Getting Started with Qlik – Crib Sheets

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The Homescreen / Qlik Hub Customisation

'Add widgets' is used to customise this view

You can drag and drop each section to change the order you see them in

Or hit the 3 dots next to the section title and select 'Remove' to delete it from view

Simply tick or untick the sections you would like to show on your Homepage / Hub
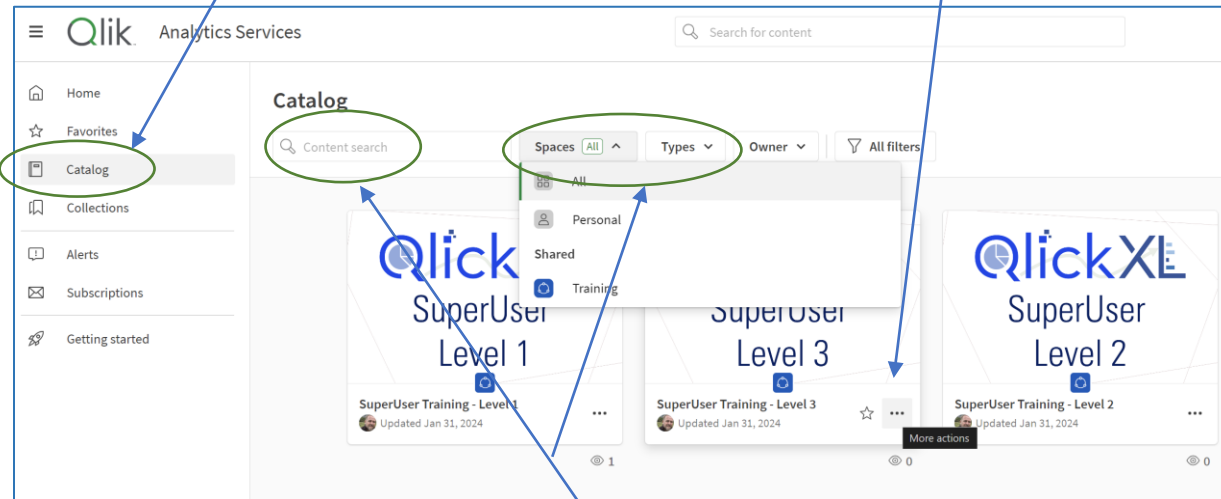
Finding Apps

Select 'Catalog' from the left menu to browse for Content (all currently available for your user)

To mark as a 'Favorite' simply click the 3 dots on the bottom right of an app, which will then display the Star icon for selection
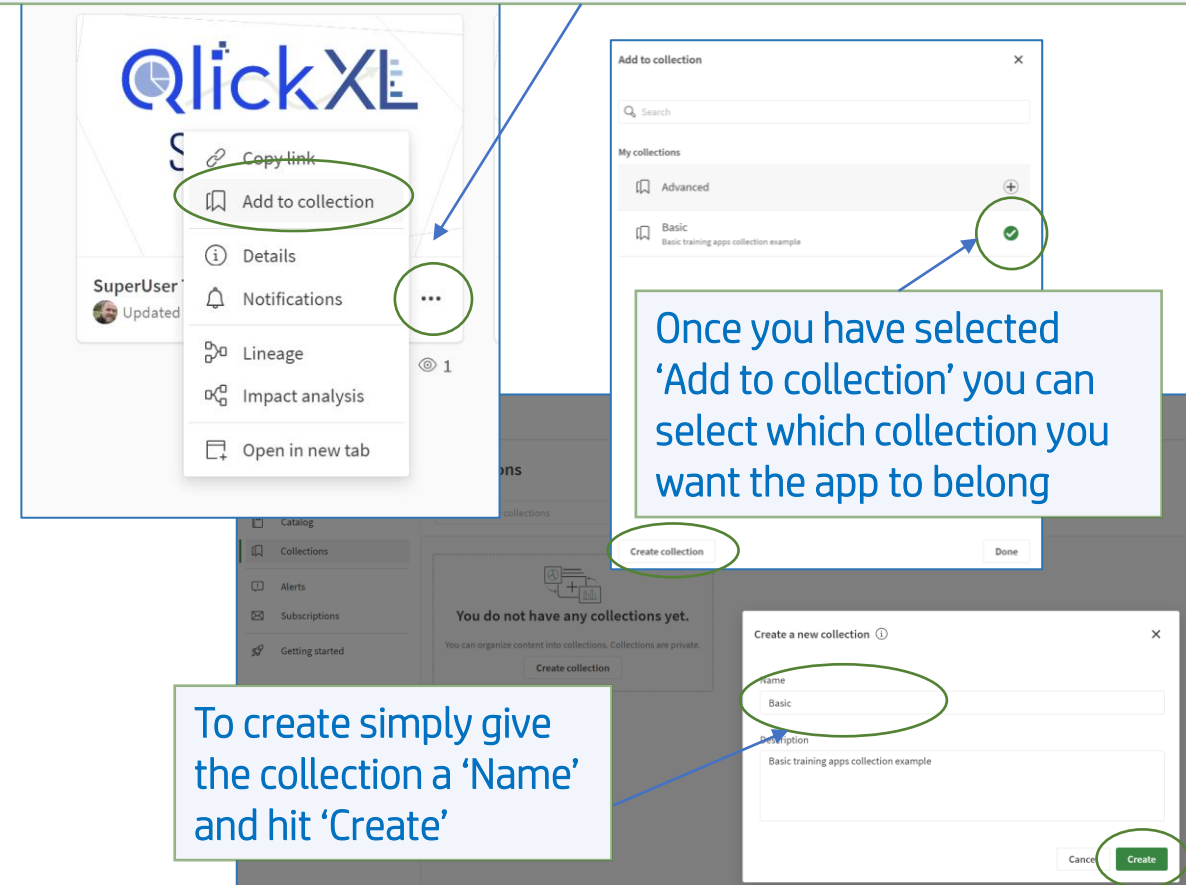
Collections are used for personal organisation of Apps and can be added as Sections on the Homescreen / Hub.

