

Qlik Mechanics

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Purpose

The purpose of this document is to instruct users how to log in/out, navigate and use the Qlik interface.

Topic 1: Logging into Qlik

Log in to Qlik

To easily access Qlik, bookmark the Qlik link within your Internet Browser (Chrome is recommended):
analytics.calgaryhomeless.com

Enter your Username: your email address

Enter your User Password: your Windows password (provided/set by your organization)

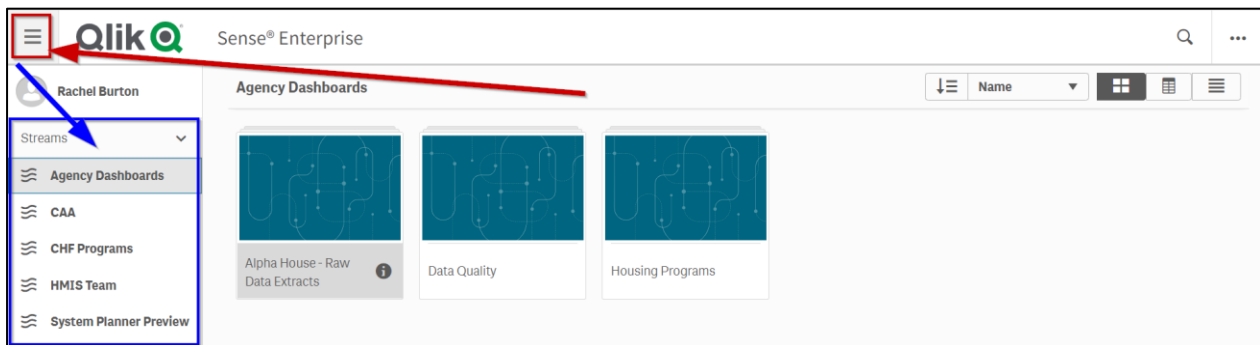
Log out of Qlik

As per instructions from HMIS Basic Training, please log out and lock your computer anytime you step away from your computer.

Topic 2: Navigating Qlik Sense Hub

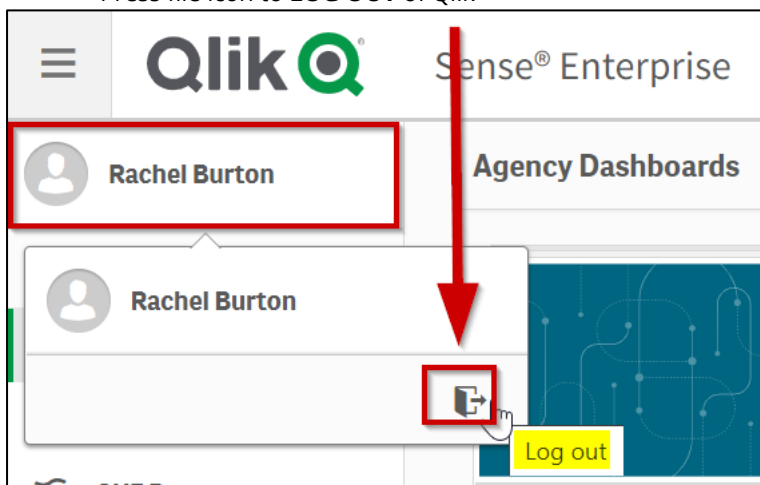
Hamburger Menu (3 lines) in top left corner:

- Press Hamburger Menu to hide the Stream menu (left column)



User Profile (below Hamburger Menu)

