**Team Discussion on An investigation on the knowledge disconnect between Qlikview BI developers and users.**

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| **Participant** | **Role** |
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| Lisa Kriel | Senior Qlikview Developer |
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Letitia**: The main problem is the user doesn’t know they don’t know**. The user will click there, there and there and get their result. **It’s difficult to give training because the users don’t know if they need training**. How can we make the user aware that they don’t know?

Caronne: We actually had a situation like that today where Chris created a button but it didn’t look like a button so I asked him, “Make it look like a button”. So he made it look like a button but the main user said yes he knows it’s a button but the other users don’t know there’s a button so he needs to make it stand out more.

Stacey: If you have like tooltips or popups that tell you suggestions.

Lisa: **put tips on the welcome screen of the apps**.

Letitia: the main problem is **some of the users don’t know the data themselves and if they don’t know the data how can they know how it should be displayed visually**. How do you show the data so the user understands it. Like if a user knows exactly they want the calculation exactly like this but the next user’s interpretation of the calculation is completely different.

Me: this is kind of different to what I am saying where those are more app specific problems where this is just getting people familiar with the tool and teaching them how to use Qlikview correctly. Whereas like the complex and convoluted apps that nothing can really be done about the usability because of so many different requests made on that app by so many different users. So users have to be trained on those kinds of apps specifically whereas this idea that I am trying to propose now is just getting users taught how to use Qlikview correctly in any company where it is implemented.

Letitia: O ok, yes.

Me: I have found that the **most common problem that users face is selection**. **Selection can make or break an app where is you select so little as 5 things and the app looks completely incorrect**.

Stefan: **Yeah when it comes to set analysis you don’t always know what’s being ignored or not**.

Me: it would be nice if everything was simple, you make a selection and your data is reduced to that selection but very often requirements don’t meet that.

Stefan: or why don’t we have an extra sheet called manual for example that has an explanation of what that app is about.

Me: **but for someone coming into a company with no Qlikview user experience I think this a good way to give the user a good idea on how to use Qlikview**. So what I am planning to do is take any computer literate person, ones with and without business knowledge put them in front of a Qlikview app and see if they can use it at all, then introduce this how to app , they go through it once and get a better understanding of how to use Qlikview.

Letitia: but there are videos.

Me: **The videos are less interactive and people pay less attention to them or not watch them at all. The best is obviously the 1 2 1 training with Caronne but that’s a lot more resourceful**.

Letitia: I still don’t know how you are going to teach them what they don’t know.

Me: **No there could be that they go through the app once and learn a few features that they did not know about before. Maybe a limitation they often experience that they didn’t know could be reduced by using a particular feature**.

Chris: I think we need to look at the way we are developing Qlikview and now with Qlik Sense. Qlikview is more guided analytics where you show the user the data; say for example you create a graph of sales where we put in the set analysis where you can’t reduce the months so it always shows the full year. That’s guided analytics, you carry the user to see what you present them. Where Qlik sense is more the user can do what they want with the data but with that comes responsibility. The user needs to understand the data and know what they can do with the data. So what we do is more guided analytics.

Letitia: **That’s the problem is we the developers and the users don’t know the data well enough.**

Me: **yeah, that’s what takes the longest in development is understanding the data and business behind the app**.

Chris: it’s very important when making an app like if you make the user used to clicking on graphs to reduce the data, they now going to click on another graph that has now got set analysis and think its not working. So be very careful of how we tell the user to reduce the data.

Letitia: **standards are basically what it comes down to.**

Chris: but I think **the basics are where you start, make them aware that they can cycle through a cycle group, drill down on a drill down group.** **Because some don’t know they can’t cycle and that’s a big problem because users request something that has already been added.**

Me: that’s what I am going for here, something that isn’t app specific. Nothing really exists for a user wizard on how to use Qlikview, even videos online are scarce on user training. Chris since you’re the only developer with qv experience outside this company, how do you think of those users expertise using QV?

Chris: **I would have to sit side by side with the user and tell them what they can do on the app. Even though some went on the training a lot of people don’t pay attention. If they don’t use it in 2 weeks they forget how to. The training is nice but there’s so much functionality in qv that you don’t remember all of it.**

Me: **you can’t prevent app specific training. If you show a user a complex app there is no way you can show them this tool and they will understand the complex app but that’s not what I’m going for.**

Lisa**: I think at one stage we used to have a welcome sheet on each of our apps saying “this is a cyclic group”, “this is how you select”, how to use qlikview etc. like an about screen.**

Chris: What we’re doing is we are not developing apps for a user; we are developing apps for a number of users. So we develop an app, give it to a user, that user tests, then they distribute it to the other users. That first user may know whats going on in the app but the other users don’t and that’s where the questions come from. “How do you do this”, “What is that” etc.

