

Getting Started with Qlik – Crib Sheets



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The Homescreen / Qlik Hub Customisation



The screenshot shows the Qlik Analytics Services homepage. The top navigation bar includes the Qlik logo, 'Analytics Services', a search bar, and buttons for 'Ask Insight Advisor', '+ Add new', and a notification bell. The main content area displays a 'Welcome, QlickXL Test.' message and a 'Recently used' section. This section contains three cards for 'SuperUser Training - Level 3', 'Level 2', and 'Level 1'. Each card has a three-dot menu icon to its right. A green circle highlights the 'Recently used' section title, and another green circle highlights the 'Remove' button (a circle with an 'X') next to it. A third green circle highlights the '+ Add widgets' button in the top right corner of the main content area.

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

'Add widgets' is used to customise this view

The 'Add widgets' dialog box is shown, allowing users to customize their homepage. It features a search bar at the top. Below, there are sections for 'Already added' and 'General'. The 'Already added' section lists 'Recently used', 'Popular apps', 'My monitored charts', and 'Favorites', each with a green checkmark indicating it is selected. The 'General' section lists 'Recently created' and 'Recently updated', each with a plus icon indicating it is not selected. At the bottom, there is a 'My content' section with a 'Reset widgets' button and a 'Done' button.

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

Finding Apps

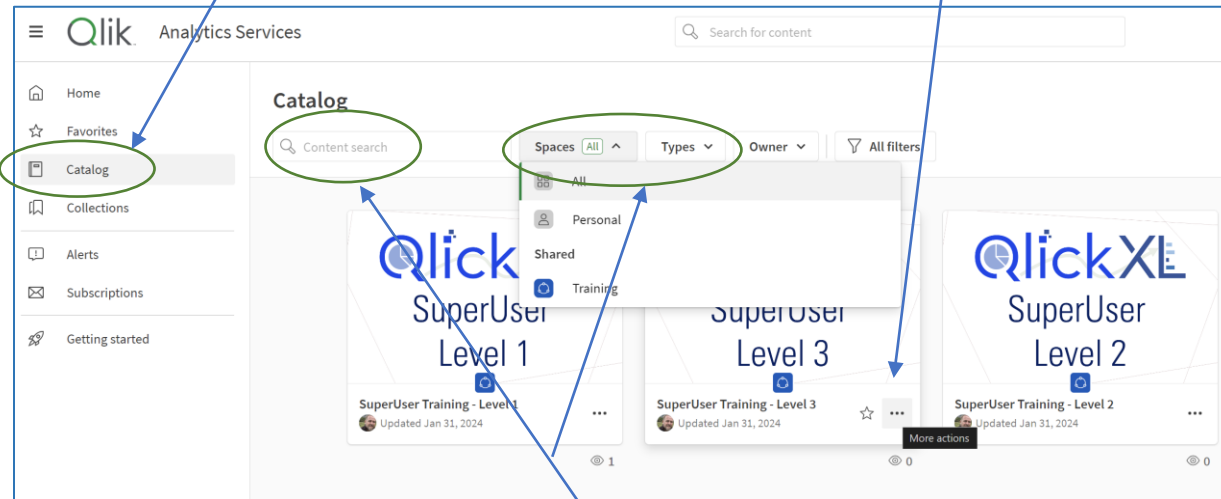


Select 'Catalog' from the left menu to browse for Content (all currently available for your user)

