

How-to Build your first report

[Space & Connection](#)

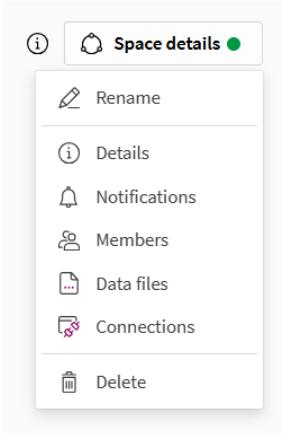
[Create an App](#)

[Connect to Snowflake and load data](#)

[Sheets & Charts](#)

Space & Connection

1. To start building building your first report on Qlik, navigate to the space “[GSO - RDS - Self-Service Reporting](#)”.
2. If you click on “Space Details” button, you will be able to govern the space settings: adding members, data connections, set notifications, explore existing data files and deleting the space.



3. Click on “Connections” and make sure that the Snowflake connection exists:

A screenshot of the "Data connections" page. At the top, there is a search bar labeled "Filter by name" and dropdown menus for "All types", "Owned by anyone", and "Alphabetical". Below this is a table with the following data:

Name	Owner	Type	Created	Last modified	...
Snowflake DW PROD	Christian Khairallah	Snowflake	Jan 27, 2025 9:58 AM	Jan 27, 2025 9:58 AM	...

This connection will allow you to load tables from the data warehouse into your dashboard.

4. If you need to load additional data from an excel:

- a. Click on “Space Details → Data Files”

- b. In the data files tab, you will be able to see existing data files (excels, QVDs, etc..).

c. To add a new file, click on the upload icon (marked in blue):

The screenshot shows a 'Data files' page with a sidebar containing 'Details', 'Notifications', 'Members', 'Data files' (which is selected and highlighted in green), and 'Connections'. The main area displays a list of files under the path '/ GSO - RDS - Se... /'. The columns are 'Name', 'Content (in total)', 'Size', 'Last modified', and 'Owner'. Two files are listed: 'countryAliases.qvd' (732.68 KiB, last modified Jan 27, 2025 12:12 PM, owner Christian Kh...) and 'countryGeo.qvd' (1.34 MiB, last modified Jan 27, 2025 12:12 PM, owner Christian Kh...). At the top right, there is a toolbar with icons for search, filters, and file operations, and an 'Upload' button which is highlighted with a blue box.

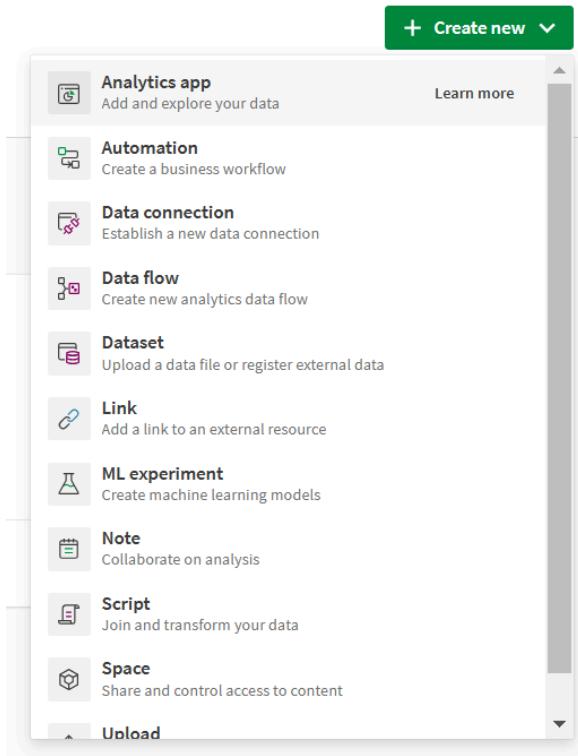
Browse to the file you need and then upload it.

Create an App

5. Navigate back to the space “GSO - RDS - Self-Service Reporting”

6. Then click on the “Create new” button.

7. A list of options appears as in the image below:



8. Click on “Analytics app”.

9. A popup box appears. In this box, you need to name the dashboard. You can add a small description over the purpose of the app and few tags which facilitate the search for it.

