Climber Custom Report

[Download Climber Custom Report v2.4.3](https://github.com/ClimberAB/ClimberCustomReport/releases/download/v2.4.3/cl-custom-report-v2.4.3.zip)
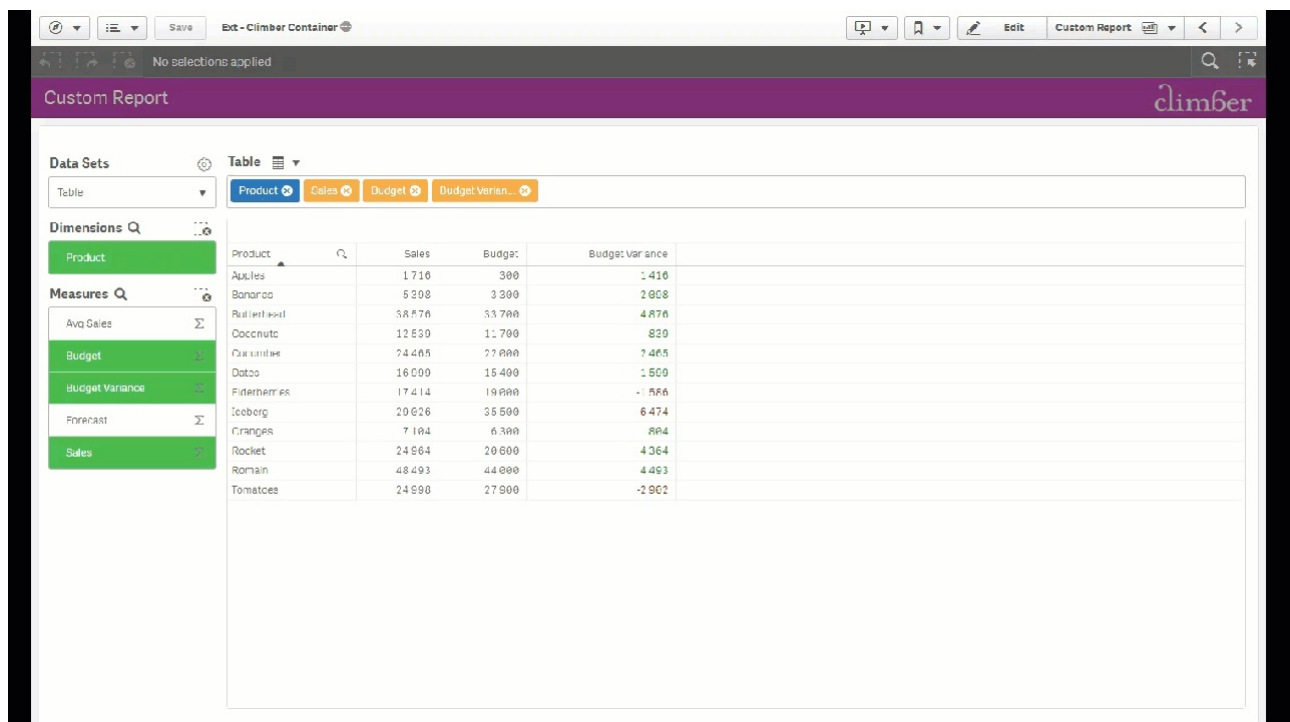
Most recent update 2.4.3 - 2018-09-29

Fixed

- Added Code Change Warning
- Fixed #74 Climber Icon

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

Self service without edit-mode for Qlik Sense!

