

Welcome to William & Mary

Qlik – Overview



WILLIAM & MARY

CHARTERED 1693

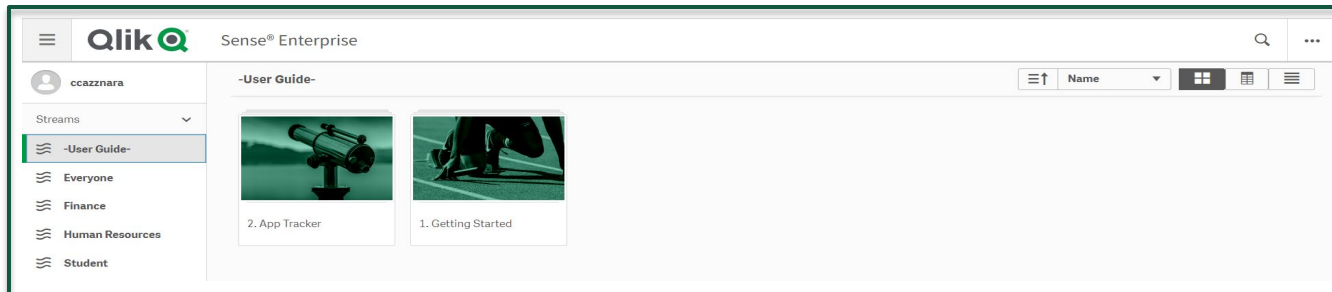
Access

- Data Self-Service
 - <https://www.wm.edu/offices/it/services/data/qlik/index.php>



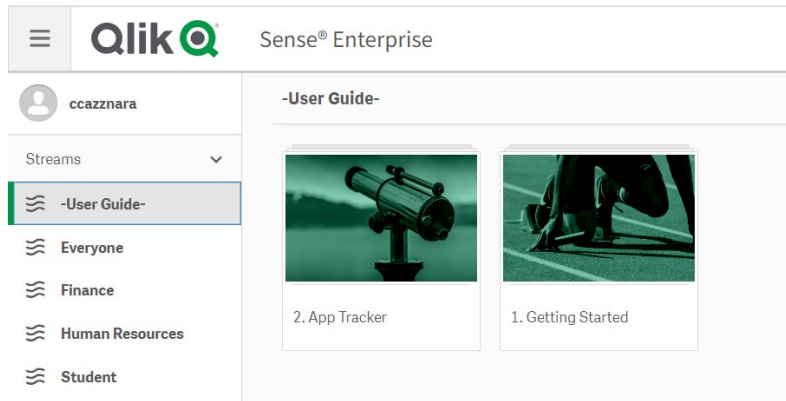
The screenshot shows a webpage titled "Data Self-Service" under the "DATA" category. The breadcrumb trail is "Departments & Offices / ... / Data / Data Self-Service". The page features a navigation menu on the left with options: "Data @ W&M", "Data Self-Service" (highlighted), "Training", and "Fact Book". Below the menu are social media icons for Facebook, Twitter, LinkedIn, Instagram, and a calendar icon. The main content area includes the heading "Data Self-Service" and the subtitle "Qlik - W&M's data discovery tool". A paragraph explains that Qlik is used to meet reporting needs and ensure effective decisions. Another paragraph describes Qlik Sense's capabilities in extracting and merging data from multiple sources. A black button at the bottom right says "VISIT QLIK (QLIK.WM.EDU)".

- Qlik Sense Hub
 - <https://qlik.wm.edu/hub/stream/4d455398-6fb7-4d2c-a449-84a8a0a83301>

