



Discovering and Analyzing

Qlik® Sense

1.1

Copyright © 1993-2015 QlikTech International AB. All rights reserved.



Copyright © 1993-2015 QlikTech International AB. All rights reserved.

Qlik®, QlikTech®, Qlik® Sense, QlikView®, Sense™ and the Qlik logo are trademarks which have been registered in multiple countries or otherwise used as trademarks by QlikTech International AB. Other trademarks referenced herein are the trademarks of their respective owners.

1 About this document	4
2 Discovering and analyzing	5
2.1 Routine analysis	5
2.2 Exploratory analysis	5
Adding your own visualizations	5
2.3 Searching in the data	5
2.4 Bookmarking selections	5
3 Making selections	6
3.1 Selection preview	6
No selection	6
A selection is made	6
A second selection is made	7
3.2 Click selection	8
3.3 Draw selection	9
3.4 Range selection	11
3.5 Lasso selection	12
3.6 Legend selection	12
3.7 Label selection	13
3.8 Selections in visualizations	13
4 Working with selections	15
4.1 Editing the selections	16
4.2 Searching the selections	16
4.3 Locking and unlocking selections	17
Locking selections	17
Unlocking selections	18
4.4 Stepping back and forward in selections	18
5 Using the selections tool	19
5.1 Making and clearing selections	20
5.2 Searching in the section APP DIMENSIONS	20
6 Using the search tool	21
6.1 Performing a search	21
List of matches	21
7 Scrolling in visualizations	22
7.1 Using lasso selection with scrolling	22
Touch device interaction	22
Computer (mouse) interaction	23
Alternative procedure	23
7.2 Visualizations where lasso selection needs to be enabled	23
8 Canceling data retrieval	24
9 Exporting data	25
9.1 Limitations	25

1 About this document

Read and learn how to make discoveries in your data, using different tools.

Make sure to see the Concepts in Qlik Sense guide to learn more about the selections model and about the different search types.

This document is derived from the online help for Qlik Sense. It is intended for those who want to read parts of the help offline or print pages easily, and does not include any additional information compared with the online help.

Please use the online help or the other documents to learn more.

The following documents are available:

- Concepts in Qlik Sense
- Working with Apps
- Creating Visualizations
- Loading and Modeling Data
- Data Storytelling
- Publishing Apps, Sheets and Stories
- Script Syntax and Chart Functions Guide
- Qlik Sense Desktop

You find these documents and much more at help.qlik.com.

2 Discovering and analyzing

When you have created your app and loaded data into it you can start using it for data discovery and analysis. You can perform analysis for different reasons and using a variety of tools.

2.1 Routine analysis

Typical for routine analysis is to follow up on key metrics (KPI) on a regular basis, for example:

- Total sales versus quota each morning
- Total sales versus total sales the same period last year
- Orders placed but not delivered at the end of the week
- Sales per region on a certain day each month

Assume that you have data representing sales over time. You can then limit your data to only show the sales during a certain month. Next, you can show only the data during the following month, to see how the sales have developed.

2.2 Exploratory analysis

Sometimes when you are analyzing data, you might find that something is missing in the app that you have access to. Even though Qlik Sense allows for efficiently filtering the data by making multiple selections, you might want to adapt the existing visualizations, dimensions or measures to be able to explore the data for new insights.

Adding your own visualizations

You can also do some more exploratory analysis by creating your own visualizations that include exactly the measures and dimensions that you are interested in.

2.3 Searching in the data

Data search makes it easier for you to find or filter in filter panes, selection items, and tables. It helps you to narrow down the data so you can make selections in the resulting list. You use the search tool to find items in all of the data that is loaded into the app.

2.4 Bookmarking selections

To keep track and be able to go back to previous selections you can bookmark your selection states.

3 Making selections

You make selections by clicking and drawing in the different visualizations. When you make a selection, all associated visualizations are updated immediately to reflect the selection. You confirm the selection by clicking ✓, or by clicking anywhere on the sheet outside the visualization, including in another visualization, (in which case you generate a new selection). You can also press Enter to confirm.

You cancel a selection by clicking ✕. You can also press Esc to undo.

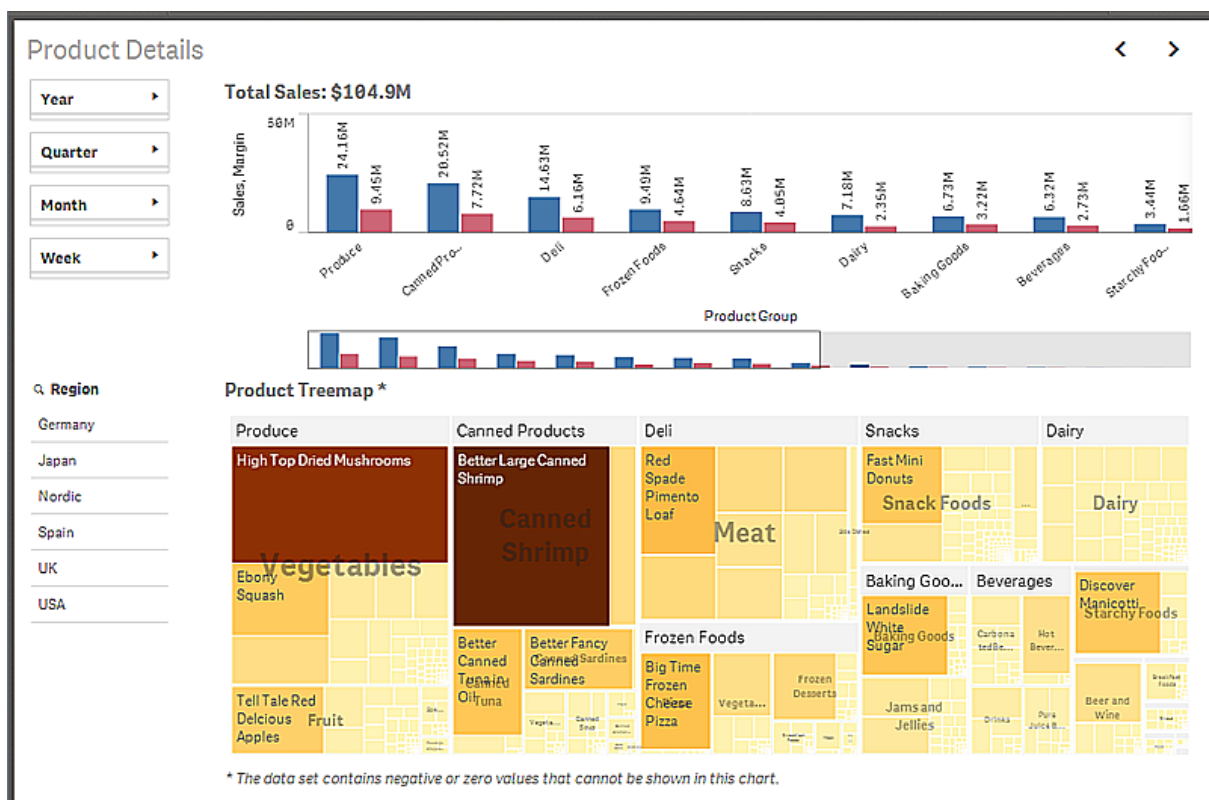
By default, new selections in a visualization are added to the previous ones. You deselect an item by clicking it. On a computer, you can hold down Ctrl while you make a selection, to automatically clear previous selections in a visualization, and only keep the new selection.