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/climber-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
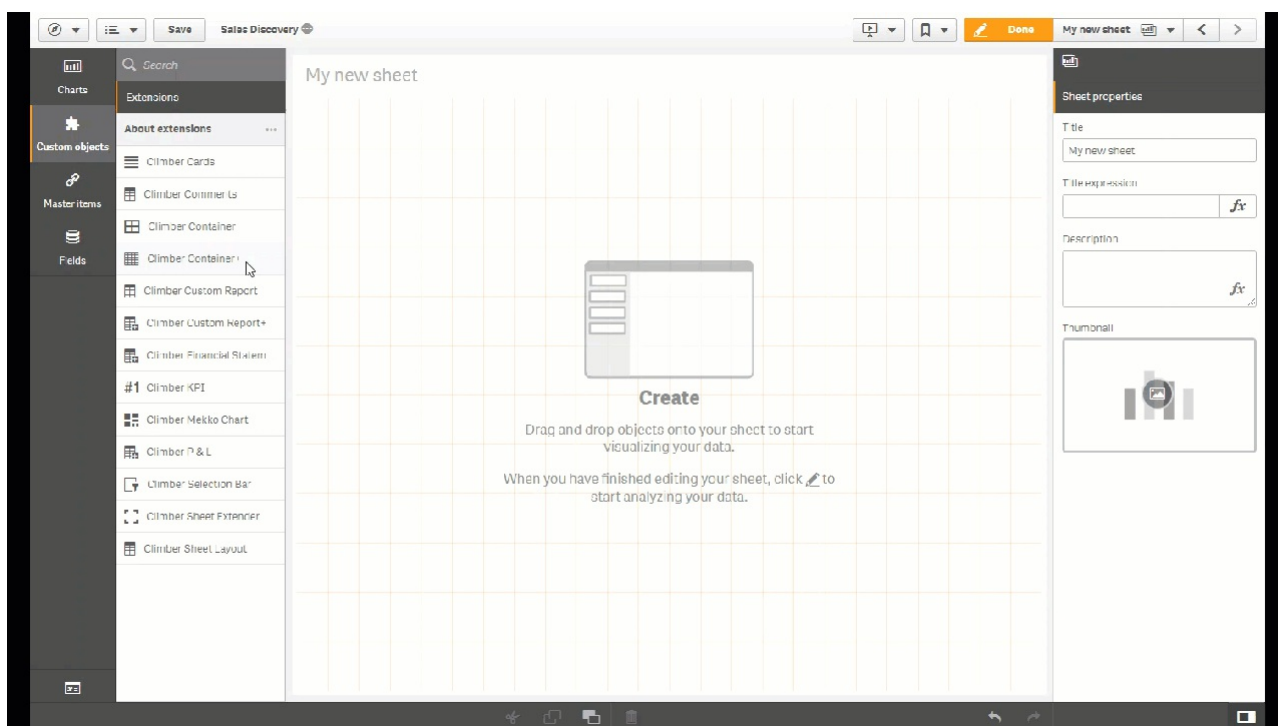
Defaults, presets and bookmarks

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

-Show default state

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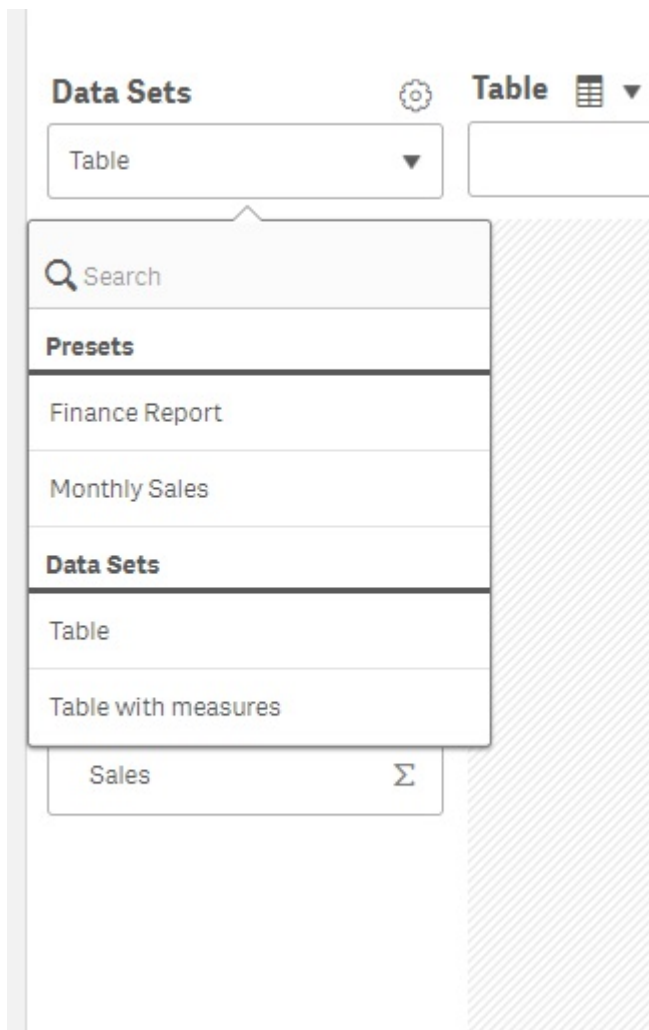
To create a preset select your dimensions/measures and go in to edit mode. Click on "presets" and click on "Add Preset". To change a preset, change your selections and click "Save preset".

