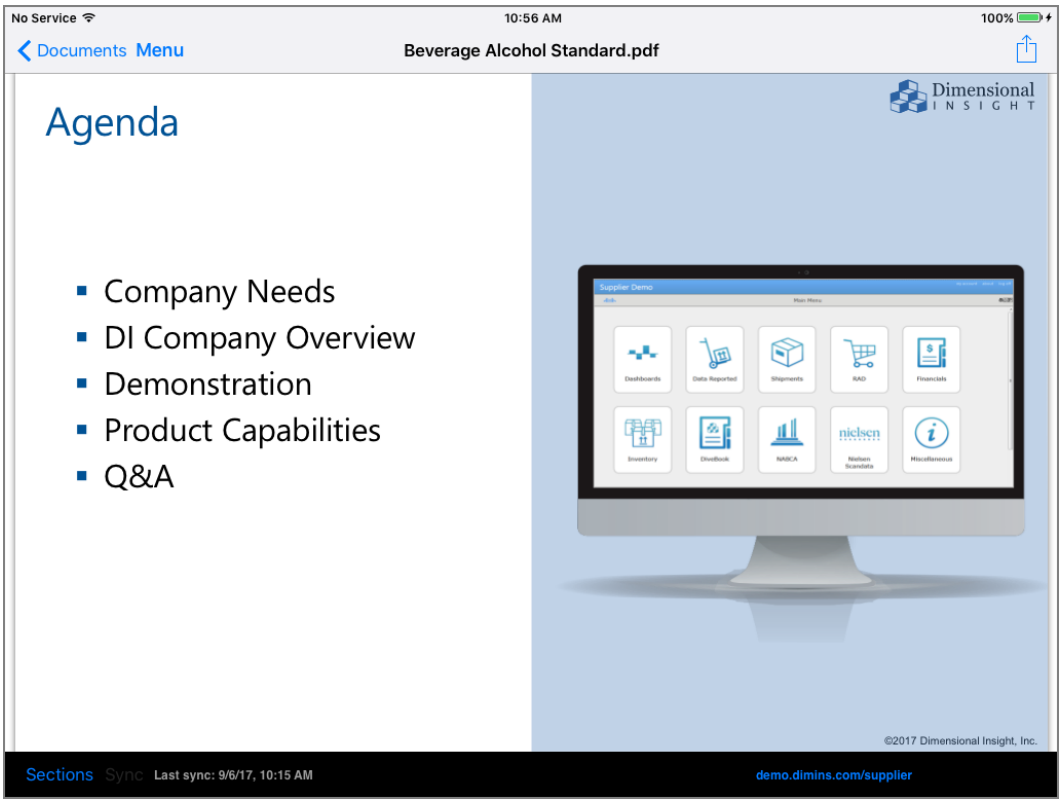
Here is the repository page with the Local switch activated and **Sync Files** button indicated, during the Sync.



Notice that the Downloaded column value changes from "No" to "Yes" after the Sync.



Here is the result in the DiveTab client, after the *Beverage Alcohol Standard.pdf* file is opened directly.



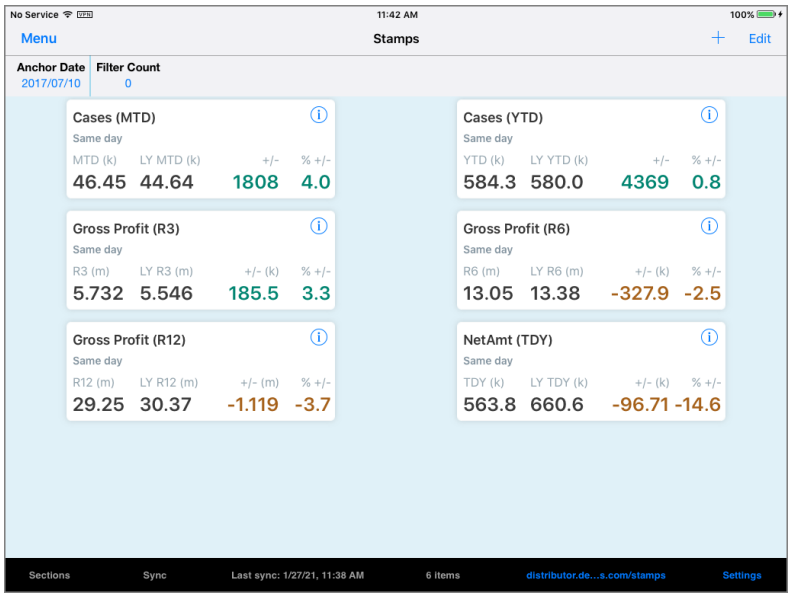
The file opens as a document and you swipe up and down to move from page to page.

NOTE: To remove a downloaded file from your device, change the Local switch to **OFF** and click **Sync Files**.

Stamp Pages

A Stamps page gives you the ability to create a customizable page using stamps, to display information related to specified measures using a chosen template.

Here is an example of a Stamp page with stamps already added.

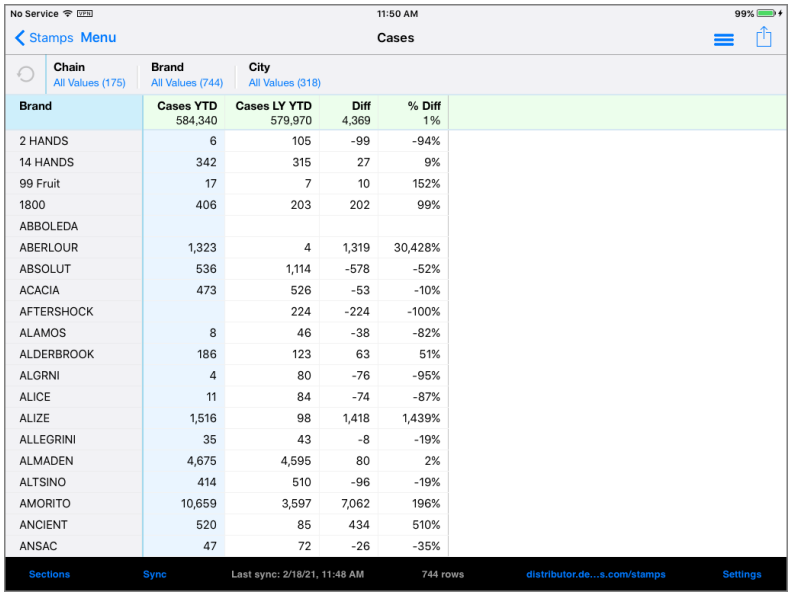


The Stamp page is for your personal use, and you can add and edit stamps as you see fit.

To open the stamp analysis page, click the stamp. From here you can:

- Switch dimensions
- Dive on a summary value

Here is an example of the stamp analysis page.

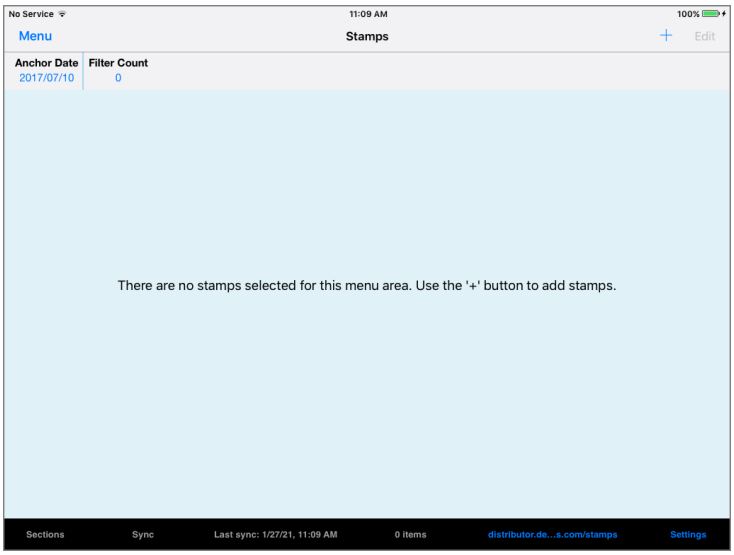


Editing a Stamp Page

You can add, delete, and reorder the stamps on a Stamp page.

Adding a stamp

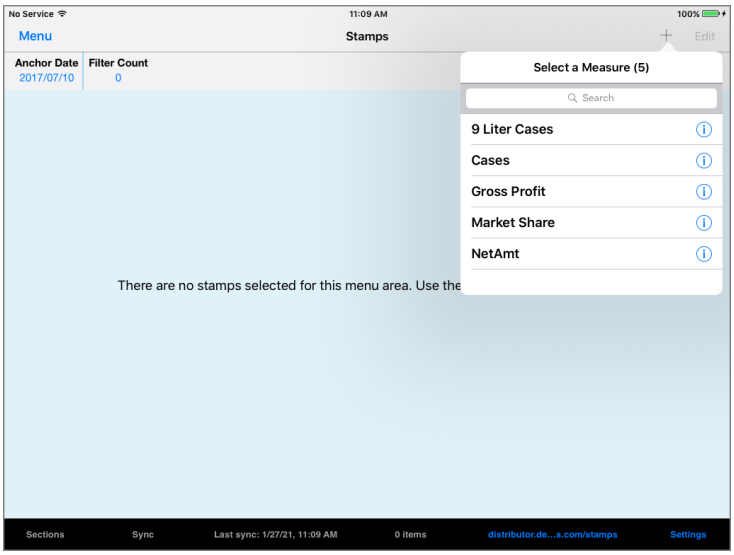
1. Navigate to the **Stamp** page.



NOTE: Depending on how the page is configured by the developer, there might be default stamps already in place.

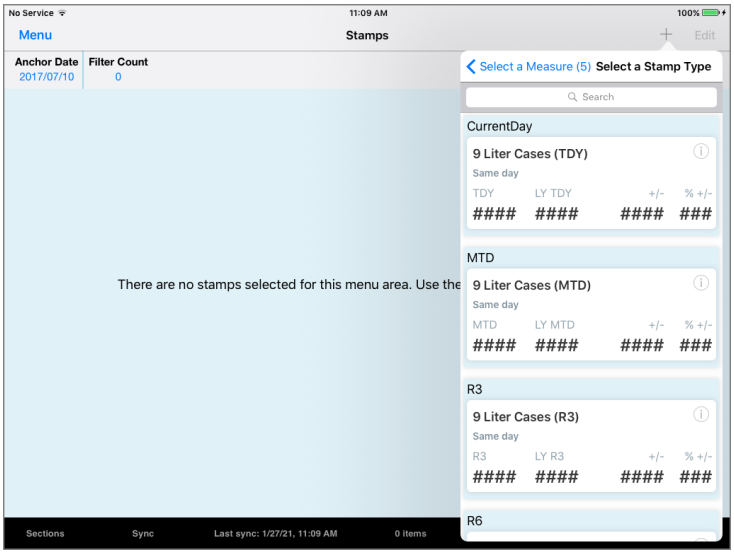
2. Tap the **Add** icon , .

   The **Select a Measure** dialog box opens.



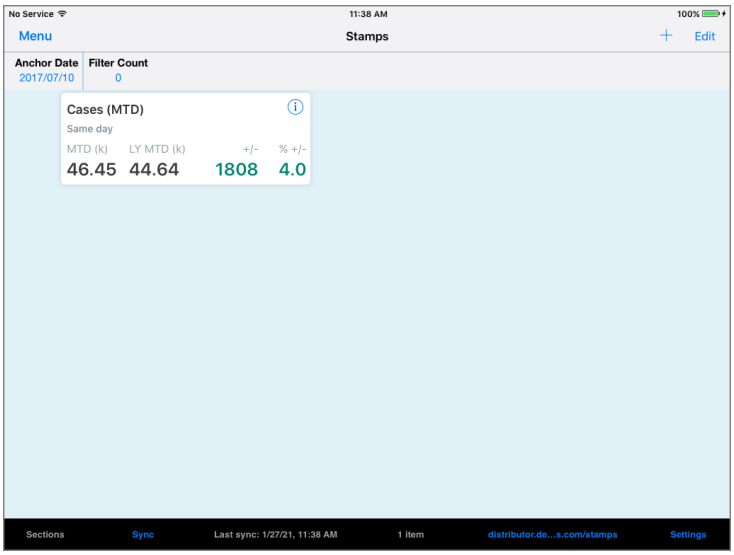
3. Tap the measure you want to use. For this example, **Cases**.

   The Select a Stamp Type options for the selected measure opens.



4. Tap the stamp template you want to use. For this example, **MTD** or month to date.

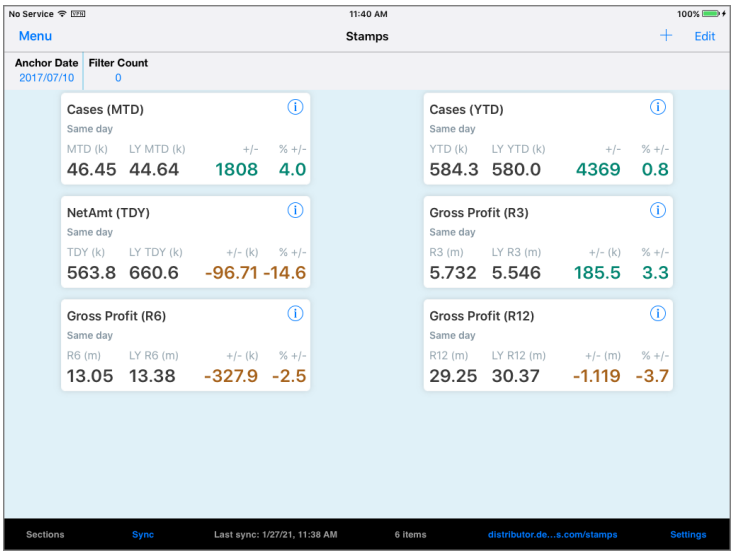
   The stamp is added to the page.



TIP: When the stamp is added to the page, the measure and stamp template combination is removed from the dialog box options.

Deleting a stamp

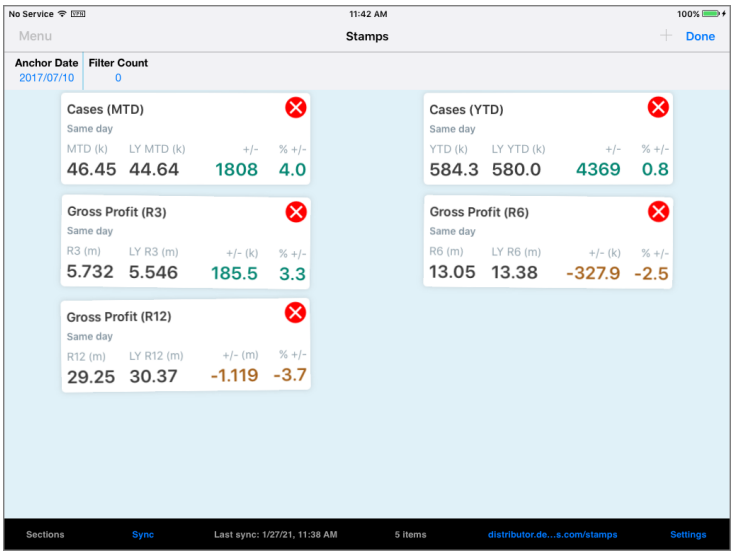
1. Navigate to the **Stamp** page.



2. Tap **Edit**, or select and hold the stamp, then release. The information icon, ⓘ, is replaced with the delete, ⊗, icon.
3. Tap the delete icon, ⊗. This example uses the **NetAmt (TDY)** stamp, The **Delete Stamp** dialog box opens.

4. Tap **Delete**.

   The stamp is removed from the page.

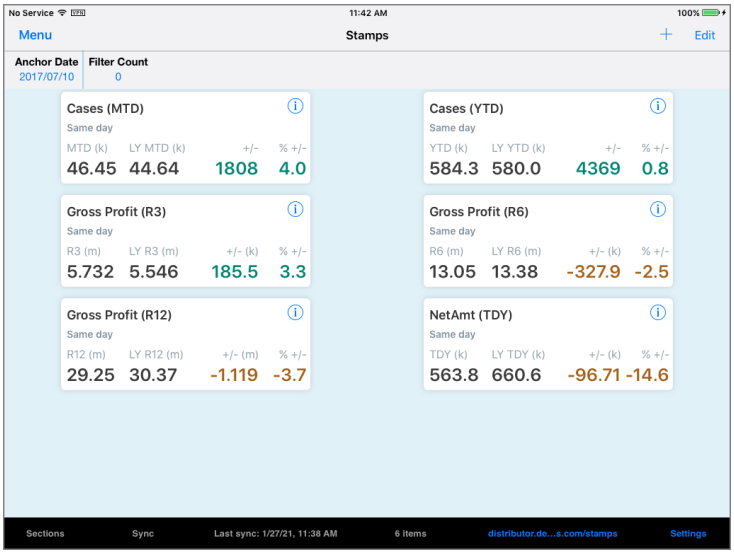


   TIP: If the stamps area is configured with default stamps and you delete every stamp, the Use Default Stamps dialog box opens. Tap **Add** to restore all the default stamps..