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

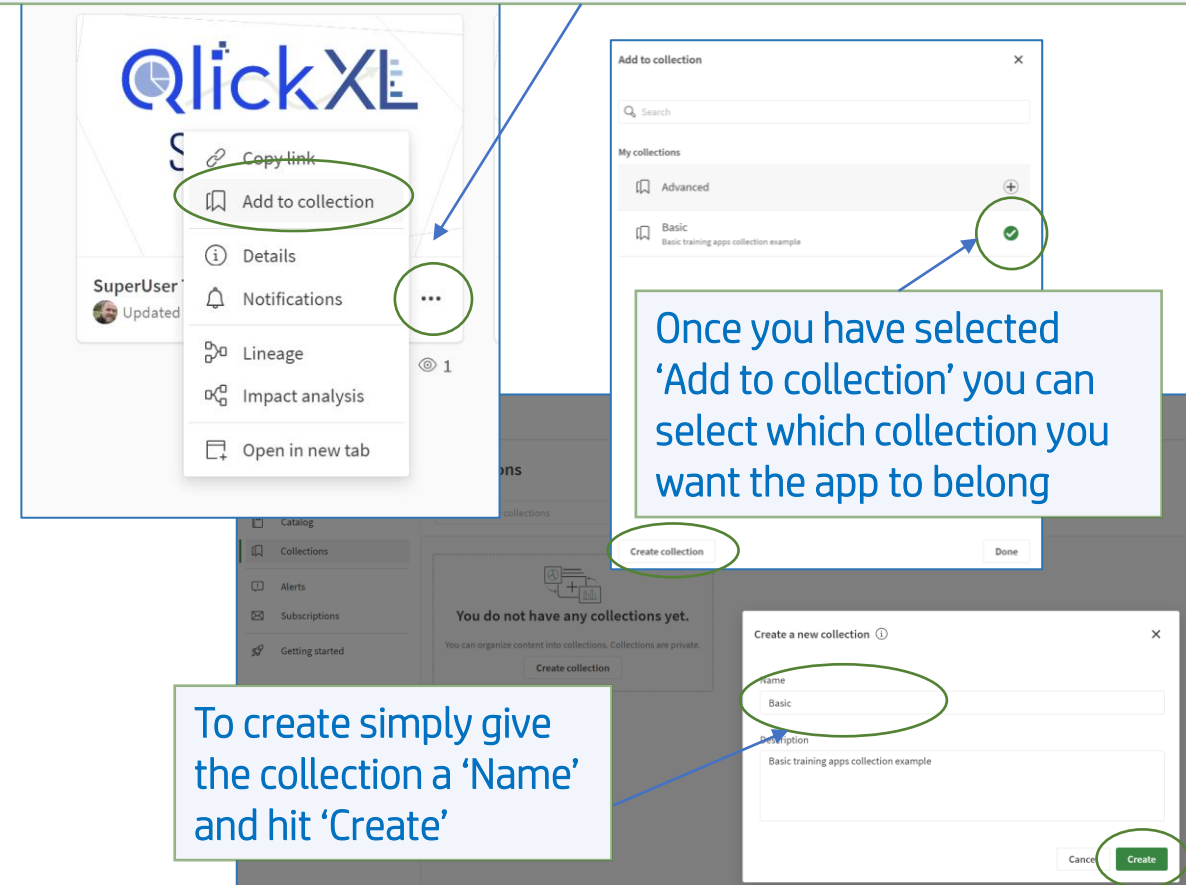
Collections are used for personal organisation of Apps and can be added as Sections on the Homescreen / Hub.

