Qlik Quick Start Guide
Qlik PROD – https://qlik.wm.edu

See also the Qlik Sense Navigation Training Video at https://cornerstone.wm.edu (key video minutes are noted below)

Key Concepts
- **Stream** - folders that holds collection of Apps
- **App** – task-specific, purpose-built application
- **Sheet -** contains data items like lists, graphs, etc. for data discoveries and decisions
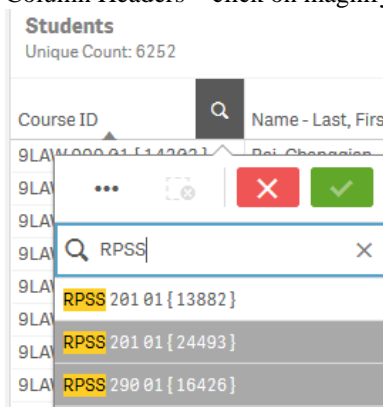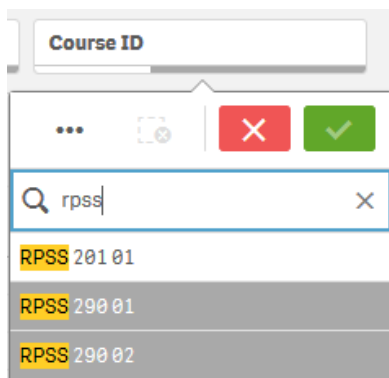
Within an App – Ways to Navigate between sheets
- Navigate Menu { ☰ ▾ } in upper right corner – select App Overview to view all available Sheets and to select any Sheet. *or*
- Sheet Navigation Bar { Vendor by Account ▾ < > } in upper left corner. Click on the Sheet name box to access list of available Sheets for selection *or* use arrow buttons to move through the Sheets one at a time.

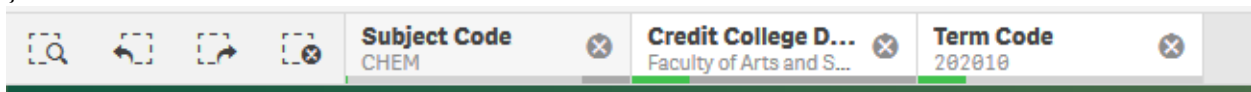**Making Selections by Searching/Filtering (video 11:35)**
You make selections by clicking one or many choices. Confirm selections with green checkmark or enter key. Confirmed selections apply throughout the App. Cancel selection with red X or press ESC key. By default, new Selections in same field built on existing selections. You deselect an item by clicking it. Hold down the <Ctrl> key while making new elections to automatically clear previous Selections, and only keep your new Selection(s).

- Filter Panes – click on box   *or*   Column Headers – click on magnifying glass
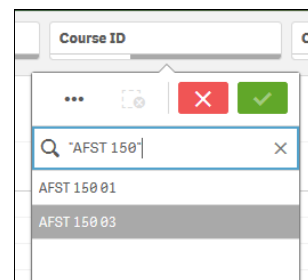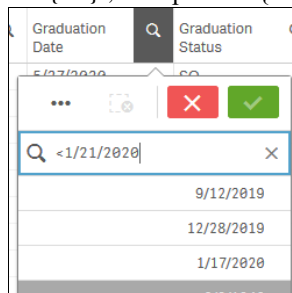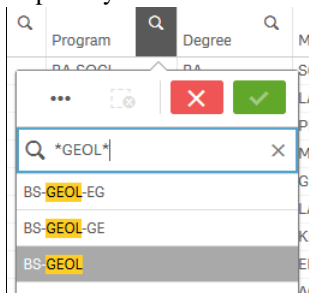

You can also select any value in a visualization to enable filter selection box.

- Selections bar provides breadcrumb of all selections and includes options to undo { ↰ }, redo { ↱ }, and clear all { ⊠ } Selections.

- Improve your selections with Wildcard { * } , Comparison { >, <, =) and exact { " " } searches.