5. Tap **Done** to exit the editing mode.

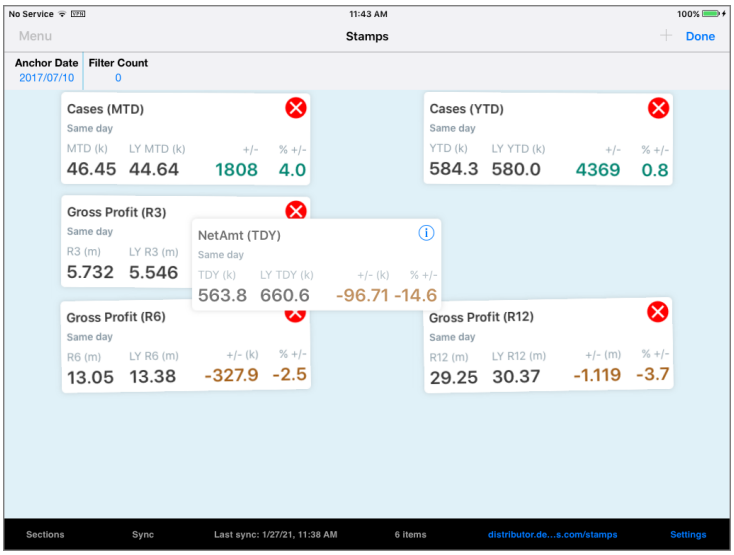
Reordering the stamps

1. Navigate to the **Stamp** page.



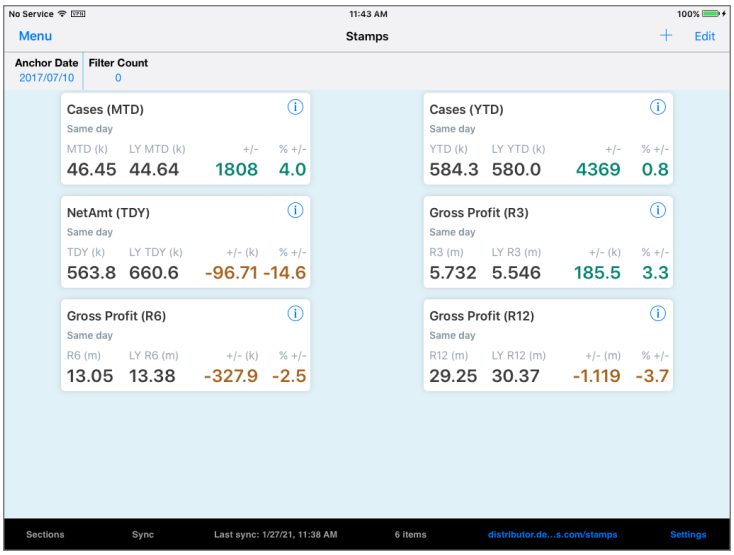
2. Tap **Edit** or select and hold the stamp, then release. The information icon, ⓘ, is replaced with the delete, ⊗, icon.
3. Select and hold the stamp and move it to where you want it.

   Here is an example of the stamp page while moving a stamp.



4. Tap **Done** to exit edit mode.

   The delete, ⊗, icon is replaced by the information, ⓘ, icon.

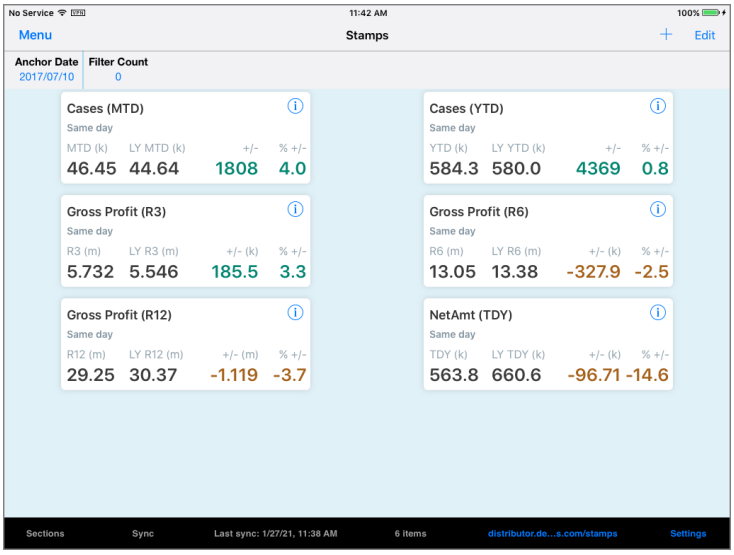


Using a Stamp

You can use a stamp to analyze the measure data or to review measure information.

Analyzing measure data

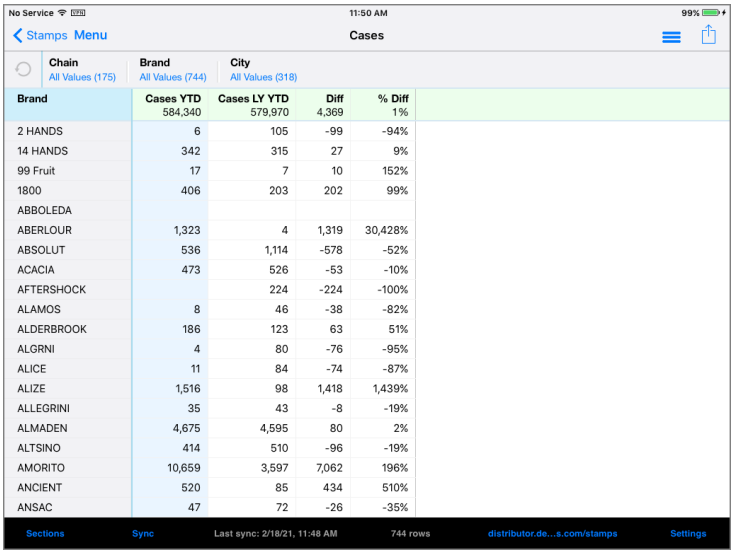
1. Navigate to the **Stamp** page.



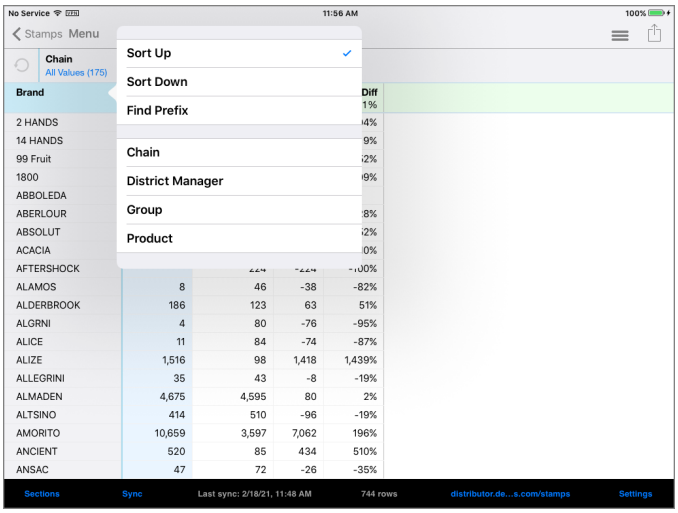
2. Tap the stamp. For example, **Cases (YTD)**.

IMPORTANT: Tapping the information icon, ⓘ, opens the Measure Info dialog box.

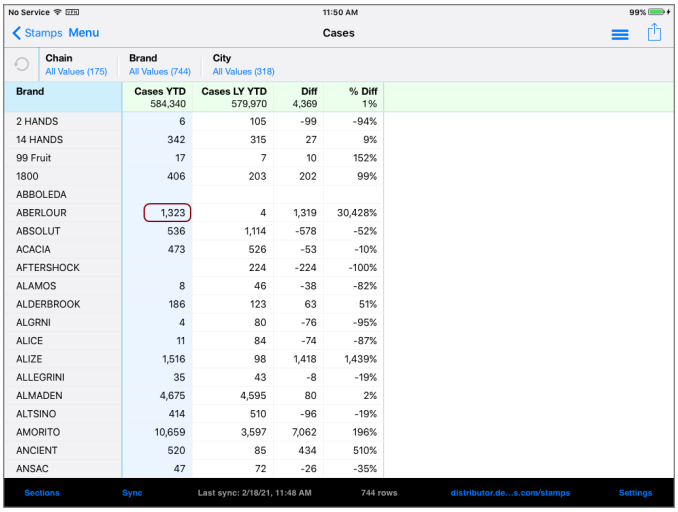
The analysis page opens.



3. Do one of the following:
    - To switch dimensions, tap the dimension column heading and choose a dimension name from the context menu.

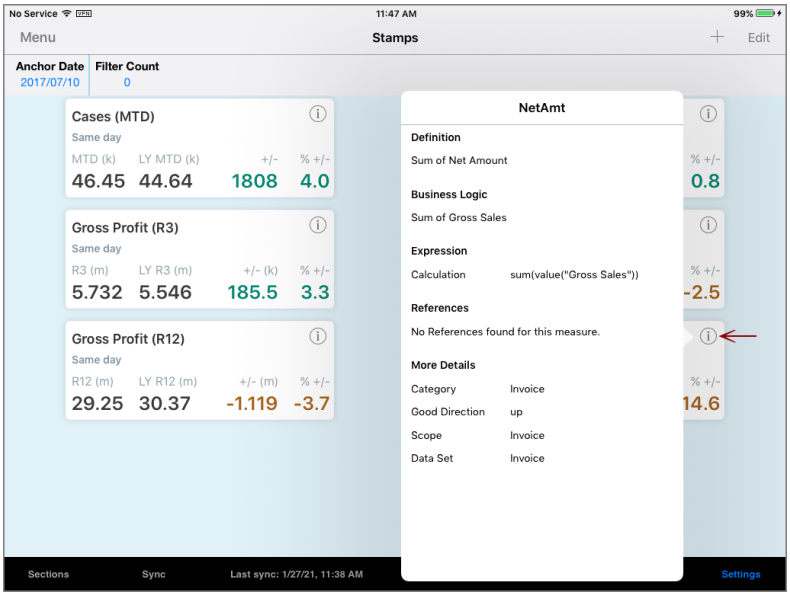


- To dive on a summary value, tap the value in the column using a link.



Review measure information

You can tap the information icon, ⓘ, to view Measure Info dialog box, which displays the metadata associated with the measure.



This metadata includes:

- **Definition**—Describes what the measure represents.
- **Business Logic**—Defines the business rule behind the measure in simple terms.
- **Expression**—The expression, including calculation and filter, used to calculate the measure.
- **References**—The documents useful for understanding the measure's definition and logic.
- **Category**—The category used to organize the measure.
- **Good Direction**—The direction considered favorable for the measure.
- **Scope**—The summary scope used for the measure.
- **Data Set**—The data set the measure is associated with.

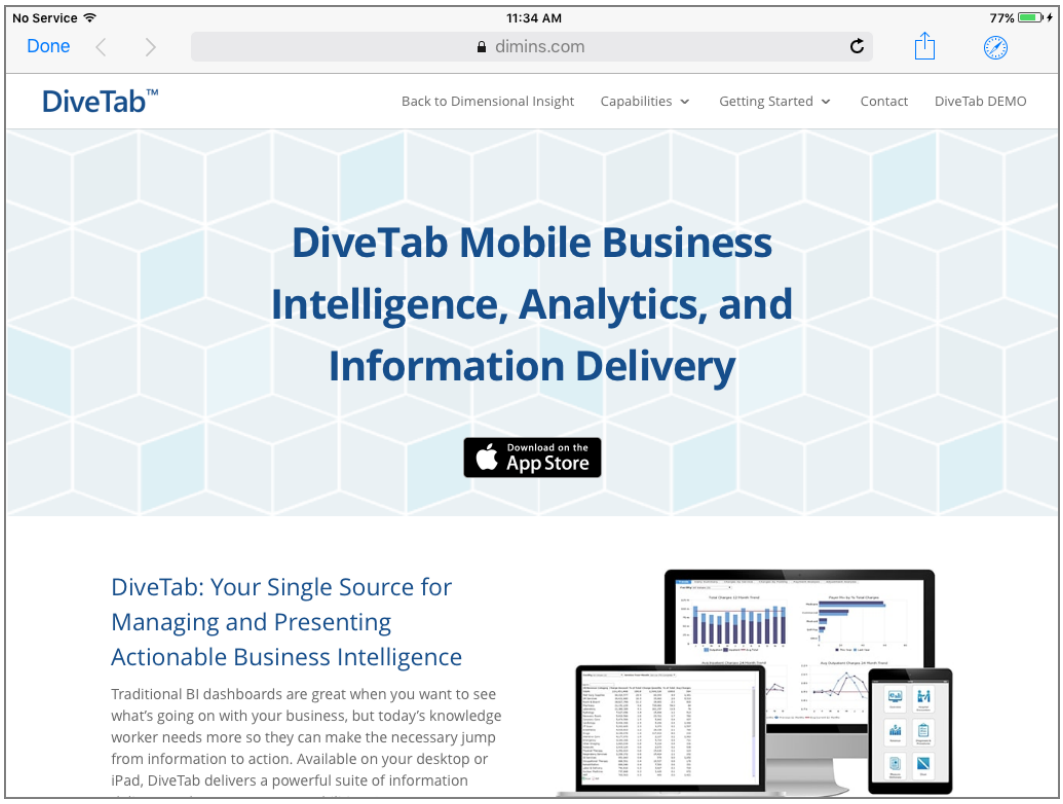
TIP: You can copy the information displayed in this window.

Tap outside the dialog box to close.

Web Pages

A web page displays a website within the DiveTab client.

Here is an example of a web page.

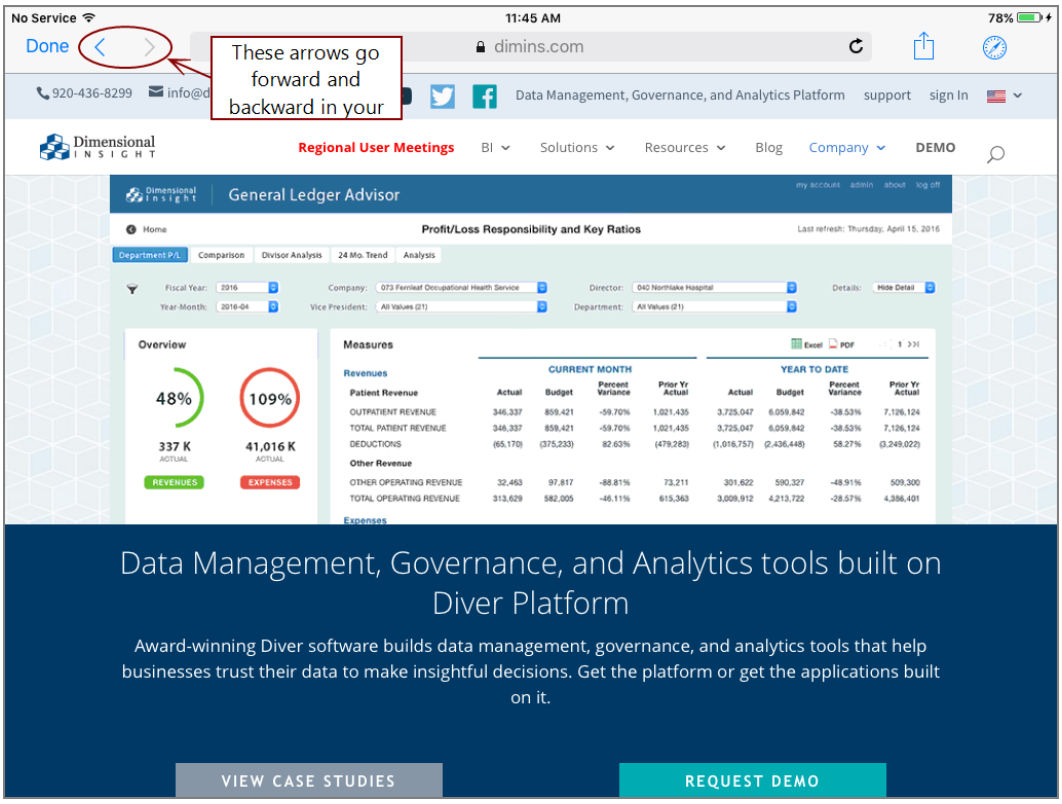


NOTE: Tap the arrows at the top of the screen to go forward and backward in the browser history.

Web pages behave like a browser: you can follow links to additional pages on the website and it keeps a history of the pages visited, so you can go back and forth between visited pages.

Here is another web page example.

DiveTab



Page Types

About Using Data Pages

There are a variety of ways to examine data using Data pages:

- Adding Bookmarks on page 66
- Changing the Text Size on page 70
- Creating Subsets on page 73
- Sharing Data Using the Output Button on page 97
- Using QuickViews on page 94

Tabular Pages

For tabular pages, there are four unique ways to explore data.

- Diving on Data Values on page 80
- Editing Dimensions and Columns on page 89
- Switching Dimensions on page 92
- Adding and Removing MultiColumns on the next page

In addition, you can use the context menus for each column to further explore the data. Tap the column heading to open the context menu.

Dimension columns can sort values and find a certain value by typing the prefix. If Dive Dimensions are present, then you can also switch places of a dimension with another dimension or Dive Dimension. You can also remove dimensions and change them to Dive Dimensions using the **Remove MultiColumn** option.

Dive Dimension columns can collapse and expand. When expanded, the context menu has options to sort values from small to large and vice versa, and the **Add MultiColumn** option which adds the Dive Dimension as a Dimension.

Summary columns can sort values from small to large and large to small, and add additional columns:

- **Rank**—Determines the rank for each dimension value with 1 being the largest.
- **Percent**—Represents each value as a percentage of the total value.
- **Graph**—Provides a visual representation of the value size, similar to a bar chart.

NOTE: When you make a change using the context menu, dive on a value, and return to the previous page using the back button, DiveTab recalls the changes you made to the view.

Free Form Pages

Free form pages provide various visual ways of viewing the data, including tables, charts, and grids. Tables function like simplified tabular data pages, with the option to sort the data from the context menu. You can create bar, pie, or line charts, which can link to additional pages. You can hover over a line chart legend item to view only that line. Clicking the item reveals or conceals the associated line. Grids contain information specified by the developer, and can link to additional pages. A light blue background indicates links.

For more information, see Data Pages on page 22 and A Closer Look at Data Pages on page 24.

Adding and Removing MultiColumns

Dive Dimensions can be added as MultiColumns, and Dimensions can be removed as MultiColumns. Adding a Dive Dimension changes it to a Dimension, and removing a Dimension changes it to a Dive Dimension.

There are no limits on the number of Dive Dimensions or MultiColumns in use.