Create a new app ⓘ

Name
Demo App

Space
GSO - RDS - Self-Service Reporting

Description
This app serves as a demo on how to get data from the MDM and load it into Qlik.

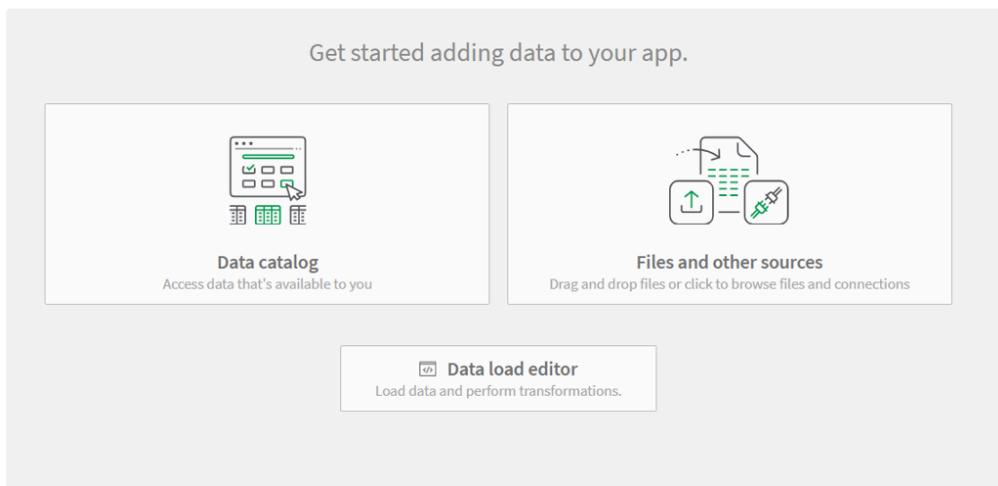
Tags ⓘ
demo mdm

Open app Cancel Create

10. Click on “Create”.

11. You will be redirected to the created app as the “Open app” option is checked by default.

12. From the landing page of the app, you will be able to check 3 options to start with:



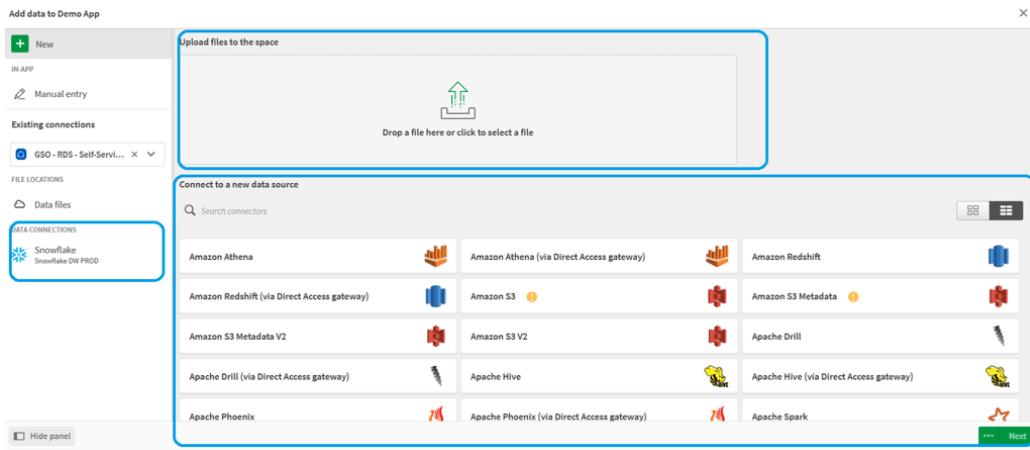
a. Data Catalog: in which you can load existing data and files into the app from the same or different spaces that you have access to. Users can also upload new files to specific spaces and then load it back into the app.

The screenshot shows the "Data catalog" interface. On the left, there is a sidebar with filters for "Spaces" (set to "GSO - RDS - Self-Service Reporting"), "Owner" (set to "Anyone"), "Creator", and "Tags". The main area is titled "Browse datasets" and shows a list of datasets with columns for "Name", "Owner", "Last modified", and "Space". Two datasets are listed:

Name	Owner	Last modified	Space
countryAliases.qvd	Christian Khaiallah	a month ago	GSO - RDS - Self-Service Reporting
countryGeo.qvd	Christian Khaiallah	a month ago	GSO - RDS - Self-Service Reporting

At the bottom right, there are buttons for "Datasets selected: 0", "Cancel", and "Next". A blue box highlights the "Upload data file" button in the top right corner of the main area.