You can always show a current preset by clicking "show preset"
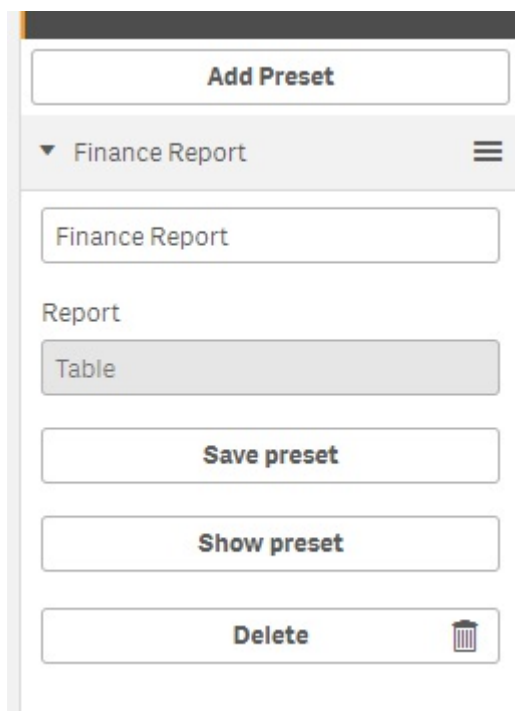
Bookmarks (Custom Report+)

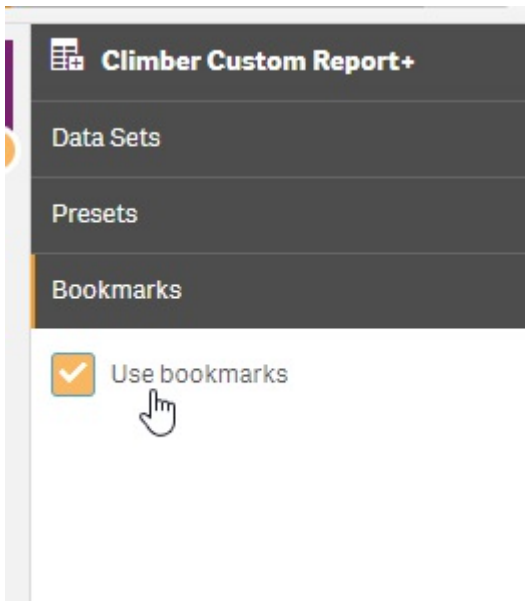For the end user is possible to create personalized bookmarks. With bookmarks you can save a state and go back to that state using the standard Qlik Sense bookmark list.
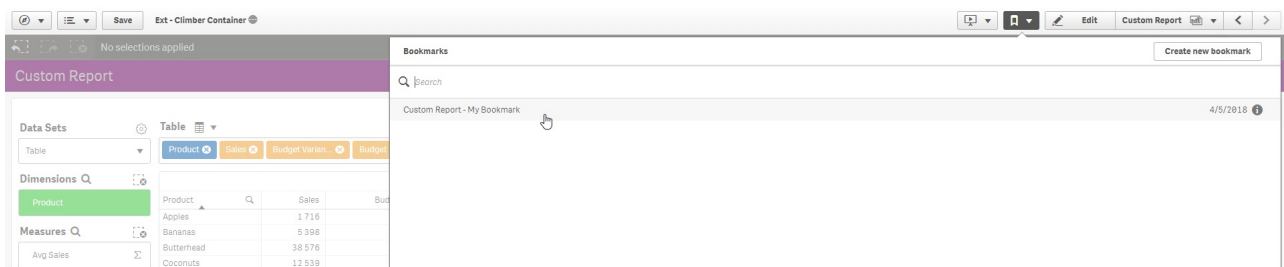
How to use bookmarks

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)
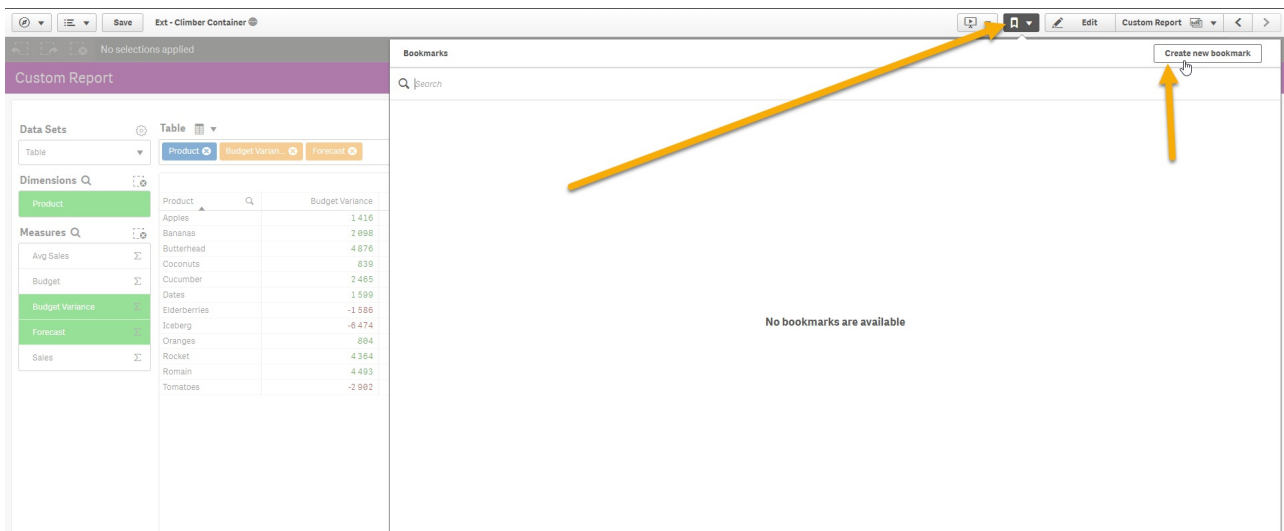
3. Access the bookmarks

