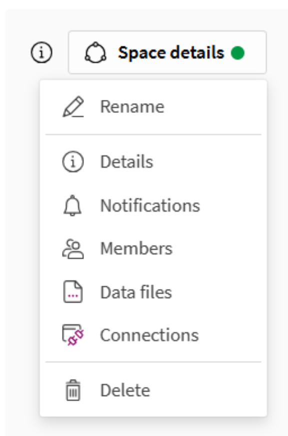
# How-to Build your first report

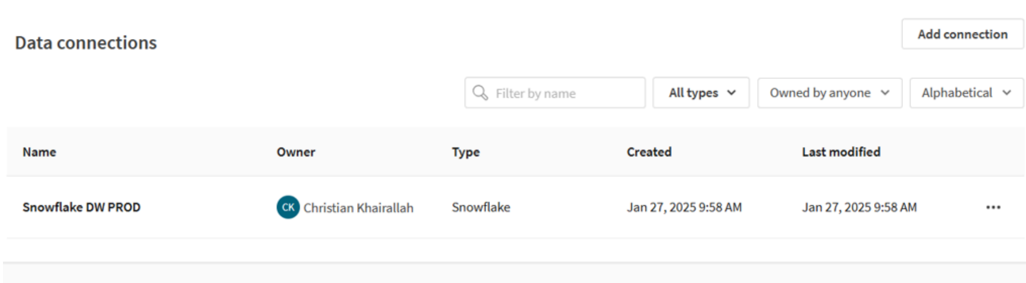


## Space & Connection

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.



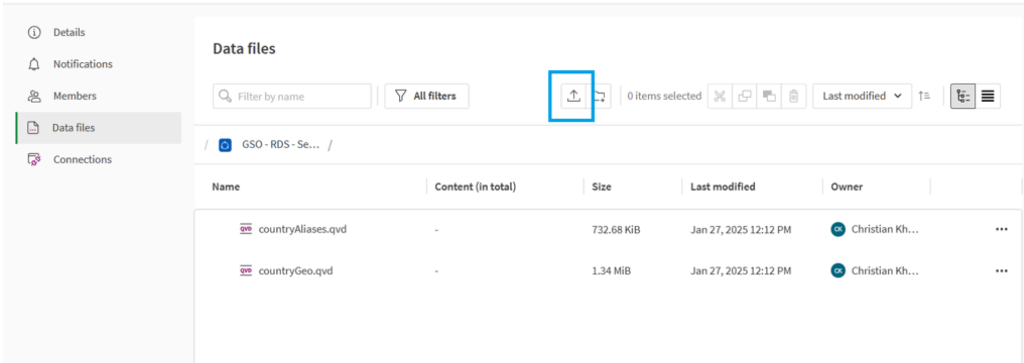

3. Click on "Connections" and make sure that the Snowflake connection exists:




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..).

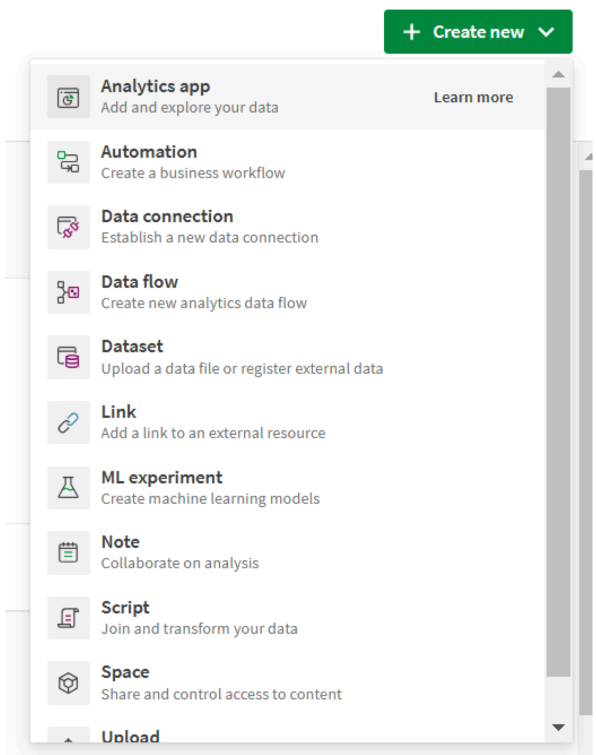
c. To add a new file, click on the upload icon (marked in blue):