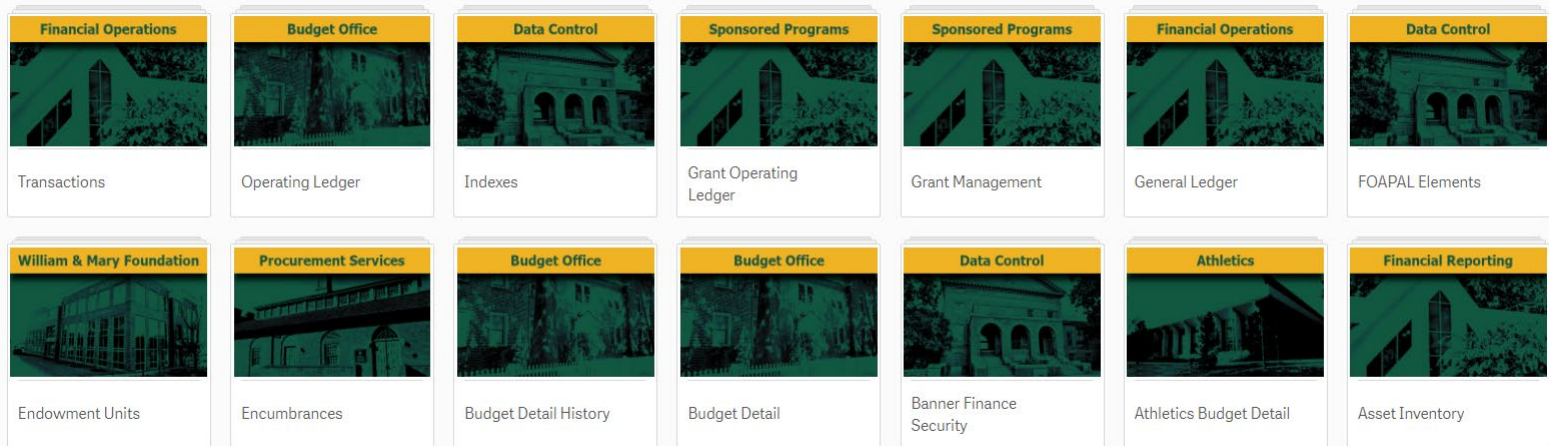


The screenshot displays the Qlik Sense Enterprise user interface. The top header shows the Qlik logo and "Sense® Enterprise". The user profile "ccazznara" is visible in the top left. A left-hand navigation pane lists "Streams" with options: "-User Guide-" (selected), "Everyone", "Finance", "Human Resources", and "Student". The main content area is titled "-User Guide-" and contains two cards: "2. App Tracker" with a telescope image and "1. Getting Started" with a person working at a desk. The top right of the interface includes a search icon and a menu icon.