Created either from the Collection area from the left menu or directly from an app by clicking the 3 dots and selecting 'Add to collection', then 'Create collection' in the bottom left of that window.

Use the search to find what you're looking for.

You can also add filters for a 'Space' (which is Qlik terminology for a storage area), or a 'Type' of content, such as 'App'

Once you have selected 'Add to collection' you can select which collection you want the app to belong

To create simply give the collection a 'Name' and hit 'Create'

Using Qlik Apps - Navigation

Once you click on an App it will open up on the 'App overview' screen, which shows all of the 'Sheets' contained in it (think of these as tabs on a spreadsheet).

From here click on a 'Sheet' to open it.

In any open 'Sheet' you can quickly view all sheets available in the App and open them from the Sheets menu, in the top right of the screen.

You can navigate back to the 'App overview' by clicking the 3 dots to the right of the Qlik logo, in the top left of the screen.

You can also use the arrows below the Sheets menu to navigate quickly one sheet to the left, or right of the current one.
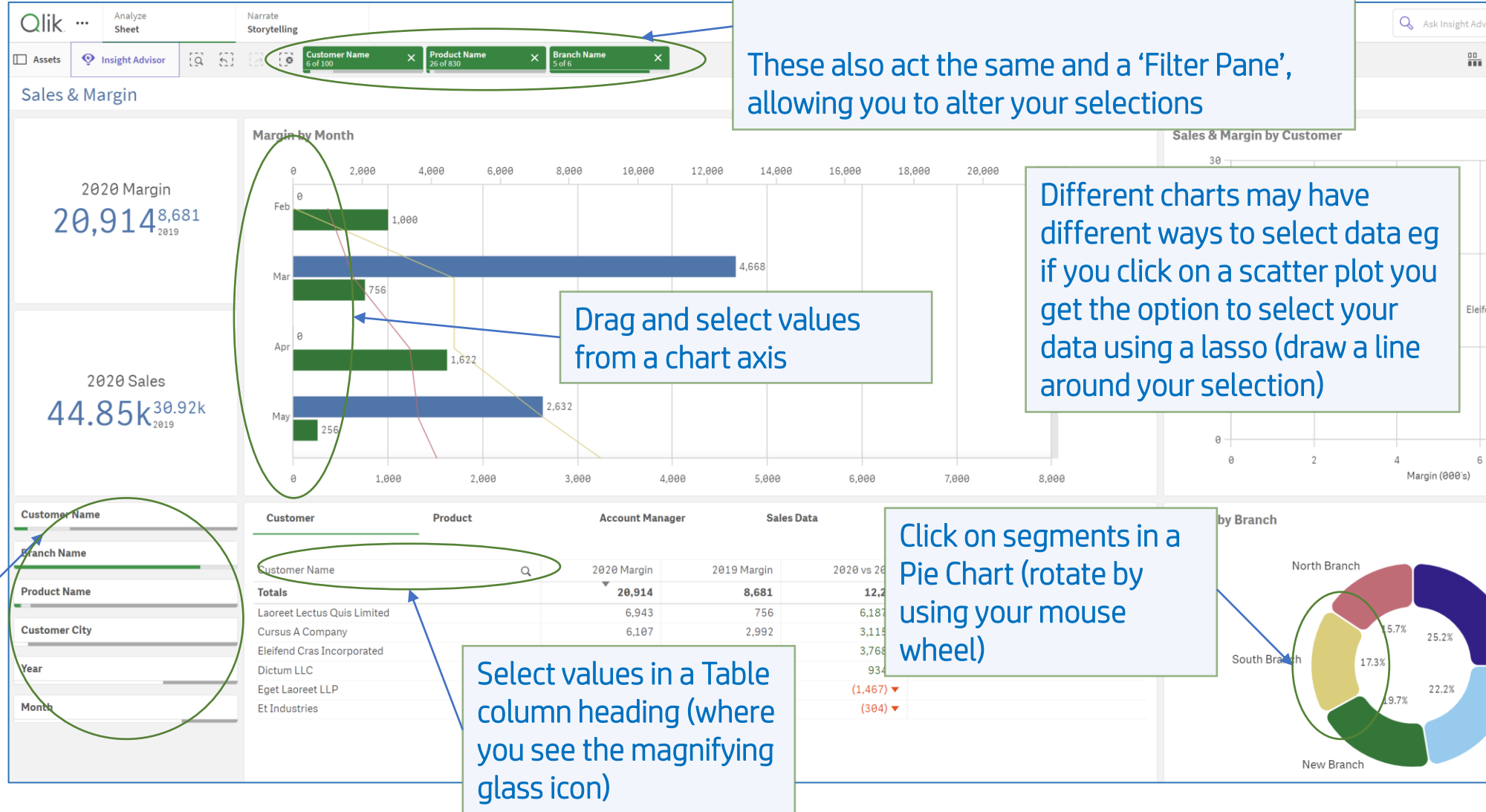
Using Qlik Apps - Filtering

QlickXL

"Filtering in Qlik is where the fun begins…"

Data can be filtered by interacting with objects in Qlik

Tip: Why not try using a wildcard in you filter eg type *wine* and hit enter, to select all products containing the word 'wine'

As you make selections they are shown in the menu bar

These also act the same and a 'Filter Pane', allowing you to alter your selections

Different charts may have different ways to select data eg if you click on a scatter plot you get the option to select your data using a lasso (draw a line around your selection)

Drag and select values from a chart axis

making selections, by selecting, then typing in a in a 'Filter Pane'

Click on segments in a Pie Chart (rotate by using your mouse wheel)

Select values in a Table column heading (where you see the magnifying glass icon)

Using Qlik Apps – Advanced Filtering

QlickXL

To 'release' a filter, simply click on the cross next to it, in the top menu bar

If you want to select everything EXCEPT certain data, select what you DON'T want from a list, click the 3 dots next to the filter and 'Select alternative'

Select all
Select possible
Select alternative
Select excluded

Qlik uses colours in filters to indicate;
Green – Selected data
White – Possible to select
Light grey – Alternative that could be selected
Dark grey – Data not associated with your selection

In the example on the right (taken from our training app) where certain customers are selected, the **Dark grey** shows Cities where no sales have been made to those customers