3.1 Selection preview

The following images show how the visualizations are updated immediately when a selection is made.

No selection

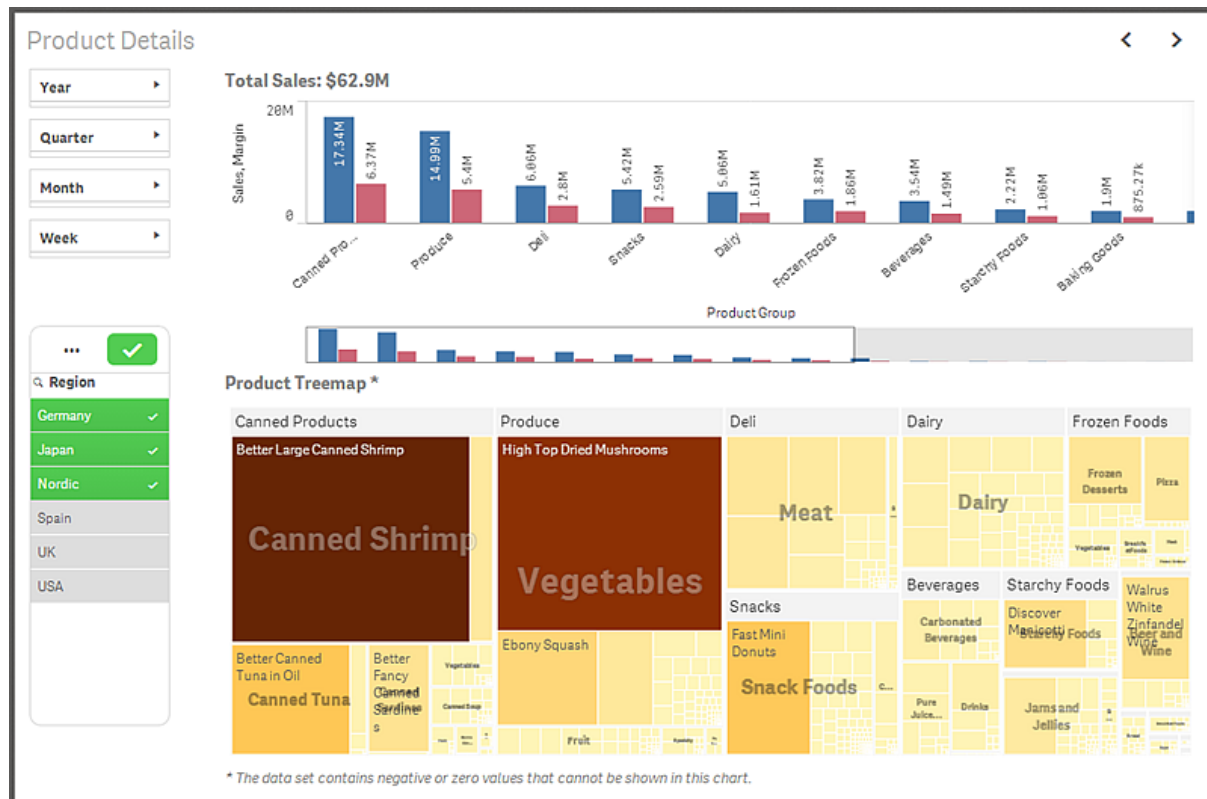
In this image, no selection has been made.



A selection is made

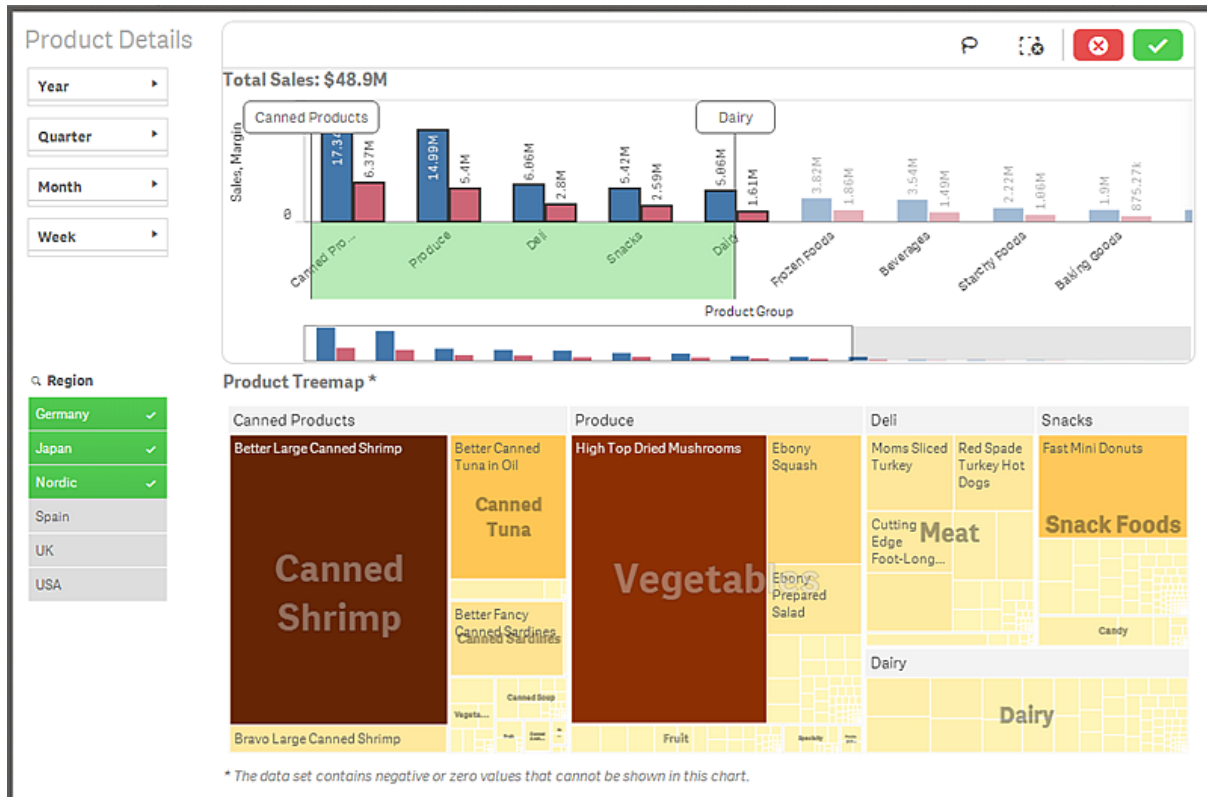
In this image, a selection is made (in the filter pane *Region*) and is reflected in all associated visualizations.