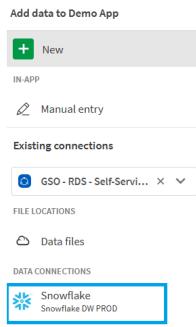
b. Files and other sources: with this option, users will be able to create a new connection or use an existing one to load data. It is also possible to upload files into the space.



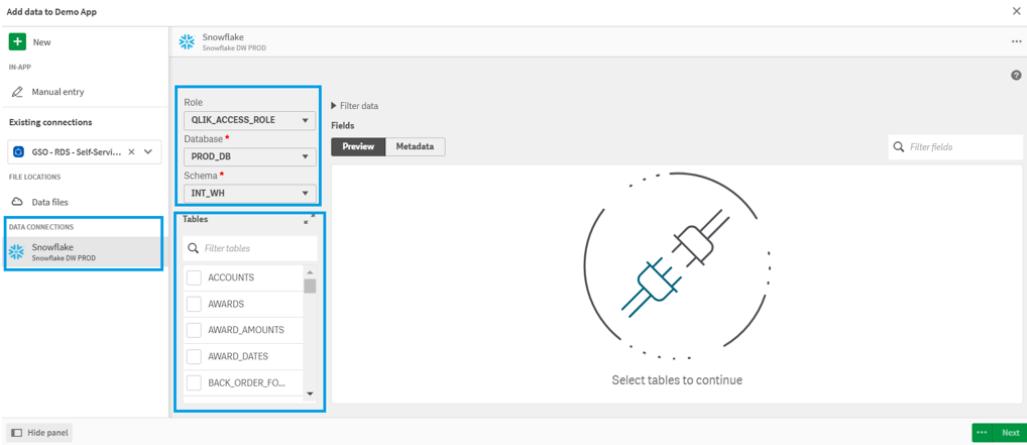
c. Data load editor: this option will redirect to the app's script sheets, in which we can load the data and perform data transformation using scripts.

Connect to Snowflake and load data

1. Click on “Files and other sources”.
2. Under the data connections tab, click on the snowflake connection:



3. Qlik will redirect the popup box and shows users a list of tables based on the selected connection:

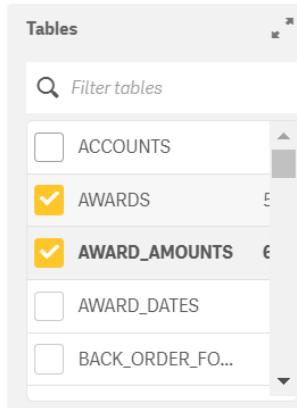


You must see **three** important information:

- Role: QLIK_ACCESS_ROLE
- Database: PROD_DB
- Schema: INT_WH

Make sure that they are always selected as we're not interested in other databases or schemas.

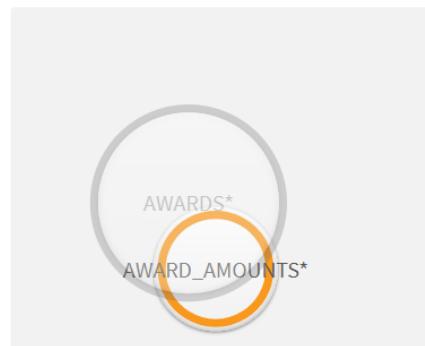
4. From the tables list, check one (i.e., AWARDS). Qlik will display a preview of the data.
5. Select all the tables needed:



6. Click on “Next”.
7. Qlik will redirect to a new page where tables are symbolized as circles.

The screenshot shows the Qlik Sense Data Manager interface. At the top, there are buttons for '+ Add data' and 'Concatenate or join'. On the right, there's a 'Load data' button and a section for 'Associations' with a 'Preview all' and 'Apply all' button. Below this, a 'Recommended associations' panel lists 'AWARD_CODE' with its descriptions: 'AWARDS:AWARDS.AWARD_CODE' and 'AWARD_AMO... AWARD_AMOUNTS.AWAR...'. A note says 'To make associations manually, you can drag one table onto another.' The main area shows two tables: 'AWARDS' and 'AWARD_AMOUNTS'. A tooltip for 'AWARD_CODE' in the 'AWARDS' table points to the 'AWARD_CODE' column in the 'AWARD_AMOUNTS' table.

