

Climber Custom Report

Download Climber Custom Report v2.4.2

<https://github.com/ClimberAB/ClimberCustomReport/releases/download/v2.4.2/cl-custom-report-v2.4.2.zip>

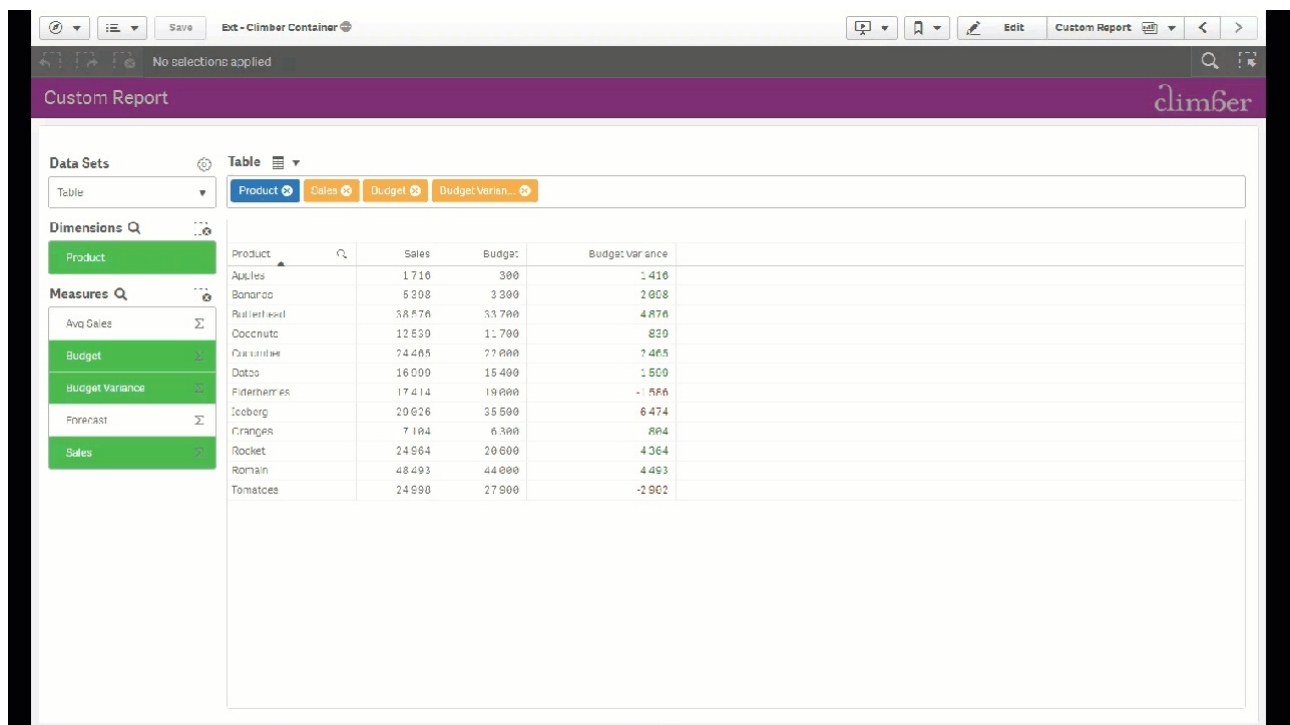
Most recent update 2.4.2 - 2018-09-20

Fixed (Plus-version)

- Add lint to CircleCi
- Possible fix ES-9371
- Fixed ES-9905 Master Item description on title hover
- Fixed ES-9720 export from Mashup proxy prefix replace
- Fixed IE export and render problem

Previous updates can be found here, [CHANGELOG \(CHANGELOG.md\)](#).

Self service without edit-mode for Qlik Sense!



Product	Sales	Budget	Budget Variance
Apples	1 710	300	1 410
Bananas	5 208	3 300	2 008
Butter	38 576	33 700	4 876
Cheese	12 530	11 700	830
Corn	74 465	77 000	2 535
Dates	16 000	15 400	600
Eggs	17 414	19 000	-1 586
Iceberg	20 626	35 500	-14 874
Oranges	7 104	6 300	804
Rocket	24 564	20 600	4 064
Romain	48 493	44 000	4 493
Tomatoes	24 598	27 900	-3 302

Purpose and Description

IMPORTANT! Any older Custom Report objects need to be recreated with version 2.0!