3 Making selections



A second selection is made

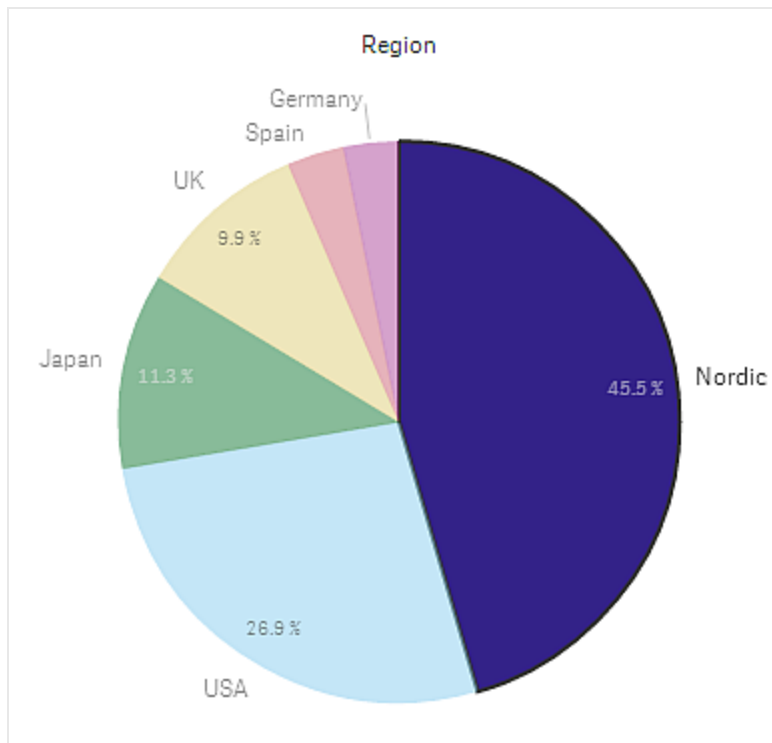
In this image, a second selection is made (in the bar chart *Total Sales*). It automatically confirms the first selection and presents a preview of the new selection.



When making selections in filter panes there is a difference between **Cancel selection** (✕) and **Clear selection** (🗑️). With ✕ you only clear the latest selection, but 🗑️ clears all selections.


3.2 Click selection

You click to select single values/data points, one at a time. If you want to deselect a value/data point, click it.

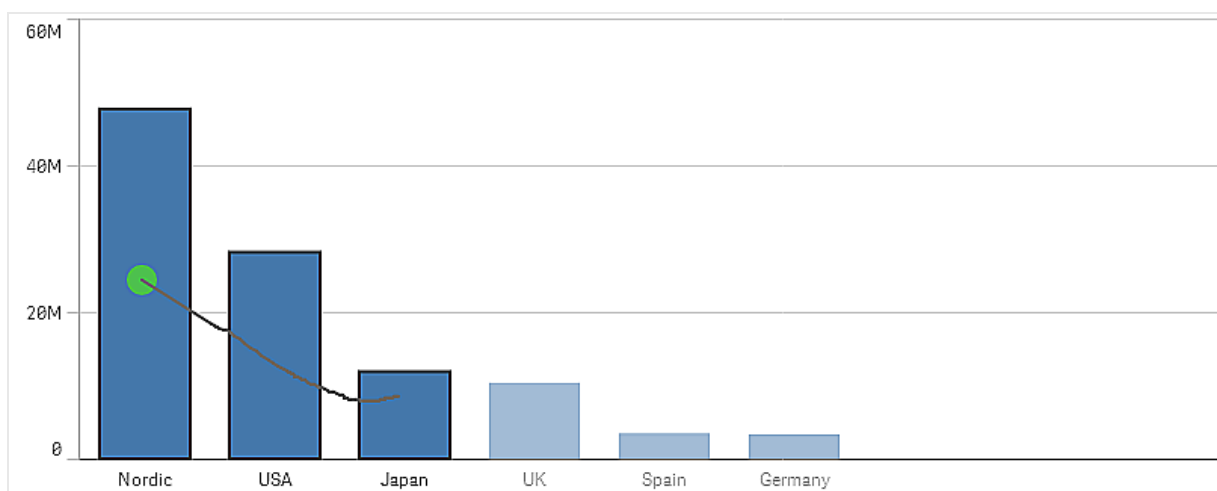


Pie chart where the sector Nordic has been selected

3.3 Draw selection

When you want to make a draw or lasso selection, you must first click inside the visualization and turn on lasso selection by clicking  at the top of the visualization. On a computer you can also press Shift and make the selection.

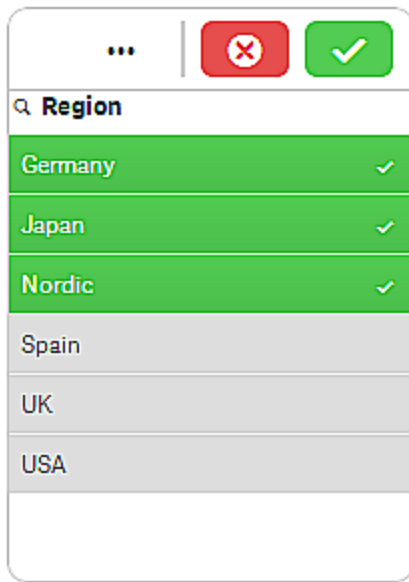
You draw a freehand line to select several values/data points at a time. You cannot draw to deselect values/data points.



