

INTRODUCTION TO QLIK SENSE

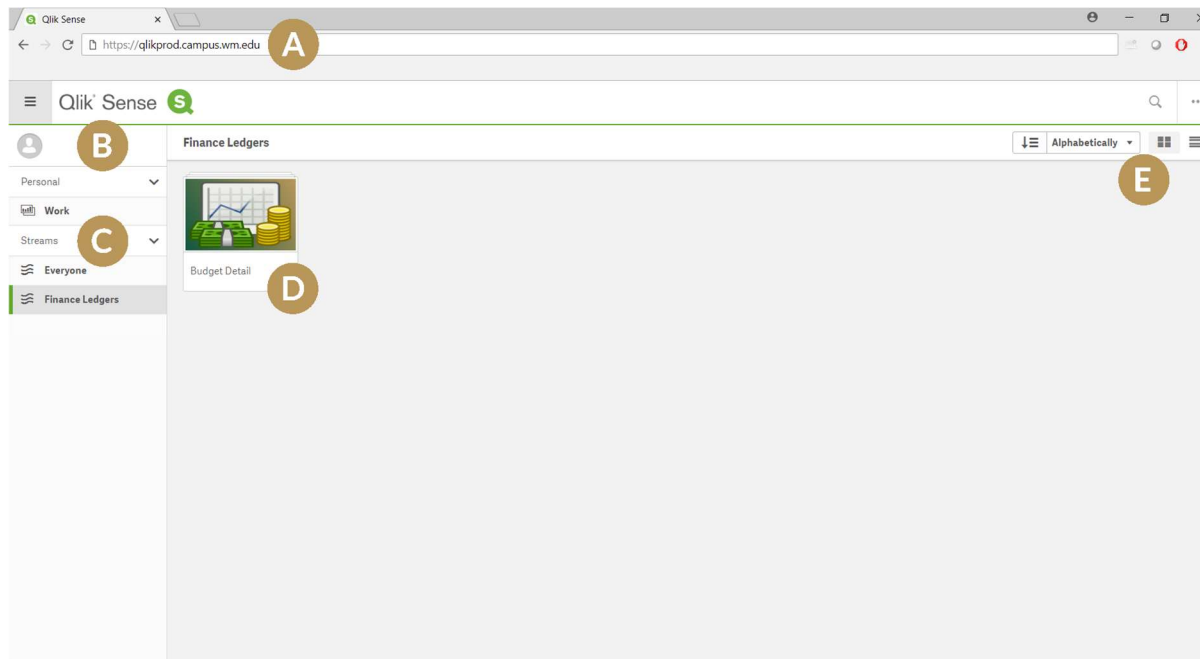
(July 2019)

Open Qlik - <https://qlik.wm.edu>

The Hub – find the Apps to which you have been granted access

Streams – a folder that holds a collection of similarly-themed apps

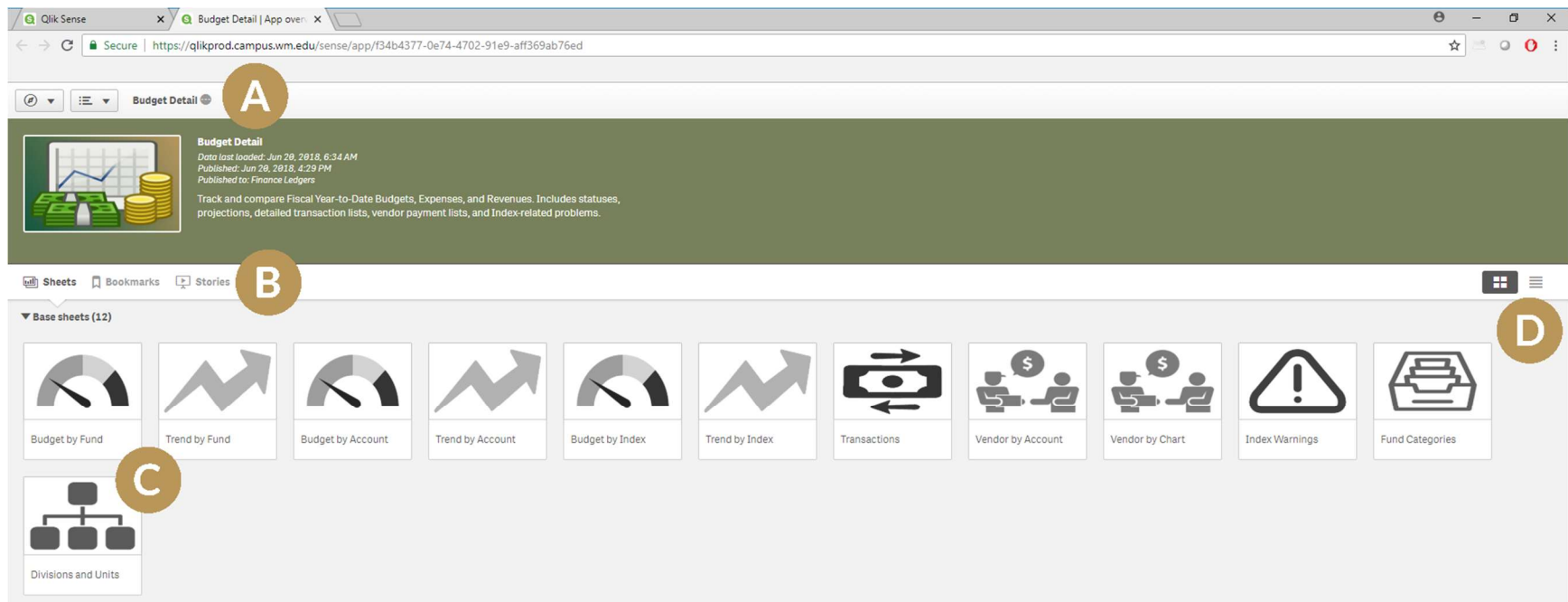
Apps – a collection of sheets (similar to tabs in Discoverer reports) that contain data items (lists, graphs, etc.) that let you make data discoveries and decisions. To see Details about an App while in the Grid View, click on the App title. To open an App, click anywhere on the App thumbnail image.