Manipulating Selections (video 19:55)
- **Expand Visualizations** 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.

- **Export** a visualization as image, PDF (only captures what is visible on screen) or Data (creates spreadsheet) by right clicking on the Visualization and selecting Export. Select from options listed.
- **Scroll** using small gray scroll bars when a visualization has more data than can be displayed on screen horizontally and/or vertically. Hover to locate scroll bar. As data is filtered, the scroll bar will move with the reduced records.

- **Sort** data in ascending or descending order by clicking on the column header. Arrow will appear to indicate sort order.

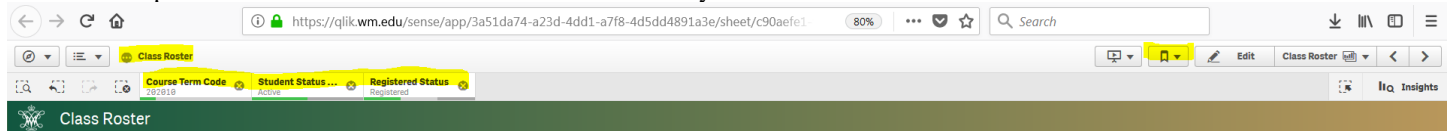- **Moving columns** is possible. Unless saved as a bookmark, the columns will revert to standard order when you exit the app.
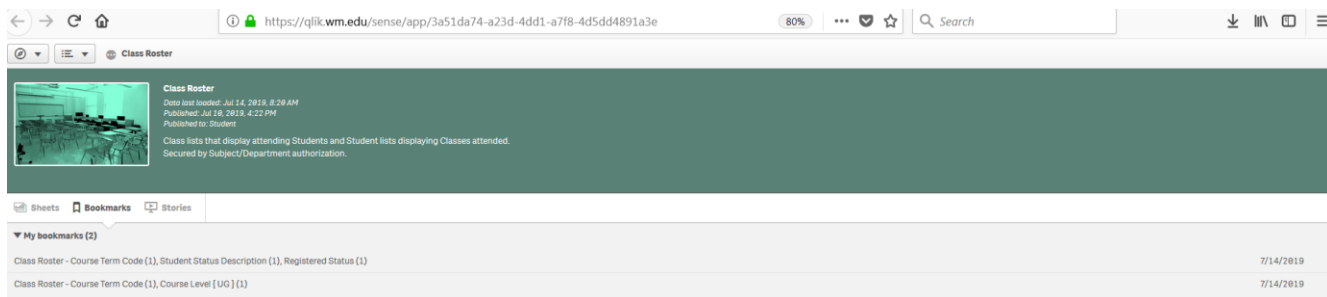
Bookmarks – Saving Your Selections as a Shortcut (video 18:30)

Make the selections on the sheet that you want to save as a bookmark. Click { 🔖 ▾ } then Create new bookmark. You can also re-order columns and save as part of bookmark. Default title is sheet name and a summary of your selections but you may edit as needed. Enter a description of the bookmark. The bookmark automatically saves.

Bookmarks – Using your Shortcut

From the App Overview *or* Sheet, click { 🔖 ▾ } to search and apply Bookmarks. Click on bookmark to activate your saved sheet/selection combo.

Bookmarks – Editing
You may edit Bookmark titles and descriptions but you *cannot* edit your selections.

Bookmarks – Deleting your Shortcut
To delete a Bookmark, right-click the Bookmark and click Delete.

Getting Help

- Navigation – IT has provided you with Qlik Sense Navigation training in Cornerstone. Return to Cornerstone to address questions regarding navigation, filtering, bookmarks and more. This online, on-demand training can be reviewed as of often as needed. Downloads are also available in the class details (1) Introduction to Qlik Sense and (2) Qlik Sense Desktop Reference.
- Technical assistance - contact IT at support@wm.edu
- Data questions – contact the appropriate functional office (i.e. University Registrar, Finance, HR, etc.)