Bar chart example

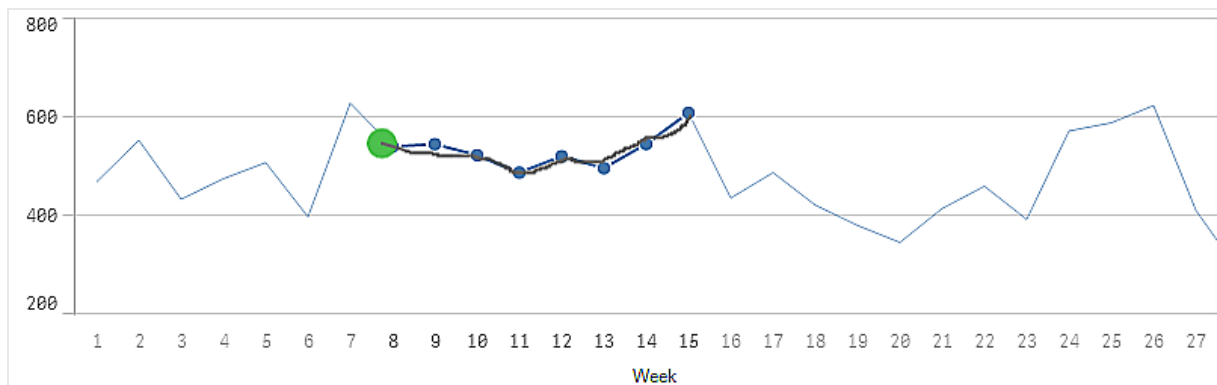
3 Making selections

In a table or a filter pane, you draw across several values to select them.



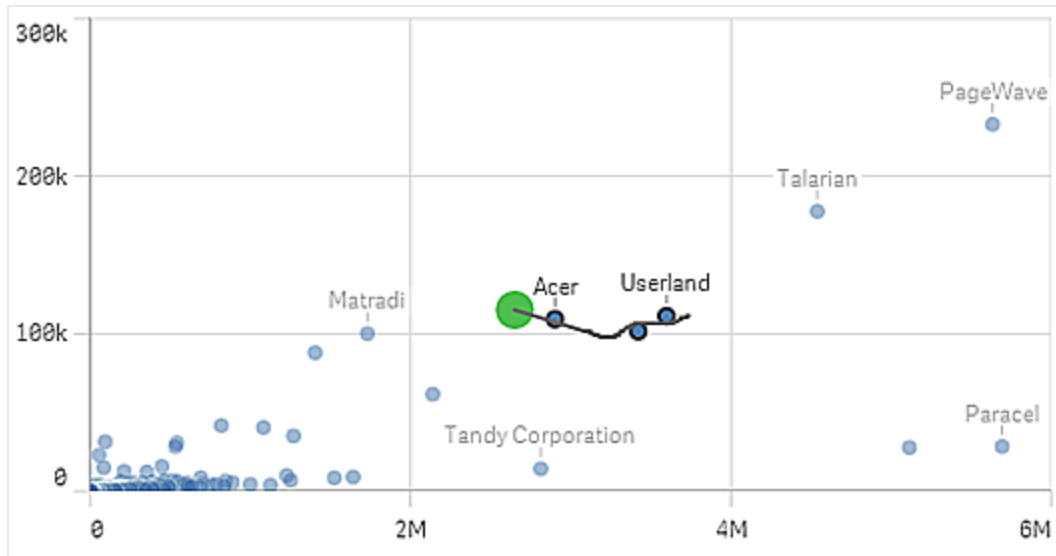
Filter pane example

In a line chart you draw along a line to select a number of data points.



Line chart example

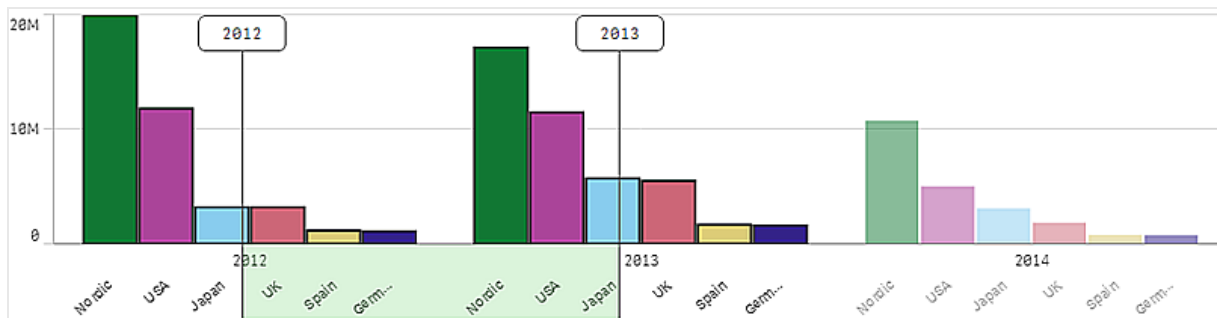
In a scatter plot you draw across a number of data points to select them.



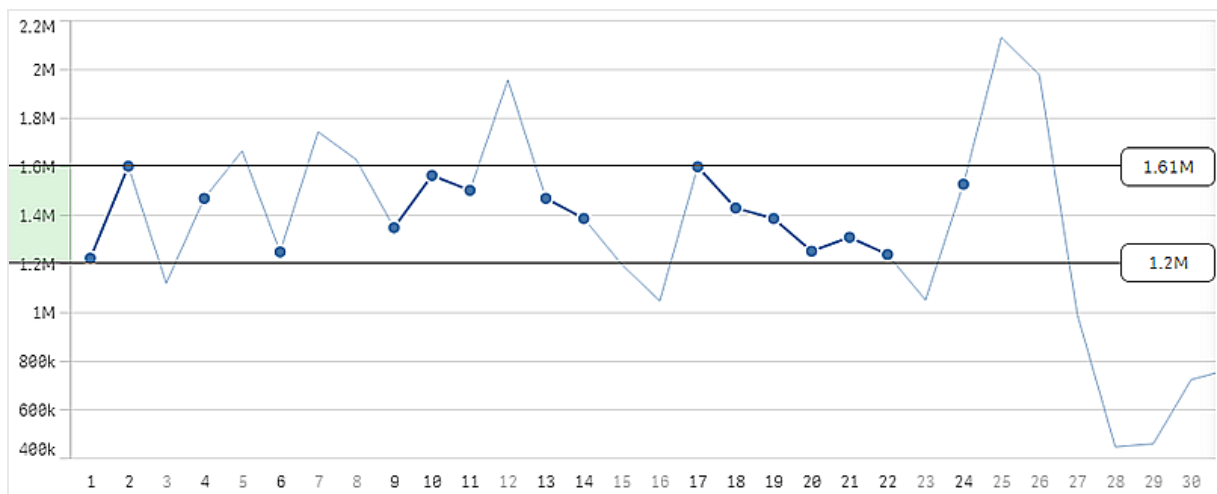
Scatter plot example

3.4 Range selection

You draw your selections, either on the y-axis or the x-axis.