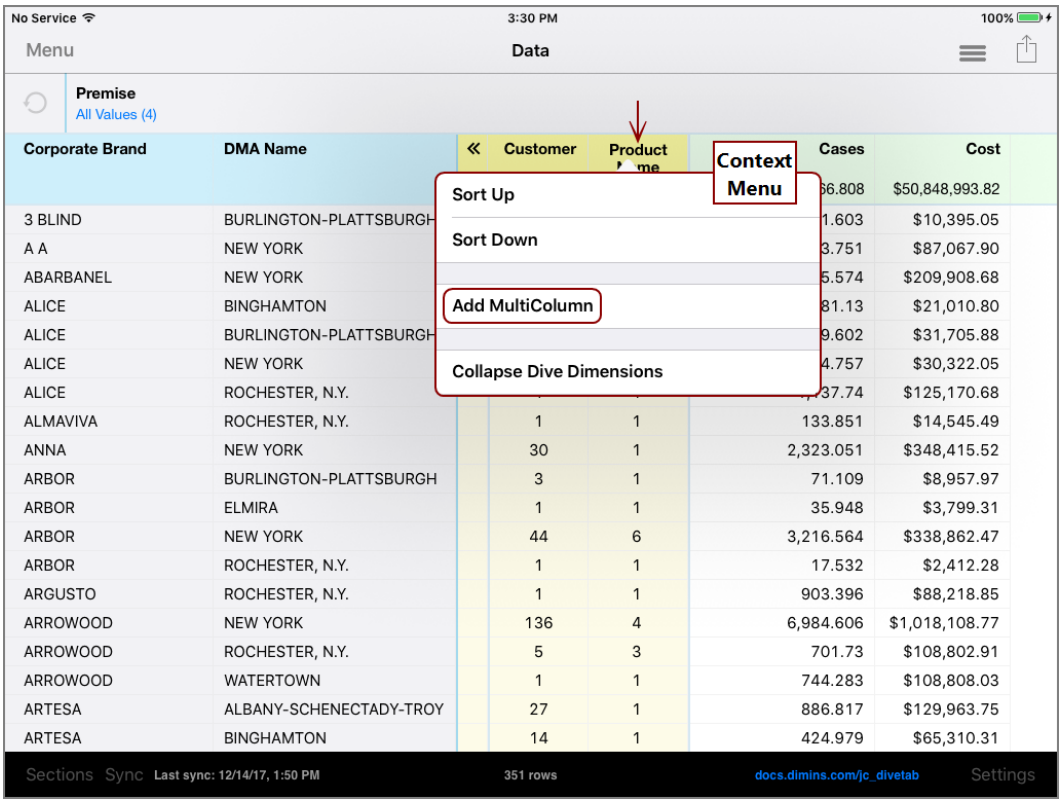
Adding a MultiColumn

NOTE: Only Dive Dimensions can be added as MultiColumns.

1. Tap the heading of the Dive Dimension you want to add as a MultiColumn.

   The Dive Dimension context menu opens.

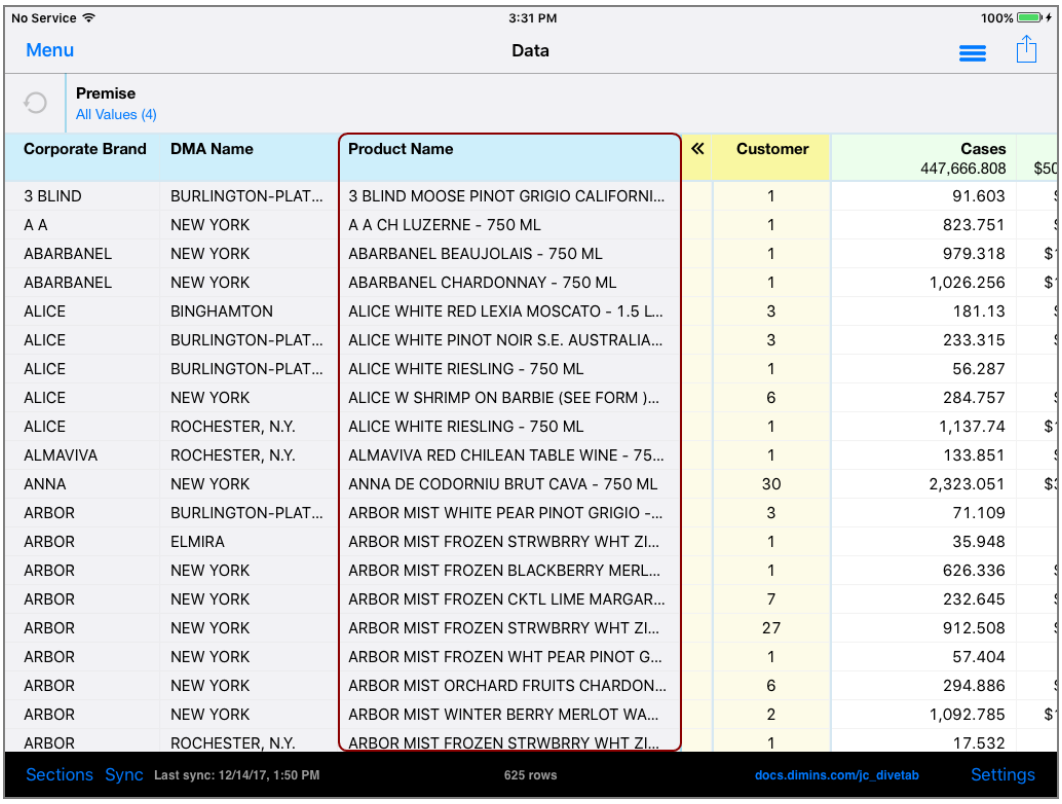
   Here is the context menu for **Product Name**.



2. Tap **Add MultiColumn**.

   The Dive Dimension is added as a MultiColumn.

   Here is the result in the DiveTab client.



Product Name is now a Dimension.

Also, notice how the number of rows has changed from 351 rows to 625 rows. The number of rows has increased because there is now a row for each product. For example, ARBOR NEW YORK appears for six different products.

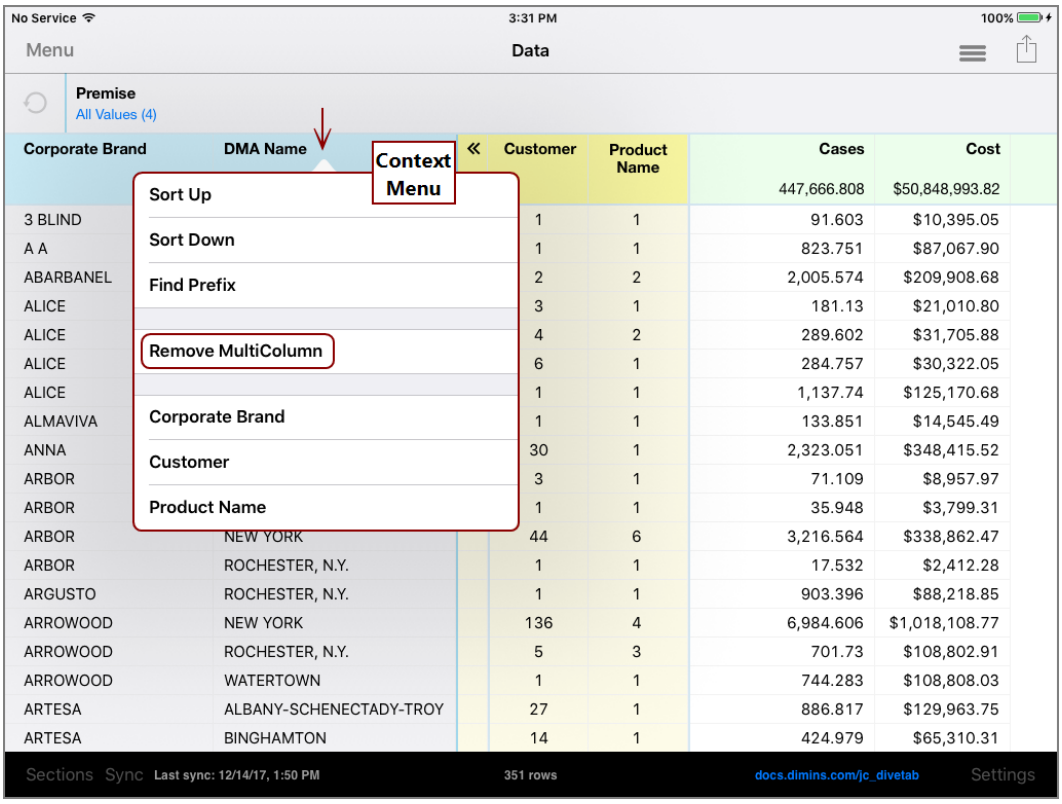
Removing a MultiColumn

NOTE: Only Dimensions can be removed as MultiColumns.

1. Tap the heading of the Dimension you want to remove as a MultiColumn.

   The Dimension context menu opens.

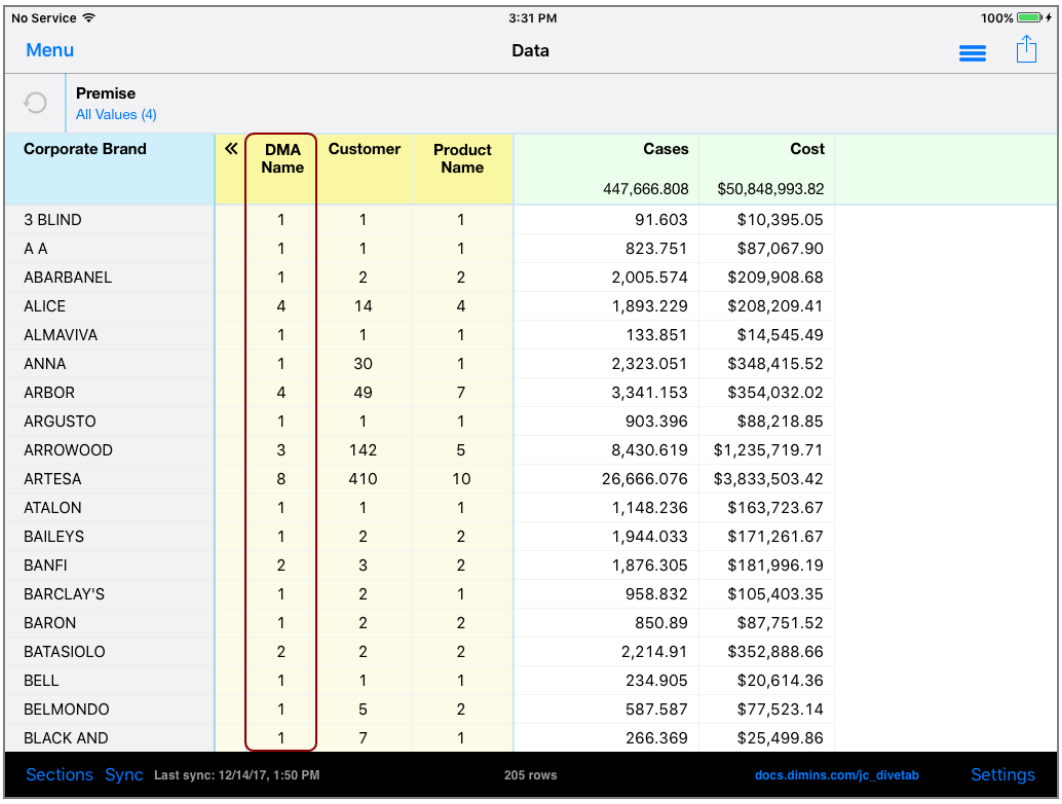
   Here is the context menu for **DMA Name**.



2. Tap **Remove MultiColumn**.

   The Dimension is removed as a MultiColumn.

   Here is the result in the DiveTab client.



Corporate Brand	«	DMA Name	Customer	Product Name	Cases	Cost
					447,666.808	$50,848,993.82
3 BLIND		1	1	1	91.603	$10,395.05
A A		1	1	1	823.751	$87,067.90
ABARBANEL		1	2	2	2,005.574	$209,908.68
ALICE		4	14	4	1,893.229	$208,209.41
ALMAVIVA		1	1	1	133.851	$14,545.49
ANNA		1	30	1	2,323.051	$348,415.52
ARBOR		4	49	7	3,341.153	$354,032.02
ARGUSTO		1	1	1	903.396	$88,218.85
ARROWOOD		3	142	5	8,430.619	$1,235,719.71
ARTESA		8	410	10	26,666.076	$3,833,503.42
ATALON		1	1	1	1,148.236	$163,723.67
BAILEYS		1	2	2	1,944.033	$171,261.67
BANFI		2	3	2	1,876.305	$181,996.19
BARCLAY'S		1	2	1	958.832	$105,403.35
BARON		1	2	2	850.89	$87,751.52
BATASIOLO		2	2	2	2,214.91	$352,888.66
BELL		1	1	1	234.905	$20,614.36
BELMONDO		1	5	2	587.587	$77,523.14
BLACK AND		1	7	1	266.369	$25,499.86

DMA Name is now a Dive Dimension.

Also, notice how the number of rows has changed from 351 rows to 205 rows. There is no longer multiple values belonging to each corporate brand, so each is represented by a single row.

See also:

- Dive Dimensions on page 28
- MultiColumns on page 30

Adding Bookmarks

Bookmarks save the current page and applied configurations, such as filters, parameters, and dive path, for later access. You can share Bookmarks by using the **Publish** button. This allows you, and other users, to return to the same page. Bookmarks can only be added to data pages.

NOTE: Bookmarks are attached to a user name and accessed across different devices.

When a bookmark is created, a **Bookmarked Pages** button is automatically added as the last button on the main menu.

CAUTION: A bookmark may become stale if the page is changed by the developer.

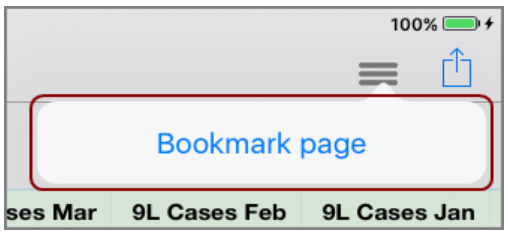
Creating and publishing a bookmark

1. Navigate to a data page.

   Here is an example of a data page.

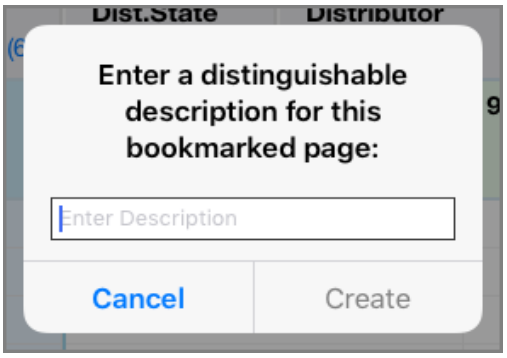
2. Tap the **Options** button on the upper right.

   The **Options** menu opens.



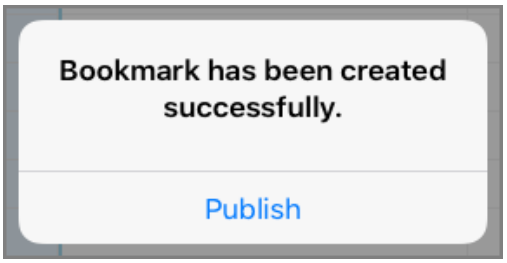
3. Tap **Bookmark page**.

   A pop-up description window opens.



4. Enter a description for the bookmark.
5. Tap **Create**.

   A confirmation message appears.

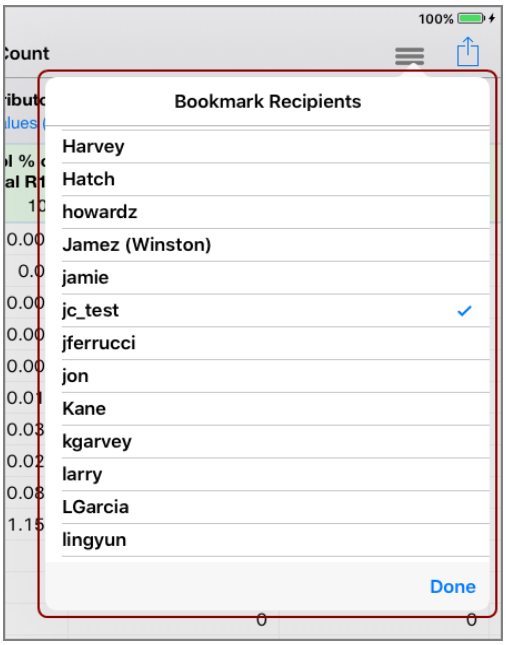


   Notice the **Publish** button on the confirmation message. The publishing option allows you to share the bookmark with other users. Publishing is optional.

6. Tap **Publish** to open a list of users to share the bookmark with.

   NOTE: You can also return to the main menu, open **Bookmarked Pages**, and tap the **Publish** button in the **Publish** column.

   Here is the **Bookmark Recipients** window.



7. Select the name to share the bookmark with that user, and tap **DONE**.
8. Click **Sync** to share the bookmark.

Viewing, editing, deleting, and publishing bookmarks

1. Navigate to the main menu.

   A new button, **Bookmarked Pages**, appears on the main menu.

   Here is the Bookmarked Pages button.

2. Tap the **Bookmarked Pages** button to open.

   Bookmarked Pages opens, displaying a list of your bookmarks in a table.

   NOTE: Tap the column heading to sort.

   Here is an example of Bookmarked Pages.

You can only edit the bookmarks you created.

3. Do one of the following:
    - Tap the **Title** value to open the bookmark.
    - Tap the **Edit** button in the **Edit** column to edit the description of the bookmark.
    - Tap the **Delete** button in the **Delete Bookmark** column to delete the bookmark.
    - Tap the **Publish** button in the **Publish** column to open up the list of users to share the bookmark with.

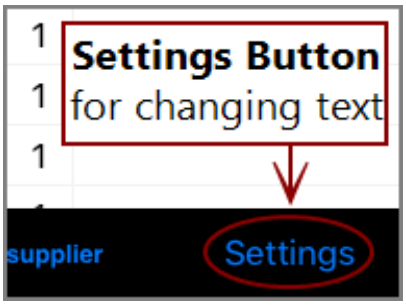
      NOTE: You must **Sync** to share the bookmark.

For more information, see Bookmarks on page 27.

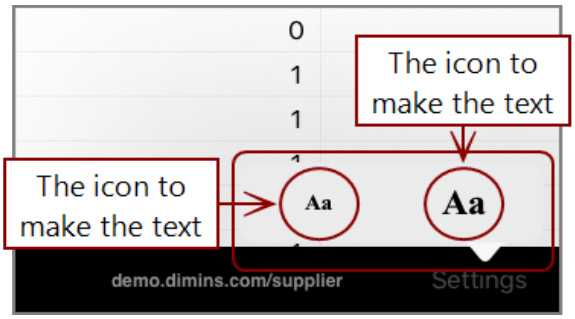
Changing the Text Size

The text size for data pages can be adjusted.