In QlikView we saw a lot of users requesting a customizable straight table. In Qlik Sense we have created something even better! The Custom Report extension allows the user to create custom tables based on data in master tables.

With Custom Report + you can create your own personalized bookmarks and add shareable presets for your reports. In Custom Report + we have also extended the visualization types to include pivot tables and combo charts (more details below).

First thing to do is create a simple straight table and make it a master item. The table is will now be accessible in Custom Report and you can select to show any or all measures and dimensions. Number format follows from the master item so no need to redo formatting!

Tested with Qlik Sense November 2017 and later

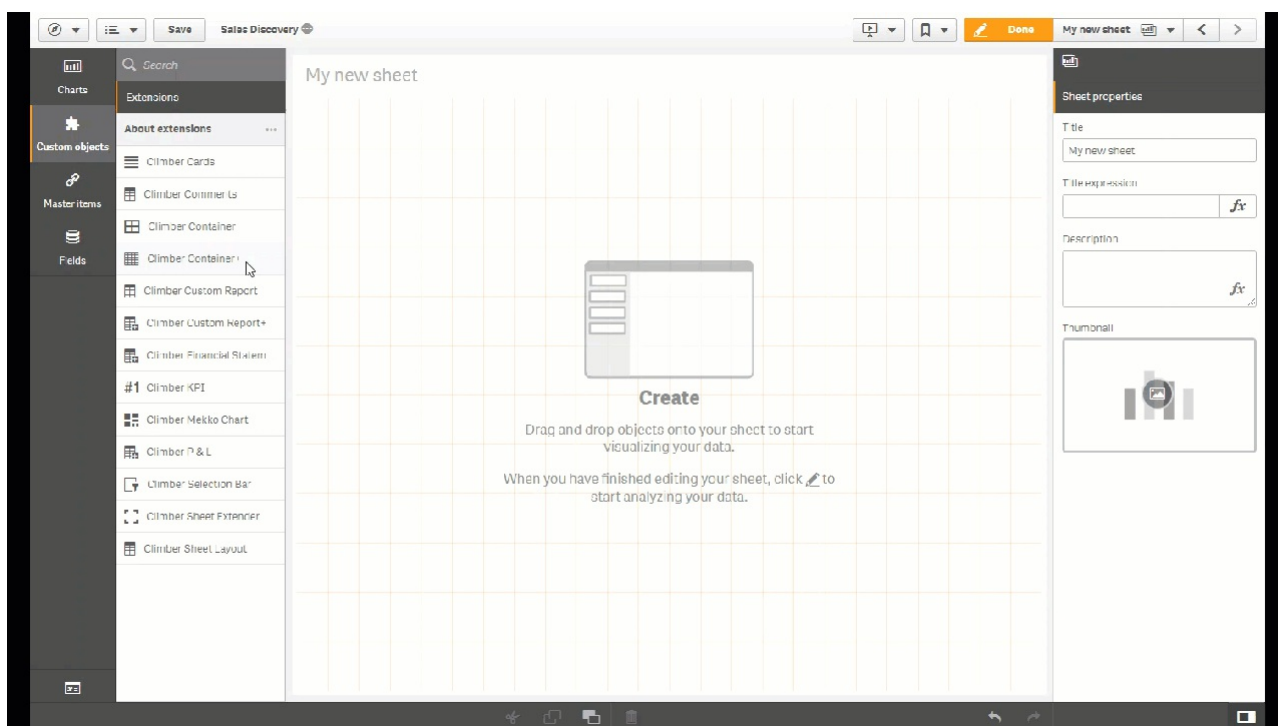
Custom Report vs Custom Report +

Feature	Custom Report	Custom Report +	Comments
Unlimited Data Sets	✓	✓	
Sums on/off	✓	✓	
Search and select dimensions & measures	✓	✓	
Climber Logo	✓		
Straight Table	✓	✓	Defined by superuser/developer
Pivot Table		✓	
Combo Chart		✓	
Export to Excel	✓	✓	
Export to App		✓	Qlik Sense license limitations may apply.
Default state per Data Set	✓	✓	
Unlimited Presets		✓	
Bookmarks		✓	

For more information about Custom Report + and our subscription model please check out our extension [page](https://www.climber.se/erbjudande/verktyg/limber-extensions-for-qlik-sense/) (<https://www.climber.se/erbjudande/verktyg/limber-extensions-for-qlik-sense/>).