Me: Christopher, how do you feel the users at your previous company were compared to this company?

Chris: **It was different because as I said it was a smaller group so I would develop an app for say the sales department which was only 4 people. Then I would meet with those people and show them the app**. Here it is different we give it to one main user for testing; during testing I am busy with my next model and forgotten about that app.

Caronne: **if you are teaching a user the basics, 15 minutes is too much, the basics, basics**.

Letitia: Maybe when someone requests access to an app we make sure why they want access to that app and make sure they understand the app that they are granted access to and what they want to do on the app.

Caronne: **but it is amazing when I sat with a user and showed her a few basics, she learned things that changed her life, simple things that just opened her eyes to doing things a lot more conveniently.**

Letitia: also **so many users that export the data to excel then do their calculations on excel when they can request the change and have the calculation done on QV**. There is one user that I said whenever they feel like exporting to excel, just phone me and ask me what you want to do with the data, now unfortunately he phones me all the time haha but it is the right way to do it.

Chis: but **there is a definite disconnect between the user and the developer**. **Like by the time it gets to the 4th user he thinks ok this is the app and it needs to be used like this but he doesn’t really know the scope and details**. Where if there is constant communication between the user and developer the user can just say, this is what I use the app for and can I request this etc.

Letitia: but how does the user know, **how does the user know you are excluding those products in this calculation, or excluding distribution centres in that list of stores**.

Chris: **The only way the user will know is by using the app and using it frequently. If you have been working with HR data for example for 5 years and you get a Qlikview app made with that data, you will know what is there and what isn’t because you know your data**.

Letitia: Yeah but it’s the interpretation of the data, one guy may interpret it this way and the other another way. So how do you effectively bring that message across? We need a super user for each app or an app owner on both the **user** side and developer side that understands the app well enough to inform the other users. I have been asked a hundred times to be give the users the calculations to specific things on the app.

Chris: A perfect example was the buttons, where we added a button for a user but then that user came back to say other users don’t know about the button, can you make it more clear.

Letitia: **So instead on the welcome screen where it says mail IT, it can rather be mail the app owner for any queries**. So for every app there is an owner who is up to date with all the changes being made on the app. We could even make it that if an app owner were to leave; we make the app unavailable for the users until a user takes upon the responsibility to be the new app owner.

Me: Chris, what was your apps to developer ration at your previous company?

Chris: well my old company was a consultant company where each developer helped their companies.

Me: I feel sorry for some of the stuff I do on the PPS models when they go onto the next person.

Letitia: That’s why I am so serious about standards.

Chris: we also need to ensure how up to date our data is that’s why I think it’s good we are starting to do connects to the databases.

Letitia: I have a few issues with the connects, like everything they have their pros and cons. But now when you start stand by you will see what impact your decisions will have and how difficult it is to get up at 2 o clock at night and try figure out what did this person do here. You do that 1 time, 2 times, 3 times, and you will completely change the way you work. So we can’t just work for ourselves and for now, so it is a good thing we are starting stand by.

Me: how many new Qlikview users are we getting recently?

Caronne: We get new users weekly.

Letitia: if you compare with FNB though, they have like 285 apps, about 4000 users and only 4 developers, but all senior developers. But they have simpler apps where we sometimes try to do too much in an app where we could potentially break it up into 2 or more apps. Like having for each of our current app’s a high level app and a detail app for the different user’s needs.

Chris: **there is definitely a need for basic Qlikview understanding.**

Letitia: Will it be a Qlikview app? - Yes

Stacey: **It should have instructions on what to do and then you have to do it.**

Stefan: **Yeah like you have to complete something until you can go to the next step. Like a next button, like as soon as you do something the next button pops up and you can proceed to the next step.**

Me: yes so new users will just use this app quickly and get a well-rounded understanding of how to use Qlikview and what it is before even working on any app. **especially to prevent them learning bad habits from existing users.**

Caronne: **And me as a resource it will free up a lot of my time preventing them from having to travel to the user and train them in person.**

Me: **Yes there are people that you are unable to see like users in china or other parts of the country. Just something to kick-start them will help a great deal.**

Letitia: but we should make sure that everyone that has access to an app, actually uses the app.