1. Navigate to a data page.
2. Tap the **Settings** button on the bottom right.



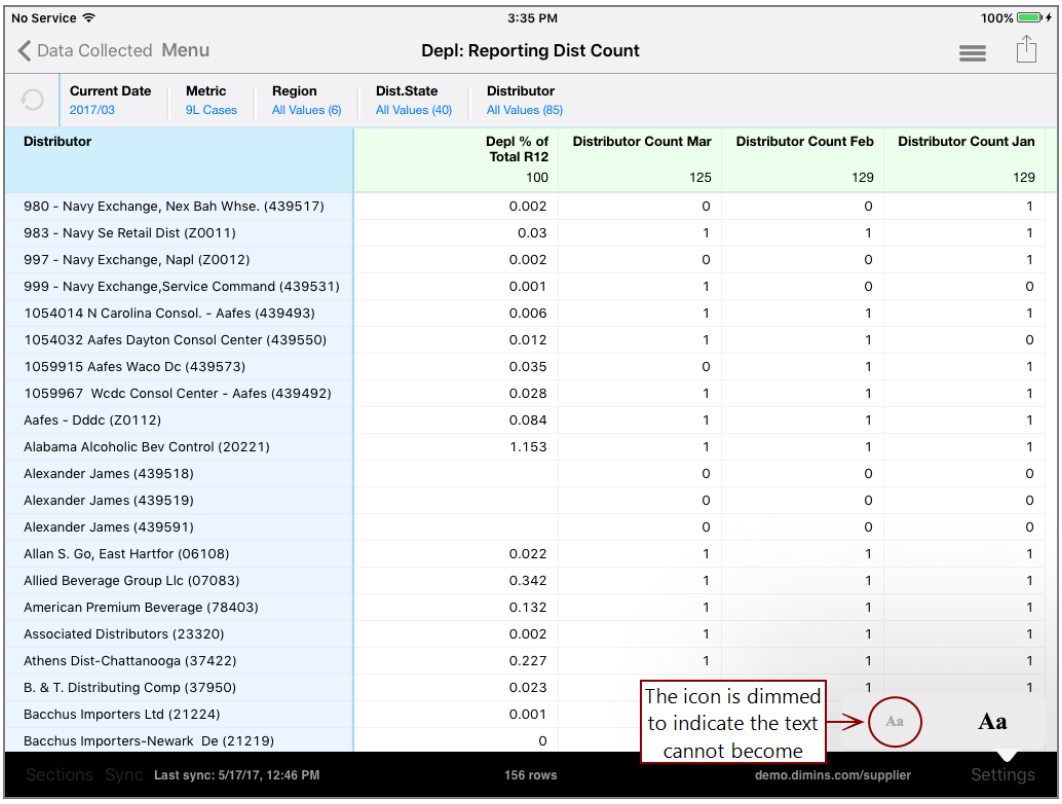
A pop-up text size menu appears



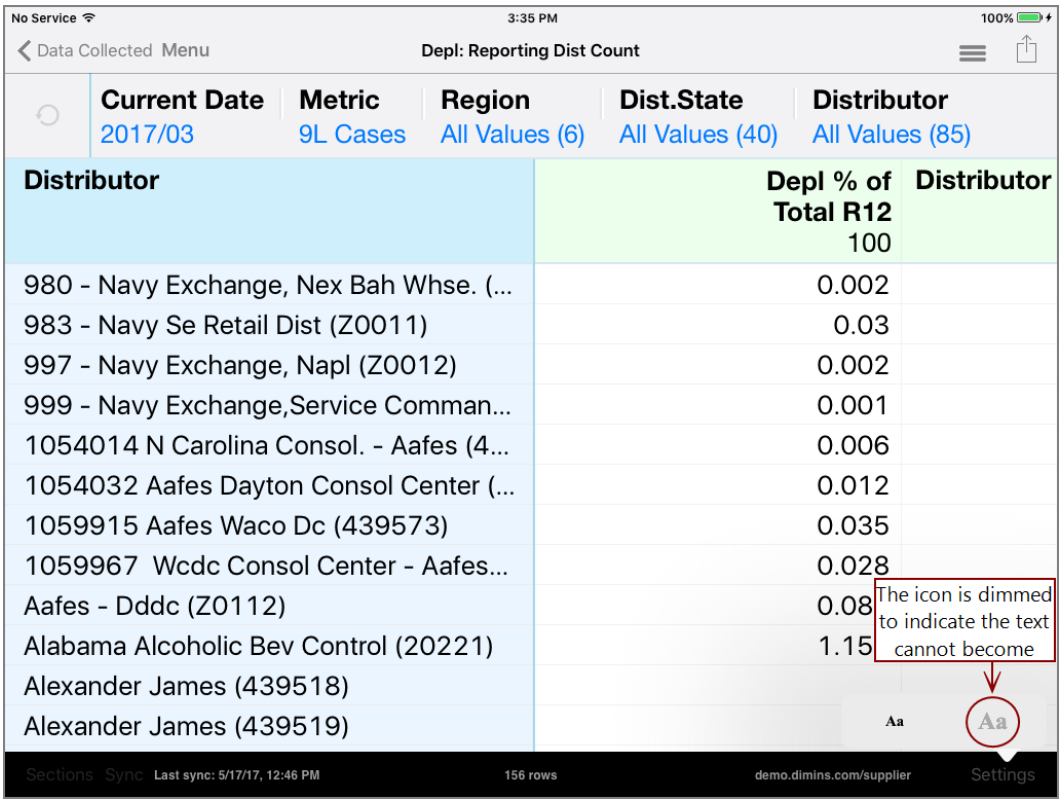
3. To make the text smaller, select the smaller **Aa** to the left. To make the text larger, select the larger **Aa** to the right.

   NOTE: The smallest text size is 75 percent, and the largest text size is 150 percent.

   Here is an example of the text set to the smallest size.



Here is an example of the text set to the largest size.



Creating Subsets

Subsets allow you to save a dimension value filter that is applied to a linked free-form data page. You can then view the filter that is applied to the parent data page and all linked data pages.

If you click on a dimension value that is shaded blue, in either a tabular page or a table on a free-form page, you can create a subset on the resulting page.

NOTE: Subsets can only be created for free-form data pages that have subsets enabled. Subsets are enabled by the developer.

A subset is different from a bookmark, which returns to the same page with any and all filters in use, can be published to other users, and made for all data pages.

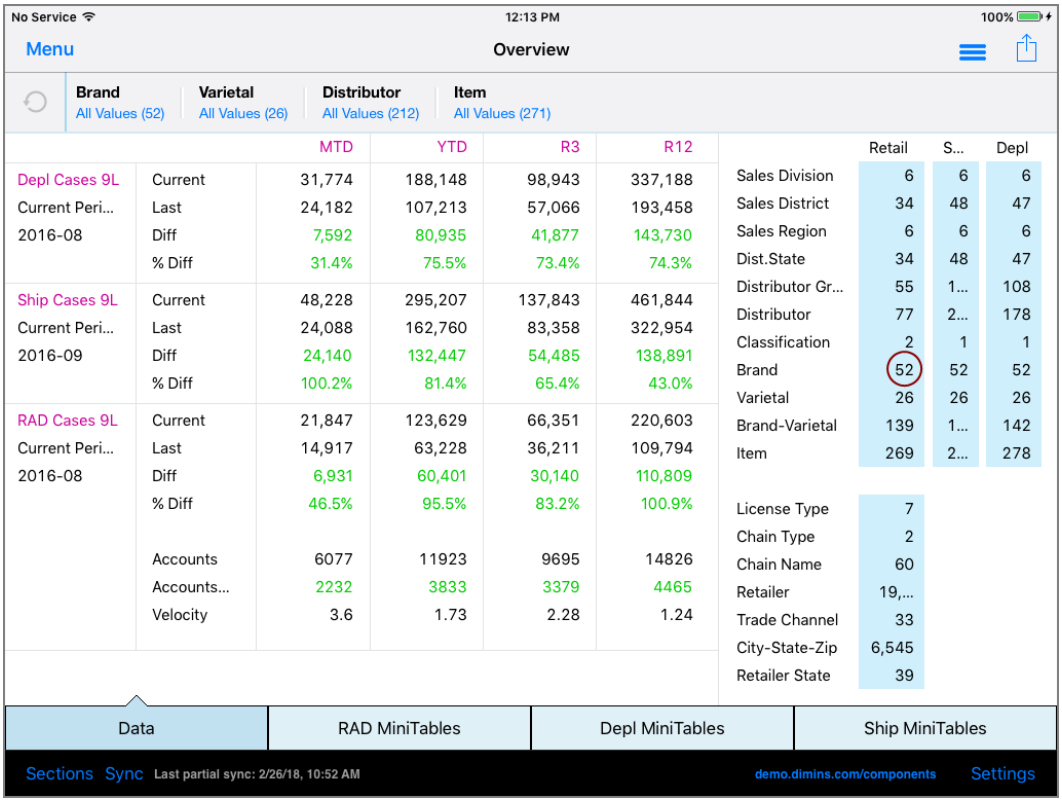
For more information, see Subsets on page 37.

Creating subsets

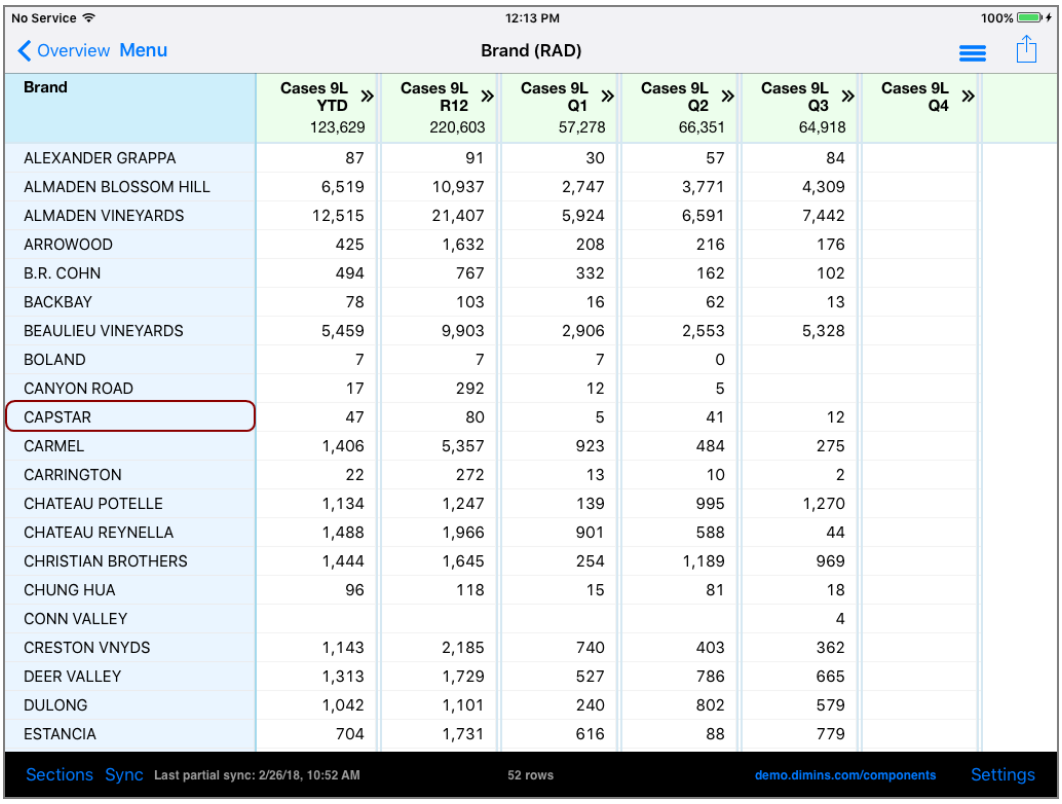
1. Navigate to a child free-form data page. This means that the page is filtered by a dimension value.

   For example, this subset is created after reaching a free-form data page after two dives.

Here is the first page, with the link for the first dive indicated.

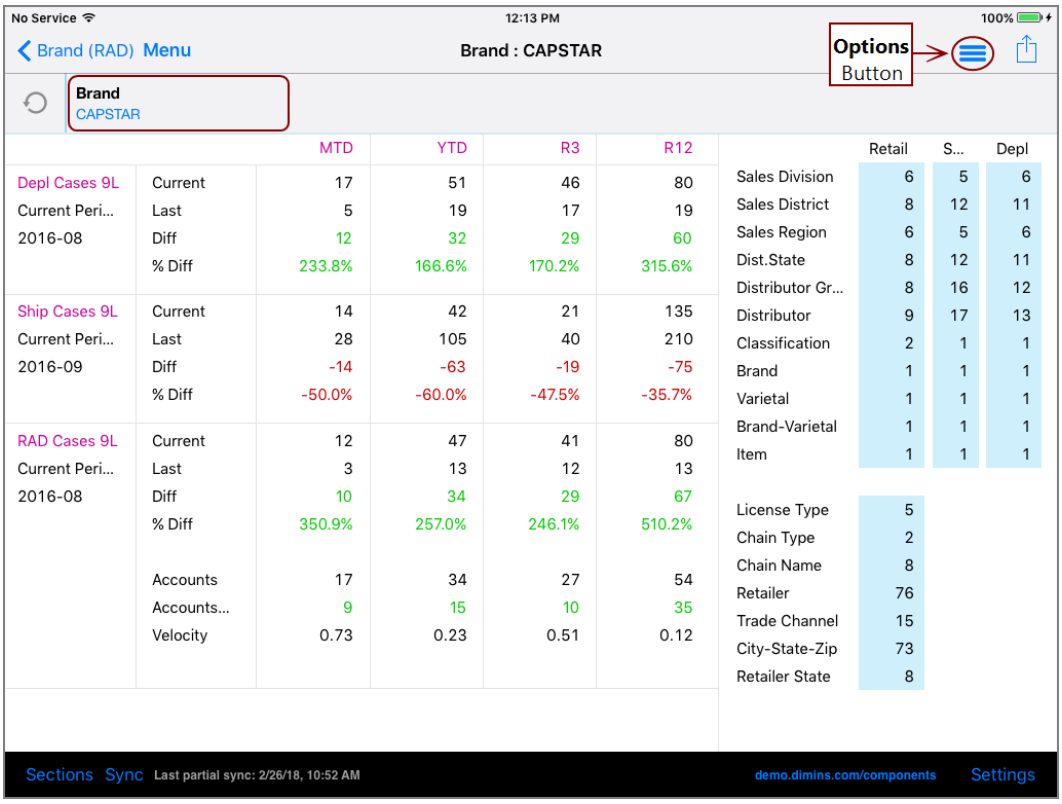


Here is the resulting page, with the link for the second dive indicated.



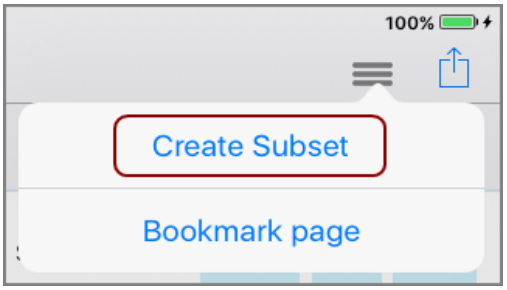
Brand	Cases 9L YTD 123,629	Cases 9L R12 220,603	Cases 9L Q1 57,278	Cases 9L Q2 66,351	Cases 9L Q3 64,918	Cases 9L Q4
ALEXANDER GRAPPA	87	91	30	57	84	
ALMADEN BLOSSOM HILL	6,519	10,937	2,747	3,771	4,309	
ALMADEN VINEYARDS	12,515	21,407	5,924	6,591	7,442	
ARROWOOD	425	1,632	208	216	176	
B.R. COHN	494	767	332	162	102	
BACKBAY	78	103	16	62	13	
BEAULIEU VINEYARDS	5,459	9,903	2,906	2,553	5,328	
BOLAND	7	7	7	0		
CANYON ROAD	17	292	12	5		
CAPSTAR	47	80	5	41	12	
CARMEL	1,406	5,357	923	484	275	
CARRINGTON	22	272	13	10	2	
CHATEAU POTELLE	1,134	1,247	139	995	1,270	
CHATEAU REYNELLA	1,488	1,966	901	588	44	
CHRISTIAN BROTHERS	1,444	1,645	254	1,189	969	
CHUNG HUA	96	118	15	81	18	
CONN VALLEY					4	
CRESTON VNYDS	1,143	2,185	740	403	362	
DEER VALLEY	1,313	1,729	527	786	665	
DULONG	1,042	1,101	240	802	579	
ESTANCIA	704	1,731	616	88	779	

Here is the page used to create the subset.



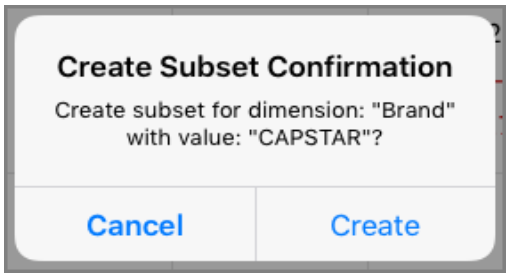
2. Tap the **Options** icon.

   The **Options** menu opens.



3. Tap **Create Subset** from the menu.

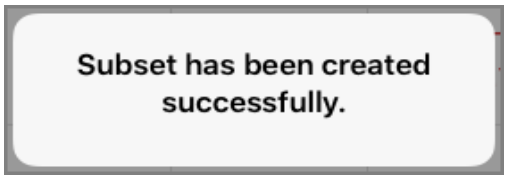
   A pop-up confirmation window opens, asking you to confirm the subset. It details the dimension and value of the subset.



This subset uses dimension Brand and value CAPSTAR.