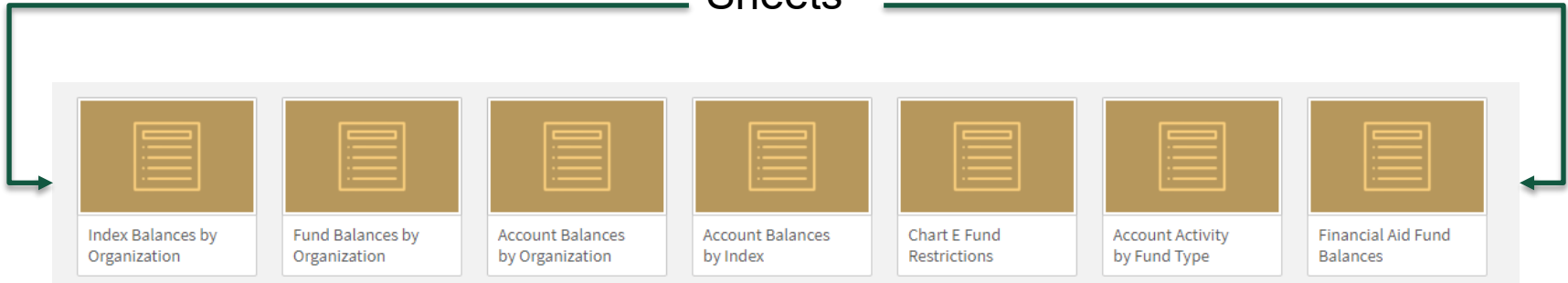
- Streams



- Tiles

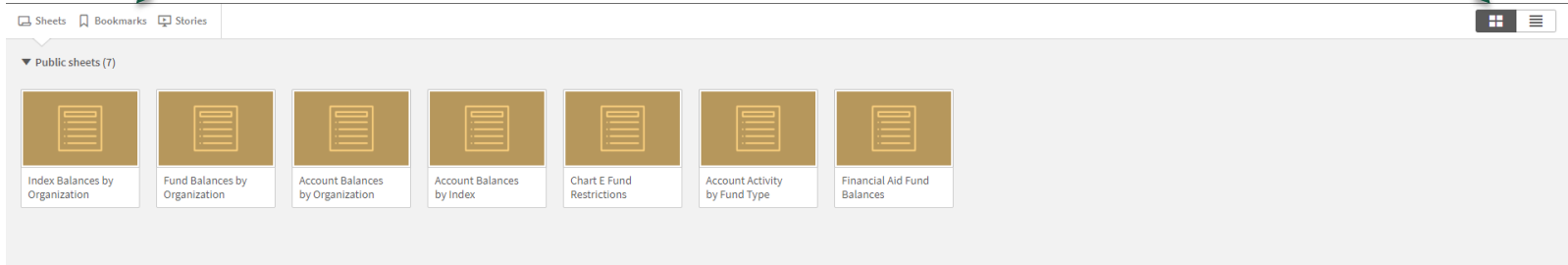


Sheets

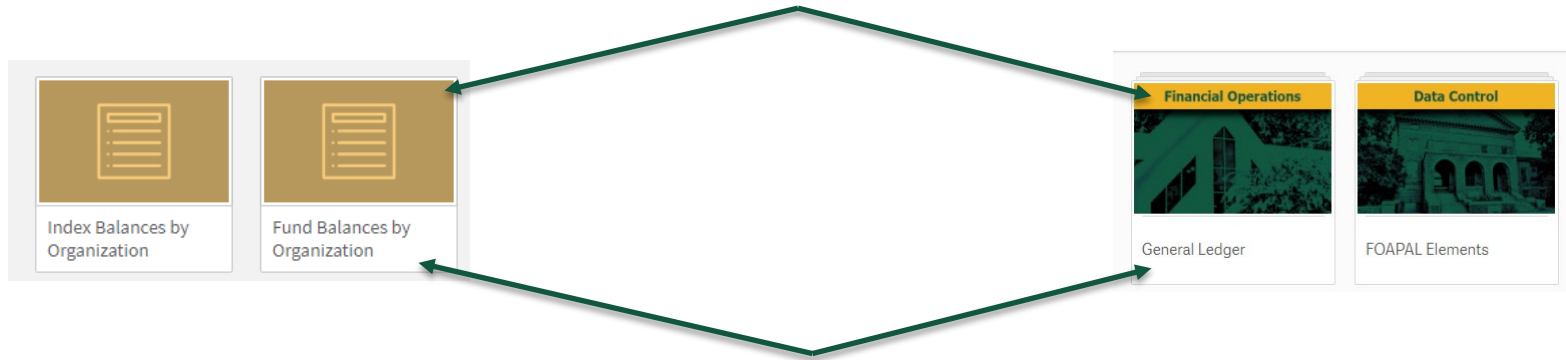


Bookmarks saved Under
Operating Ledger Tile

Sheet Views



Click on the picture to go to report



Click on words to get report information

Grant Operating Ledger ✕

[Open](#)

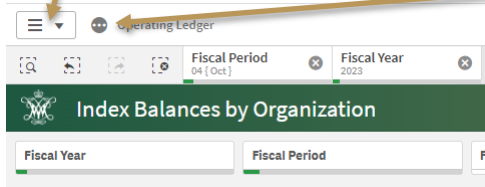
Sponsored Programs



Data reloaded: Oct 31, 2022, 7:36 AM
Published: Apr 18, 2022, 10:35 AM
Created: Nov 19, 2021, 12:24 PM
File size: 373 MB
Location: Finance
Properties: WM_App_Data_Restriction_Type: Finance Fund/Org
WM_App_Data_Source: ODS - Banner
WM_App_Data_Steward: Sponsored Programs
WM_App_Intended_Audience: Sponsored Programs Staff
WM_App_Refresh_Rate: 1 day
Owner: Qlik Admin (CAMPUS)qvadmin

Track budget, expenditure, revenue, encumbrance, and balance summaries of funds associated with the Banner Finance Grants module (Sponsored Programs, Capital Projects, Study Abroad Revenue Funds). Includes Grant and Fund summaries by Billing Category and a list of Billing Category definitions.