App Overview

When you open an app from the Hub, you arrive at the App Overview in a new browser tab. This is where you see all the content within the App. The content of the main area depends on what category you have selected: Sheets, Bookmarks, or Stories. By default, the Sheets are displayed.

- A. The Qlik Sense toolbar contains the Navigation Menu button {  }, the Global Menu button {  }, and the App name. To return to the Hub, click the Navigation Menu and select Open Hub. To get Help with Qlik Sense, click the Global Menu and select Help, which will open a page at help.qlik.com. In both of these menus, there is the option to open the links in a new browser tab by clicking the {  } icon next to the menu option. You can hide or show the App Details by clicking the {  } icon next to the App name.
- B. The Main Area toolbar lets you choose whether to display Sheets, Bookmarks, or Stories. This introductory training will focus on Sheets and Bookmarks. Stories will be covered in advanced training at a later date.
- C. The Main Area of the page defaults to displaying a list of Sheets. Clicking on a Sheet title will show or hide Details about the Sheet. Clicking on the thumbnail image of a Sheet will open it.
- D. Similar to the Hub, you can choose whether to display Sheets as a Grid or a List. Qlik Sense will default to the Grid View. If you select the List View by clicking the {  } icon, the Details for a given App will be displayed alongside the thumbnail image. To switch back to the Grid View, click the {  } icon.



(App Overview)

Sheet View

When you click on a Sheet in the App Overview, the content displayed in the browser tab changes to the Sheet View allowing you to analyze the data by making Selections in the Visualizations.

- A. The Qlik Sense toolbar has some additional options when in Sheet View. The Navigation Menu {  } now has an option to return to the App Overview, either in the same tab or in a new tab {  }, and the Global Menu {  } now has an option to export the displayed Sheet to a PDF. At the right end of the toolbar, there are buttons for Stories {  }, Bookmarks {  }, and Sheet navigation {  }. Clicking the arrow buttons on the Sheet Navigation bar will select either the previous Sheet or next Sheet. Clicking the Sheet name on the Sheet Navigation bar will drop down the list of all available Sheets, allowing you to select any Sheet in the App.
- B. The dark gray Selections bar keeps track of all the current Selections you have made, and includes options to undo {  }, redo {  }, and clear all {  } Selections. There are two icons at the right end of the Selections bar. The Smart Search icon {  } allows you to search the entire App for whatever search terms you type, and the Selections Tool icon {  } allows you to apply Selections for every data element included in the App, whether or not it is displayed on the current Sheet.
- C. The Main Area of the Sheet View displays all of the Visualizations associated with the selected Sheet. There are many different types of Visualizations (also called Charts) used in Qlik Sense Apps: Filter Panes, Tables, Pivot Tables, Bar Charts, Pie Charts, Line Charts, Maps, Gauges, Scatter Plots, Treemaps, and more.
- D. You can expand any Visualization to full-screen by hovering over it and then clicking the full-screen {  } icon in the upper right corner of the Visualization. To close the full-screen view, click the {  } icon in the upper right corner of the expanded Visualization.

Qlik Sense

Budget Detail - Vendor b

Secure | https://qlikprod.campus.wm.edu/sense/app/f34b4377-0e74-4702-91e9-aff369ab76ed/sheet/3bafd5ea-d2c9-4bf9-b984-6c3af592e0db/state/analysis

Budget Detail

Vendor by Account

No selections applied

Fiscal Year

2018

2017

2016

Chart

E

H

Division

Administration

Advancement

Arts and Scien...

Unit

Academic Affairs

Academic Serv...

Academic Sup...

Organization

110000 { Office of the President }

111100 { Office of the Dean and Direct...

111110 { Diversi...

Index

110001 { Undergraduate Financial Assi...

110002 { Grad Arts Sci Financial Assist...

110003 { Sch Business Financial Assist...