4. Tap **Create**.

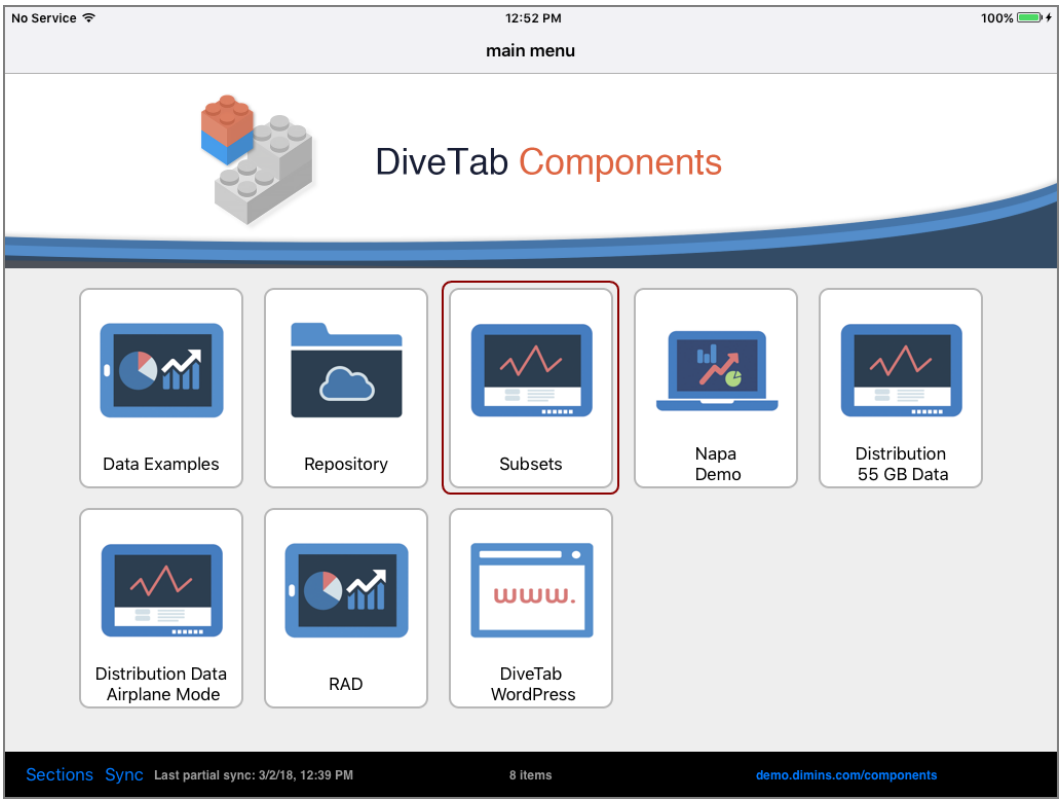
   A message confirming the successful creation of the subset appears.



Accessing subsets

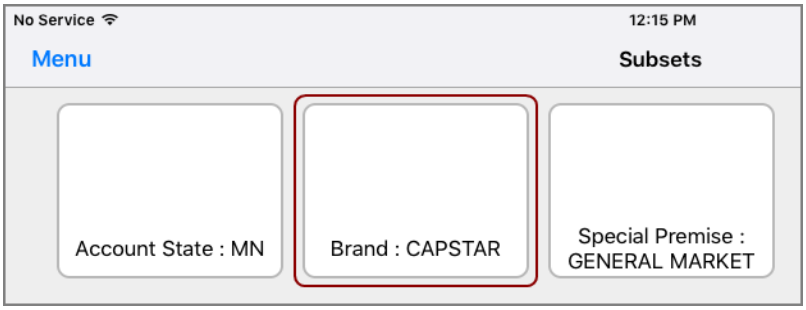
1. From the main menu, tap the **Subsets** button.

   NOTE: The icon for the Subsets button might differ.

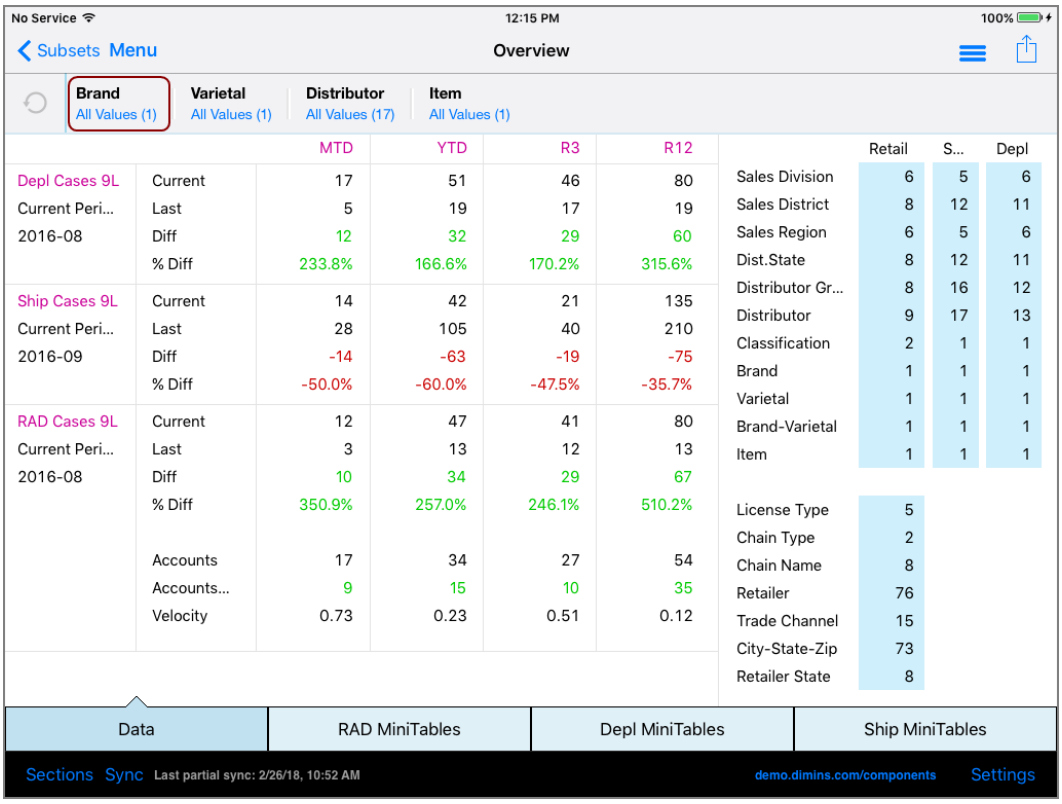


All created subsets are displayed in a sub-menu.

2. Tap the subset you want to access. For this example, the subset is CAPSTAR.



The data page opens with the subset applied.



NOTE: Every page associated with this button is filtered by the subset value.

Notice that the Brand QuickView shows one value. This refers to Brand dimension value CAPSTAR.

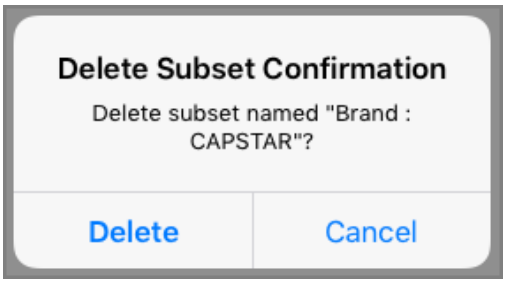
Deleting subsets

1. Navigate to the **Subsets** Menu.
2. Do one of the following:
   - Tap **Edits** in the top right corner.
   - Select and hold the **Subset** button, then release.

   A red circle with an X appears on the top left of the button or buttons.

3. Tap the red circle with an X of the subset you want to delete.

   The Delete Subset Confirmation pop-up window opens.



4. Select **Delete** to delete the subset or **Cancel** to keep it.
5. Return to the main menu. If there are no subsets left, the Subsets button disappears.

Diving on Data Values

The DiveTab client gives the option to dive on specific data values. This means viewing the related dimension information for a single data value. There are four ways to dive:

- **On a Summary column value**—This involves selecting a linked column cell. This is configured by the developer.
- **On a Dive Dimension value**—This involves selecting a dimension value from a column with a yellow heading.
- **On a Dimension value**—This involves selecting the dive icon in the same cell.
- **On a Chart**—This involves selecting a linked chart value. This is configured by the developer.

The style of diving for a particular tabular page is determined by the developer.

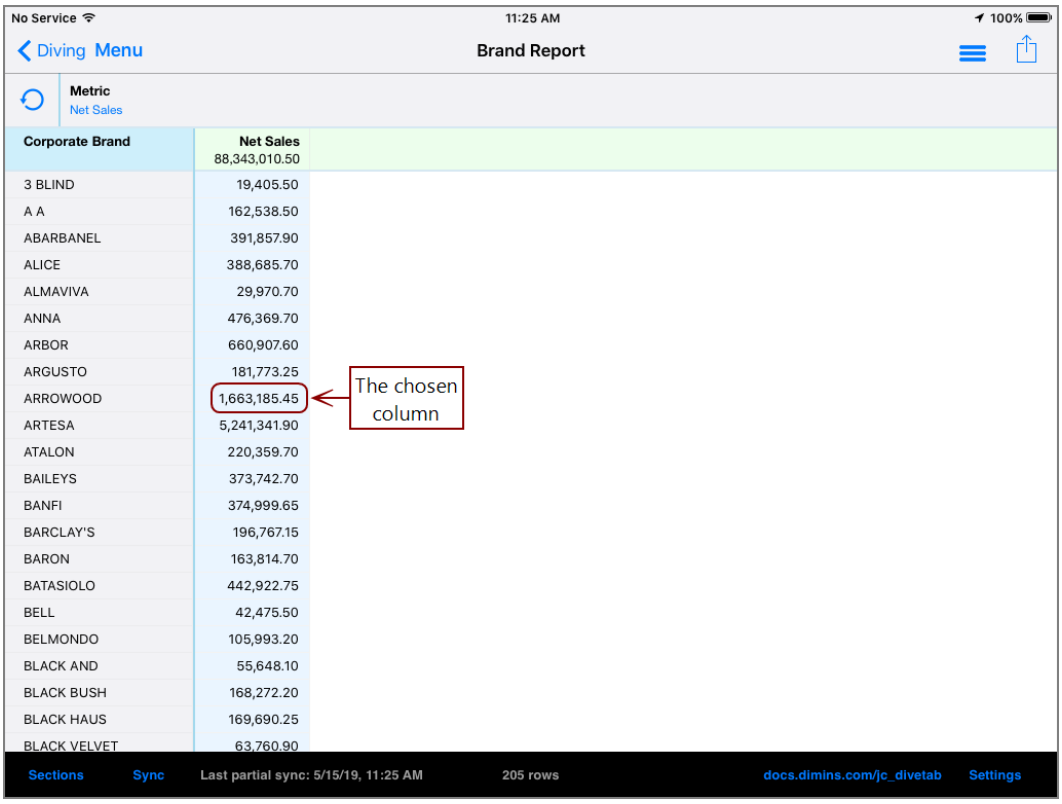
Diving on column cells

NOTE: Diving on column cells is configured by the developer.

1. Choose a column value to dive on.

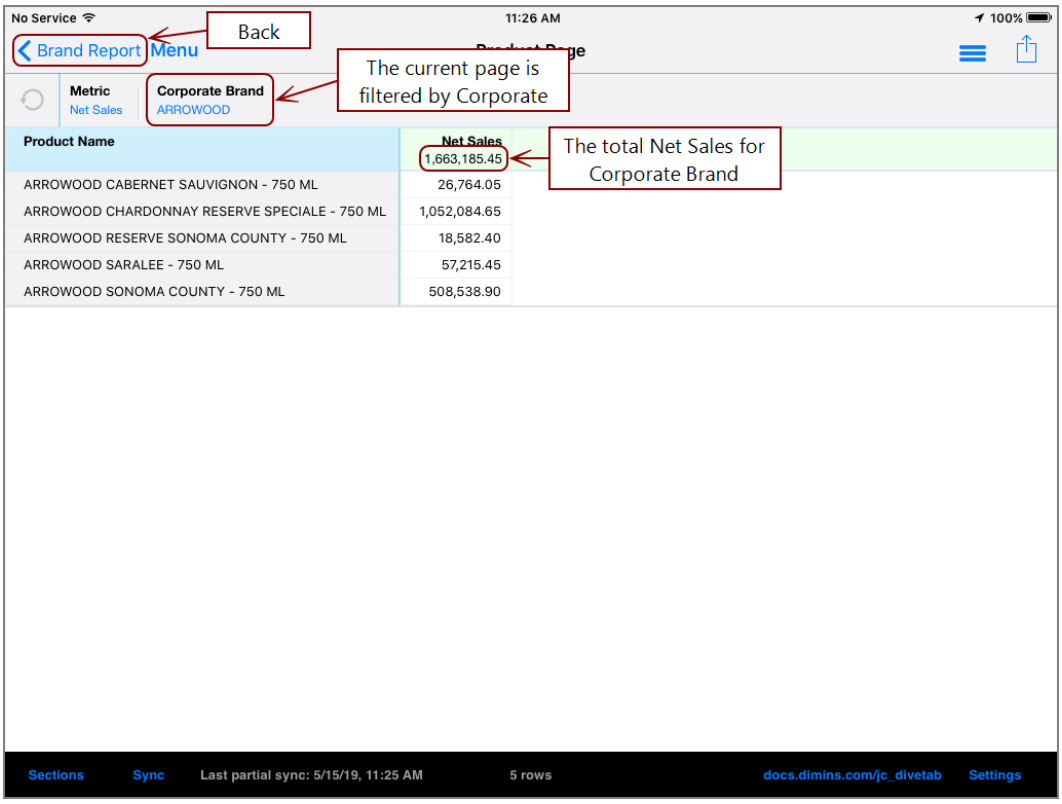
   For example, the Summary Column Net Sales value corresponding to ARROWOOD. This means that the Corporate Brand ARROWOOD has 1,663,185.45 in Net Sales.

   TIP: If a column is linked, the column is shaded blue.



2. Tap the column cell.

   A new page opens.



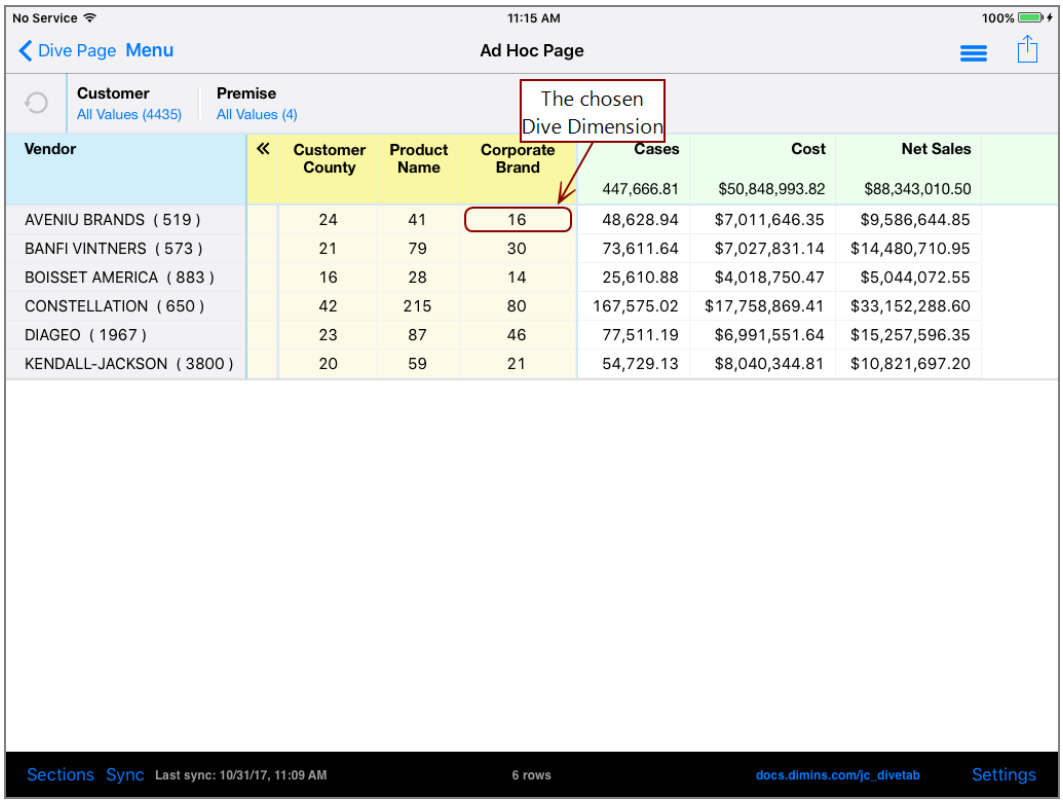
The resulting page is filtered by Corporate Brand ARROWOOD, and the Products add up to the total of 1,663,185.45 in Net Sales.

3. Tap the **Back** button to return to the previous page.

Diving on Dive Dimension values

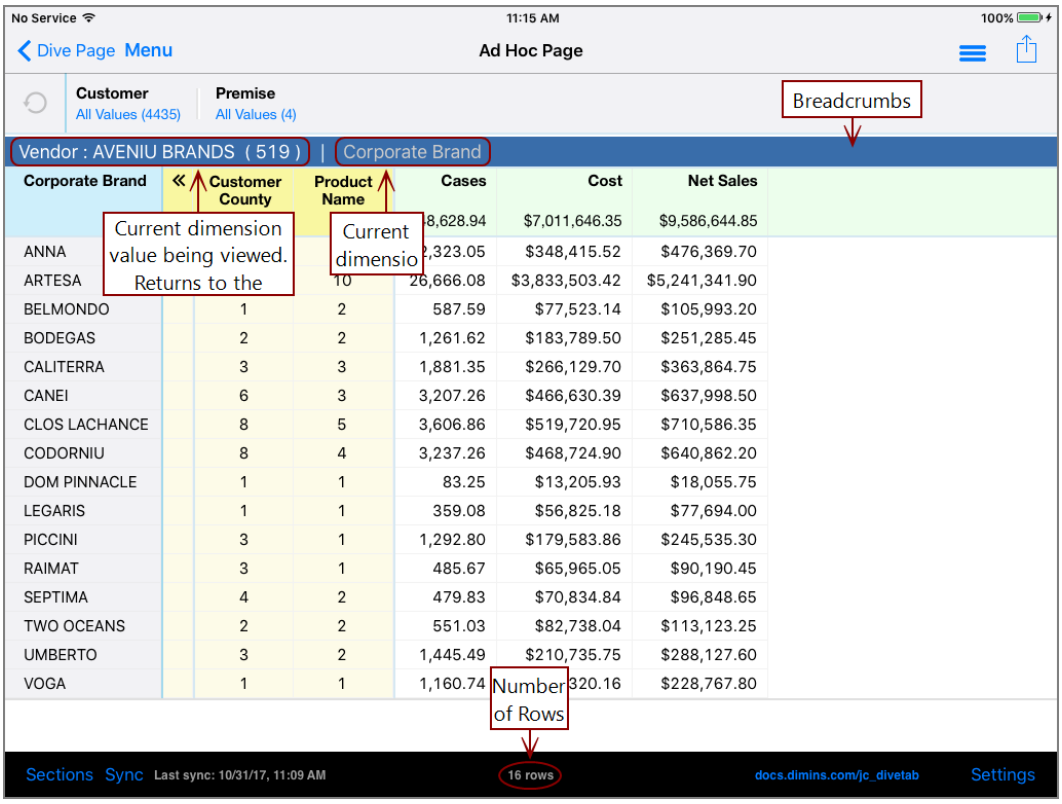
1. Choose a Dive Dimension value to dive on.