Navigation Tools

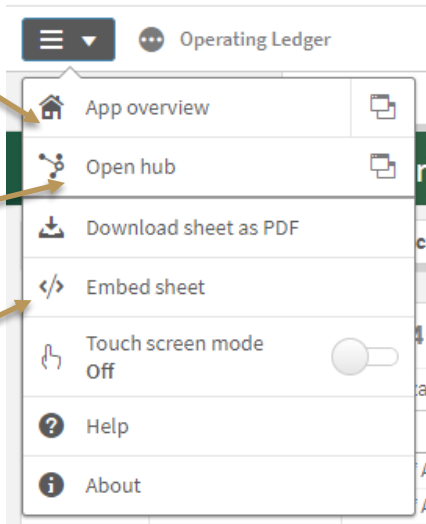


Show App Info

Navigates back to “sheets” page

Navigates back to Hub

Share with Embedding

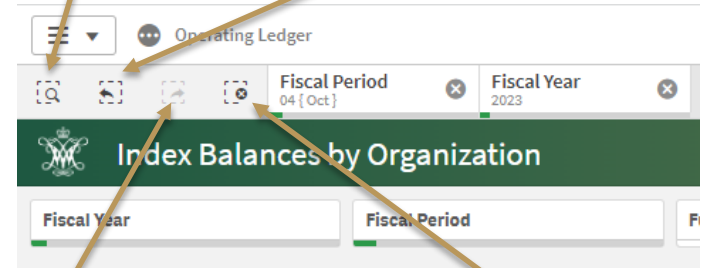


Smart Search

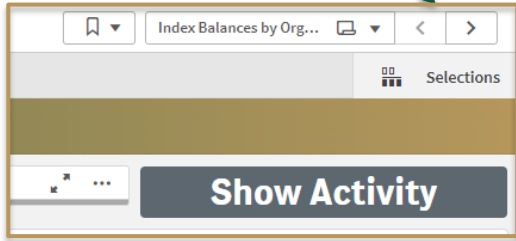
Step Back

Step Forward

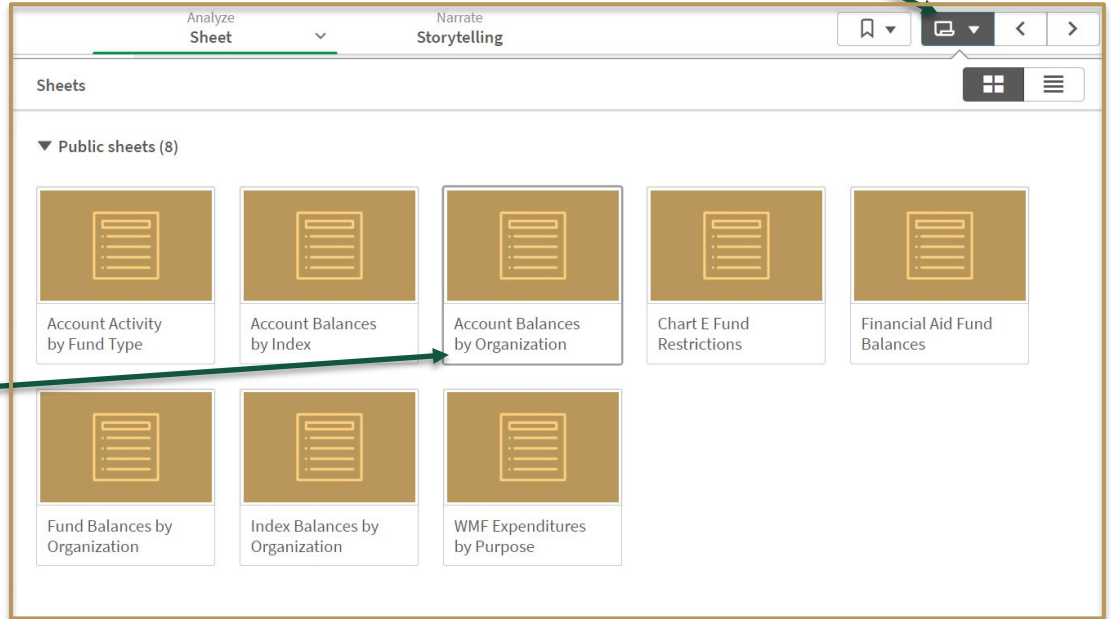
Clear All Selections



These arrows will navigate through sheets in order



To select a different report by title, click the dropdown

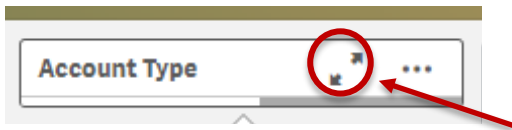


The highlighted one is the active report

Click the gray 'Show Activity' button in the top right corner to add the activity column

Filter searches

- Using the filter boxes on top
- Using the magnifying glass next to the column titles
- In the dropdown box, select the desired filter and then click the green check box



To view the filter boxes in full screen mode, select the arrows pointing in opposite directions