Setup

1. Create one or more Master Item Tables with the dimensions and measures you want to visualize.
2. Select Master Item in the drop-down or drag and drop it on the visualization



Defaults, presets and bookmarks

Default states

All added data sets can have a default state when a new session is opened, i.e. preselected dimensions and measures. Even the table column widths are saved in the state. It is recommended to always set a default state so the user does not have to start with an empty table.

To create a new default state for a dataset go in to edit mode. Select your measures/dimensions you want to set in you default state and click "Save default state". After you added a default state you can always show your current default state by clicking on the button "show default state".

To change your default state, just make your new selections and click "Save default state" again.

-Save default state

The screenshot shows the application interface with the 'Table' visualization type selected. The 'Data Sets' panel on the left lists 'Product' as a dimension and 'Avg Sales', 'Budget', 'Budget Variance', 'Forecast', and 'Sales' as measures. The main table displays data for various products, including Apples, Bananas, Butterhead, Coconut, Cucumber, Dates, Elderberries, Iceberg, Oranges, Rocket, Romain, and Tomatoes. The 'Save default state' button in the right-hand panel is highlighted with an orange arrow.

Product	Sales	Budget Variance	Budget
Apples	1 716	1 416	300
Bananas	5 398	2 098	3 300
Butterhead	38 576	4 876	33 700
Coconut	12 539	839	11 700
Cucumber	24 465	2 465	22 000
Dates	16 999	1 599	15 400
Elderberries	17 414	-1 586	19 000
Iceberg	29 026	-6 474	35 500
Oranges	7 104	804	6 300
Rocket	24 964	4 364	20 600
Romain	48 493	4 493	44 000
Tomatoes	24 998	-2 992	27 900

-Show default state

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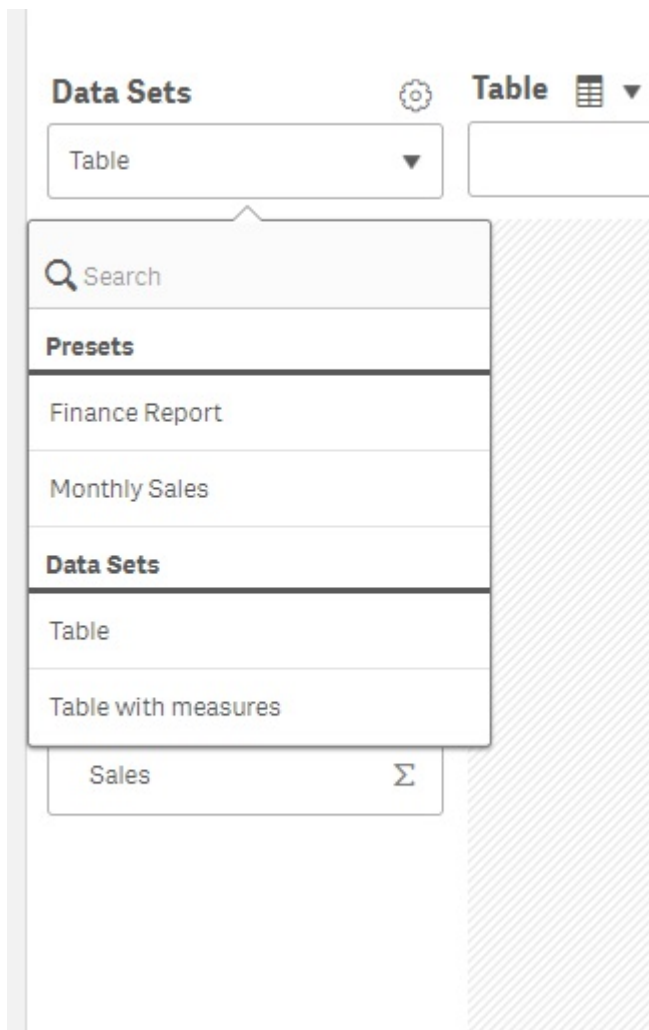
Session