Vendor Payments by Fiscal Year

SWaM Vendors highlighted

Vendor Name	FY2018	FY2017	FY2016	FY2015
Totals	204,400,568.84	199,830,224.30	217,254,619.13	198,543,239.52
	20,868,258.62	22,268,940.14	20,849,484.32	18,443,469.86
	17,793,330.22	17,883,516.12	17,524,945.83	15,094,250.34
	12,201,717.18	13,442,468.12	21,172,817.74	17,009,650.79
	11,641,512.96	13,081,799.85	26,819,583.77	18,706,365.21
	10,950,534.04	1,805,601.97	7,552,155.33	3,310,284.19
	8,026,991.08	8,543,556.19	6,229,574.78	0.00
	6,594,738.99	10,853,695.21	14,464,589.81	3,285,507.85
	6,027,502.81	6,083,617.98	5,599,745.72	6,208,951.87
	3,449,811.34	1,069,818.37	0.00	0.00
	3,351,198.00	2,874,816.00	2,231,463.00	2,461,782.00

Vendor Payments by Account Type

Filter your selections to a single Fiscal Year

Vendor Payments by Account

Filter your selections to a single Fiscal Year

(Sheet View)

Making Selections in Visualizations

To filter the data that is displayed in a Qlik Sense App, you make Selections. Nearly every item in nearly every Visualization is selectable. You make Selections by clicking or drawing in the different Visualizations. When you make a Selection, all Visualizations in every Sheet in the App are updated immediately to reflect that Selection.

You confirm the selection by clicking the green check mark, or by clicking anywhere on the Sheet outside the Visualization, including in another Visualization (in which case you generate a new Selection). You can also press the <Enter> key to confirm a Selection. You can cancel a Selection prior to confirming it by clicking the red X or by pressing the <Esc> key.

By default, new Selections are added to the previous ones. You deselect an item by clicking it. You can hold down the <Ctrl> key while making a Selection to automatically clear previous Selections, and only keep the new Selection(s).

In addition to being able to make a Selection by clicking any item in any Visualization (including values, labels, legends, bars, pie slices, etc.), there are also two ways to “draw” a Selection. In a Visualization that has an x-axis and y-axis, such as a Bar Chart, you can click and drag a range on either axis to limit the displayed values. The other drawing option is enabled by clicking on a Visualization and clicking on the Lasso {  } icon in the upper right corner. With the Lasso tool enabled, you can draw a freehand line through a collection of data points or draw a freehand circle around a collection of data points.

Exploring with Selections

Each time a Selection is made, the result is displayed in the dark gray Selections bar above the Sheet, and each one has a small bar at the bottom that reflects the states of the values for that filtered Dimension: selected (green), alternative (light gray), and excluded (dark gray). You can undo {  }, redo {  }, or clear all {  } Selections by clicking on the appropriate icon. Remember: Active Selections apply to all Sheets in the App.

When you click a Selection item on the Selections bar, a popup appears. This lets you view, edit, or clear that Selection. You can also select alternative values or excluded values by clicking the {  } icon, or you can search for values.

To search for values in a Filter Pane or Table, click the magnifying glass {  } icon next to the Dimension to be searched and begin typing. All matching values will be highlighted in green as you type. Pressing the <Enter> key or clicking the green check mark will select all highlighted values. An asterisk may be used as a wildcard when searching.

To filter an item not listed on the Sheet, you can click Selections Tool icon {  } on the right side of the dark gray Selections toolbar above the Sheet. This will give you an overview of every Dimension in the App, including the current filtered state of every dimension and the ability to make a Selection on every Dimension.

Bookmarking Selections

Bookmarks let you save specific Selection states to prevent having to make the same Selections each time you open an App. Bookmarked Selections are available in both the App Overview and the Sheet View.

To create a Bookmark, make the Selections on the Sheet that you want to save as a Bookmark, click the Bookmarks {  } button on the right side of the Qlik Sense toolbar, then click the Create New bookmark button in the upper right corner. The Bookmark is now created, so there is no need to save it. You can give the Bookmark a Title and Description that makes it easier to identify in the future. Click anywhere outside the Bookmark drop-down window to close it.

To apply the Selections associated with a Bookmark, simply click on it and you will be taken to the Sheet where the Bookmark was originally created.

To delete a Bookmark, right-click it and click Delete.

Manipulating Visualizations

The amount of data in a Visualization (particularly in Filter Panes, Tables, and Pivot Tables) will occasionally exceed the size of the Visualization, even if it is expanded to a full-screen view using the full-screen {  } icon. When you hover over a Filter Pane or Table that has more data than can be displayed, small gray scroll bars will appear that can be clicked-and-dragged to scroll through the data, horizontally and/or vertically. Bar Charts and Line Charts also have a “zoomed-view” scroll bar that can be clicked-and-dragged.

Fields in a Table can be sorted in either ascending or descending order by clicking on the field name at the top of the column.

Data contained within a Visualization can be exported as an image, a PDF, or Excel file, by right-clicking on the Visualization and clicking Export.

To log out of Qlik Sense, click on your UserID, then click the {  } icon.

Getting Help

Qlik Sense help is available at <http://help.qlik.com> and can be easily accessed by clicking the Global Menu button {  } and selecting Help.

For assistance with connection and navigation problems, contact IT at support@wm.edu