Bar chart example

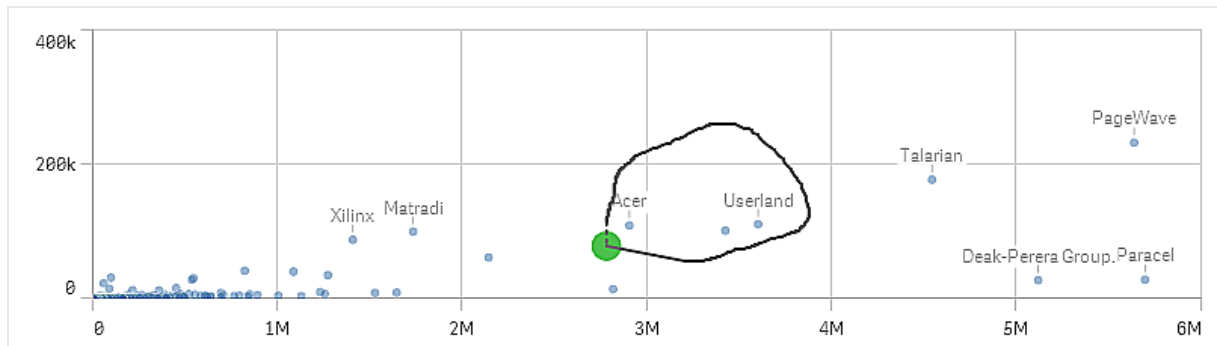


Line chart example

3.5 Lasso selection

When you want to make a draw or lasso selection, you must first click inside the visualization and turn on lasso selection by clicking  at the top of the visualization. On a computer you can also press Shift and make the selection.

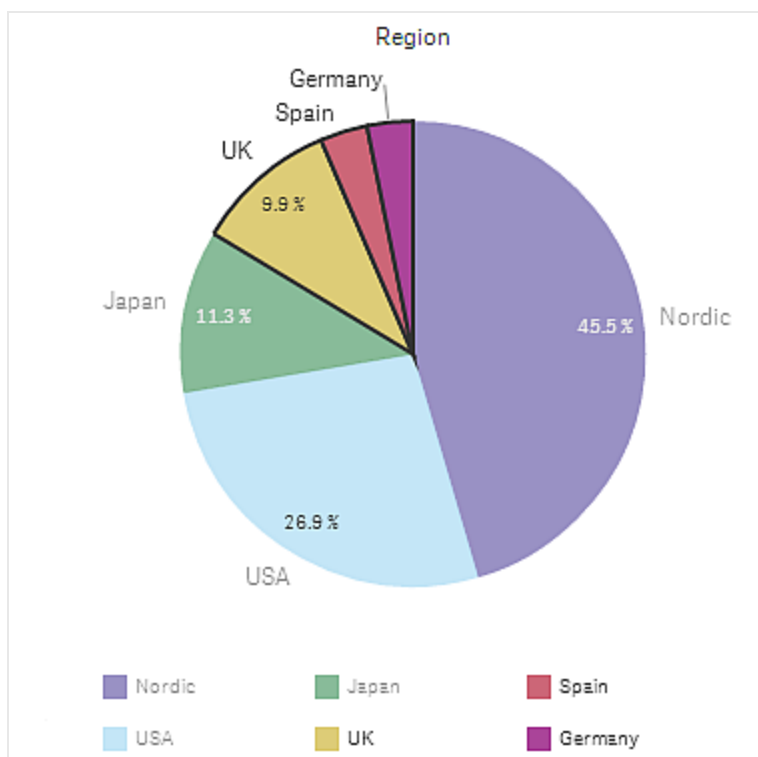
You draw a freehand circle to capture and select data points.



Scatter plot example

3.6 Legend selection

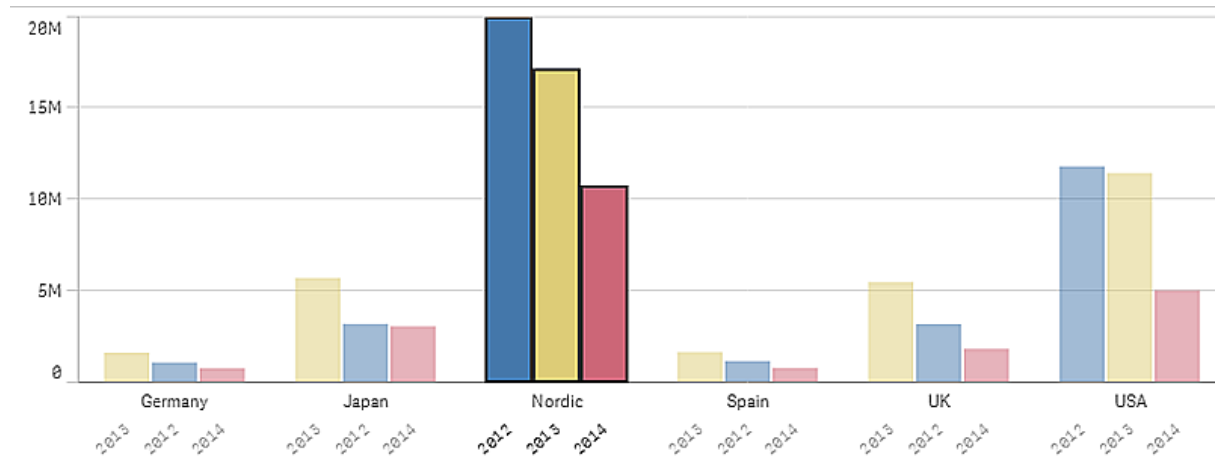
You can click the legend items to select the values.



Pie chart example

3.7 Label selection

You can click the dimension labels to make selections. When dimensions are grouped or stacked, the whole group or stack is selected.



Label selection of 2011, 2012, and 2013. Clicking any of the years selects the whole group.

3.8 Selections in visualizations

When you analyze your data, you have different ways of making selections. The charts and tables have different selection patterns. Some selection types are particularly useful for certain visualizations.



You cannot make selections in gauges, texts, or images.

The following table displays which kinds of selections that are supported in the visualizations.