Click the X to exit full screen mode

Click the three dots for more options

Fiscal Year	Fiscal Period	Fund Type	Fund	Organization	Internal Account Type	Account Type
2023	04 [Oct]	11 [General Funds Unrestricted (0100)]			50 [Revenue]	51 [CONTRIBUTIONS - GENERAL]
2022	14 [EOY]	12 [E&G Funds(0300)]			60 [Labor]	51 [Tuition and Fees]
2021	13 [EOY]	12 [UNRESTRICTED QUASI-ENDOW SPEN...]			70 [Direct Expenditures]	53 [Grants & Contracts]
2020	12 [Jun]	13 [G&C Fixed Price Pool Accounts(0302)]			80 [Transfers]	55 [Other Revenue]
2019	11 [May]	14 [Indirect Cost Recoveries (0303)]				58 [Local/Local Aux Revenue]
2018	10 [Apr]	14 [UNRESTRICTED ENDOWMENT SPEND...]				61 [SALARIES]
2017	09 [Mar]	16 [Excess Indirect Cost Recovery(0310)]				61 [Salaries]
2016	08 [Feb]	1Y [College Local Funds]				62 [Wages]
2015	07 [Jan]	1Z [BOV Funds - Unrestricted]				63 [Fringe Benefits]
2014	06 [Dec]	21 [CURRENT RESTRICTED]				64 [Termination Payments]
2013	05 [Nov]	26 [Federal Grants & Contracts (0301)]				65 [Special Payments]
2012	03 [Sep]	26 [RESTRICTED QUASI-ENDOW SPENDA...]				66 [Disability Payments]
2011	02 [Aug]	27 [Non-Fed Grants & Contracts (0302)]				67 [WTA]
2010	01 [Jul]	27 [RESTRICTED ENDOW SPENDABLE]				69 [Recoveries]
2009	00 [BBE]	2W [CWMF Gifts Pass Through-Restrictd]				7 [Undesignated Budget Direct Expend]
2008		2Z [Restrictd Expendable Gifts]				71 [Contractual Services]
2007		91 [Unexpended Plant Funds]				72 [Supplies and Materials]
2006		1W [CWMF Gifts Pass Through-Unrestrictd]				73 [TRANSFER PAYMENTS]
2005		11 [CURRENT UNRESTRICTED]				73 [Transfer Payments]
2004						74 [Continuous Charges]

To view table in full screen mode, select the arrows pointing in opposite directions

More Options:

- View Data- changes the table to view data only, also offers a download option
- Share- provides an Embed option
- Storytelling snapshots- takes screenshots of the table and store them in a library
- Download as- provides export options: Image, pdf, Data

For more options, click on the three dots

The screenshot shows the 'Index Balances by Organization' report. The interface includes a header with 'Operating Ledger', 'Analyze Sheet', and 'Narrate Storytelling'. Below the header are filters for 'Fiscal Year', 'Fiscal Period', 'Fund Type', 'Fund', 'Organization', 'Internal Account Type', and 'Account Type'. A 'Show Activity' button is on the right. The main table has columns: 'Chart', 'Organization', 'Organization Description', 'Index', 'Index Description', 'Budget', 'YTD Activity', 'Encumbrances', 'Remaining Balance', 'Fund Restriction Text', and 'Fund Signers'. Red arrows point from the filter fields to their corresponding column headers in the table.

- Budget= Starting Budget from carry over budgets and/or budget loads
- YTD Activity=All transactions posted to index
- Encumbrances=Payments on hold from buyW&M
- Remaining Balance=Current balance in Index
- Fund Restriction Text=How this fund can be spent
- Fund Signers=The budget authorities for this index

Additional Information

- **Qlik Training**
 - *Training videos*
 - *Useful Information*
 - *Qlik Cheat Sheets*
- **Get Access**
 - *Student, Advancement, Faculty, Financial Aid, Human Resources Request Form*
 - *Banner Admin Access request through Request IT.*
- **Help & Support**
- **Questions**
 - *Contact the Technology Support Center (TSC) 757-221-4357 (HELP) | support@wm.edu*

Qlik Training

Ready to start using Qlik? **Take the training!**

Get Access to Qlik

The method to obtain access to Qlik will depend on the Qlik Subject Area you intend to access.

- ▶ **Student, Advancement, Faculty, Financial Aid, Human Resources**
- ▶ **Finance**

Help & Support

- **Qlik Help**
- **Qlik Help Video Library**
- **Qlik Community (User Forums)**

Questions? Contact the **Technology Support Center (TSC)**

757-221-4357 (HELP) | support@wm.edu | Monday - Friday, 8:00 am - 5:00 pm