



**UNIVERSIDAD PRIVADA DE TACNA**

**FACULTAD DE INGENIERIA**

**Escuela Profesional de Ingeniería de Sistemas**

**INFORME DE LABORATORIO N° 02**  
**“GETTING STARTED WITH QLIK SENSE”**

Curso: Inteligencia de Negocios

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**2022**



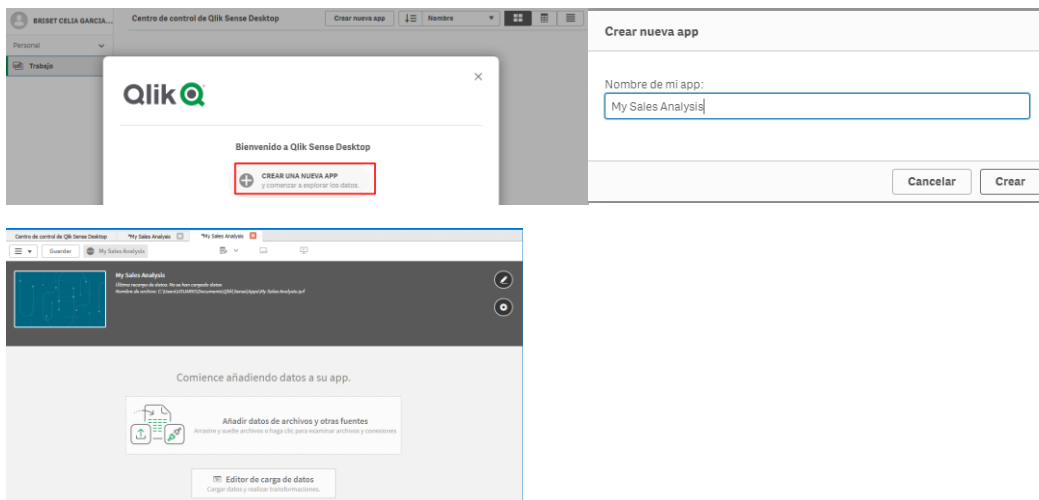
## **INFORME DE LABORATORIO N° 02**

### **TEMA: GETTING STARTED WITH QLIK SENSE**

Analysis Goal: Create an app designed to evaluate sales in different countries, consider sales trends over time, and discover and focus upon product categories with low sales totals

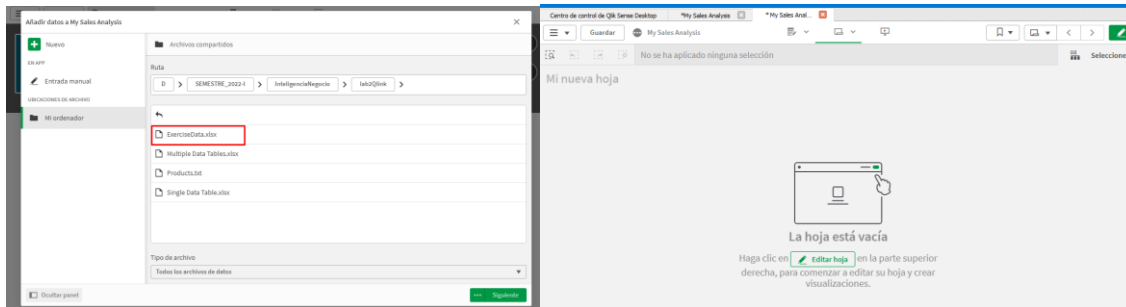
#### **Create a new app**

- Launch Qlik Sense.
- Create a new app.
  - o Name the app: “My Sales Analysis”.
  - o Create and Open app.



#### **Load data**

- Use the Add data from files and other sources tile in order to add the Excel data to the app (from the file ExerciseData.xlsx).
  - o Load all fields from the spreadsheet, by clicking the Add data button.