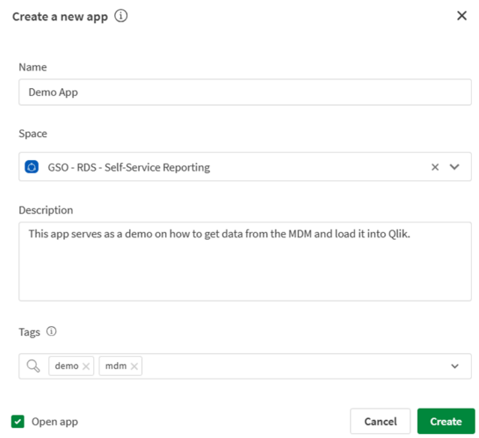

Browse to the file you need and then upload it.

## Create an App

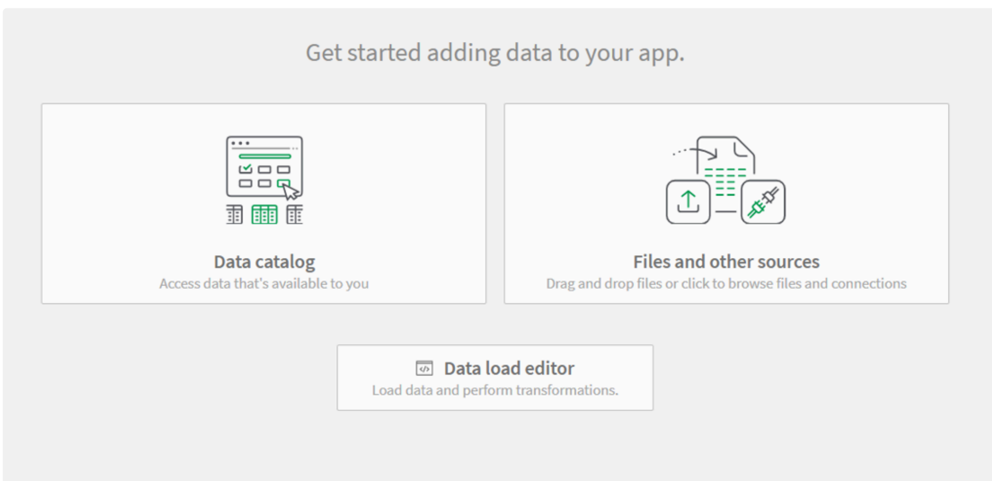
5. Navigate back to the space "GSO - RDS - Self-Service Reporting"
6. Then click on the "Create new" button.
7. A list of options appears as in the image below:



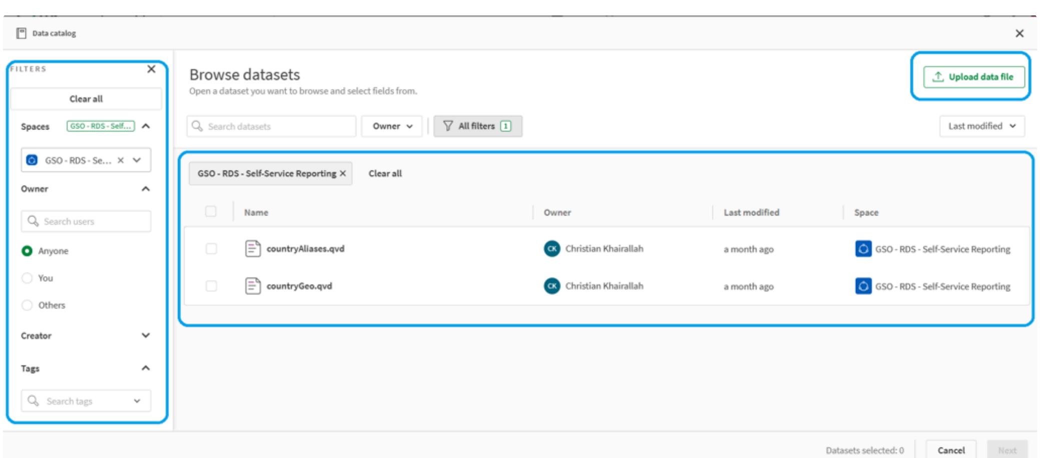

8. Click on "Analytics app".
9. A popup box appears. In this box, you need to name the dashboard. You can add a small description over the purpose of the app and few tags which facilitate the search for it.