   For example, Dive Dimension Corporate Brand value 16. This means that the corresponding dimension value, AVENIU BRANDS, has 16 related values under Corporate Brand. This number is called a DimCount.



2. Tap the Dive Dimension value.

   A new page opens.



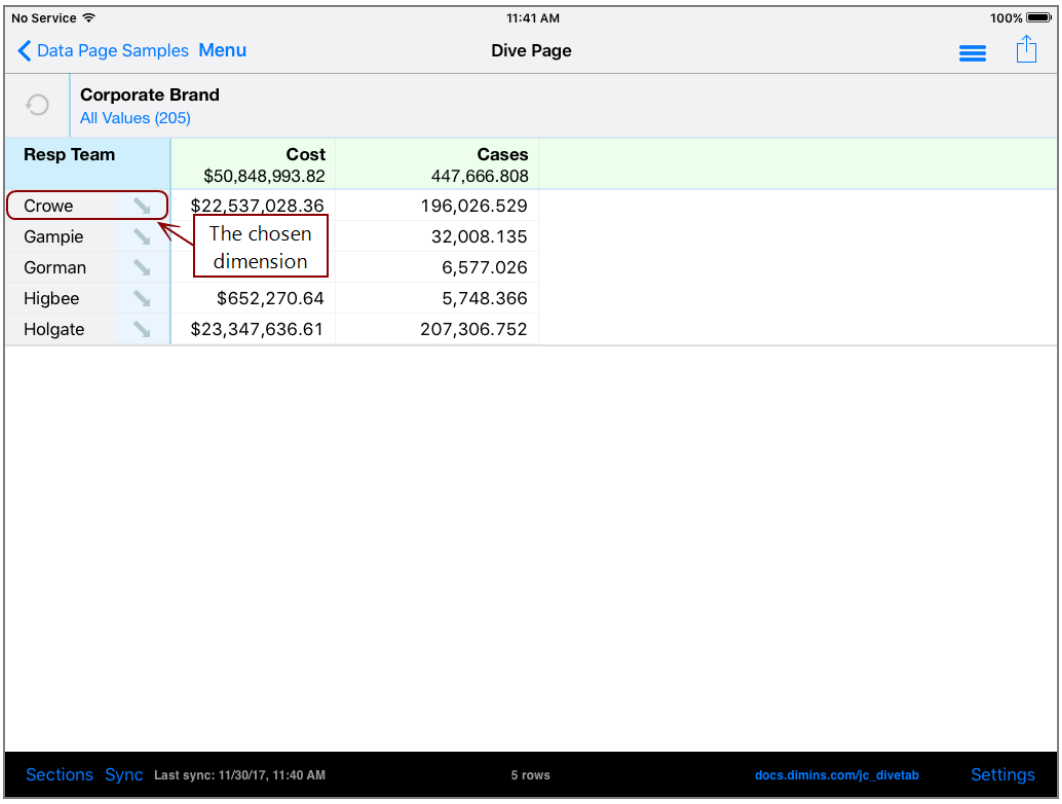
Corporate Brand	« Customer County	Product Name	Cases	Cost	Net Sales
			8,628.94	$7,011,646.35	$9,586,644.85
ANNA			2,323.05	$348,415.52	$476,369.70
ARTESA		10	26,666.08	$3,833,503.42	$5,241,341.90
BELMONDO	1	2	587.59	$77,523.14	$105,993.20
BODEGAS	2	2	1,261.62	$183,789.50	$251,285.45
CALITERRA	3	3	1,881.35	$266,129.70	$363,864.75
CANEI	6	3	3,207.26	$466,630.39	$637,998.50
CLOS LACHANCE	8	5	3,606.86	$519,720.95	$710,586.35
CODORNIU	8	4	3,237.26	$468,724.90	$640,862.20
DOM PINNACLE	1	1	83.25	$13,205.93	$18,055.75
LEGARIS	1	1	359.08	$56,825.18	$77,694.00
PICCINI	3	1	1,292.80	$179,583.86	$245,535.30
RAIMAT	3	1	485.67	$65,965.05	$90,190.45
SEPTIMA	4	2	479.83	$70,834.84	$96,848.65
TWO OCEANS	2	2	551.03	$82,738.04	$113,123.25
UMBERTO	3	2	1,445.49	$210,735.75	$288,127.60
VOGA	1	1	1,160.74	320.16	$228,767.80

The new page focuses on Vendor AVENIU BRANDS, and the 16 Corporate Brand values that belong to it. Notice the blue bar, or the breadcrumbs, along the top of the table. This indicates that the page is filtered by Vendor dimension value AVENIU BRANDS.

3. Tap the dimension and dimension value name in the breadcrumbs to return to the previous page.

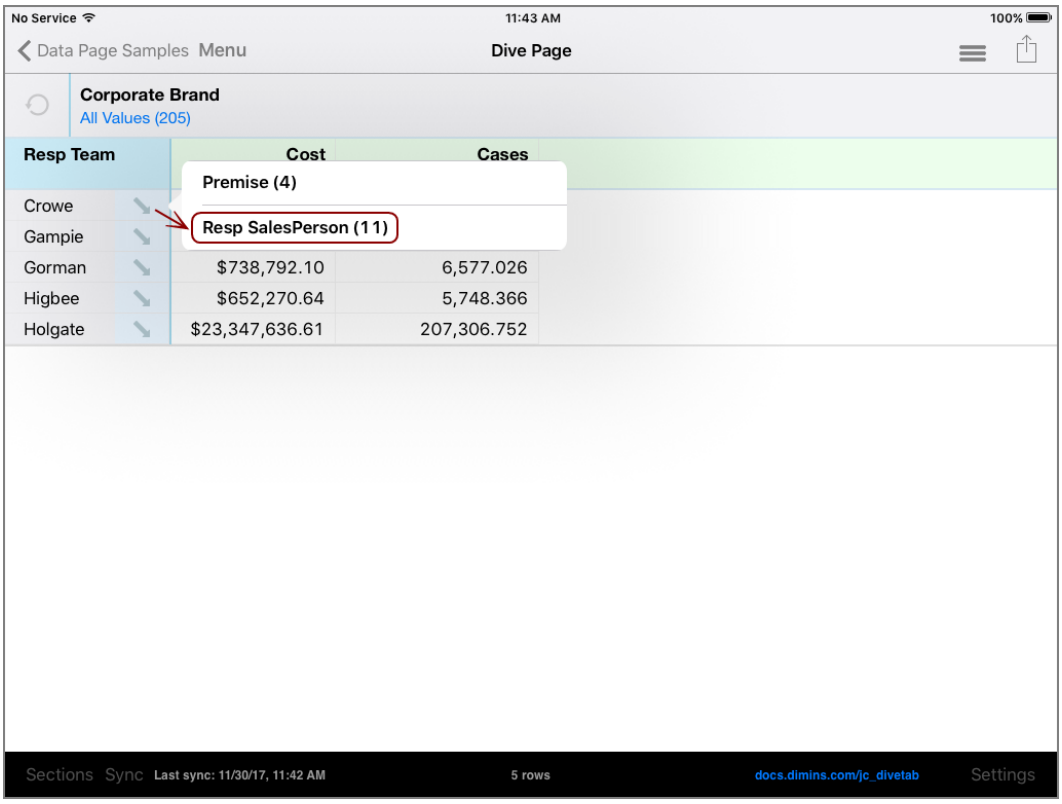
Diving on Dimension values

1. Choose a dimension value to dive on. This value must have a dive arrow, , indicating diving is possible.
2. For example, Resp Team value Crowe.



3. Tap the dive icon.

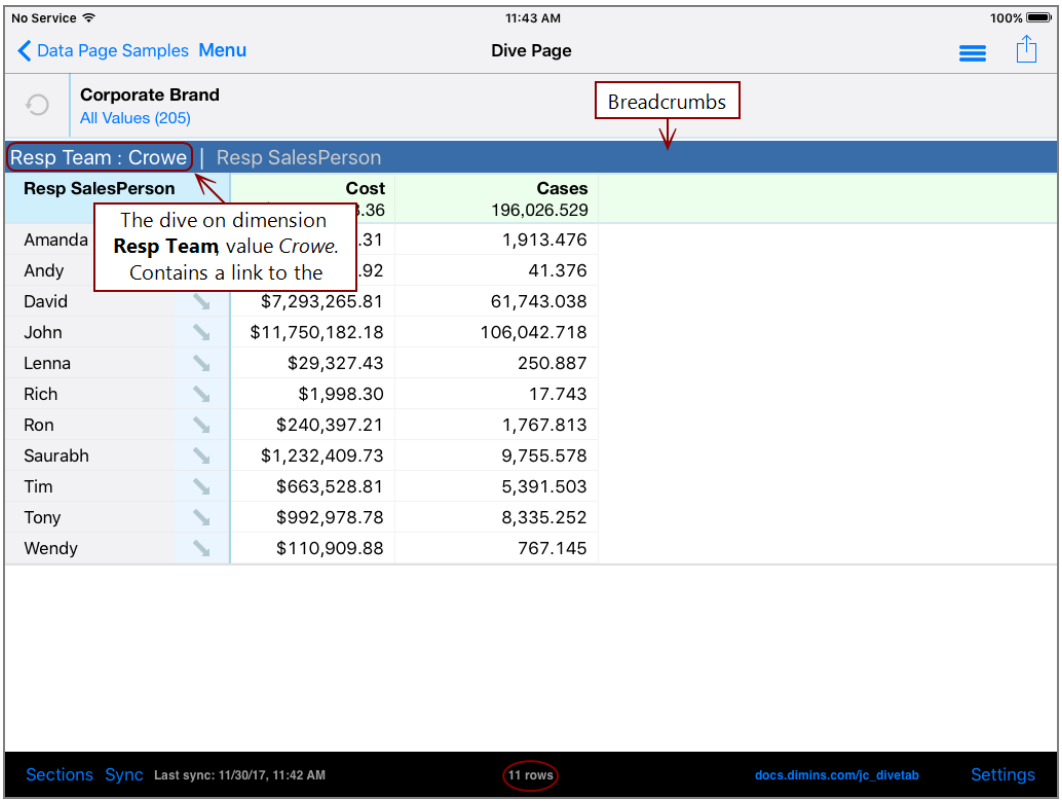
   The context menu opens.



4. Choose a dimension to dive on. For example, Resp SalesPerson. The number next to the dimension name indicates the number of values the dimension contains.

5. Tap the dimension name.

   A new page opens.



The new page focuses on Resp Team Crowe, and the related values from dimension Resp SalesPerson.

To return to the previous page, tap the values in the blue breadcrumbs bar.

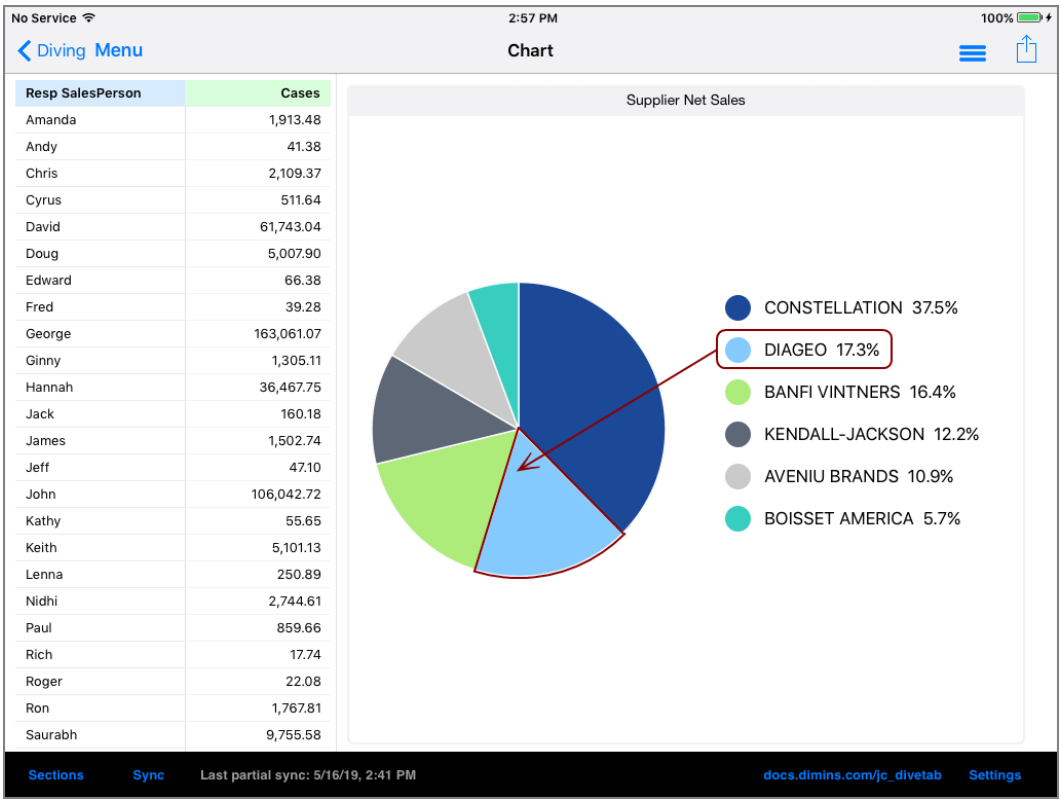
Diving on a Chart

NOTE: Diving on charts is configured by the developer.

1. Choose a chart value to dive on.

   For example, pie chart Corporate Supplier dimension value value DIAGEO. This value indicates that 17.3% of Corporate Supplier Net Sales belong to DIAGEO.

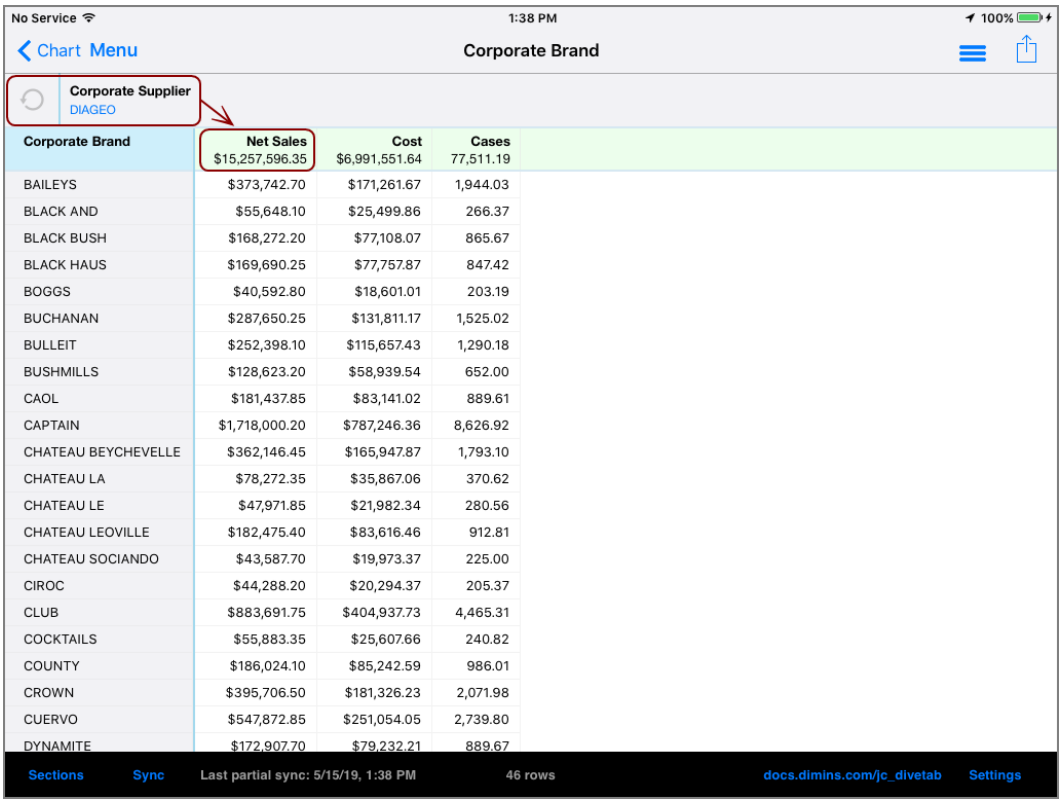
   TIP: Hover over the chart to view the chart value.



Resp SalesPerson	Cases
Amanda	1,913.48
Andy	41.38
Chris	2,109.37
Cyrus	511.64
David	61,743.04
Doug	5,007.90
Edward	66.38
Fred	39.28
George	163,061.07
Ginny	1,305.11
Hannah	36,467.75
Jack	160.18
James	1,502.74
Jeff	47.10
John	106,042.72
Kathy	55.65
Keith	5,101.13
Lenna	250.89
Nidhi	2,744.61
Paul	859.66
Rich	17.74
Roger	22.08
Ron	1,767.81
Saurabh	9,755.58

2. Tap the chart value.

   A new page opens.



Corporate Brand	Net Sales $15,257,596.35	Cost $6,991,551.64	Cases 77,511.19
BAILEYS	$373,742.70	$171,261.67	1,944.03
BLACK AND	$55,648.10	$25,499.86	266.37
BLACK BUSH	$168,272.20	$77,108.07	865.67
BLACK HAUS	$169,690.25	$77,757.87	847.42
BOGGS	$40,592.80	$18,601.01	203.19
BUCHANAN	$287,650.25	$131,811.17	1,525.02
BULLEIT	$252,398.10	$115,657.43	1,290.18
BUSHMILLS	$128,623.20	$58,939.54	652.00
CAOL	$181,437.85	$83,141.02	889.61
CAPTAIN	$1,718,000.20	$787,246.36	8,626.92
CHATEAU BEYCHEVELLE	$362,146.45	$165,947.87	1,793.10
CHATEAU LA	$78,272.35	$35,867.06	370.62
CHATEAU LE	$47,971.85	$21,982.34	280.56
CHATEAU LEOVILLE	$182,475.40	$83,616.46	912.81
CHATEAU SOCIANDO	$43,587.70	$19,973.37	225.00
CIROC	$44,288.20	$20,294.37	205.37
CLUB	$883,691.75	$404,937.73	4,465.31
COCKTAILS	$55,883.35	$25,607.66	240.82
COUNTY	$186,024.10	$85,242.59	986.01
CROWN	$395,706.50	$181,326.23	2,071.98
CUERVO	$547,872.85	$251,054.05	2,739.80
DYNAMITE	$172,907.70	$79,232.21	889.67

The resulting page is filtered by Corporate Supplier DIAGEO, and the Corporate Brands add up to the total of $15,257,596.35 in Net Sales.