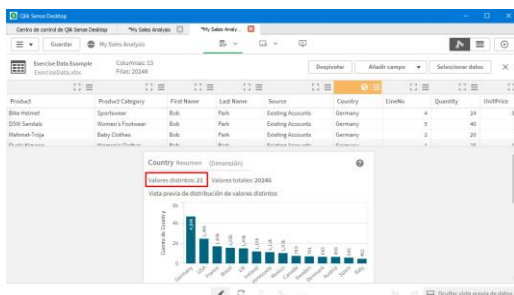


## Review data

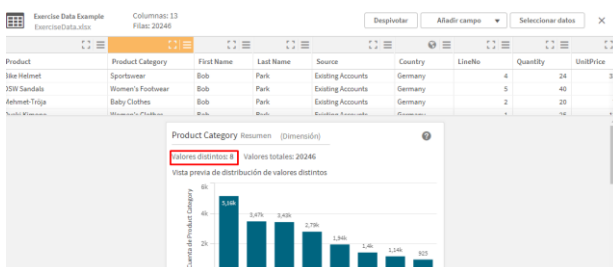
- Use the quick access menu to navigate to the Data manager view, in order to learn more about this table.
- Open the Data manager's table editor view by clicking on the icon along the bottom of the view.

Click on the indicated fields and view the summary card to answer the following questions:

- o How many distinct Country values are present in this table?  
(Answer = 21)

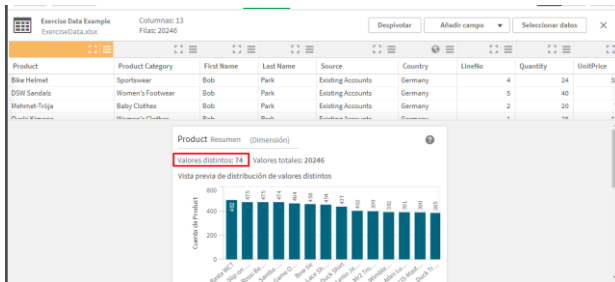


- o How many distinct values are there for the Product Category field? (Answer = 8)



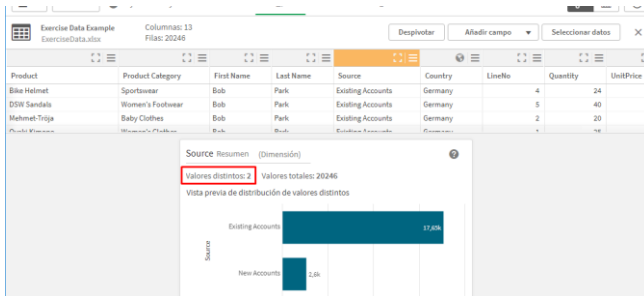
- o How many distinct values are there for the Product field?

(Answer = 74)



o How many distinct values are there for the Source field?

(Answer = 2); What are those two values? (Answer = Existing Accounts and New Accounts)



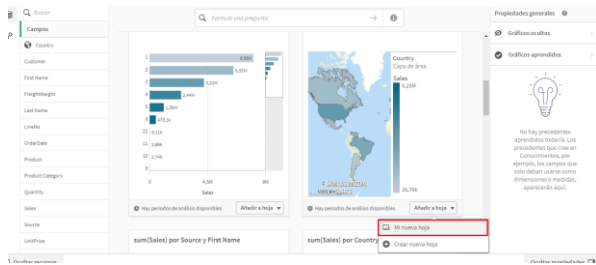
## Develop a sheet using the 'Insight advisor'

- Use the quick access navigation submenu under Analyze > Sheet to select Insights, click the button to

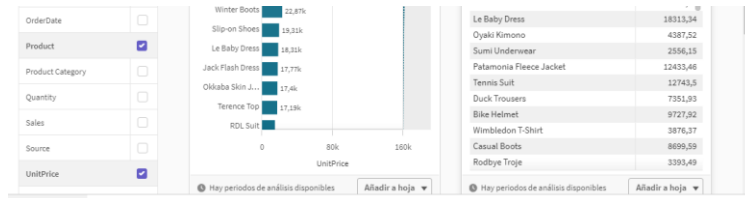
Generate insights - based upon the entire data model.