Within a session, all selections between the data sets will be saved, i.e. the default state will not be followed once the session is started. This makes it possible to easily change between data sets without losing the last state.

Presets (Custom Report+)

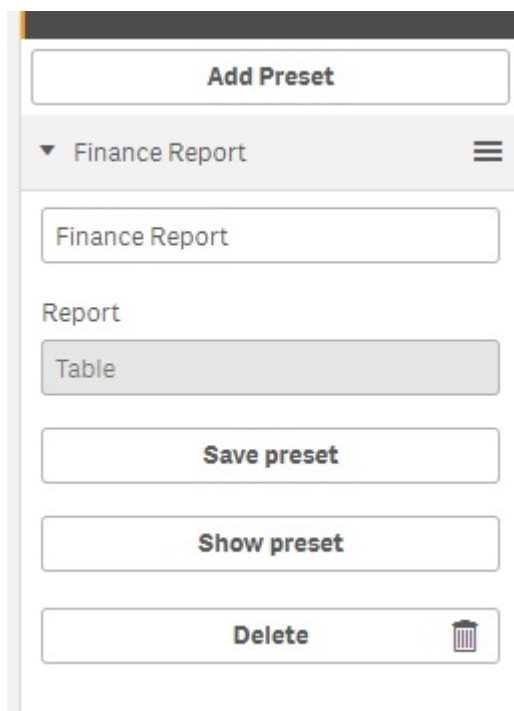
It is possible for the developer/super users to create presets (i.e. a saved state). Presets will be accessible for all users in the application. This can be used for creating predefined reports.

Presets are accessible from the drop down of data sets



To create a preset select your dimensions/measures and go in to edit mode. Click on "presets" and click on "Add Preset". To change a preset, change your selections and click "Save preset".

You can always show a current preset by clicking "show preset"

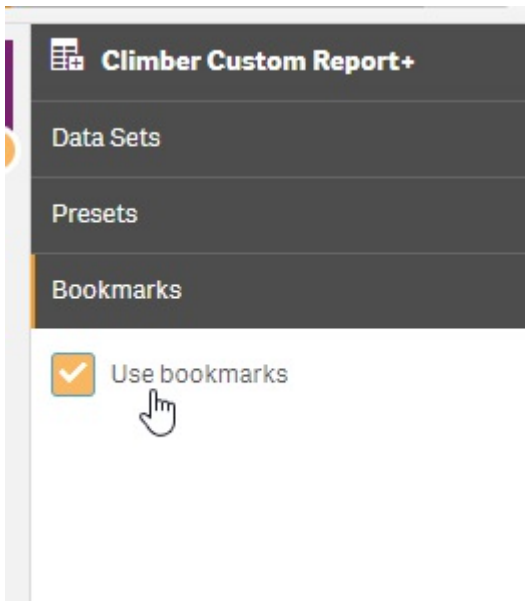


Bookmarks (Custom Report+)