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

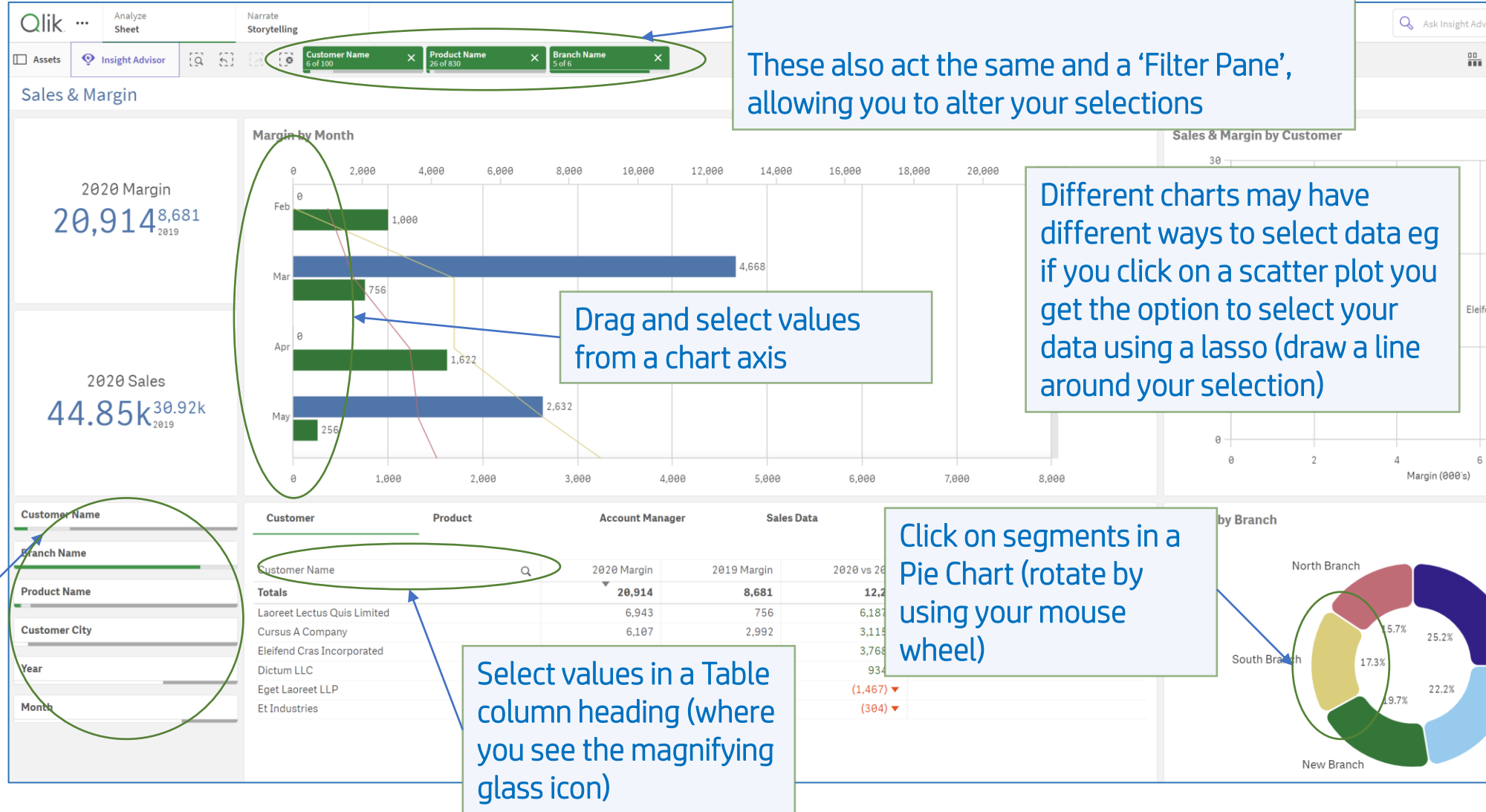


“Filtering in Qlik is where the fun begins...”

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’

making selections, by selecting, then typing in a in a ‘Filter Pane’



Using Qlik Apps – Advanced Filtering



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

The screenshot shows the Qlik Sense interface with three filter bars at the top: 'Customer Name' (6 of 100), 'Product Name' (26 of 830), and 'Branch Name' (5 of 6). The 'Branch Name' filter is highlighted with a green circle. Below the filters, a chart titled 'Sales & Margin' is visible. A selection menu is open over the chart, showing options: 'Select all', 'Select possible', 'Select alternative', and 'Select excluded'. The 'Select alternative' option is highlighted with a green circle. A blue arrow points from the text box above to the 'Branch Name' filter 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'

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

The screenshot shows a list of customer cities. The list includes: Arsoli, Edam, Erie, Lisciano Niccone, Richmond Hill, San Pancrazio Salentino, Aberystwyth, and Adelaide. The cities 'Aberystwyth' and 'Adelaide' are highlighted in dark grey, indicating they are not associated with the current selection.

Advanced filtering cheat sheet c/o Arturo Munoz of Qlik.

<https://community.qlik.com/t5/Design/Qlik-Sense-Cheat-Sheet-version-2-0/ba-p/1667455>

The cheat sheet is titled 'QLIK SENSE SEARCH CHEAT SHEET' and is organized into several sections:

- Normal Search:** The search string is matched against the beginning of every word in the field value.
- Numeric Search:** If the search string begins with '<' or '>', a numeric comparison is made. Only values that fulfill the numeric requirement will be matched.
- Quotes:** Treats search as a single string.
- ? Wildcard:** Matches only those values which substitutes a single character in place of the ?
- * Wildcard:** Represents zero or more characters, including blank. Matches any character or any block of characters in a specific position.
- ^ Wildcard:** Beginning of word within field value. Only in conjunction with other wildcards.
- Modifier:** Search results not including the string preceded by "-" modifier.
- + Modifier:** Search results must contain all string preceded by "+" modifier.
- ~ Fuzzy:** Field values are ranked according to similarity to the search string.
- Expression Search:** Search string begins with '='. Expression search is based on an aggregation in any field.
- Compound Search:** Search string begins with '(': Search conditions with logical operators '&', '|', or '^'. Combine multiple wildcards.