- Press User Profile
- Press file icon to **LOG OUT** of Qlik

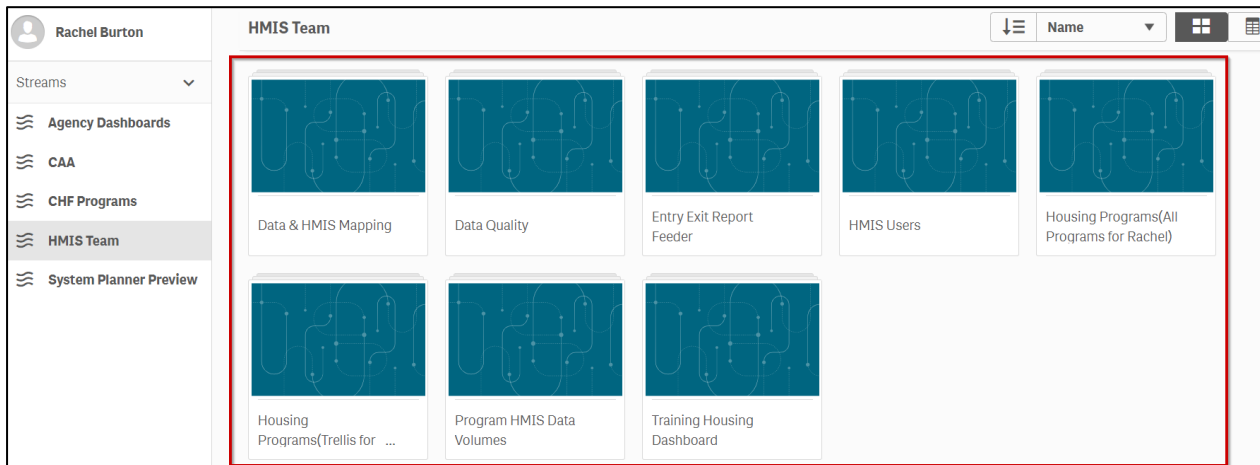


Streams Menu (below User Profile)

- Custom to each user
- List of available dashboards

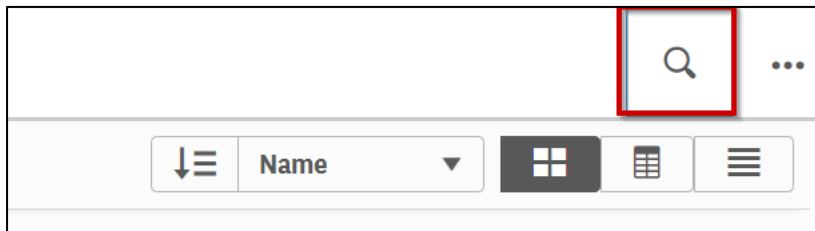
Dashboard Options (large window next to Streams Menu)

- Available dashboards (custom to each user) within each Stream

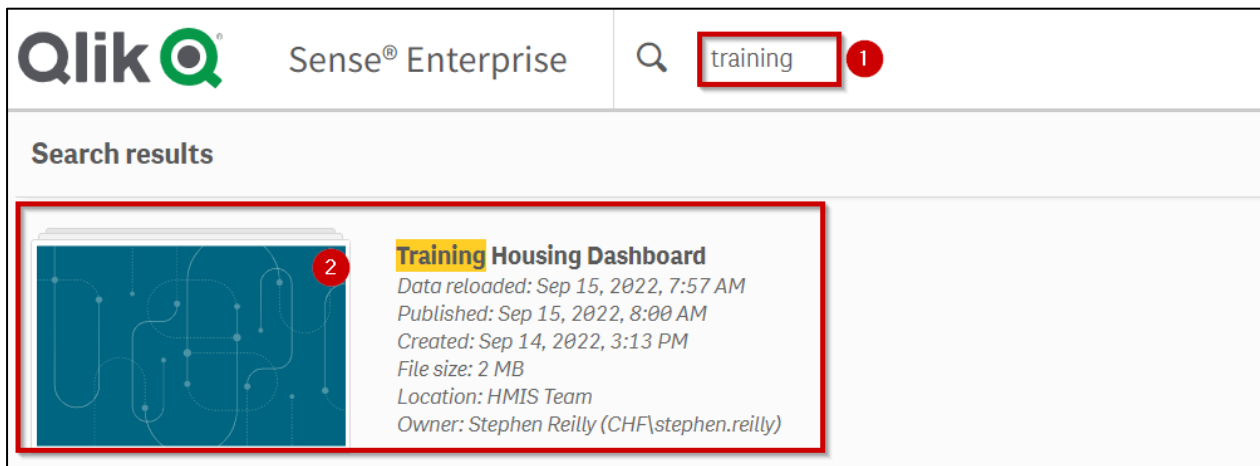


Search Tool (magnify glass in top right corner)

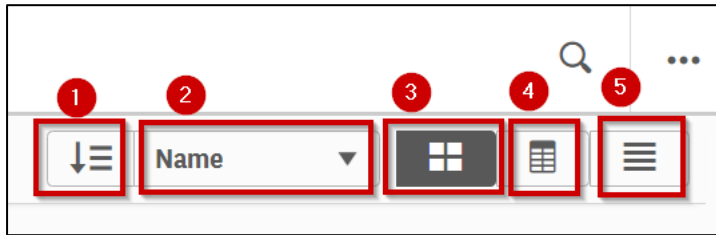
- Press magnify glass to open search bar



- Type dashboard needed to search Qlik
- Click on relevant dashboard tile

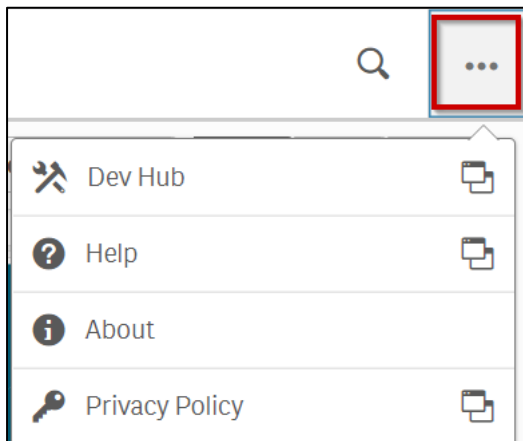


Sorting Options (below Search Tool):