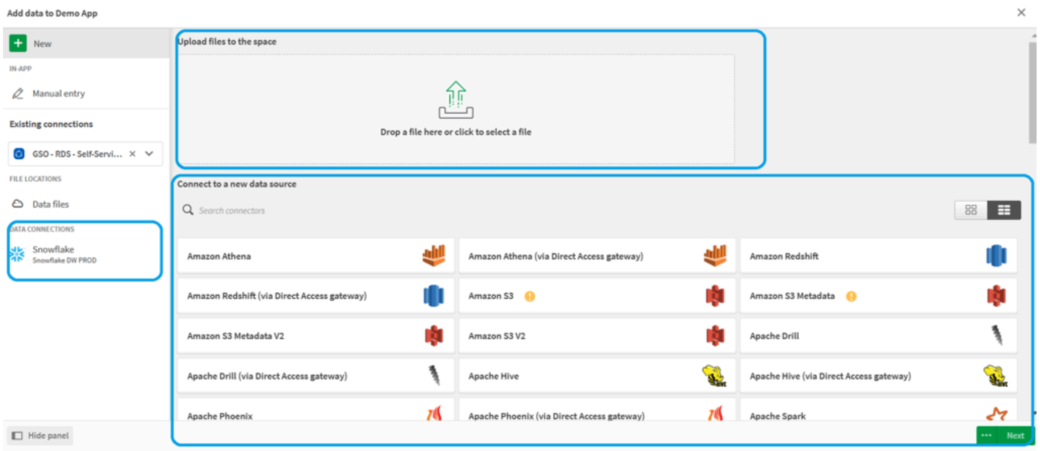

10. Click on “Create”.
11. You will be redirected to the created app as the “Open app” option is checked by default.
12. From the landing page of the app, you will be able to check 3 options to start with:




**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.



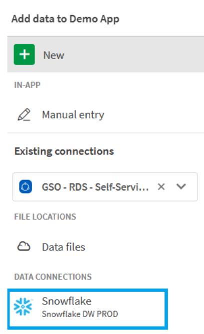
**b. Files and other sources**: with this option, users will be able to create a new connection or use an existing one to load data. It is also possible to upload files into the space.



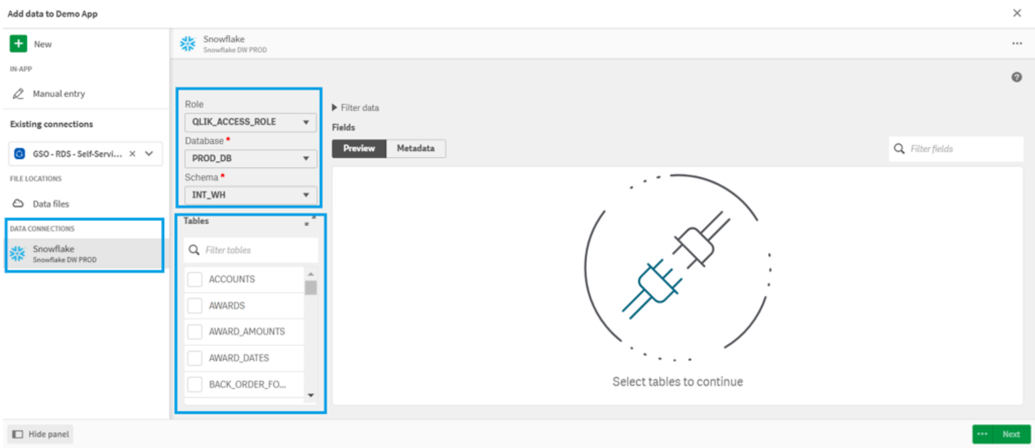

**c. Data load editor**: this option will redirect to the app's script sheets, in which we can load the data and perform data transformation using scripts.

## 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:

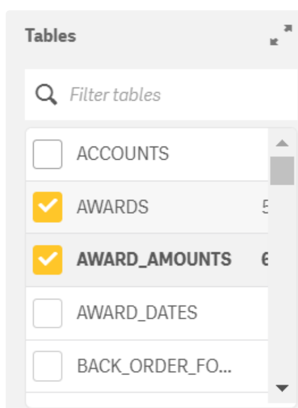



You must see **three** important information:

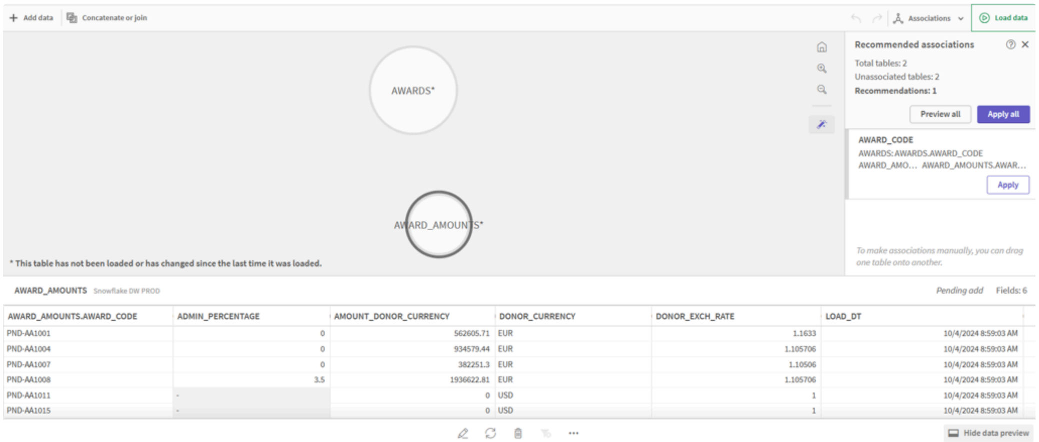
- Role: QLIK_ACCESS_ROLE
- Database: PROD_DB
- Schema: INT_WH

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

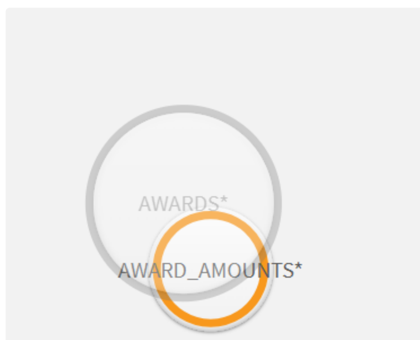
4. From the tables list, check one (i.e., AWARDS). Qlik will display a preview of the data.
5. Select all the tables needed:



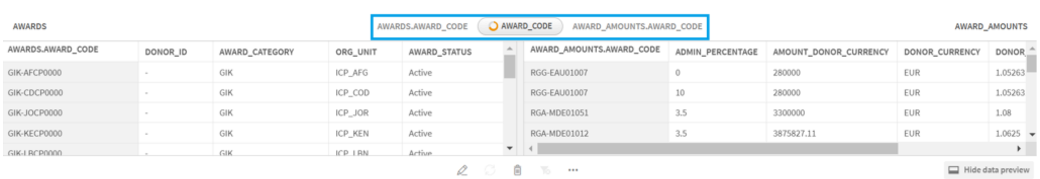

6. Click on "Next".
7. Qlik will redirect to a new page where tables are symbolized as circles.



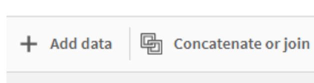

8. Some tables in the data model can be linked through one common. In our case, **AWARD_CODE** is common between both tables.
9. Some other fields may be named the same (i.e., **ORG_UNITS**) in both tables, and we need to rename one of them to avoid linking two tables with more than **one column**.
10.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



