

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)

	Sense [®] Enterprise	Q
Rachel Burton	Agency Dashboards	↓ = Name ▼ = = =
Streams 🗸 🗸		
😸 Agency Dashboards		
🚎 саа		
😸 CHF Programs	Alpha House - Raw Data Quality Housing Programs	
😸 HMIS Team	Data Extracts Data Quality Housing Programs	
🔶 System Planner Preview		

User Profile (below Hamburger Menu)

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

	S	ense [®] Enterprise
Rachel Burton		Agency Dashboards
Rachel Burton		
		Log out

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



Rachel Burton	HMIS Team			ĮΞ	Name 🔻 📰
Streams V 第 Agency Dashboards 第 CAA 第 CHF Programs 第 HMIS Team	Data & HMIS Mapping	Data Quality	Entry Exit Report Feeder	HMIS Users	Housing Programs(All Programs for Rachel)
≫ System Planner Preview	Housing Programs(Trellis for	Program HMIS Data Volumes	Training Housing Dashboard		

Search Tool (magnify glass in top right corner)

• Press magnify glass to open search bar

			Q	
↓≡	Name	▼		

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

Qlik Q	Sense [®] Enterprise	Q training 1
Search results		
	2 Training Housing Da Data reloaded: Sep 15, 2 Published: Sep 15, 2022 Created: Sep 14, 2022, 3 File size: 2 MB Location: HMIS Team Owner: Stephen Reilly (0	2022, 7:57 AM 22, 8:00 AM 3:13 PM

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):

	Q	
🗙 Dev Hub		
Help		Ð
i About		
Privacy Policy		5

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

Topic 3: Dashboard Title Window



	Training Housing Dashboard X							
Open		*						
	Data reloaded: Sep 15, 2022, 7:57 AM Published: Sep 15, 2022, 8:00 AM Created: Sep 14, 2022, 3:13 PM File size: 2 MB Location: HMIS Team Owner: Stephen Reilly (CHF\stephen.reilly)							

Open button:

• Press to Open dashboard

Dashboard Information:

- Date reloaded: date/time when data was last re/loaded 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



	Training Housing Da	ishboa	rd
	App overview	7	n
` >	Open hub	Ð	
4	Download sheet as PDF		
	Embed sheet		
ŀ	Touch screen mode Off		pa
0	Help		g
0	About		
Sect	or Cate		

Title Row: 2) Dashboard Title

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

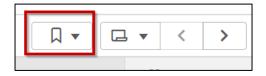


Title Row: 3) Navigation Tools

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.

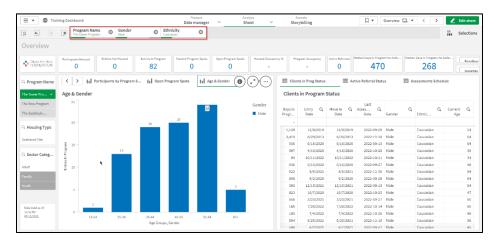
Picture tutorial in how to create a bookmark - additional tips & tricks (knowledge base article)



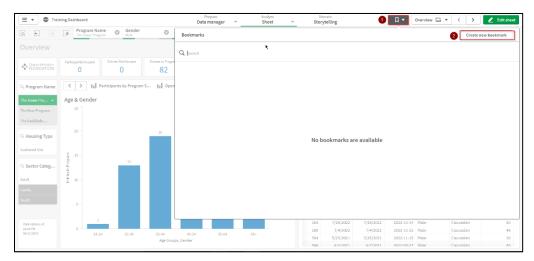


Making a bookmark

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.



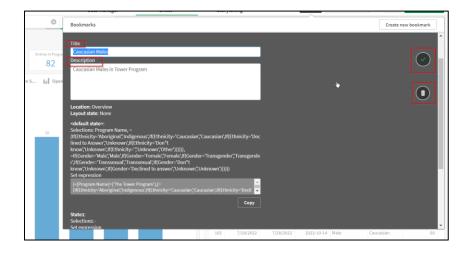
- d. Save layout If any changes have been made to the graphs or tables prior to creating the bookmark eg. Sorting by a column in a table. This will save those changes to your bookmark.
- e. Click on the create button to finish creating the bookmark and then the green checkmark to finish creating.

		Q Search									
Housed	intries In Pro	Create bookmar	k						×		
y Program S	ni «O	Title Caucasian Males									
		Description (Option Caucasian Males		ım							
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13	8 9	Save sheet Save layout	_								
							5	Crea	ite]	
						16					-14 Mal -25 Mal
	Q Search										
82	2 My bo	okmarks (1)									
	Open Title Caucasi Caucasi Caucasi				٦						
	Location: Layout st	Overview ate: None									
								۰.			

- 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.
 - 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.