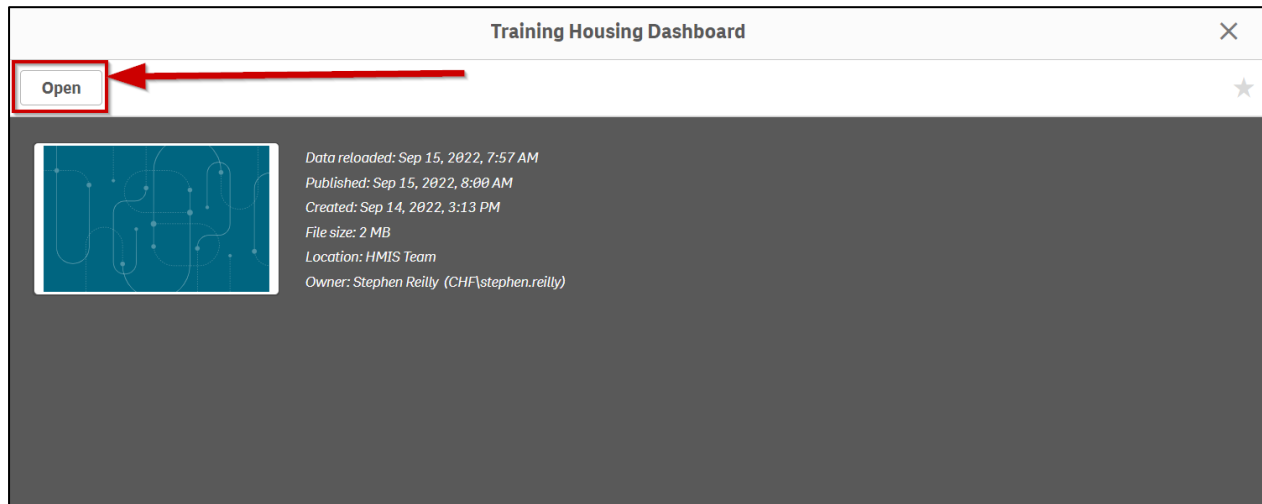
- 1) Sort direction (ascending or descending)
- 2) Sort by various options:
 - Name (of dashboard)
 - Owner (of dashboard)
 - Data reloaded
 - Published
 - Created
- 3) Grid view
- 4) Table view
- 5) List view

Menu (top right corner):



- Help – Common Help Topics/Documentation
- About – Information about Qlik product
- Privacy Policy – How Qlik manages privacy of its products

Topic 3: Dashboard Title Window



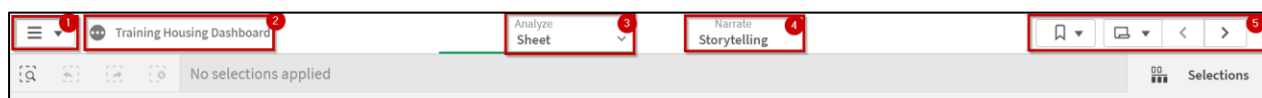
Open button:

- Press to Open dashboard

Dashboard Information:

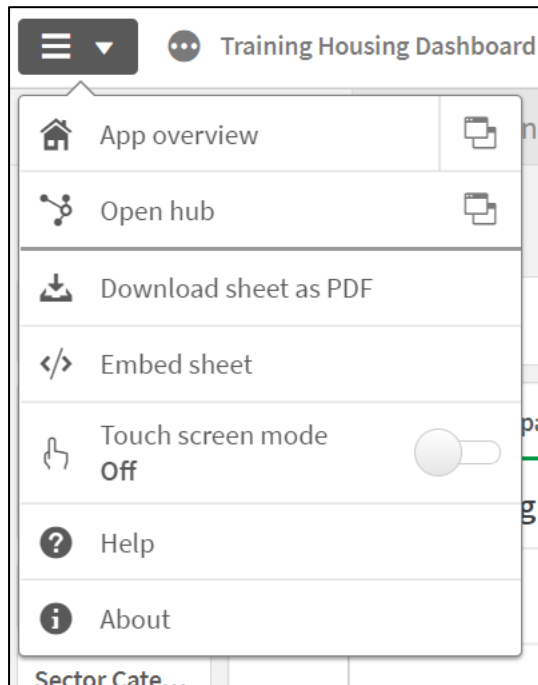
- Date reloaded: *date/time when data was last re/reloaded into dashboard from CHF database*
- Published: *date/time data was published as dashboard*
- Created: *original date dashboard was created*
- File size: *size of dashboard*
- Location: *stream dashboard is filed within*
- Owner: *CHF owner/creator of dashboard*