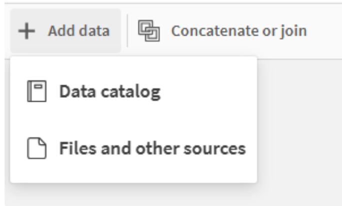

11. Qlik detected the common field which is **AWARD_CODE**  and **joined** both tables through it.




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

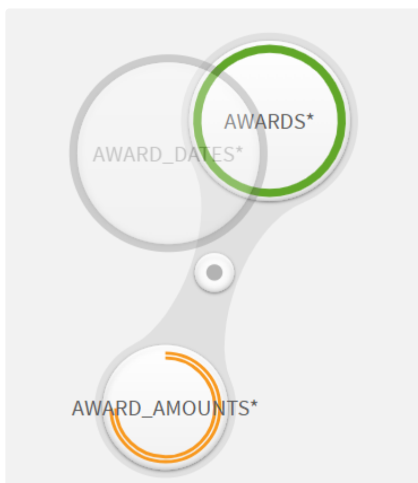



13. Then “Files and other sources”:

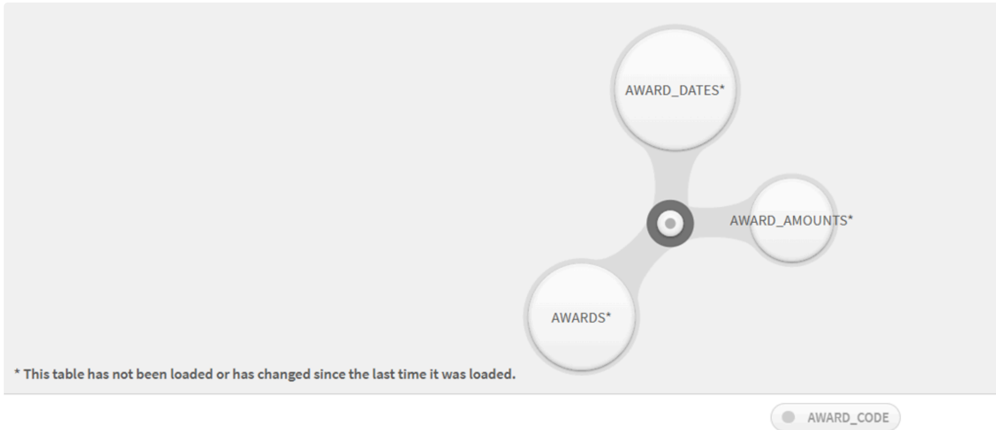



14. Click back over the Snowflake connection and load the needed table(s).
15. If a common field exists between the newly added table and the others, we need to link them together:

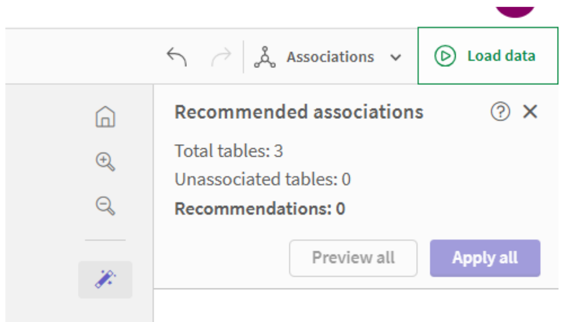

16. Drag the new table over the table highlighted with green as they both have common fields:



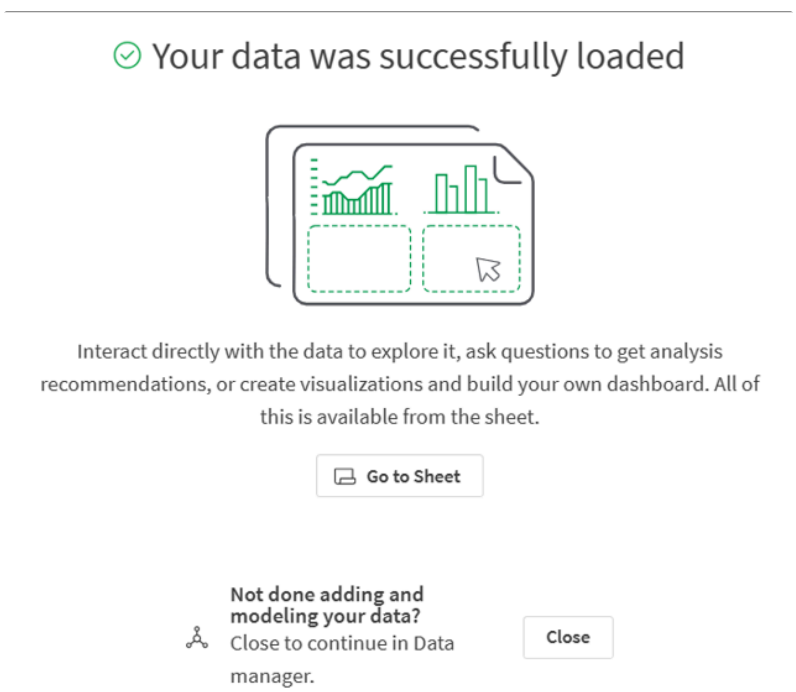

17. All three tables are now linked through **AWARD_CODE** field.




18. Click on “Load data”.

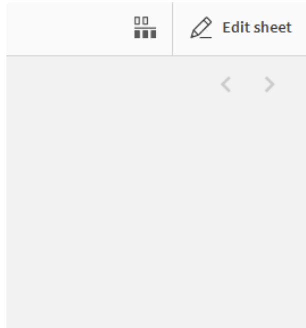



19. Your data was loaded, now click on “Go to Sheet” to start working on the report needed.

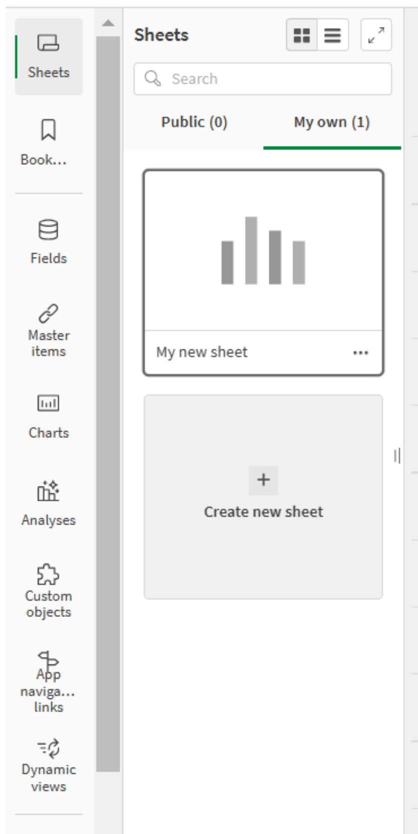



## Sheets & Charts

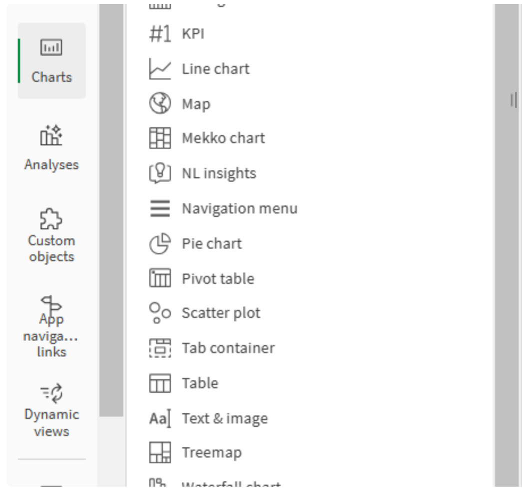
1. Click on “Edit sheet”



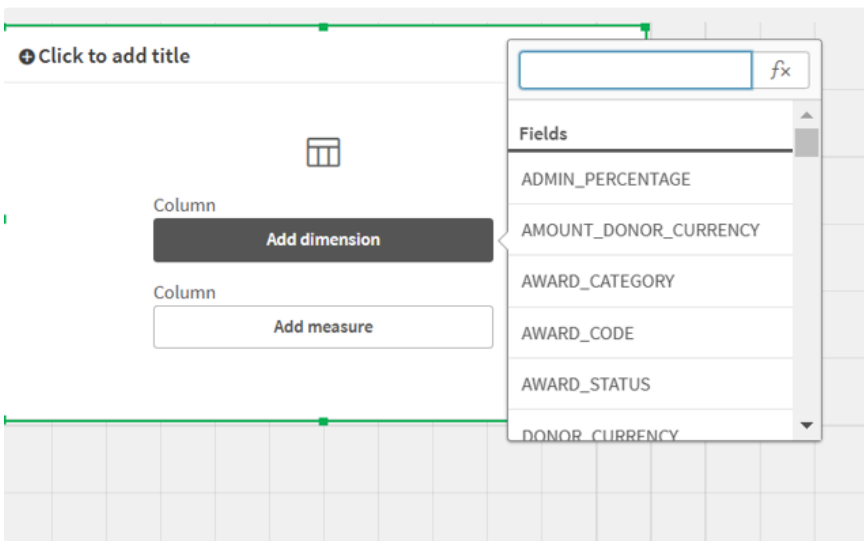

2. Qlik will display the list of sheets you have and few tabs to the left where you can click on "Charts":




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:

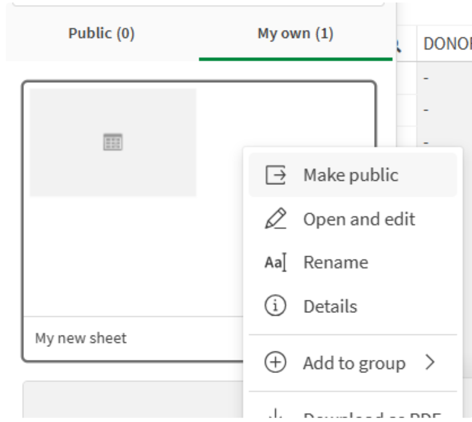



4. From within the table object, you can add dimensions (columns) and measures (i.e., sum of values).




| AWARD_CODE | AWARD_CATEGORY | DONOR_ID |
|---|---|---|
| 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”.


Public (0)
My own (1)
DONOR
Make public
Open and edit
Rename
Details
Add to group
My new sheet


Public (1)
My own (0)
My new sheet