At the bottom, there are examples for logical operators: OR operator '|', OR plus wildcards, AND operator '&', and XOR operator '^'.

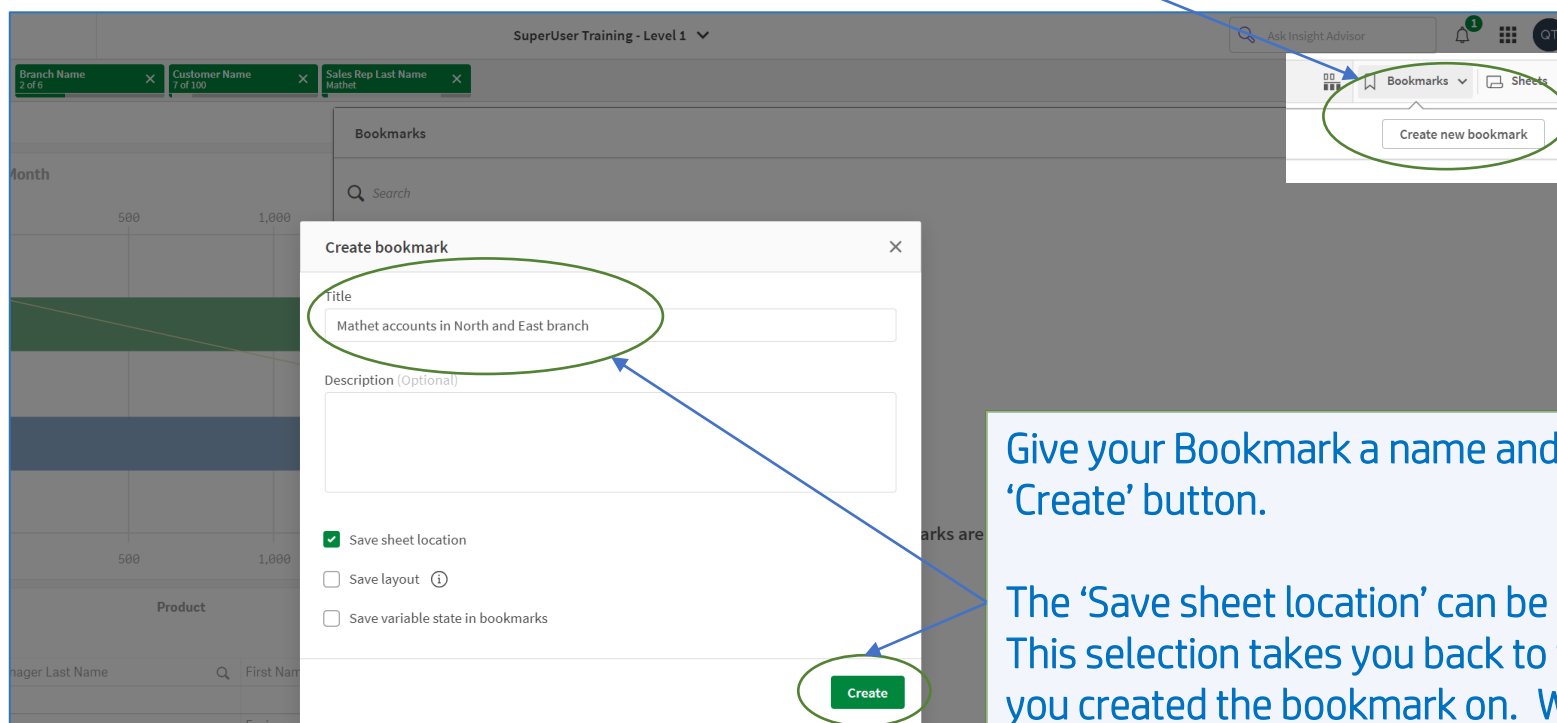
Using Qlik Apps – Bookmarks



Bookmarks are as used to save selected filters for future use

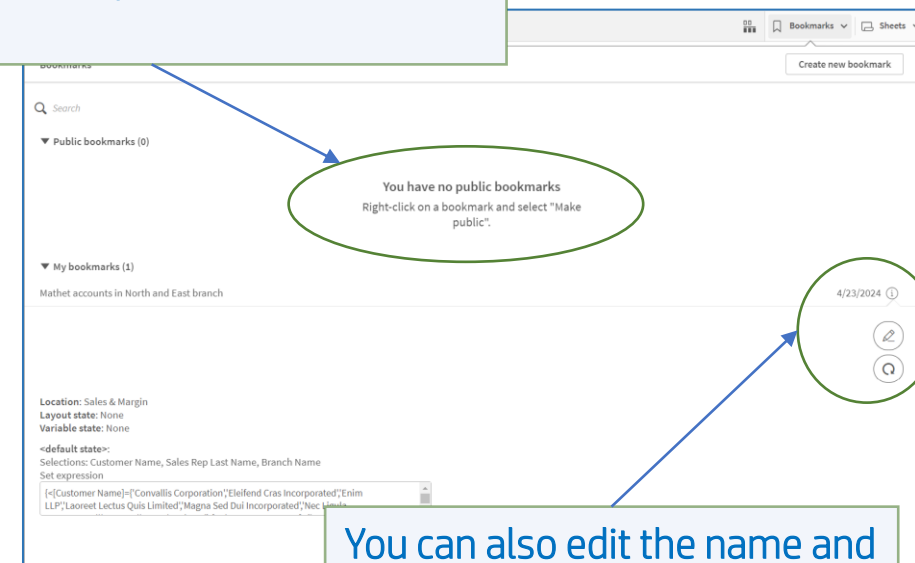
Once your filters are selected simply click on the Bookmarks drop down menu and hit the 'Create new bookmark' button

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



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

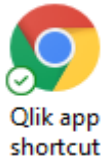
The 'Save sheet location' can be unticked. This selection takes you back to the sheet you created the bookmark on. When not selected, just your filters are applied



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

Create Shortcuts