8. Some tables in the data model can be linked through one common. In our case, **AWARD_CODE** is common between both tables.
9. Some other fields may be named the same (i.e., **ORG_UNITS**) in both tables, and we need to rename one of them to avoid linking two tables with more than **one column**.
10. To join them, drag one into the other



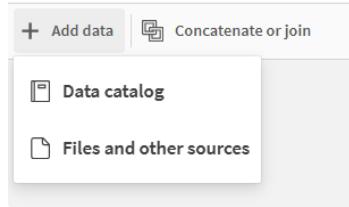
11. Qlik detected the common field which is **AWARD_CODE** and **joined** both tables through it.

The screenshot shows the Qlik Sense Data Manager interface after joining the tables. The joined table has columns from both 'AWARDS' and 'AWARD_AMOUNTS'. The 'AWARD_CODE' column is highlighted in blue, indicating it is the common field used for joining. The data in the joined table is identical to the original data in both tables.

12. Users may need to add a third table. Click on “+ Add data”:



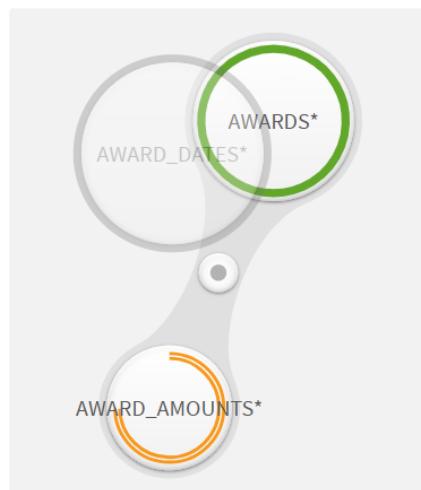
13. Then “Files and other sources”:



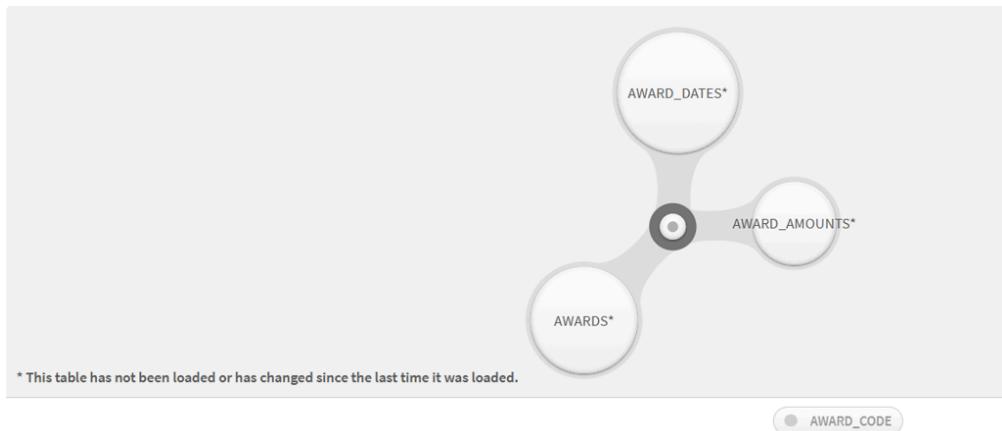
14. Click back over the Snowflake connection and load the needed table(s).
15. If a common field exists between the newly added table and the others, we need to link them together:



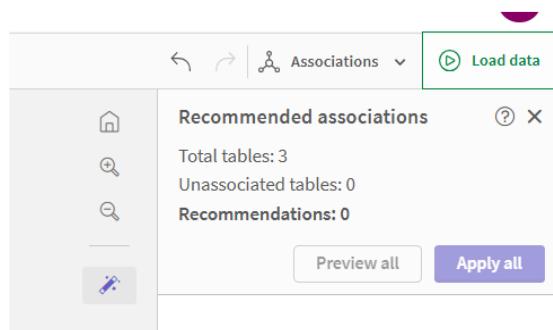
16. Drag the new table over the table highlighted with green as they both have common fields:



17. All three tables are now linked through **AWARD_CODE** field.

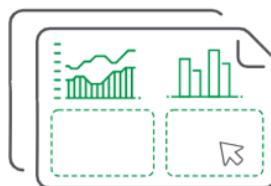


18. Click on “Load data”.



19. Your data was loaded, now click on “Go to Sheet” to start working on the report needed.

Your data was successfully loaded



Interact directly with the data to explore it, ask questions to get analysis recommendations, or create visualizations and build your own dashboard. All of this is available from the sheet.

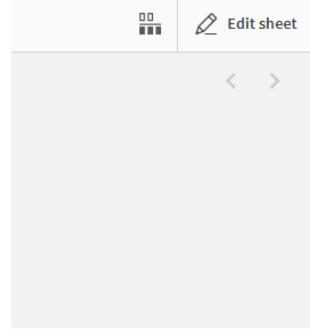
Go to Sheet

Not done adding and modeling your data?
Close to continue in Data manager.

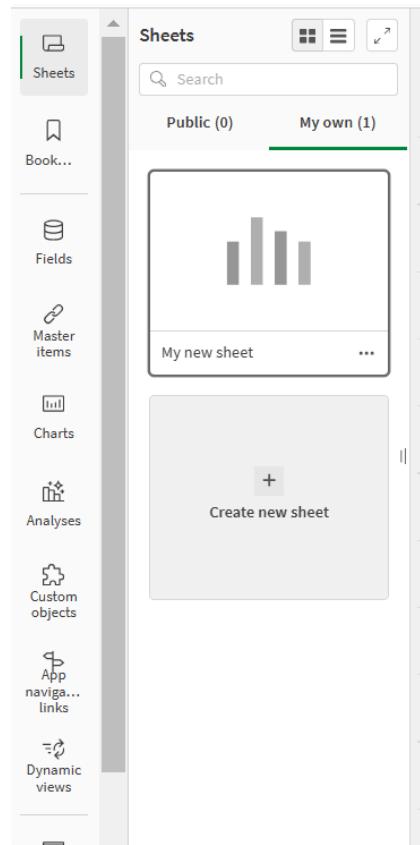
Close

Sheets & Charts

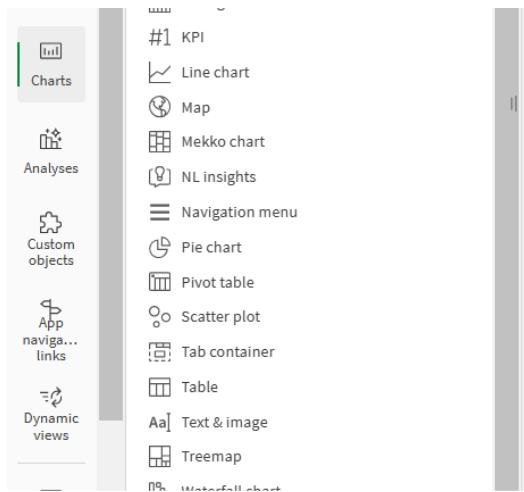
1. Click on “Edit sheet”



2. Qlik will display the list of sheets you have and few tabs to the left where you can click on “Charts”:



3. Click on “Charts” then drag and drop the desired object that you want to work with into the sheet. Lets start with a table:



4. From within the table object, you can add dimensions (columns) and measures (i.e., sum of values).

AWARD_CODE	Q	AWARD_CATEGORY	Q	DONOR_ID	Q	
GIK-AFCP0000		GIK		-		
GIK-CDCP0000		GIK		-		
GIK-JOCP0000		GIK		-		
GIK-KECP0000		GIK		-		
GIK-LBCP0000		GIK		-		
GIK-MGCP0000		GIK		-		
GIK-PHCP0000		GIK		-		
GIK-PLCP0000		GIK		-		
GIK-SDCP0000		GIK		-		
GIK-SOCP0000		GIK		-		

5. To make the sheet available for others, click on “Assets” and if the sheet you worked on is under “My own”, then right click over it and then click on “Make public”. The sheet will be moved to “Public”.