3. Tap the **Back** button to return to the previous page.

For more information, see Dive Dimensions on page 28.

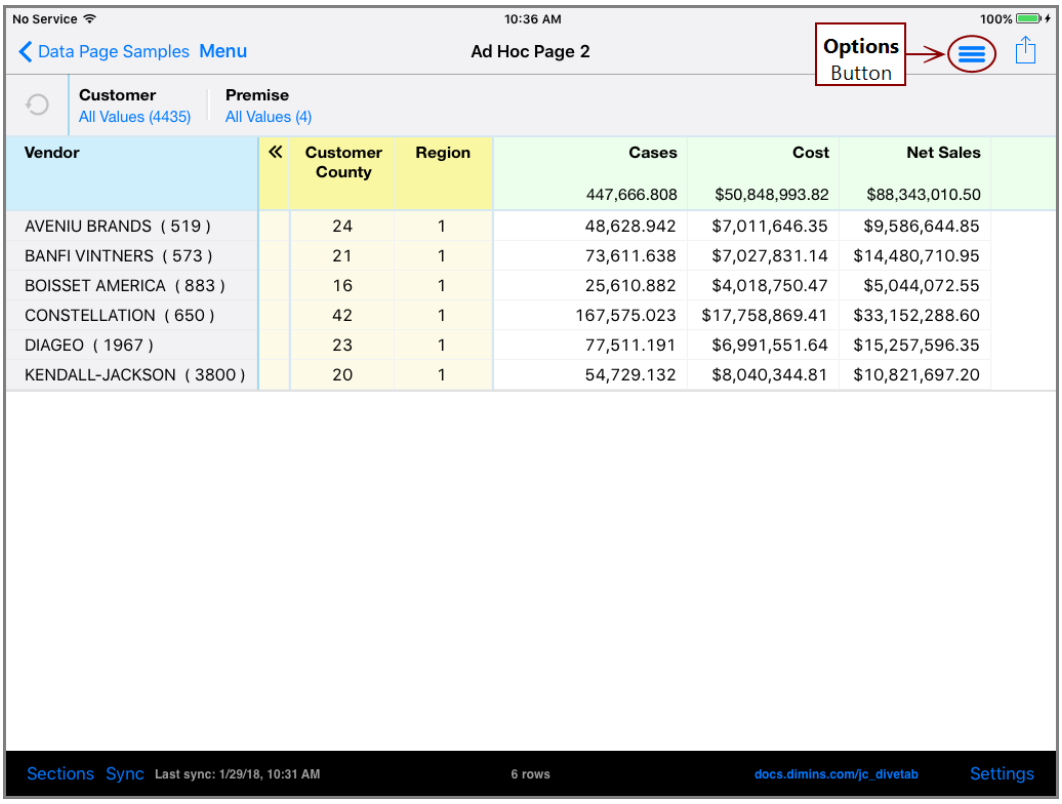
Editing Dimensions and Columns

You can change the placement of Dimensions and Summary Columns on a data page. The **Edit Dimensions and Columns** option allows you to edit the function and selection of dimensions and columns.

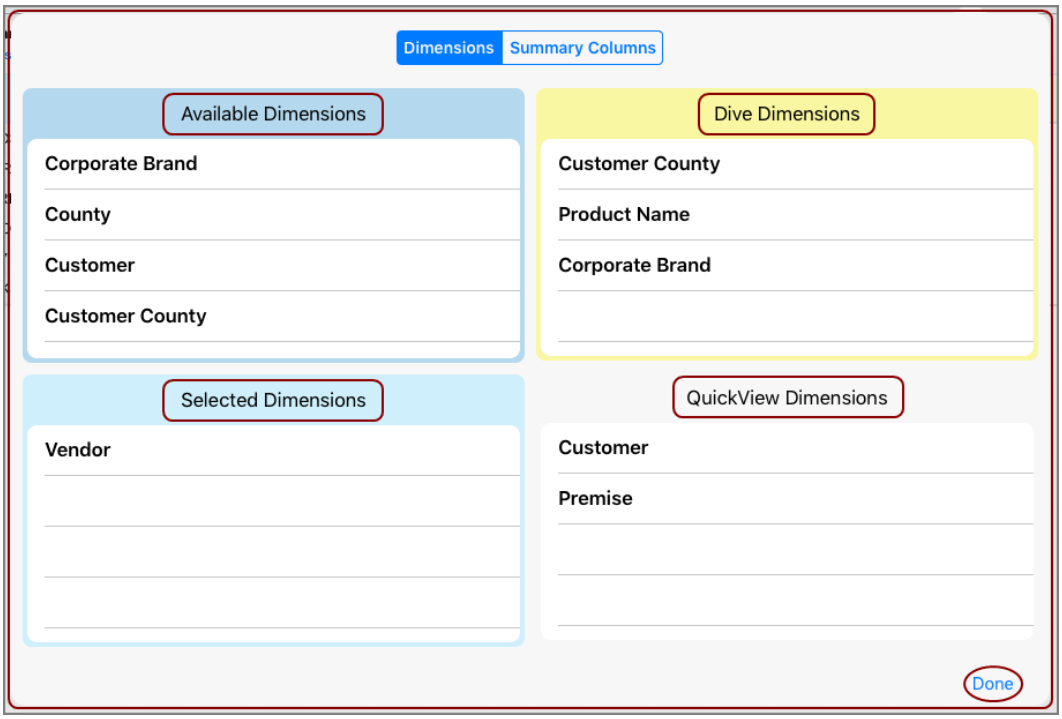
Select the **Edit Dimensions and Columns** option from the **Options** menu to bring up the dialog box.

NOTE: Not all tabular pages have the ability to edit dimensions and columns. The presence of a Dive Dimension is an indicator that editing dimensions is possible.

Here is an example of the **Options** button for the DiveTab application.



Here is the **Dimensions** tab of the **Edit Dimensions and Columns** dialog box.



TIP: Tap outside the dialog box to exit without making changes.

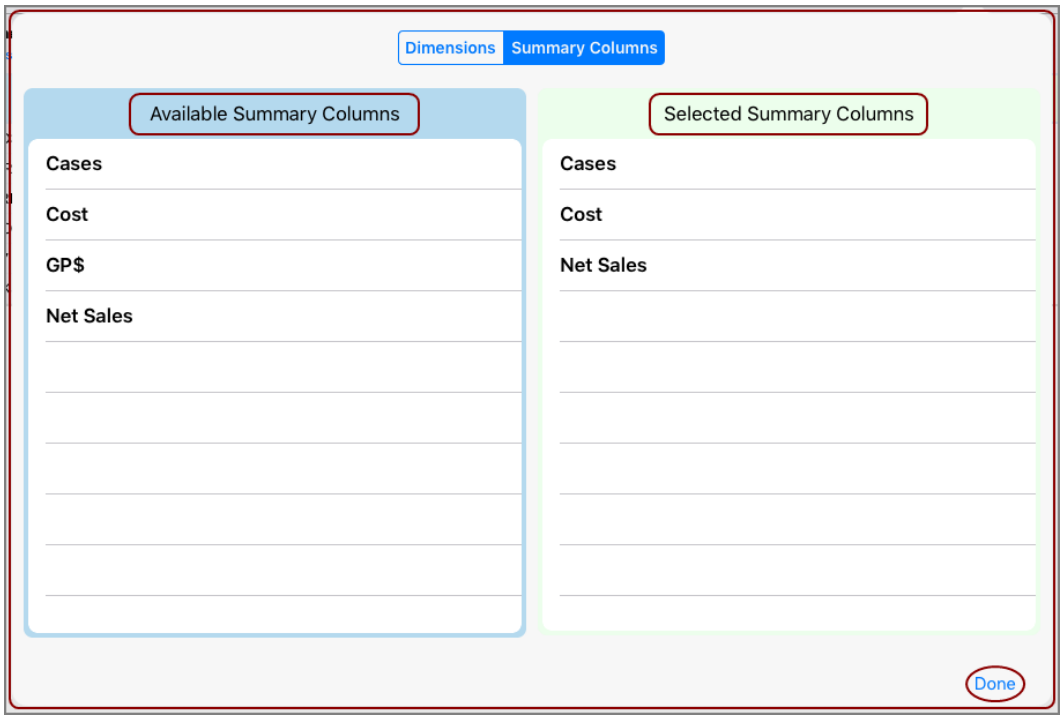
The **Dimensions** tab has four sections:

- Available Dimensions
- Selected Dimensions
- Dive Dimensions
- QuickView Dimensions

NOTE:

- Selected Dimensions and Dive Dimensions are mutually exclusive.
- QuickView Dimensions can be configured to not be edited. These Dimensions appear with a lock icon next to the name.

Here is the **Summary Columns** tab.



The **Summary Columns** tab has two sections:

- Available Summary Columns
- Selected Summary Columns

The Available section includes dimensions and columns that do not appear in the initial view. You can drag any of the Available Dimensions and Available Summary Columns to any other section to add a dimension or column, and do

the opposite to remove it. A Dimension cannot be added as both a Selected Dimension and a Dive Dimension. Keep in mind that **Selected Dimensions** must include at least one dimension.

Tap **Done** to save your changes.

NOTE: Dimensions, Dive Dimensions, and QuickView Dimensions are automatically included as Available Dimensions. Text columns, alert columns, and bullet columns are automatically included as Available Summary Columns.

Dimensions appear in the order they are listed in the dialog, from left to right.

If you return to the top level menu, or use the **Sections Button** to change pages, the dimension selections are reset, allowing you to organize the data page into a new configuration.

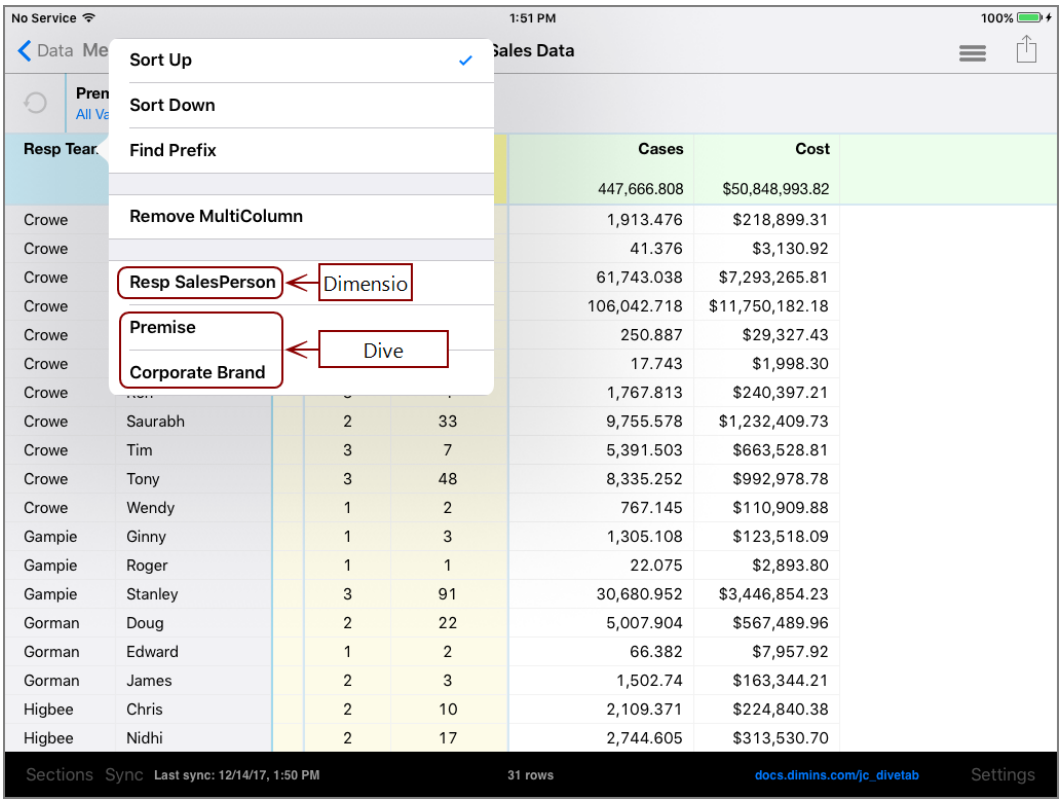
Switching Dimensions

When there are MultiColumns or Dive Dimensions in a data page, you can switch a dimension with another dimension or Dive Dimension. The dimensions that can be switched appear in the context menu.

To switch a dimension:

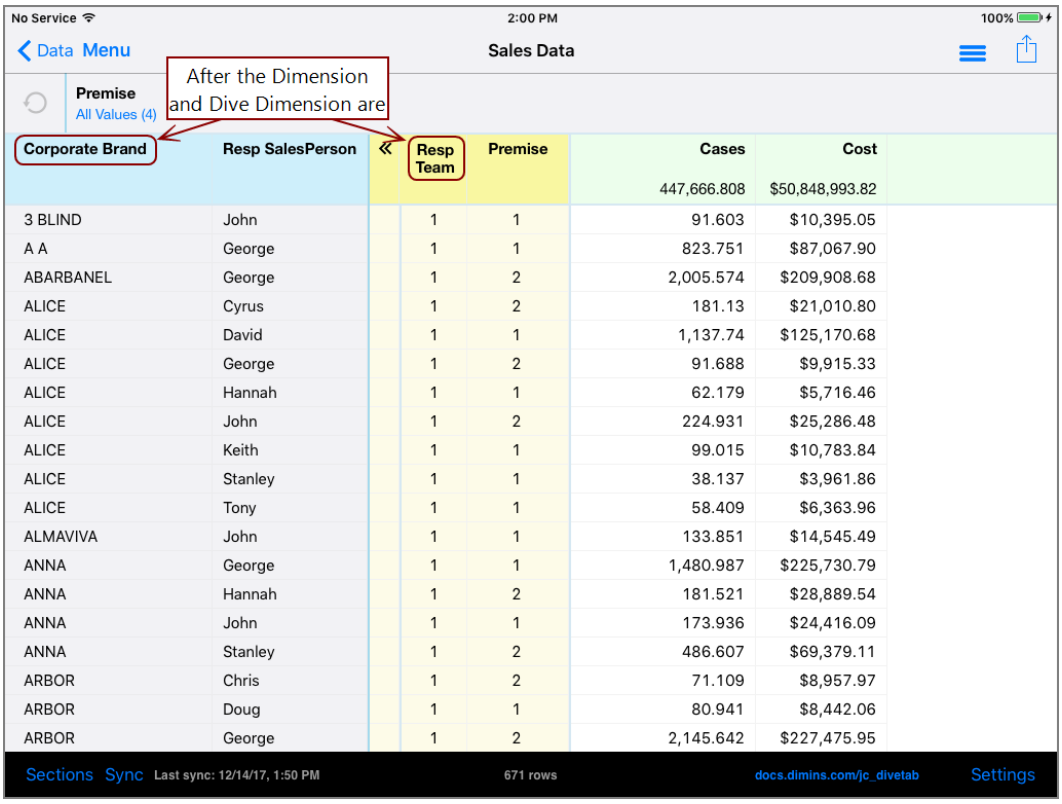
1. Tap the heading of the dimension you want to switch.

   The context menu opens.



2. Tap the dimension or Dive Dimension that you want to switch with. For this example, dimension *Resp Team* is switched with Dive Dimension *Corporate Brand*.

   This is the resulting configuration after the switch.



Notice how *Resp Team* is now a **Dive Dimension**, and *Corporate Brand* is now a **Dimension**.

See also:

- **MultiColumns**
- Dive Dimensions on page 28

Using QuickViews

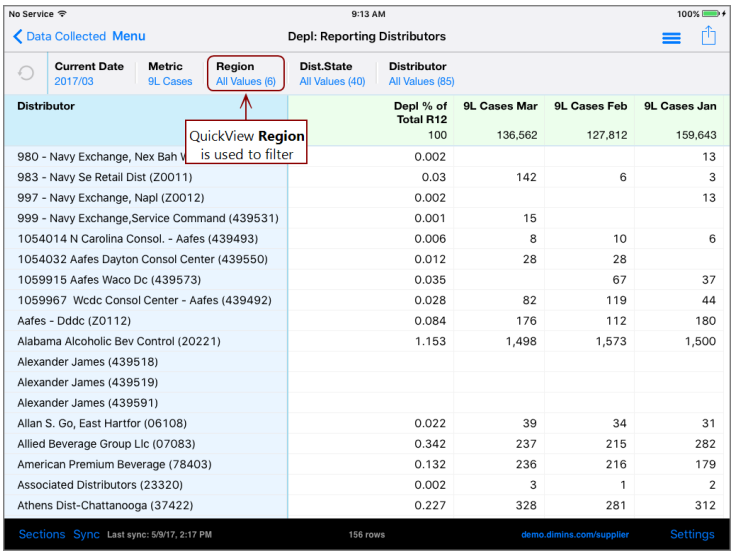
QuickViews are used to filter data by selecting specific values to view. Multiple QuickViews can be applied at the same time.

NOTE: A 64-bit iPad and developer configuration is required to use QuickViews offline, and the QuickView must be previously cached.

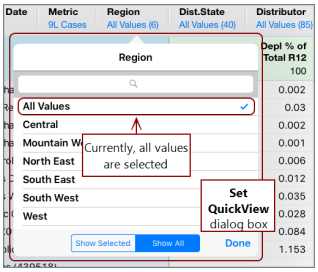
To use a QuickView:

1. Tap a QuickView.

   Here is an example of a QuickView.

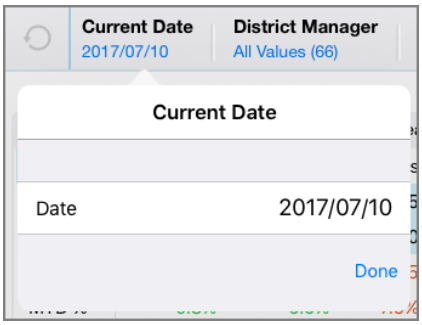


The **Set QuickView** dialog box opens.



You can also search for values using the search box. It returns values that contain your search term.