- Locate the map in the list of proposed charts, and Add to sheet > My new sheet.



- Use the panel along the left to select (checked boxes) the fields: Product and UnitPrice.



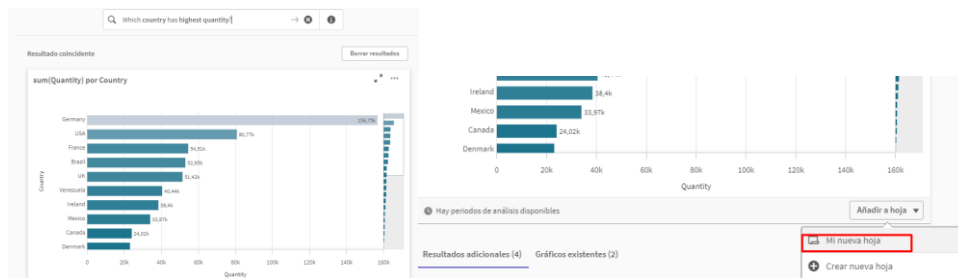
- o Locate the bar chart titled: sum(UnitPrice) by Product, and Add to sheet > My new sheet.

- o Clear the fields ( ).



- Type the following into the 'Ask us a question' field: Which country has highest quantity? (and submit question).

- o Locate the bar chart titled: sum(Quantity) by Country, and Add to sheet > My new sheet.

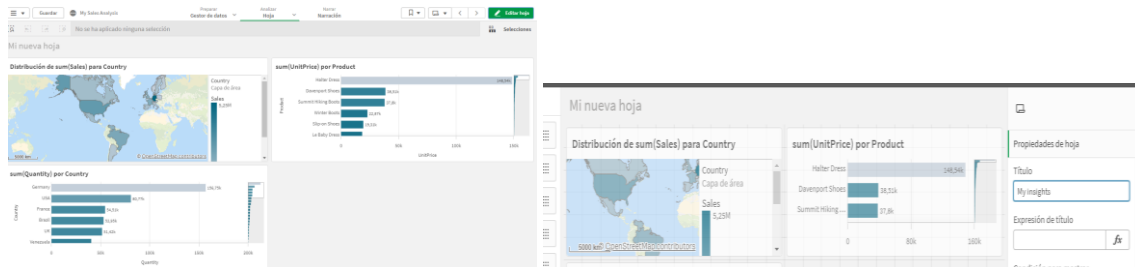


- Use the quick access navigation submenu under Analyze > Insights to select Sheet, and evaluate the sheet you have created:

- Toggle the sheet into Edit mode ( ), and use the properties panel to change the title of the sheet from "My new sheet" to "My insights".

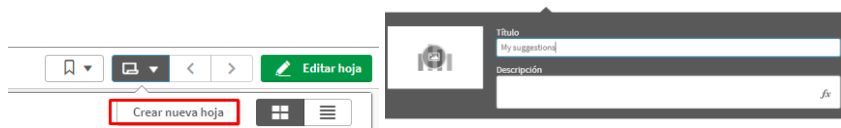
- o HINT: If it is hidden, show the properties panel (using the icon in the lower-right corner) and

do not activate any of the charts on the sheet. This will ensure that Sheet properties are available for editing, including the sheet Title

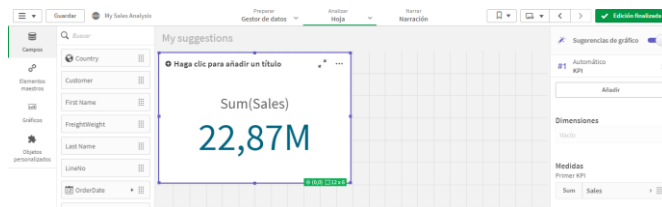


### Develop a sheet using 'Chart suggestion assistance'

- Use the sheets drop down menu ( ) to Create new sheet. o Title the sheet: "My suggestions".