	Click selection	Draw selection	Range selection	Lasso selection	Legend selection	Label selection
Bar chart	✓	✓	✓	✓	✓	✓
Combo chart	✓	✓	✓	✓	✓	✓
Filter pane	✓	✓				
Gauge						
KPI						
Line chart	✓	✓	✓	✓	✓	✓
Map	✓	✓		✓	✓	

3 Making selections

Pie chart	✓	✓		✓	✓	✓
Scatter plot	✓	✓	✓	✓		
Table	✓	✓				
Text & image						
Treemap	✓	✓		✓		

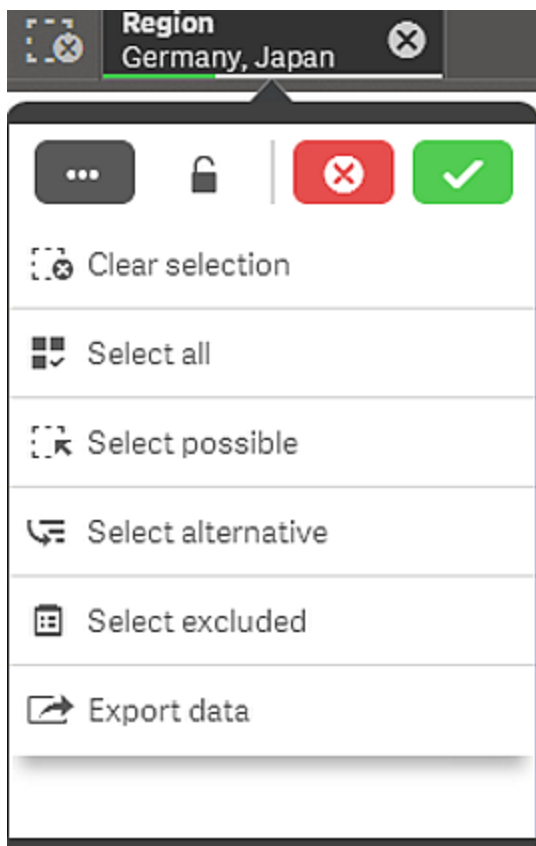
4 Working with selections

During analysis, the selections are displayed above the sheet. Each selection item has a small bar at the bottom that reflects the selection states for that dimension. Three states are displayed in the bars: selected (green), alternative (light gray), and excluded (dark gray). Locked values are indicated by a lock icon.



Selections bar

By clicking a selection item, you can view, edit, or clear that selection in the popup that appears. You can also search for dimension values or lock the selection. In the following image the selection menu is open. Depending on what selections that have been made previously, some of the options may not be available.



Selection menu in the selection popup

The following table describes the options.

Select all	All values are selected (marked ✓). Alternative values change state to selected (green). Excluded values change state to selected excluded. They are still dark gray, but are now selected (marked ✓). If you clear the selections that made these values excluded, they will change state to selected (green).
Select possible	All possible values (white) are selected. This option is never available in the selections item, because when a selection is made, the other values are either alternative or excluded. In a filter pane, however, you can have possible values as a result of another selection.
Select alternative	<p>When a selection has already been made in a field, alternative values, when present, have a light gray color. These are values that would have been possible values (white), if a selection had not already been made in that field.</p> <p>By selecting alternative values, the values that previously were selected, become alternative instead.</p>
Select excluded	<p>If there are alternative values, they will be selected (green) and the values that previously were selected will change state to alternative. Excluded values will change state to selected excluded.</p> <p>If there are not any alternative values, the excluded values are selected (green), and the previously selected values change state to alternative.</p>
Export data	<p>Export the selected data to an Excel file.</p> <p>See: <i>Exporting data (page 25)</i></p>

4.1 Editing the selections

If you during data analysis want to make changes to the selections, you can do so in the selections bar.

Do the following:

1. Switch to sheet view.
2. In the selections bar above the sheet, click the selection that you want to edit.
A popup window with the selection appears.
3. In the popup window, select the values that you want to add or clear.
4. Confirm your selection.

The selection is updated.


4.2 Searching the selections

You can search for values in selection items, and make selections in the filtered list.

Do the following:

1. Click a selection item.
The selection popup is displayed.
2. Type your search string.
While you type, the list is filtered to only display matching values.
3. Make a selection by clicking or by drawing.
4. Confirm your selection.




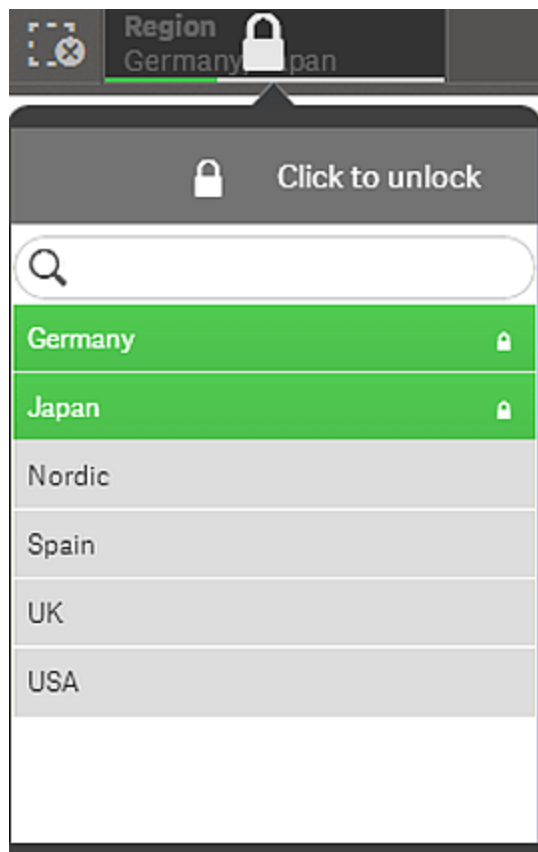
You can confirm the selection of all matching values by pressing Enter. You can remove the search string by clicking  or by pressing Esc.

4.3 Locking and unlocking selections

With the lock option, you can protect your selections.

Locking selections

You can lock a selection by clicking  in the selection popup. The lock prevents any changes from being made to that selection. You can neither change nor clear a locked selection. If you have locked a selection and then try to select excluded field values, the selection item will flash to indicate that the locked selection prevents the selection from being made.




Locked selection



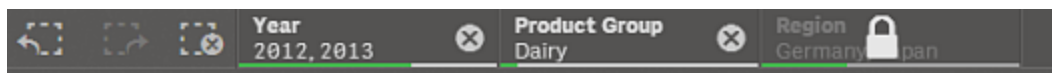
It is possible to step back in the selection history to a state before the dimension was locked.

Unlocking selections



You can unlock a selection by clicking  in the selection popup. When you have unlocked the selection, you can make changes to it, or clear it.