Topic 4: Navigating Sheet Interface



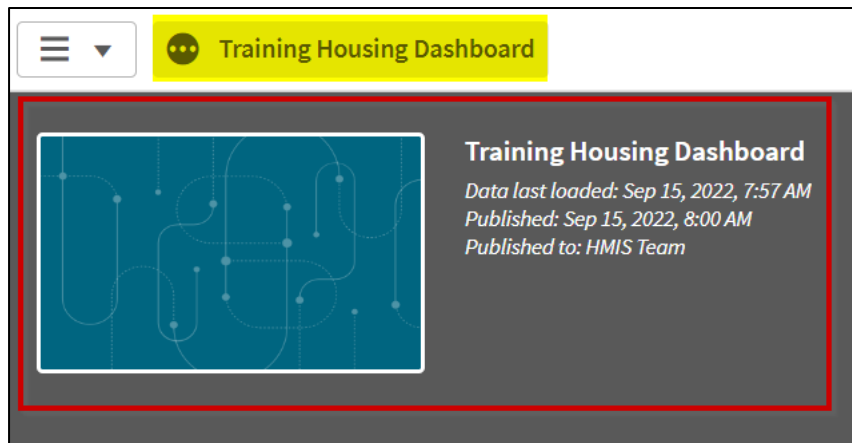
Title Row: 1) Hamburger Menu

- 1) Hamburger Menu offers following options:
 - App overview – *pulls user back to landing page listing the dashboard's multiple sheets*
 - Open hub – *pulls user back to Qlik Sense Hub*
 - Download sheet as PDF – *option to download as PDF*
 - Embed sheet – *allows any object within the dashboard to be embedded on a webpage. This is not a feature that will be available to users and should not attempted to be used.*
 - Touch screen mode (default: off) – *ability to configure for touchscreens*
 - Help - *Common Help Topics/Documentation*
 - About - *Information about Qlik product*



Title Row: 2) Dashboard Title

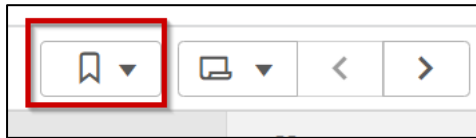
- 2) Dashboard Title: click to open and close the following dashboard details:
 - Date last loaded
 - Published
 - Published to



Title Row: 3) Navigation Tools

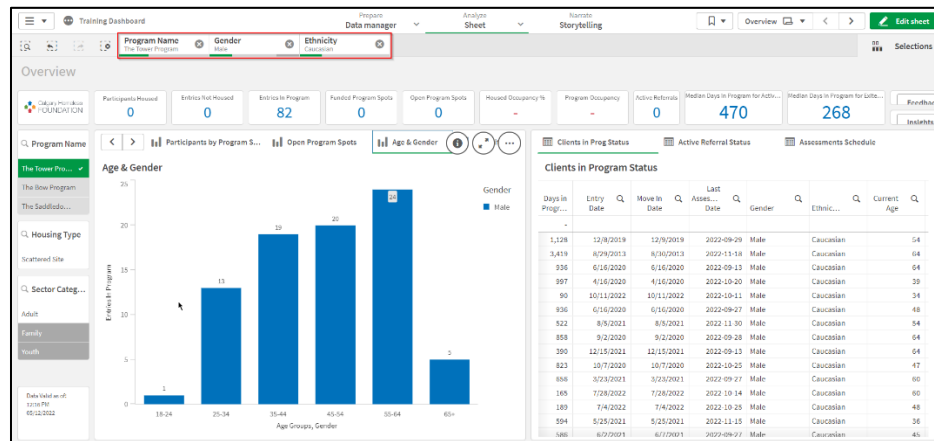
Bookmarks: Allows user to save filter presets. If user is constantly navigating to the same sheet with the same filters, can be saved as a bookmark. These are user specific and only bookmarks a user creates will be visible to the user.