- In Edit sheet mode, use the Fields ( ) section of the assets panel, drag & drop the Sales field onto the visualization area.
  - o A KPI chart type results, which displays the sum of sales values for the entire data model.
  - o In addition, the Chart suggestions switch at the top of the properties panel is set to 'on'.

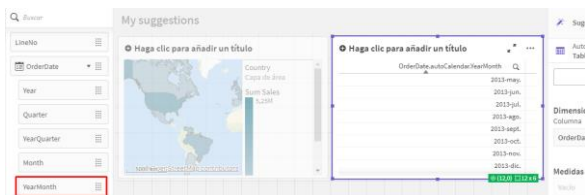


- Drag & drop the Country field onto the KPI chart, ensuring that the 'ghost' image covers the entire chart. o A map chart type results, and the color on the map relates the sum of sales values in each country.

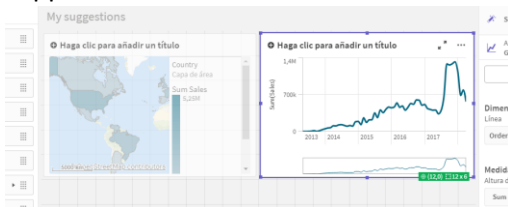


### Develop a sheet using 'Chart suggestion assistance' (cont'd)

- Expand the OrderDate field in the assets panel in order to expose derived date groupings.
- o Drag & drop the YearMonth grouping onto an empty space in the visualization area.
- o A table chart type results.



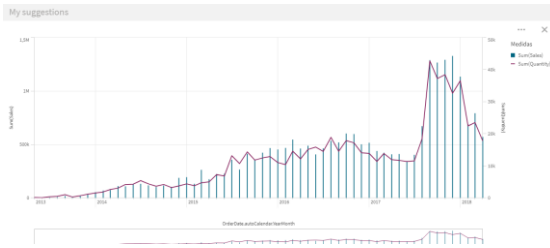
- Drag & drop the Sales field to cover the entire table which currently displays year and month values for orders.
- o A line chart results, due to the fact that a date dimension and a field of measure values have been supplied to this visualization.



- Drag & drop the Quantity field to cover the entire line chart.
- o A combo chart results, due to the fact that a dimension and multiple measures (occupying different ranges) were provided.

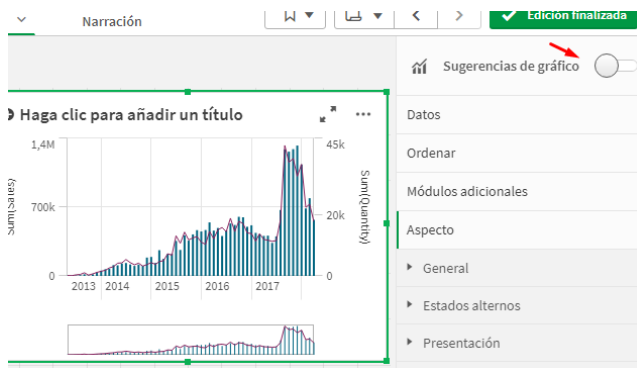


- o Click the Done editing button, and use the mini-chart zoom slider, below the combo chart, to examine more recent month – year values.



### Try an alternate suggested chart type

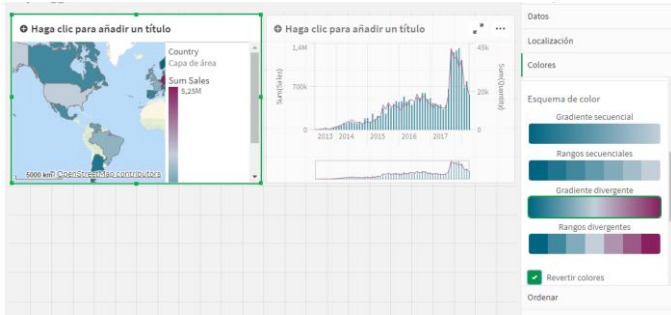
- Return to Edit sheet mode and consider alternative chart suggestions.
- o Switch from the recommended Combo chart to a Line chart.