Customer Name

Customer City

Search in listbox

Arsoli
Edam
Erie
Lisciano Niccone
Richmond Hill
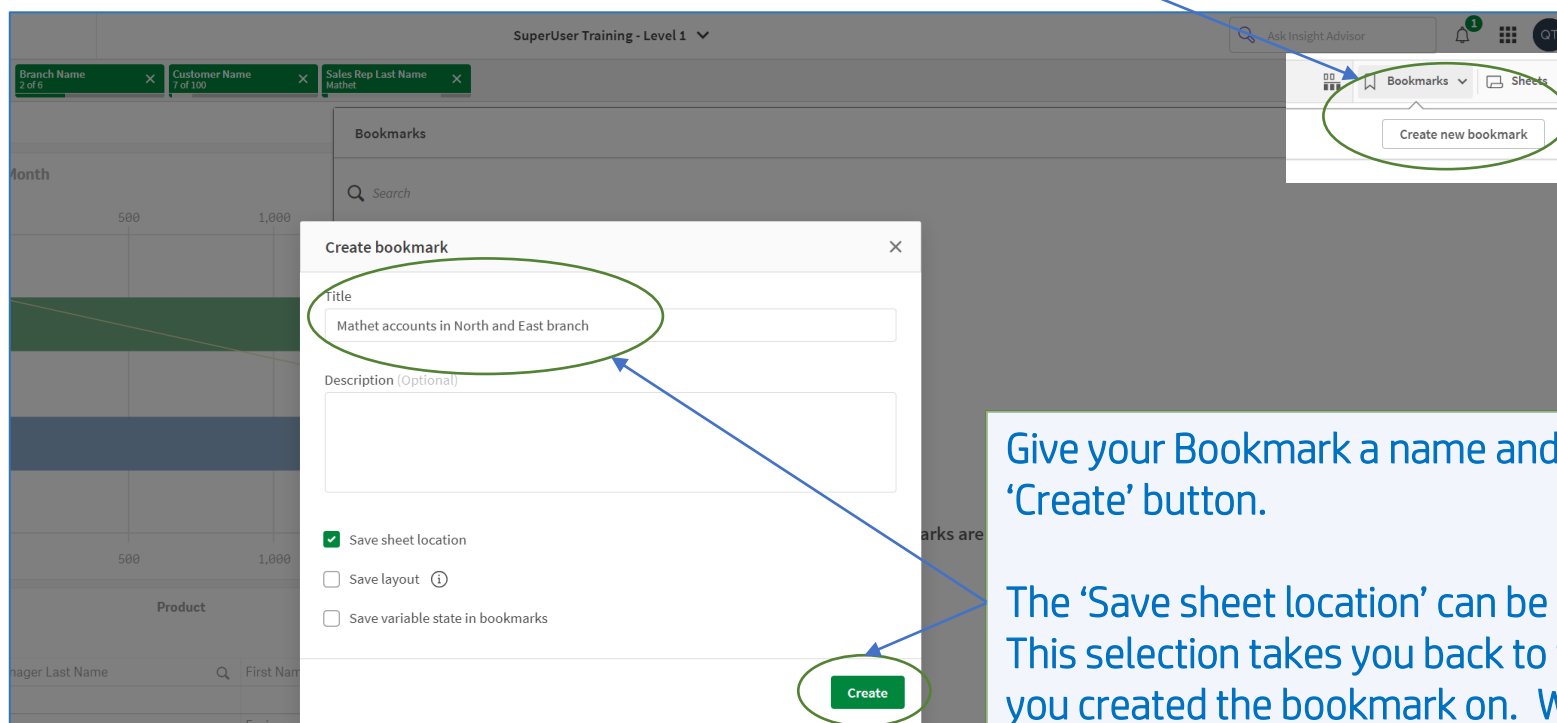San Pancrazio Salentino
Aberystwyth
Adelaide

Using Qlik Apps – Bookmarks

QlickXL

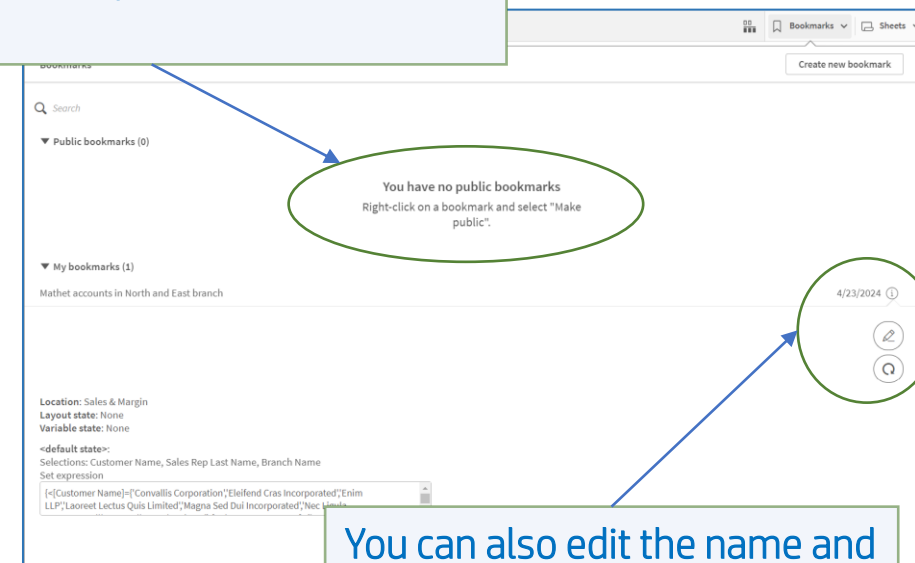Bookmarks are as used to save selected filters for future use