Picture tutorial in how to create a bookmark – additional tips & tricks (knowledge base article)

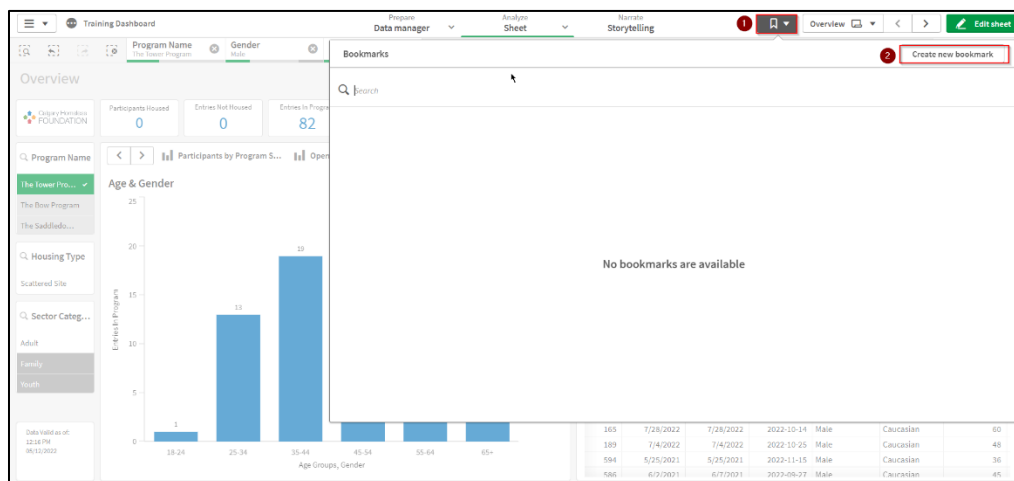


Making a bookmark

1. Select filters frequently used for bookmark.

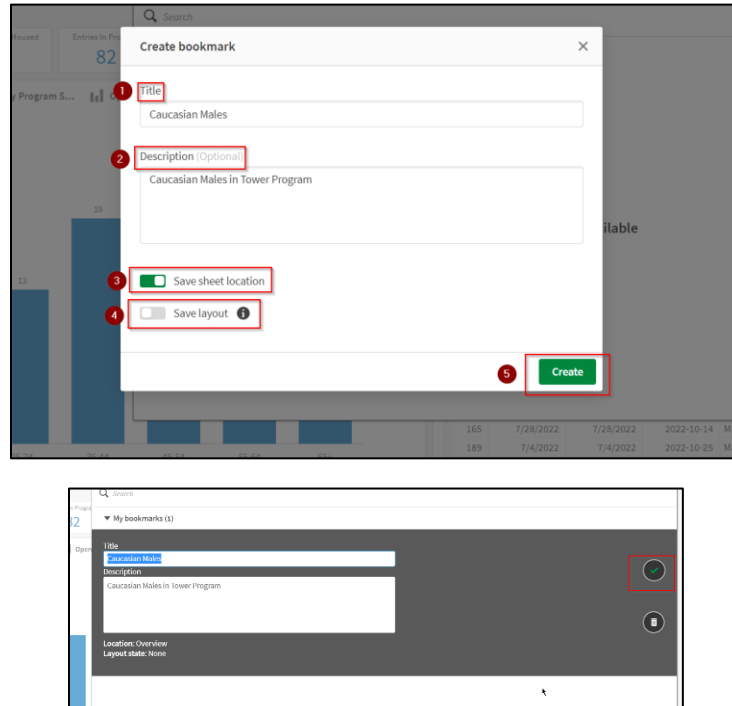


2. Click on bookmark icon and then create new bookmark



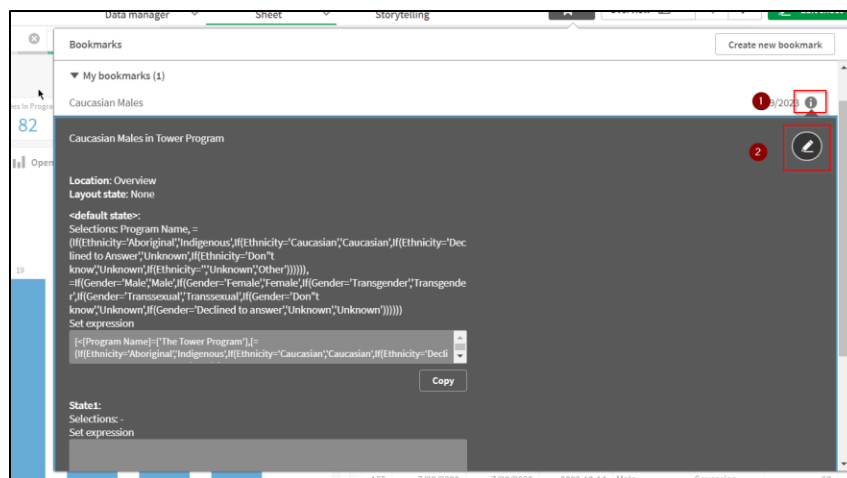
3. Create bookmark.
 - a. Title – Name of Bookmark
 - b. Description (optional) – A description for the bookmark, useful for more complicated bookmarks that may not be immediately apparent what the filters are doing.
 - c. Save sheet location – If this toggle is enabled, when you click the bookmark, it will take you to the sheet that the bookmark was originally created on.