### Toggle the Chart suggestions switch from 'on' to 'off'

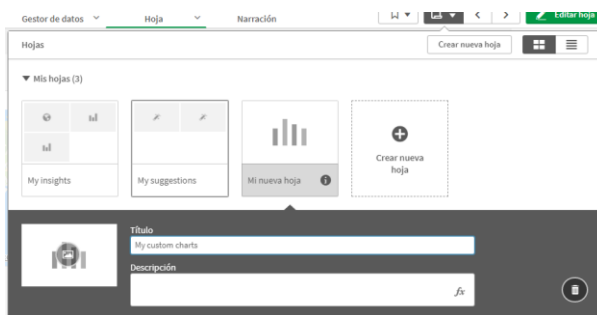
- Notice that the properties panel for the charts configured with assistance present only limited settings options for you to adjust.
- We would like to adjust the color scheme applied to the country shapes on the map chart, so toggle the Chart suggestions switch to 'off'.
- o Open the Layers section of the properties panel and click on the Country Area layer.
- Open the Colors section and locate the Color scheme options.
- Change the color scheme from Sequential gradient to Diverging gradient.
- Check the Reverse colors checkbox.
- The resulting map should appear as you see below.



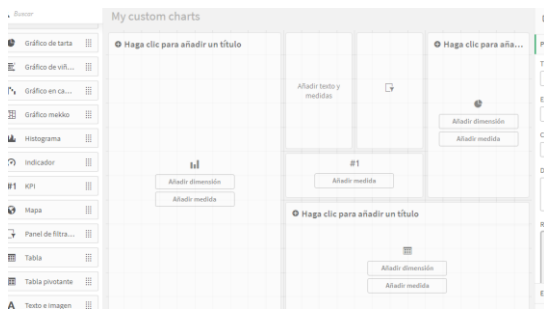


### Develop a sheet without assistance

- Create a new sheet in the app, titled “My custom charts”.

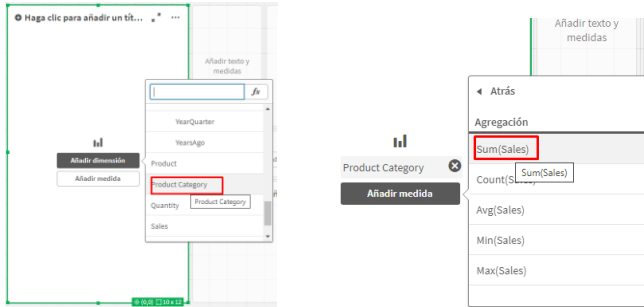


- Drag & drop objects from the Charts ( ) section of the assets panel to the visualization area, and resize each, to populate a sheet with a Bar chart, Table, Pie Chart, KPI, Filter pane, and Text & image area organized within the visualization space as shown below:



### Develop a sheet without assistance (cont'd)

- Bar chart configuration:
  - o Dimension = Product Category
  - o Measure = Sales, aggregated with a sum: Sum(Sales)



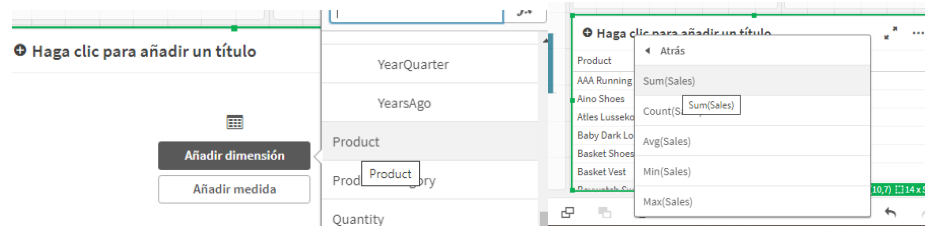
o Add a title to the chart which reads: “Sales totals per product category”

- Table configuration:

o Dimension = Product

o From the Fields section ( ) of the assets panel, drag & drop the Sales field to cover the entire table.