Once your filters are selected simply click on the Bookmarks drop down menu and hit the 'Create new bookmark' button

Bookmarks can be shared by a user with the relevant permissions to make it public

You have no public bookmarks
Right-click on a bookmark and select "Make public".

You can also edit the name and description by hovering over the name and clicking the 'i' icon to the right. This also display the selection criteria, with technical Qlik punctuation

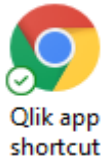Give your Bookmark a name and hit the 'Create' button.

The 'Save sheet location' can be unticked. This selection takes you back to the sheet you created the bookmark on. When not selected, just your filters are applied

Create Shortcuts

Qlik is web application, therefore you can save an app or sheet location by simply using favourites in your web browser

Pro Tip: You can actually build filter slsections into your shortcuts...

By simply adding '/options/clearselections/select/' to the end of the web address (URL) after the word 'analysis', you can then add fields and selections to that URL

For example; '/options/clearselections/select/Branch Name/South Branch;North Branch/select/Customer Name/Enim LLP', which would apply applies the Branch Name filter as South and North Branch and also the Customer Name filter as Enim LLP
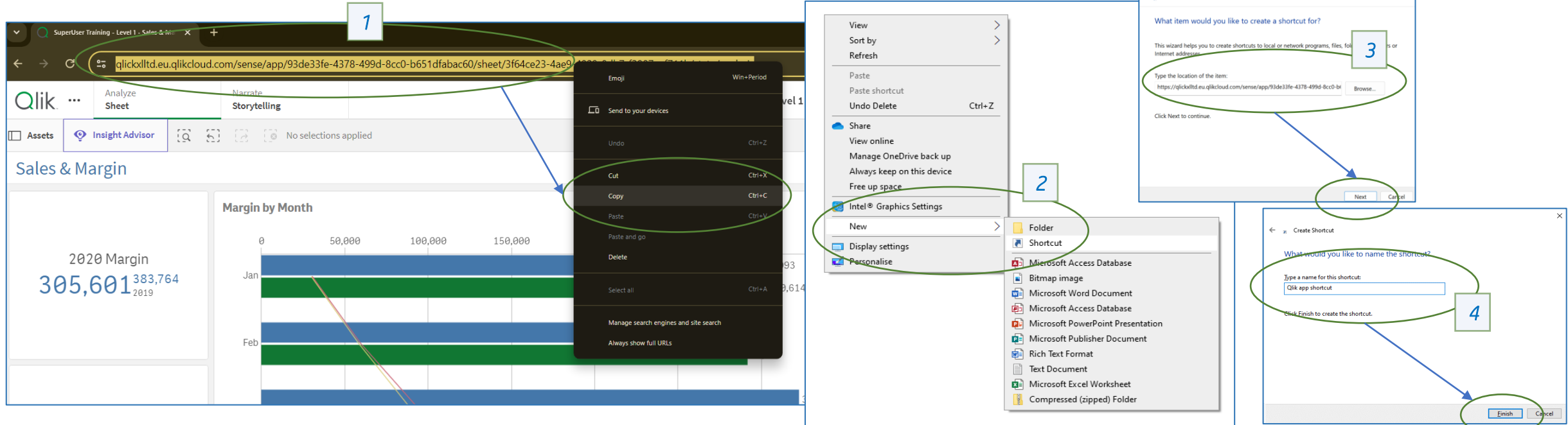
Qlik app shortcut

A second option is a 'desktop shortcut'
1 - Copy the address out of your browser
2 - Right click anywhere on your desktop, select new, then shortcut
3 - Paste the address into the location field and click next
4 – Give your shortcut a name, click finish and you're done!

"Desktop shortcuts allow me to organise, using a traditional tree like structure of folders and subfolders. Being on my desktop it also fits in with the home for the remainder of my business systems and information shortcuts"