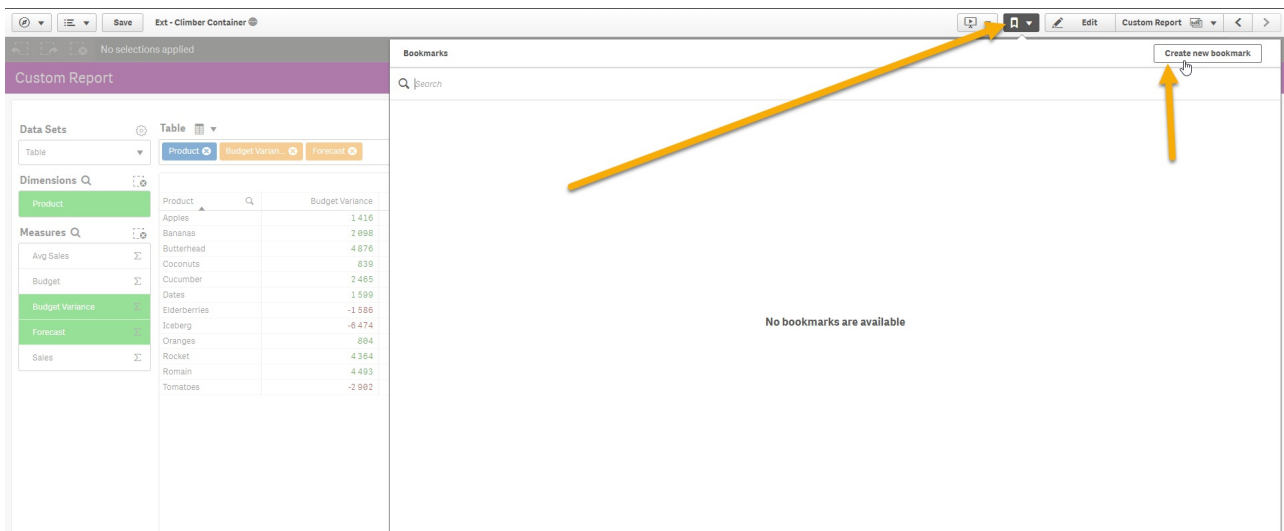
For the end user is possible to create personalized bookmarks. With bookmarks you can save a state and go back to that state using the standard Qlik Sense bookmark list.

How to use bookmarks

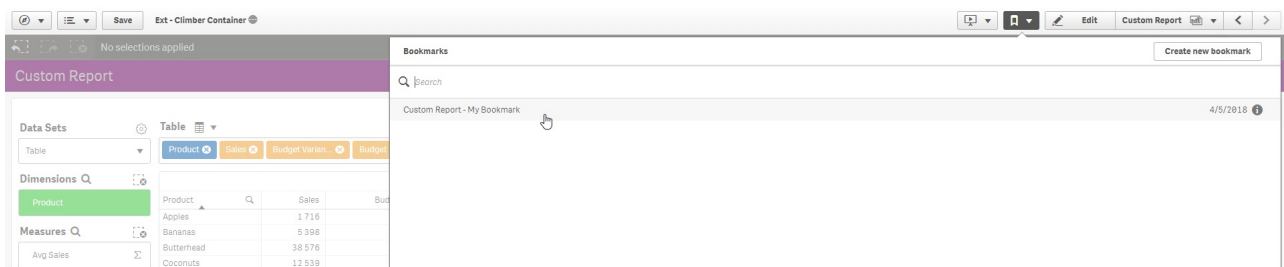
1. Enable bookmarks in Custom Report Object (enabled is default)



2. Use the bookmark creator [How to create a bookmark \(https://help.qlik.com/en-US/sense/2.1/Subsystems/Hub/Content/Bookmarks/create-bookmark.htm\)](https://help.qlik.com/en-US/sense/2.1/Subsystems/Hub/Content/Bookmarks/create-bookmark.htm)



3. Access the bookmarks



Note! To support bookmarks using the Qlik Sense standard functionality, the extension creates and use variables starting with "ClimberCustomReport". These variables values are stored in the selection state and therefore in bookmarks. This is not the default behaviour of variables created in the Qlik Sense client. If you accidentally delete the variable, entering Edit mode will recreate it if the app is not published. Variables are not automatically deleted. In the Custom Report+ state is stored even if Use Bookmarks is not enabled, but only applied if enabled.

Note! If the Custom Report should be used as a master items it need to disable Use Bookmarks and then enabled, after it's been added to the master library. This is due to the Custom Reports gets a new Id and a new variable needs to be created.

Sort Bar

With the sort bar you can change the order of the dimensions and measures. It is possible to hide the sort bar for different visualizations types.