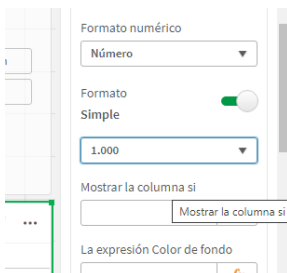
- Add as measure, aggregate with a Sum: Sum(Sales)



- Use the Data section of the properties panel to expand the Sum of Sales measure subsection and format the sum of sales values as follows:

- Number formatting = Number

- Formatting = Simple; 1,000

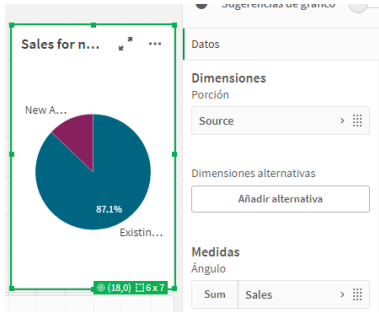


- Pie chart configuration:

o Dimension (Slice) = Source

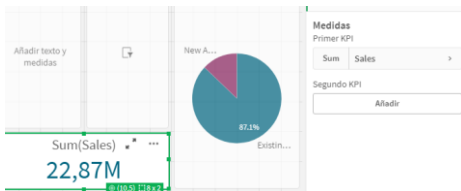


- o Measure (Angle) = Sales, aggregated with a Sum: Sum(Sales)
- o Add a title to the chart which reads: “Sales for new vs. existing accounts”



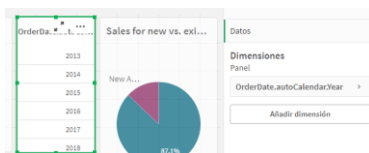
- KPI configuration:

- o Measure = Sales, aggregated with a Sum: Sum(Sales)



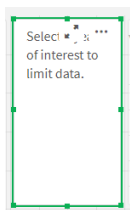
- Filter pane configuration:

- o Dimension = OrderDate.Year (HINT: search for OrderDate, and from the resulting list: select derived date grouping which groups dates by year.)
- Expand the resulting dimension subsection, and edit the Title to: “Year”.



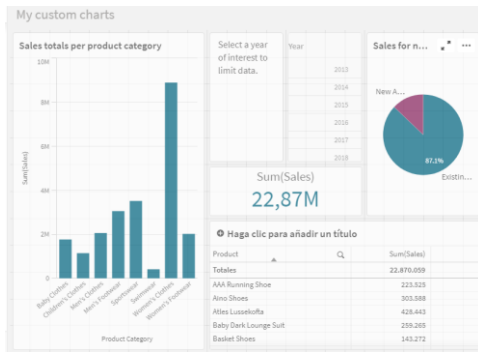
- Text & image configuration:

- o Enter the text: “Select a year of interest to limit data.”



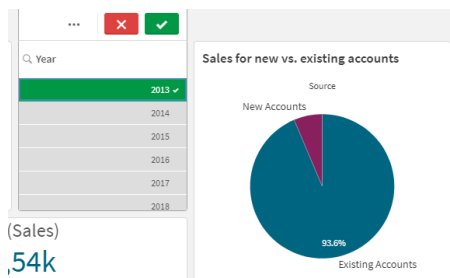
### Develop a sheet without assistance (cont'd)

- The sheet you configured should appear as you see below:



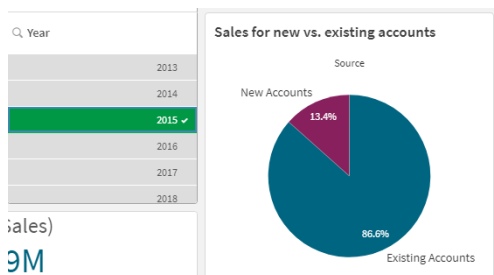
### Analyze a sheet

- Select the year 2013, take a snapshot of the Pie chart, annotate with “2013”.



o Clear the selection.

- Select the year 2015, and take a snapshot of the Pie chart, annotate with “2015”.