4.4 Stepping back and forward in selections

When you make selections, these are saved as items in the selections bar above the sheet.




To the left in the selections bar, there are three options, one for stepping back in the selections history, one for stepping forward, and one for clearing all selections. In the screen shot you can see that the option to step back is available, but not the forward option. This is the normal case when you have not stepped back in the selection history.

Clicking  brings you one step back in the selection history. You can move back all the way to the first selection in the session. Even if a selection has been locked, you can move back to a state before the selection was made. A locked selection has a  before the dimension name. In the screen shot, the dimension *Region* is locked.

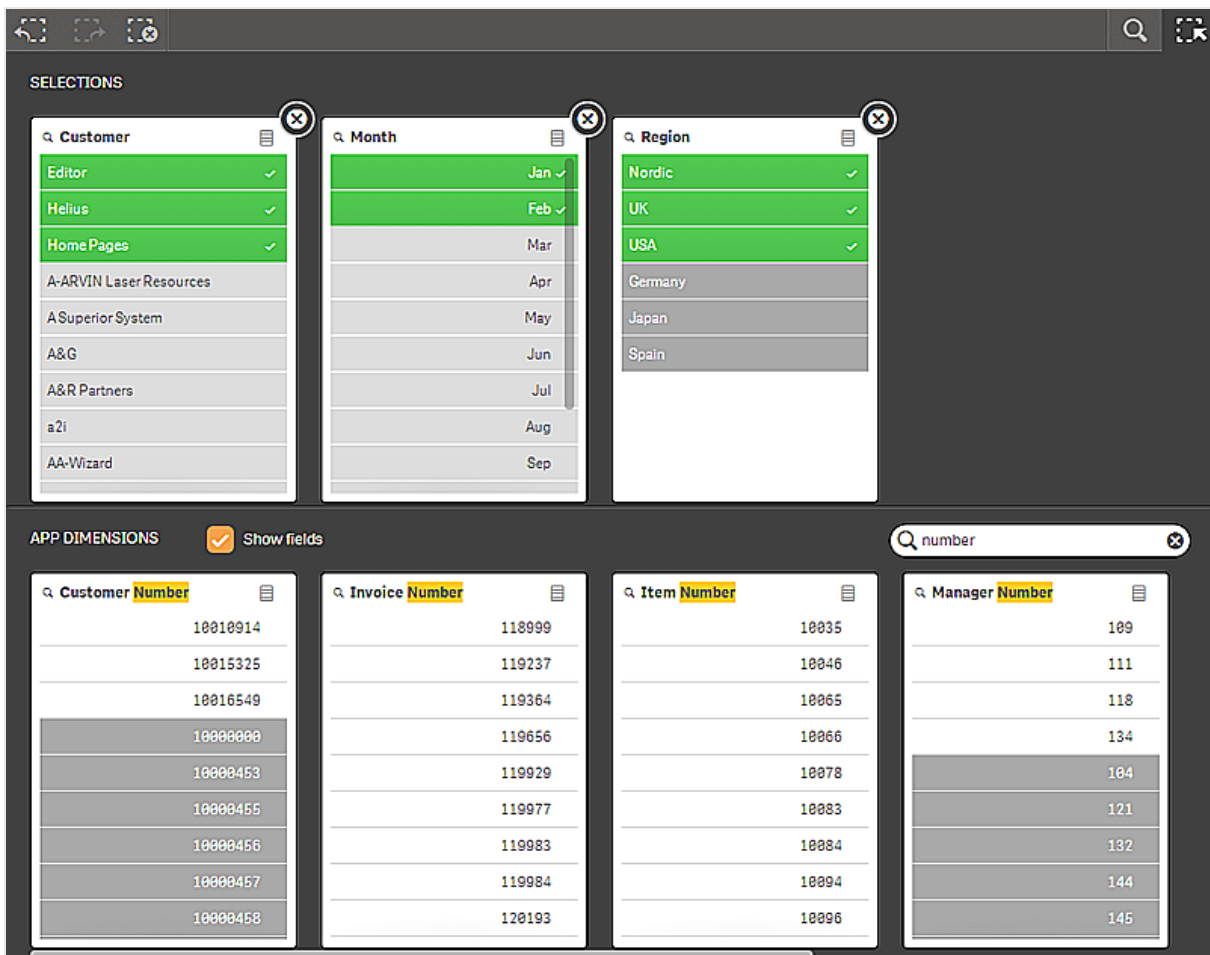
Clicking  clears all selection, except the ones that are locked.

5 Using the selections tool

The selections tool is an extension of the selections bar. In the selections tool you get an overview of all the dimensions and fields in the app, not only the dimensions that have selections. The selections tool gives a more detailed view of the selected data, so that you can explore the associations in the data even if the dimensions are not used on any sheet.

During analysis, the selections tool is available to the right in the selections bar. Click  to open the selections tool.

The selections tool is divided into two sections: **SELECTIONS** and **APP DIMENSIONS**. The selections section displays the fields that have active selections. The app dimensions section displays all dimensions without an active selection. Both sections are sorted alphabetically. When **Show fields** is selected, the section **APP DIMENSIONS** includes all the fields that have been loaded into the app but which are not used as dimensions.



SELECTIONS

Customer

Editor	✓
Helius	✓
HomePages	✓
A-ARVIN Laser Resources	
A Superior System	
A&G	
A&R Partners	
a2i	
AA-Wizard	

Month

Jan	✓
Feb	✓
Mar	
Apr	
May	
Jun	
Jul	
Aug	
Sep	

Region

Nordic	✓
UK	✓
USA	✓
Germany	
Japan	
Spain	

APP DIMENSIONS ☒ Show fields

Search: number

Customer Number

10010914
10015325
10016549
10000000
10000453
10000455
10000456
10000457
10000458

Invoice Number

118999
119237
119364
119656
119929
119977
119983
119984
120193

Item Number

10035
10046
10065
10066
10078
10083
10084
10094
10096

Manager Number

109
111
118
134
104
121
132
144
145

5.1 Making and clearing selections

You can make several selections consecutively, but it is not until you confirm the selections that the dimensions will move up to **SELECTIONS**. You confirm by clicking ✓ or by clicking outside the list, but within the selections tool area. If you click the toolbar you close the selections tool.


In **SELECTIONS**, you can clear a selection in a field by clicking ✕. The field is then moved down to the section **APP DIMENSIONS**.

When you are in the selections tool, you can still use the options in the selections bar (step back, step forward, and clear all selections), and in each dimension you have the usual list options: selection menu, clear selection, cancel selection, confirm selection, and search.