From Qlik Sense February 2018 it's possible to change column order in a table by dragging in the column header so typically a straight table does not need the Sort Bar

The screenshot shows the Qlik Sense interface. On the left, the 'Data Sets' pane is visible with 'Table' selected. The main area displays a table with columns: Product, Budget, Forecast, and Budget Variance. The table lists various products and their corresponding values. A 'Visualizations settings' panel is open on the right, showing the 'Table' visualization type selected. Below this, there is a checkbox labeled 'Hide sort bar' which is currently unchecked. A large yellow arrow points from the text 'Hide the sort bar' at the bottom left towards the 'Hide sort bar' checkbox in the settings panel.

Product	Budget	Forecast	Budget Variance
Apples	300	4123	1416
Bananas	3300	10327	2098
Butterhead	33700	60300	4876
Coconuts	11700	21969	839
Cucumber	22000	47070	2465
Dates	15400	32424	1599
Elderberries	19000	38406	-1586
Icecream	35500	70477	6474

Visualizations settings

Table

☐ Hide sort bar

Pivot table

Combo chart

Hide the sort bar

Other options

1. The objects used are standard Qlik Sense objects so all standard features such as export and sorting are available (Export to image/pdf does not work. See limitations below.)
2. Using a minimized version of the object you can put a custom report on any sheet along with the rest of the visualizations. Click arrows to expand to full screen!
3. Right-click menu allows you to make changes even with fields/sortbar hidden
4. Search in dimensions and measure list
5. Clear all selections

6. Add totals to table/pivot table

Data Sets **Table**

Table

Dimensions

Product

Measures

Avg Sales

Budget

Budget Variance

Forecast

Sales

Product	Budget Variance	Budget	Forecast
Totals	11 992	-	-
Apples	1 416	300	4 123
Bananas	2 098	3 300	10 327
Butterhead	4 876	33 700	66 360
Coconuts	839	11 700	21 969
Cucumber	2 465	22 000	47 070
Dates	1 599	15 400	32 424
Blackberries	-1 586	19 000	38 406
Iceberg	-6 474	35 500	70 477
Oranges	804	6 300	14 623
Rocket	4 364	20 600	55 495
Romain	4 493	44 000	107 547
Tomatoes	-2 902	27 900	50 690

7. Right-click selected dimension/measures. Dimensions only for Pivot Table, both for Combo chart. Table handle sort inside the visualization.