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



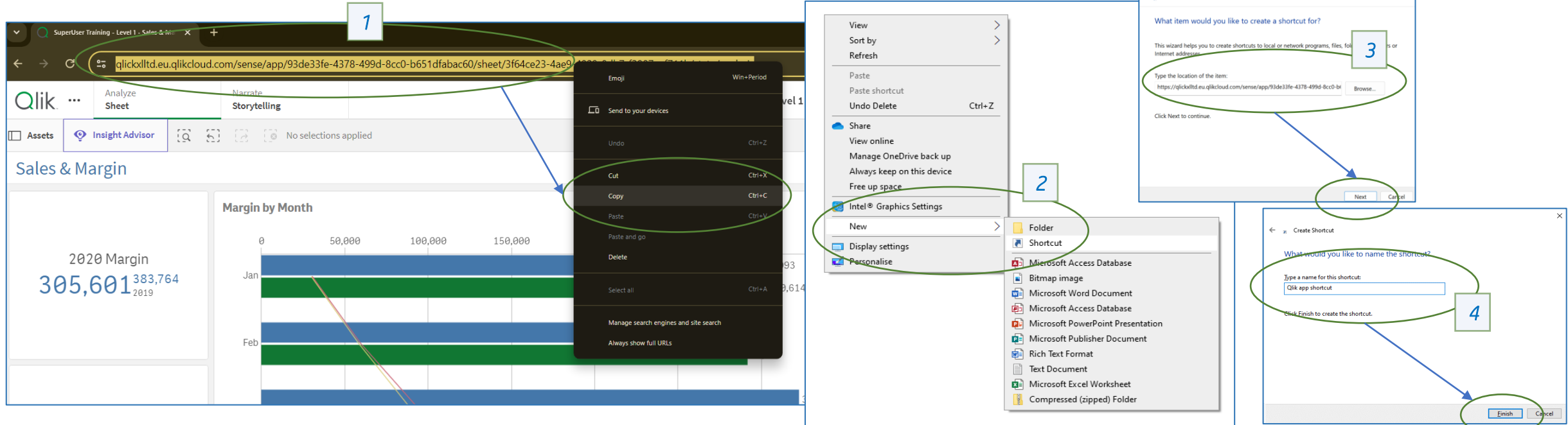
A second option is a 'desktop shortcut'

- 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!

Pro Tip: You can actually build filter sections 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 the Branch Name filter as South and North Branch and also the Customer Name filter as Enim LLP



The screenshot illustrates the steps to create a desktop shortcut for a Qlik Sense application. It shows the Qlik Sense interface with the URL bar highlighted (1). A right-click context menu is open over the URL bar, showing the 'New' option (2). The 'Create Shortcut' wizard is shown, with the 'Type the location of the item' field highlighted (3). The wizard is also shown with the 'Name' field highlighted (4).

"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"