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 accidently 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 QS 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

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

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

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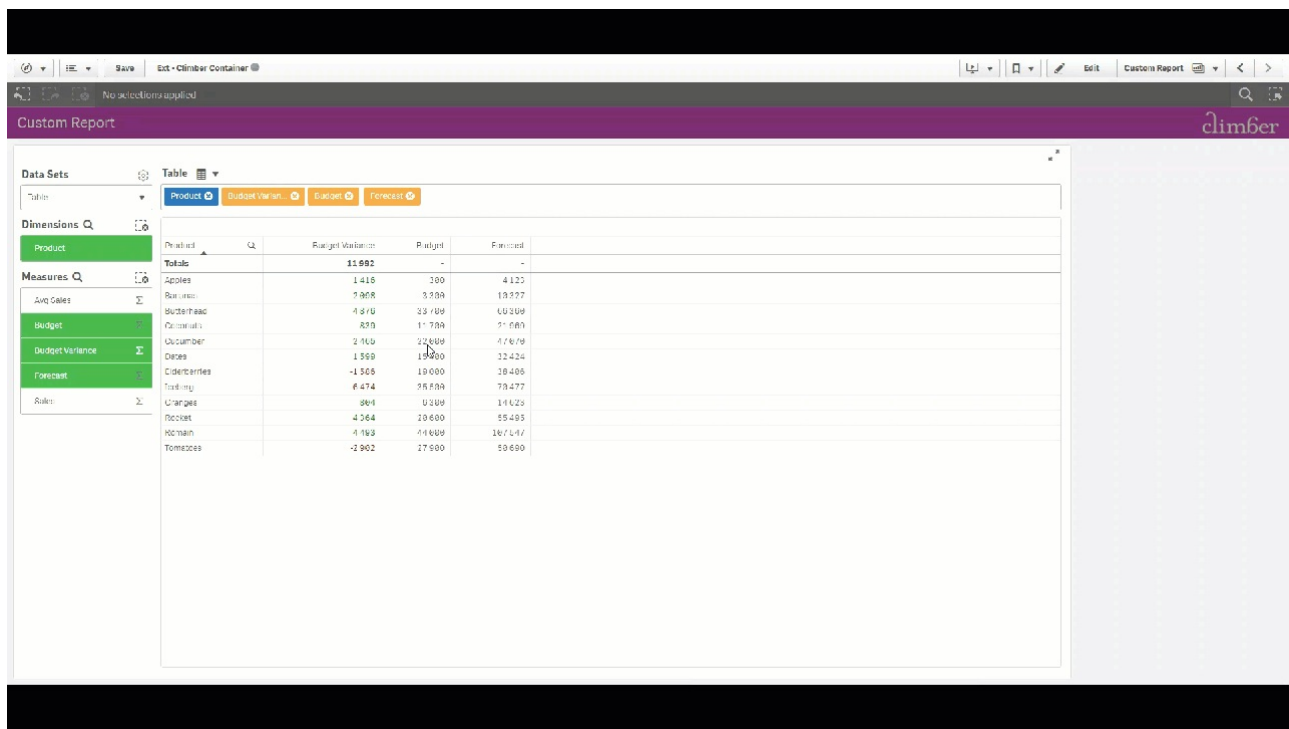
Export to new application using a template (Custom Report+)

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

    - To install, copy all files in the .zip file to folder "C:\Users\[%Username%]\Documents\Qlik\Sense\Extensions\cl-customreport"

3. Qlik Sense Server

    - See instructions how to import an extension on Qlik Sense Server (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) 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=9zdfYshNeI4

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)](CHANGELOG.md)

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