5.2 Searching in the section APP DIMENSIONS

The section **APP DIMENSIONS** has a search box that is useful when you have many dimensions and fields. You search on the titles of the fields and dimensions. Your search string can consist of one or more words, or only a part of word. The search is case insensitive, but only exact string matches are displayed. A search for "numbers" will not display fields with the string "number", but a search for "mbe" will.

6 Using the search tool


When you are analyzing data on a sheet, the search tool is available to the right in the selections bar. Click  to open the search tool.

Keyboard shortcuts:

- Ctrl+F to open.
- Esc to close.

6.1 Performing a search

You type your search strings in the text box. Matches are presented immediately. If there are additional matches to the string you are typing, an auto-suggestion list is displayed with up to 10 matches in alphabetical order. Click a string to insert it into the text box. The search strings are always compared against the beginning of the strings in the database. Searching for 'read' does not present 'bread' as a match, whereas 'reader' and 'Reading' would both be matches. Each of the 10 first search strings that are entered has a unique color to support the identification of the matches. With more than 10 search strings, the colors are reused.

You can clear the search text box by clicking  to the right.

Keyboard shortcuts:

- Tab or Right Arrow Key to insert the auto-suggested search string.
- Up and Down Arrow keys to navigate in the auto-suggestion list.
- Enter to insert the selected string in the auto-suggestion list.
- Esc to close the auto-suggestion list.
- Esc to clear the text box.

List of matches

The search results shows the associated combinations of matches that the search algorithm found in the Qlik Sense database. The results are sorted after the number of search strings matched, in descending order. The search tool area is limited to approximately half of the screen, and when you have many matches there is both a scroll bar option and a **Load more** button to view more matches.

You select a row by clicking it. When you select a row you make an actual selection of the values, just like when you select values in the visualizations. The selections bar shows the selected values.

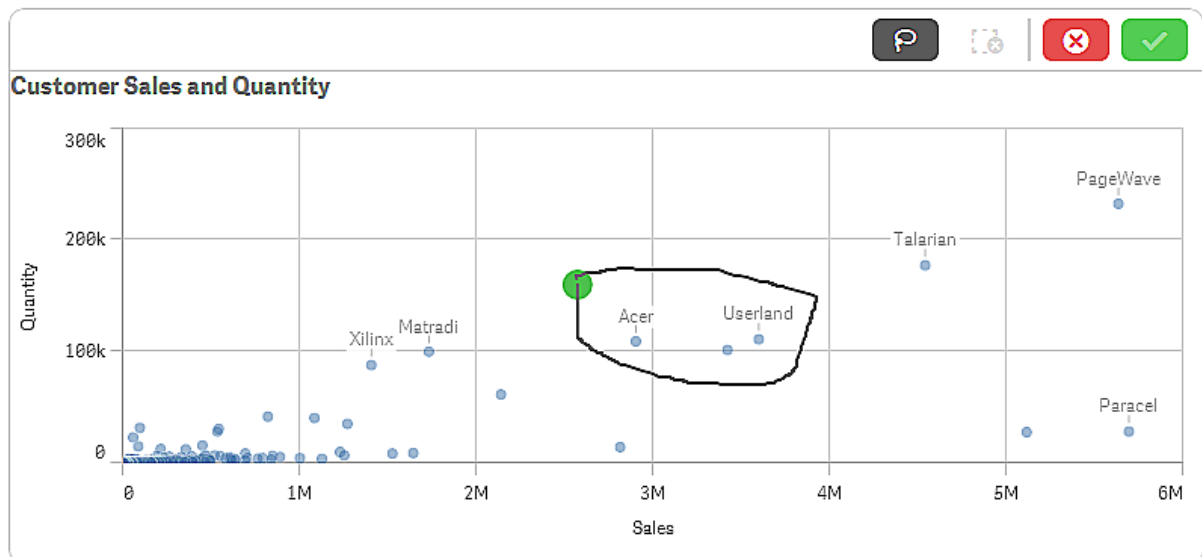
Keyboard shortcuts:

- Up and Down Arrow keys to navigate in the auto-suggestion list.
- Enter to select the values.

7 Scrolling in visualizations

You can swipe/drag to pan and scroll in visualizations and then turn on lasso selection to draw and select.

When working with visualizations, you often need to scroll to find the data you are looking for. Especially on a touch device, the most natural way of scrolling is to swipe. You scroll by swiping to the data that you want to select and then make your selection. When you scroll, draw selection and lasso selection are disabled, so as not to interrupt the scrolling and to avoid making accidental selections. The other selection options are available as usual.




Selection of values using lasso selection

7.1 Using lasso selection with scrolling

When you make a lasso selection, the interaction differs depending on what device you are using.

Touch device interaction

Do the following:

1. Tap  to turn on lasso selection.
2. Draw to make a selection.
You can make consecutive selections.
3. Confirm the selection.

Use two-finger-swipe if you need to scroll and pan between selections.


Computer (mouse) interaction


Do the following:

1. Press Shift and draw to make a selection.
You can make consecutive selections. Lasso selection is turned on for as long as Shift is pressed.
2. Confirm the selection.

Alternative procedure

Do the following:

1. Click inside the visualization without making a selection.
Selection options are displayed at the top of the visualization.
2. Click  to turn on lasso selection.
3. Make and confirm the selection.

You can click  to turn lasso selection on and off if you need to scroll and pan between selections.

7.2 Visualizations where lasso selection needs to be enabled

In the following visualizations you need to activate lasso selection:

- Bar chart
- Combo chart
- Line chart
- Map
- Pie chart
- Scatter plot
- Treemap


8 Canceling data retrieval

When you are making discoveries in Qlik Sense and have your data on a server, there may sometimes be waiting time before the data is retrieved. To avoid long periods of waiting time, **Cancel** buttons are displayed on each visualization after a while, so that you can choose to cancel the data retrieval for one or more of the visualizations. When you click **Cancel**, you stop the data retrieval for that visualization, but retrieval continues in the visualizations that have not been clicked. When you have clicked **Cancel**, a **Retry** button is displayed instead, so that you can make a new attempt to retrieve the data.

9 Exporting data

You can export data from a visualization to Excel and save it in an .xlsx file.

Do the following:

1. Long-touch/right-click the visualization that you want to export data from.
2. Select  **Export data**.
3. In the **Export complete** dialog, click the link to download the data file.
4. Open or save the file.

The data has been exported to an .xlsx file.



In filter panes with more than one dimension, you can either select all dimensions or a single dimension.

9.1 Limitations

There are limitations to the amount of data that can be exported. You can reduce the data amount by making selections. Excluded values are not exported.