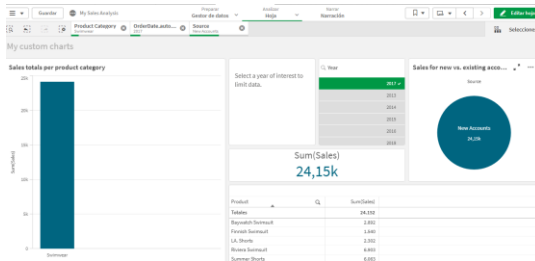
o Clear the selection.

- Click to make the following three selections ...

o Select the Swimwear bar in the bar chart and confirm the selection.

o Select the year 2017 in the filter pane and confirm the selection.

o Select the New accounts wedge in the pie chart and confirm the selection.



o ... then create a new bookmark:

- Name the bookmark = “New accounts, swimwear, 2017”

Crear marcador

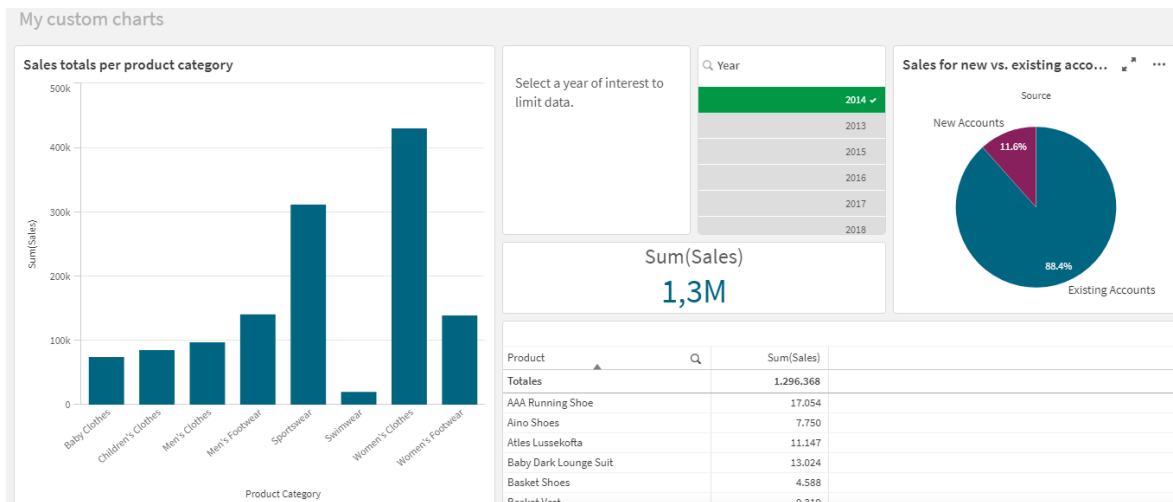
Título

New accounts, swimwear, 2017

Descripción (Opcional)

{<[Product Category]='Swimwear',Source='New Accounts'],'=Dual(Year([OrderDate]),YearStart([OrderDate]))='{2017}'>>

- Clear all selections, and create a second bookmark which limits the visualizations to 2014 data.
- Name the bookmark = “2014 orders”



{<'=Dual(Year([OrderDate]),YearStart([OrderDate]))='{2014}'>>

- Use the two bookmarks to switch back and forth between these different states of selected data

Mis marcadores (2)	
New accounts, swimwear, 2017	7/4/2022
2014 orders	7/4/2022

### Tell a story

- Use the quick access menu to navigate to the Storytelling view.
- Use the Snapshot library ( ) to add the two snapshots you took to the blank slide.
- Use the Text library ( ) to add a label for 2013 (to the pie chart with the smaller New Accounts wedge).
- Add another label for 2015 (to the pie chart with the larger New Accounts wedge).
- Use the Sheet library ( ) to add the sheet titled My suggestions to a slide in the story.
- Play the story ( ). Click on different visual aspects of your live data sheet (like individual country shapes) in order to see that it is an interactive slide.