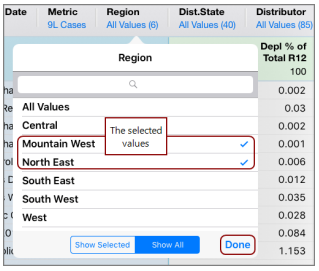
For QuickViews related to the date or date range, a drop-down menu reveals a calendar you can use to select dates. You can also enter the date in the text box using the date format.



TIP: Tap outside the dialog box to exit without making changes.

2. Tap the values you want to filter by. A check indicates the value is selected.

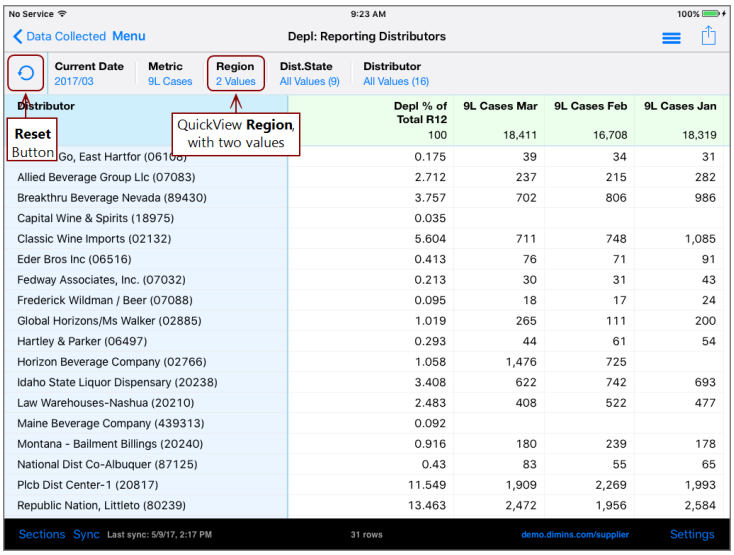
   Here is an example of the **Set QuickView** with values selected.



NOTE: You can choose to view only the selected values by clicking the **Show Selected** button.

3. Tap **DONE**.

   The dialog box closes, and QuickViews are applied.



Notice that the values have changed; only values North East and Mountain West are selected, so only data for those regions is included in the page.

NOTE: When diving on data, the QuickView still applies to the resulting page. For example, when following a link for Distributor, the Region QuickView with two selected values carries over to the resulting page.

4. Tap the **Reset Button** to return the QuickViews to the way they were configured when you initially opened the current page.

See also:

- **QuickViews**

Sharing Data Using the Output Button

In the top right corner of the DiveTab client is the **Output** icon, which has options for sharing your information. All data, document, and presentation pages have the option of sharing through **Export**, **Email**, and **Print**.

- **Export** creates and opens a *pdf* file of the page that can be saved and distributed.
- **Email** opens the default email service, creates a new message, and attaches the page as a *pdf* file.
- **Print** opens the print dialog for you to select a printer and set print configurations.

Tabular data pages have additional options to **Export** or **Email** the tabular information as a spreadsheet:

- **Export as a Spreadsheet** creates and opens an *xlsx* file of the page that can be saved and distributed.
- **Email as a Spreadsheet** opens the default email service, creates a new message, and attaches the page as an *xlsx* file.

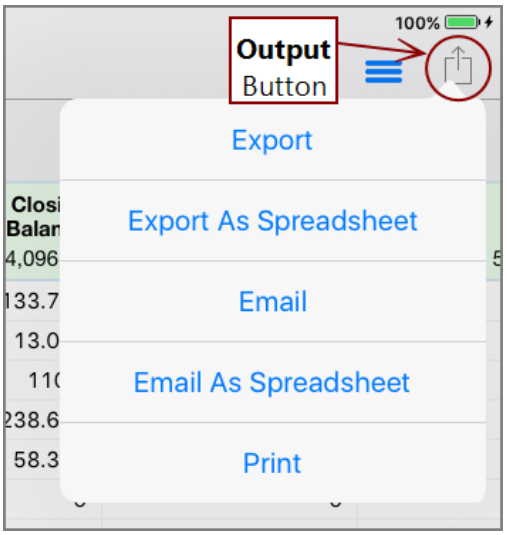
TIP: When sharing a tabular data page with many columns, choose a spreadsheet format so that columns align correctly.

The exported file is named after the page. If there is an existing file of the same name, a counter is appended to the file name.

Sharing using Export

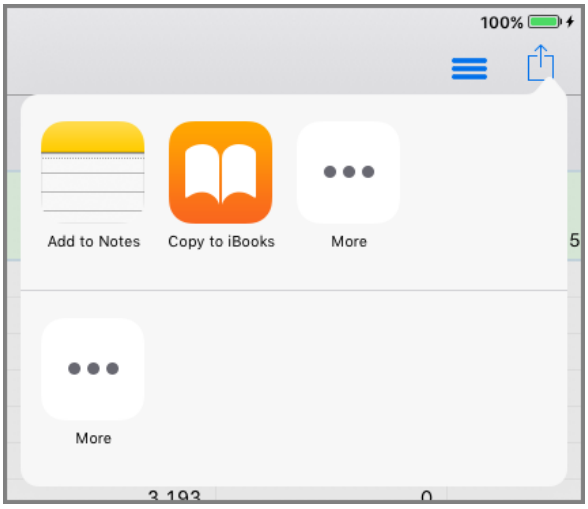
1. Tap the **Output Button**.

   The **Output** menu opens.



2. Tap **Export** or **Export as Spreadsheet**.

   A second options menu opens.



3. Choose which application you want to use to store and later open the file.

   The exported file opens automatically using the chosen application.

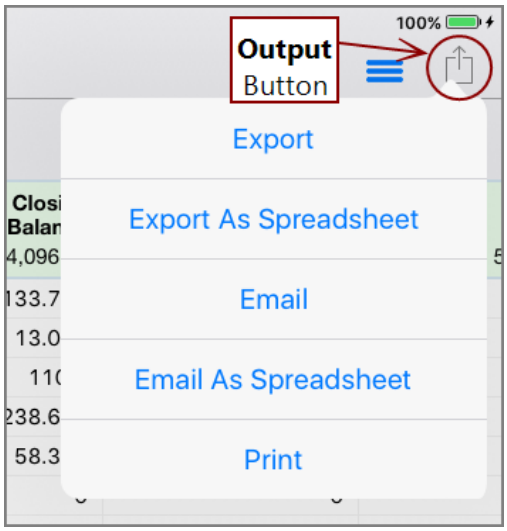
   NOTE: **Export** results in a *pdf* file. **Export As Spreadsheet** results in an *xlsx* file.

Sharing using Email

CAUTION: Before using **Email** or **Email as Spreadsheet**, check that a default email program is defined.

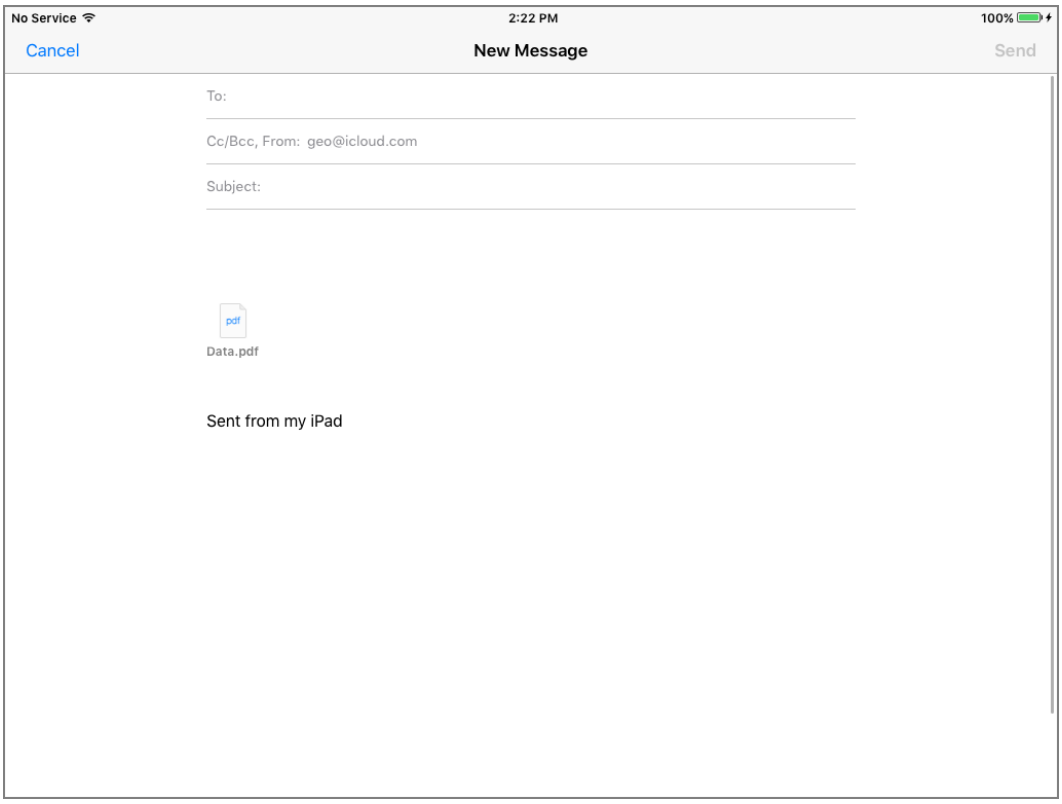
1. Tap the **Output Button**.

   The **Output** menu opens.



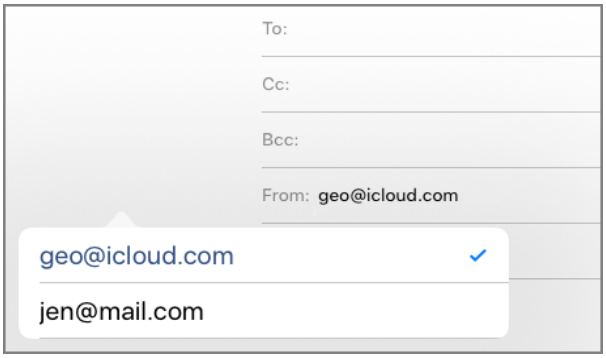
2. Tap **Email** or **Email As Spreadsheet**.

   A new email message opens using the Mail application, with the file attached.



NOTE: **Email** sends a *pdf* file. **Email As Spreadsheet** sends an *xlsx* file.

3. Fill in the recipients, subject, and message as appropriate, and send the message. If the *From* email is incorrect, tap the email and select the email you want to use as the sender from the menu.



Configuring email settings

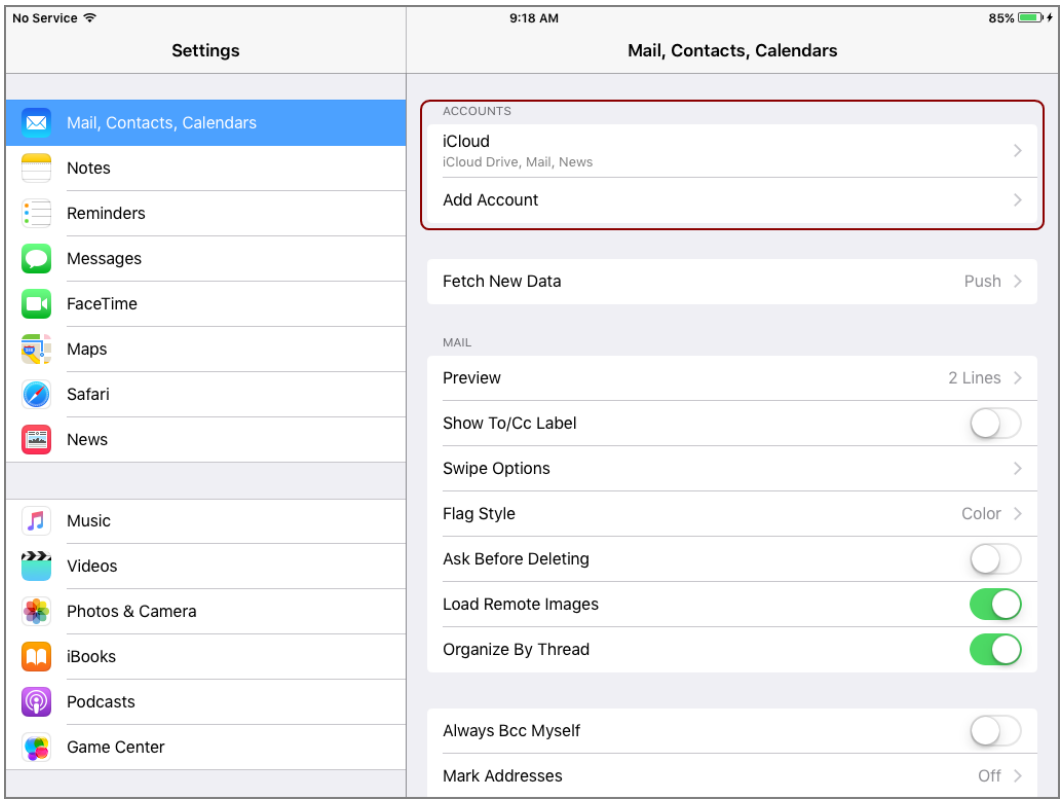
The iPad uses the Mail application. If you want to use a different email than the one currently chosen, you can choose or add another account.

1. From the home page on the iPad, locate and tap the **Settings** icon.

2. In the Settings pane on the left, scroll until you find **Mail, Contacts, Calendars**.

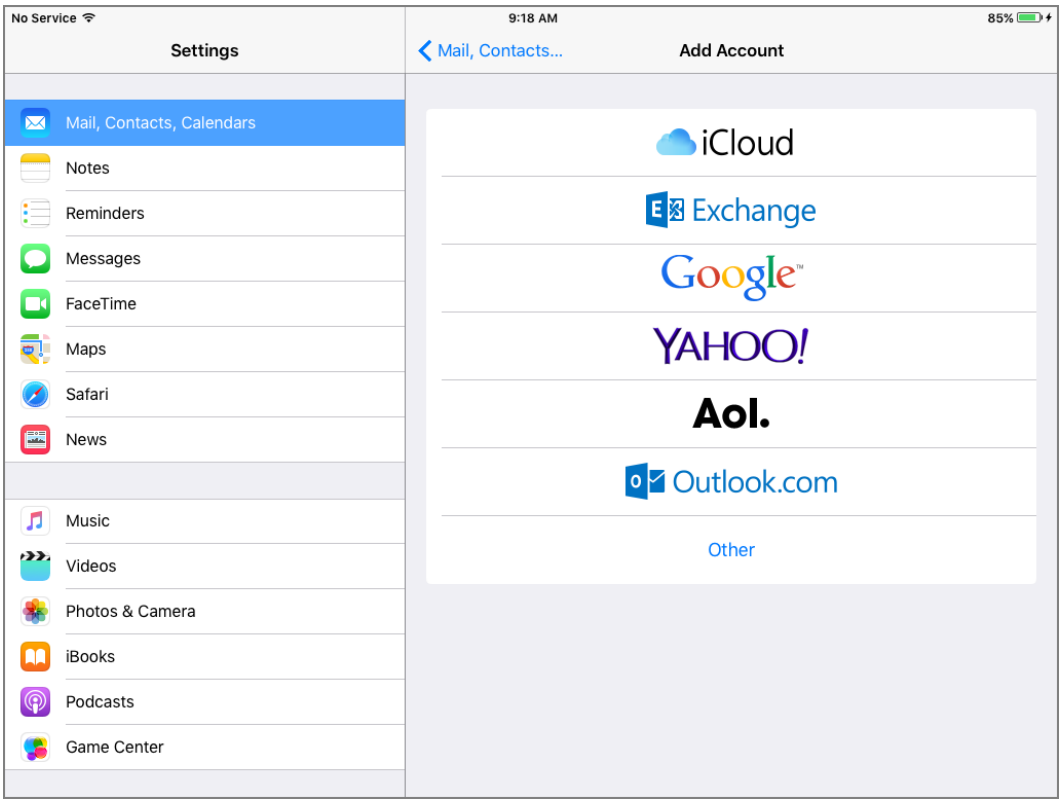
3. Tap **Mail, Contacts, Calendars**.

   The Mail, Contacts, Calendars information opens in the pane on the right.



4. Beneath Accounts, tap **Add Account**.

   A list of account types opens.



5. Choose which account type you want to use and fill out the required information.

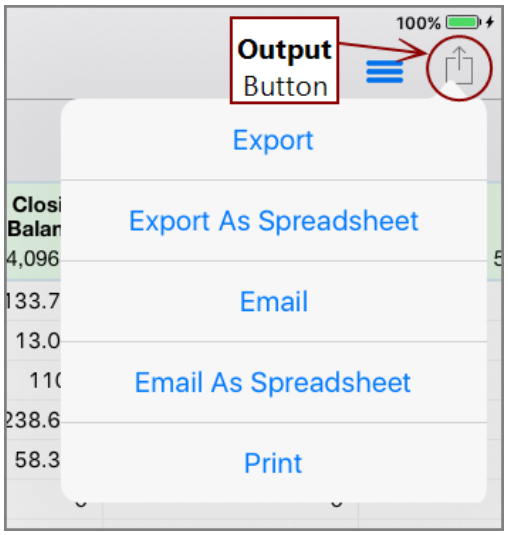
   NOTE: Contact your administrator for server information.

Sharing using Print

NOTE: Contact your administrator to set up wireless printing.

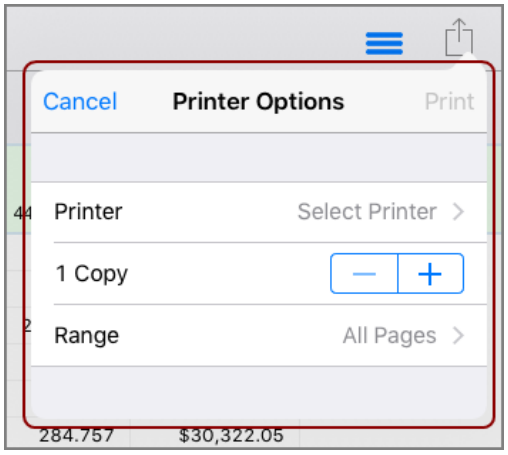
1. Tap the **Output Button**.

   The **Output** menu opens.



2. Tap **Print**.

   The **Printer Options** dialog box opens.



3. Configure your print options and tap **Print**.