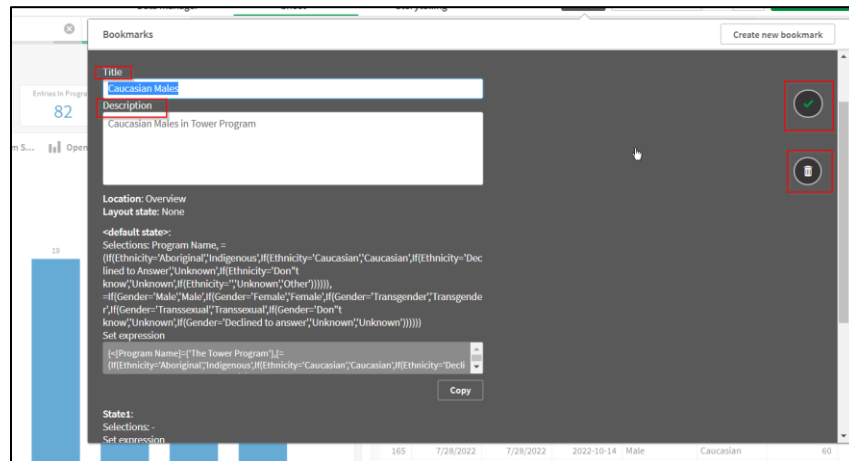
- d. Save layout – If any changes have been made to the graphs or tables prior to creating the bookmark eg. Sorting by a column in a table. This will save those changes to your bookmark.
- e. Click on the create button to finish creating the bookmark and then the green checkmark to finish creating.



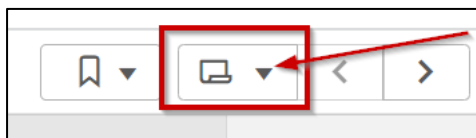
4. Edit/Delete bookmark

- a. In the bookmark tab click on the small 'i' icon to open the bookmark menu. Click on the pencil icon to open the bookmark editor.
- b. From here you will be able to edit the title and description as well as delete the bookmark. To delete the bookmark, click on the trash can icon and then delete in the dialog box which opens. To save any changes click the green checkmark to save your changes.

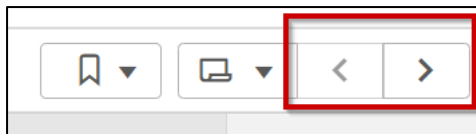




Navigate to Sheet Menu by pressing the dropdown arrow:




Navigate between sheets:

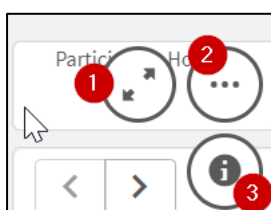


Key Data Points

This row outlines the high level or aggregate statistics of each sheet.

	Participants Housed 215	Entries Not Housed 25	Entries In Program 240	Funded Program S... 260	Open Program Spots 20	Housed Occupancy 82.7%	Program Occupancy 92.3%	Median Days in Pro... 433	Active Referrals 43
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To expand each selection there are 3 tools available:



1.) Full screen

- a. Click to expand into full screen

2.) More

- a. Click for a wider range of options such as:
 - i. Full Screen
 - ii. Show details
 - iii. Share
 - iv. Storytelling snapshots
 - v. Download as...

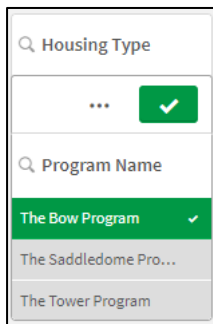
3.) Details

- a. Click for definition of metric

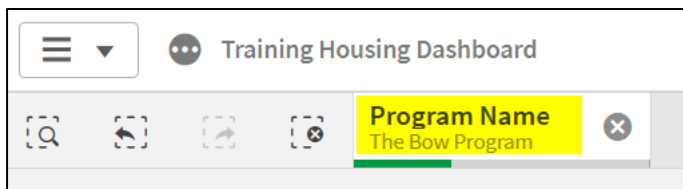
Topic 5: Using Selections (Filters)

Selection/Filter Column

On the left-hand side of the screen there are multiple selections, or filters, that me applied to the data. To apply a desired selection/filter, click on the option you wish to filter by, and press the green checkmark box:



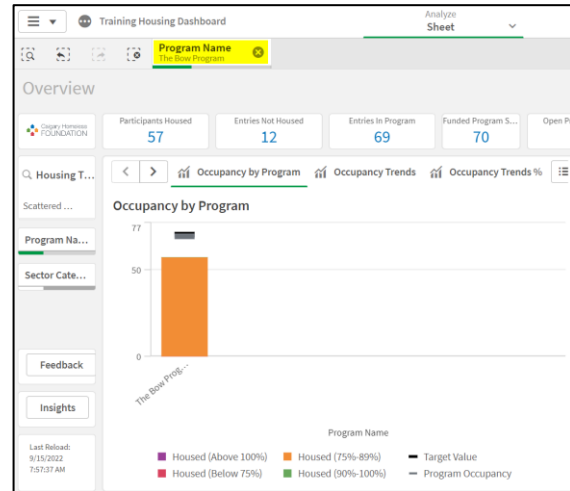
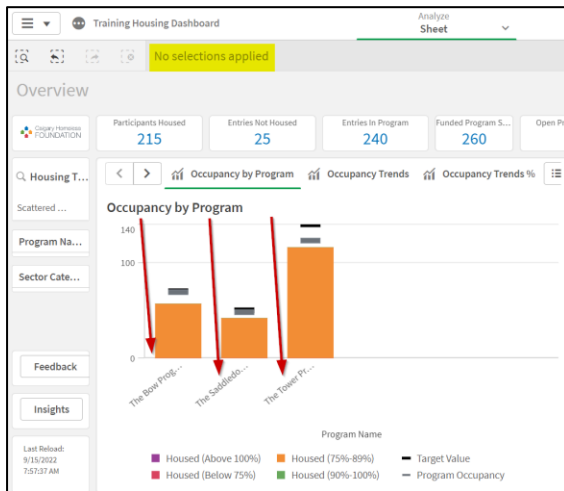
You will now see the selection indicated in the Selection/Filter row:



You will now see a difference in the Aggregate Row data, as well as in the 2 data containers.

Before Selection/Filter:

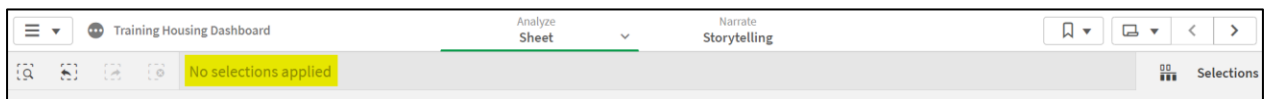
After Selection/Filter:



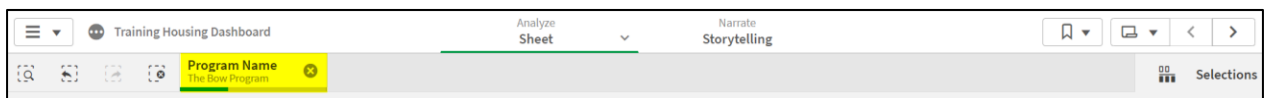
Selection/Filter Row:

Selections operate as filters. Any filters applied to the sheet will appear in this row. Filters are not page specific. Be sure to clear filters if you move on to next sheet (if desired). Not all filters are applicable to each sheet. Just because you can't see the filter, does not mean you haven't applied it.

No filter applied:

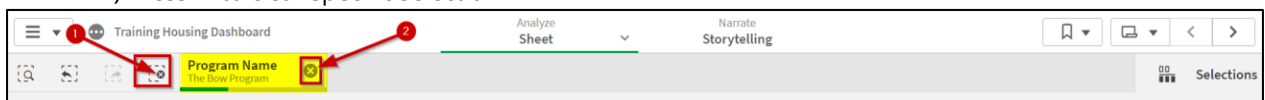


Filter applied:



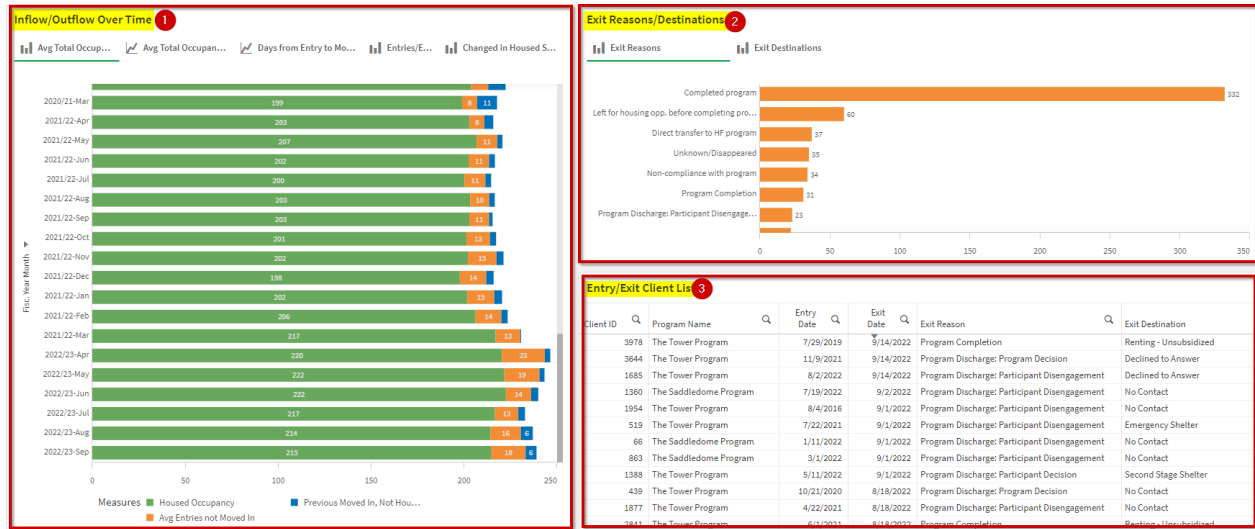
There are multiple ways to remove a selection/filter from a sheet:

- 1) Press 'Clear all selections'
- 2) Press 'x' to clear specific selection



Topic 6: Navigating Containers

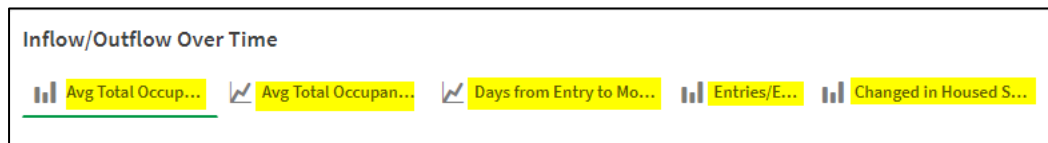
There are different containers that may exist with any given sheet of a dashboard.



The above image depicts a sheet that contains 2 containers:

- 1) Inflow/Outflow Over Time
- 2) Exit Reasons/Destinations

There may be multiple graphs or tables within a single container. Each graph or table may be navigated to by clicking on the title at the top of each container:



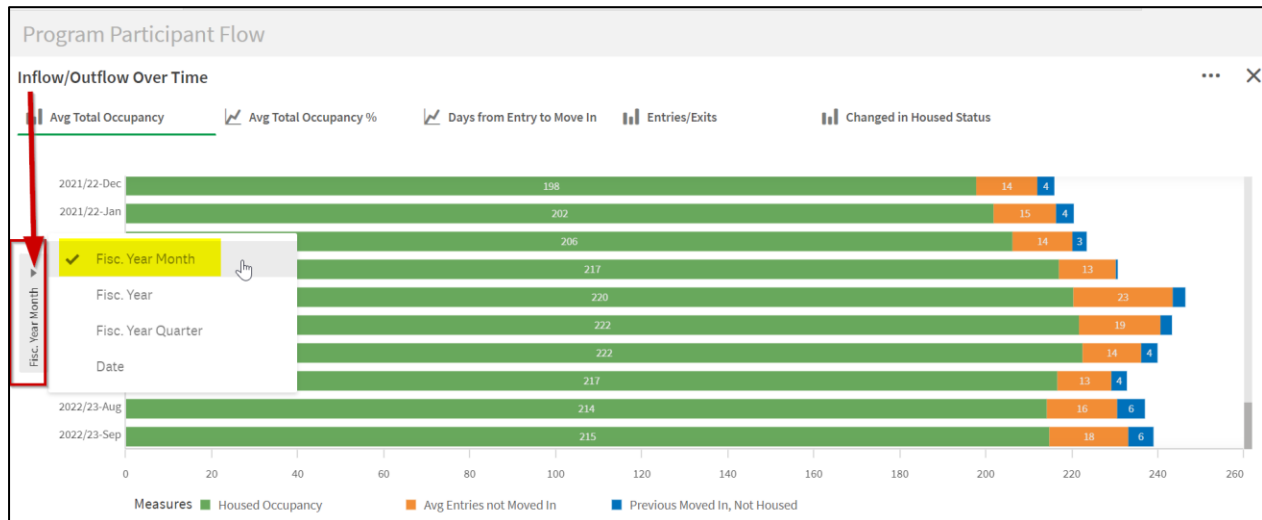
Graph Containers:

Graph Containers may take different shapes.

General Rules of Thumb include:

- Y-axis is vertical
- X-axis is horizontal

Some graphs can be filtered by the one or both axis measurement(s) by pressing the black arrow:



Feedback – this chart doesn’t make any sense. I don’t find this useful; it would be useful to have; for things that are missing or don’t make sense. NOT: I’m missing this client. For high-level feedback.

Insights – feedback w/ a purpose; these filters were useful to show me this, how people are using and what info they are getting, we can make visualizations more useful in future. Which charts provide the most value.