Dimensions

Channel

Consumables

Small Report

Channel

Country

↓ Sort Country Asc

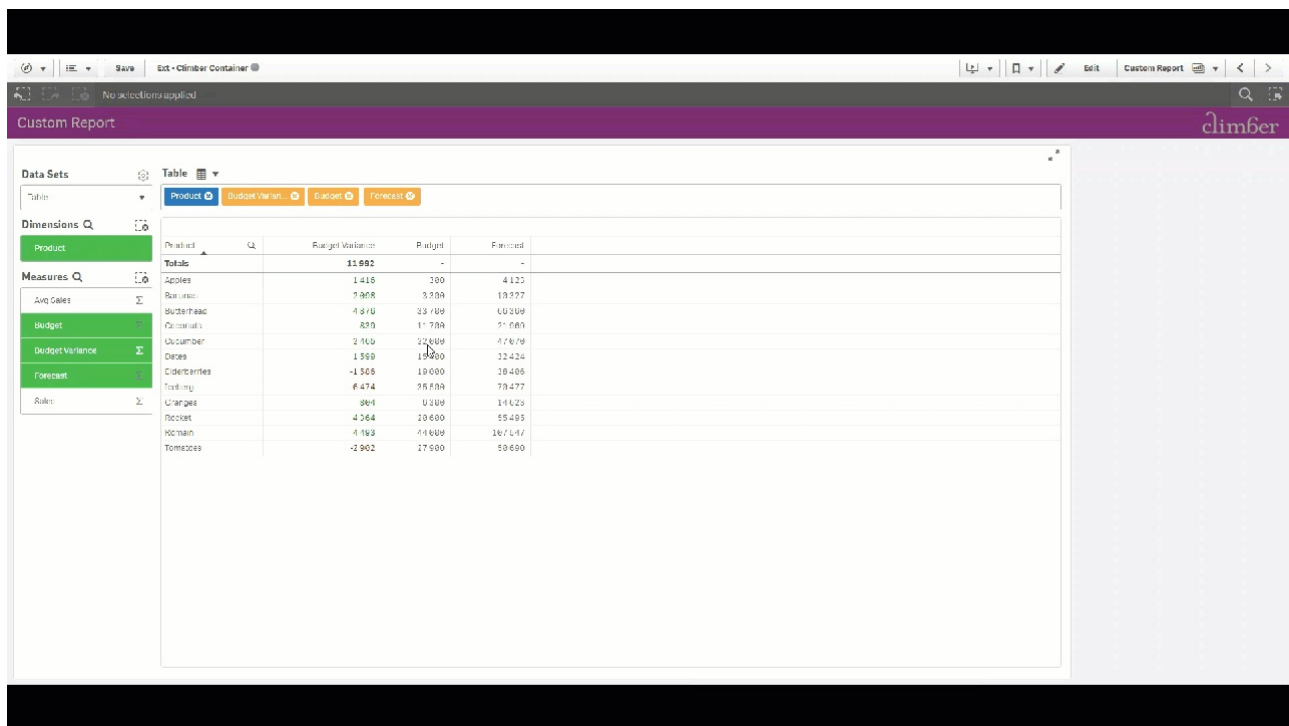
↑ Sort Country Asc

Type

Year

Export to new application

It is possible to export the current state of a selected data set to a new application. In the new application, master items will be created from your dimension and measures. In Qlik Sense Enterprise the user need to have security rights to create an app for the feature to work. For June 2018 and later releases the new app will open in "Generate Insights"-mode that suggest charts based on the data.



Export to new application using a template (Custom Report+)

To enable this feature, Enable export to template features in the experimental settings (Settings\Experimental Settings).

Installation

1. Download the latest version of Qlik Sense (QS November 2017 or higher)
2. Qlik Sense Desktop
 - o To install, copy all files in the .zip file to folder "C:\Users[%Username%]\Documents\QlikSense\Extensions\cl-customreport"
3. Qlik Sense Server
 - o See instructions [how to import an extension on Qlik Sense Server \(http://help.qlik.com/en-US/sense/Subsystems/ManagementConsole/Content/import-extensions.htm\)](http://help.qlik.com/en-US/sense/Subsystems/ManagementConsole/Content/import-extensions.htm)

Climber Extensions

Like this extension? Check out the other Climber extensions below or visit [climberextensions.com \(http://www.climberextensions.com\)](http://www.climberextensions.com) for more information about our extensions offerings.

Finance Report (P&L)

- <https://www.youtube.com/watch?v=xOfShi94T4k>
(No free version available, only on subscription.)

Container

- <https://github.com/ClimberAB/ClimberContainer>

Selection Bar

- <https://github.com/ClimberAB/ClimberSelectionBar>
- <https://www.youtube.com/watch?v=4fxrphADRKw>

KPI

- <https://github.com/ClimberAB/ClimberKPI>
- <https://www.youtube.com/watch?v=9zdfYshNel4>

Cards

- <https://github.com/ClimberAB/ClimberCards>
- https://www.youtube.com/watch?v=k_IET8TvB_c

Limitations

- No pdf/png export supported. (This also means no Nprinting support.)
- Calculation conditions in master items are not respected
- Master measure/dimension colors only in Combo chart
- A very small (collapsed) version of the extension could look nicer :-)
- Export to template only works in Qlik Sense Enterprise
- Unpublished sheets in a published app can't use Bookmarks
- Show details is not implemented
- Expression labels doesn't work in Qlik Sense November 2017 or prior
- Expression labels only work for master measures/dimensions
- Step back/forward needs to be clicked twice if a measure/dimension is added/removed (only Custom Report+)

Climber

- <http://github.com/ClimberAB>

Change Log

See [CHANGELOG \(CHANGELOG.md\)](#)

License

See [LICENSE \(License.pdf\)](#)