	Data manager Sheet Storytelling
0	Bookmarks Create new bookmark
	▼ My bookmarks (1)
es In Progra	Caucasian Males
82	Caucasian Males in Tower Program
	Location: Overview Layout state: None
19	<pre>cdefault state> Selections: Program Name, = (If(Ethnicity='Aboriginal',Indigenous,If(Ethnicity='Caucasian',If(Ethnicity='Dec Inned to Answer',Unknown',If(Ethnicity='Caucasian',If(Ethnicity='Dec Inned to Answer',Unknown',If(Ethnicity='))))), =If(Gende='That','Male', If(Ende='')-Female', If(ende='' Transgender', 'Transgender', 'Transgender', 'Innexeult,'If(Ende='')-Female', If(ende='')-Don't know',Unknown',If(ende='')-Den't know',If(ende='')-Den't know',I</pre>
	(If[Ethnicity="Aboriginal", Indigenous; If[Ethnicity="Caucasian", If[Ethnicity="Deti
	Copy State1:
	Same: Selections - Set expression
	165 7/28/2022 7/28/2022 2022-10-14 Male Caucasian 60

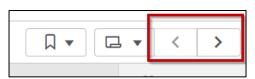




Navigate to Sheet Menu by pressing the dropdown arrow:



Navigate between sheets:

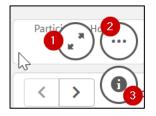


Key Data Points

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



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

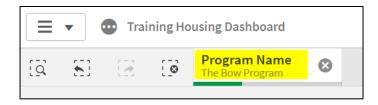
Topic 5: Using Selections (Filters)

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:

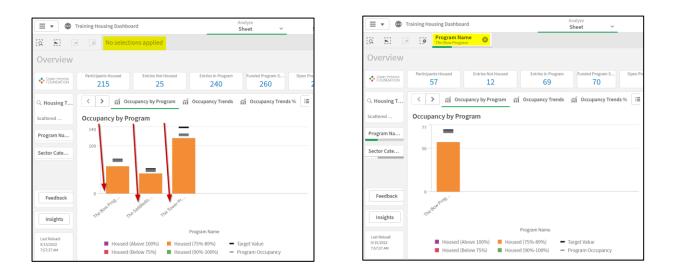


You will now see a difference in the Aggregate Row data, as well as in the 2 data containers.

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:

Training Housing Dashboard			Analyze Sheet	~	Narrate Storytelling] •	<	>		
(Q	80	12	0	No selections applied				00	Se	lections

Filter applied:

Training Housing Dashboard	Analyze Narrate Sheet V Storytelling	
[Q 중] [2 [3 [3 Program Name @		Selections

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

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

Training Housing Dashboard	_2	Analyze Sheet	~	Narrate Storytelling	<	>
Image: Second system Program Name The Bow Program The Bow Program					S	elections

Topic 6: Navigating Containers

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



Infl	ow/Outflow Ove	r Time		Exit F	eason	s/Destinations 2								
ы	Avg Total Occup	Avg Total Occupan 🖉 Days from Entry to Mo 📊 Entrie	es/E 📊 Changed in Housed S	ni e	xit Reaso	ons 📊 E	Exit Desti	nations						
	_													
	2020/21-Mar	199	8 11			Completed program								332
	2021/22-Apr	203	8	Left fo	r housing	opp. before completing pro		6	1					
	2021/22-May	207	11			Direct transfer to HF program		37						
	2021/22-Jun	202	11			Unknown/Disappeared		35						
	2021/22-Jul	200	11			Non-compliance with program		34						
	2021/22-Aug	203	10			Program Completion		31						
	2021/22-Sep	203	11	Prog	ram Disch	arge: Participant Disengage		23						
	2021/22-Oct	201	10											
1	2021/22-Nov	201 202	13				0	50	100	150	200	250	300	35
Mont	2021/22-Dec	198												
Year	2021/22-Jec	198	24	Entry	/Exit C	lient Lis 3								
Fisc.			15					Entry	Exit					
	2021/22-Feb	206	14	Client I	, q	Program Name	q	Date Q	Date Q	Exit Reason		Q Exit [Destination	
	2021/22-Mar	217	13		3978	The Tower Program		7/29/2019	9/14/2022	Program Completion		Renti	ing - Unsubsidized	
	2022/23-Apr	220	23			The Tower Program		11/9/2021		Program Discharge: Pro	-		ned to Answer	
	2022/23-May	222	19			The Tower Program		8/2/2022	9/14/2022	Program Discharge: Pa	1 00		ned to Answer	
	2022/23-Jun		14			The Saddledome Program		7/19/2022 8/4/2016	9/2/2022	Program Discharge: Pa			ontact	
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	2022/23-Jul	217	13			The Tower Program			9/1/2022				Challes	
	2022/23-Jul 2022/23-Aug	217 214	13 16 6		519	The Tower Program		7/22/2021	9/1/2022	Program Discharge: Pa	rticipant Disengagemen	t Emer	gency Shelter	
			13 16 6 18 6		519 66				9/1/2022 9/1/2022		rticipant Disengagemen rticipant Disengagemen	t Emer	gency Shelter ontact ontact	
	2022/23-Aug	214 215			519 66 863	The Tower Program The Saddledome Program		7/22/2021 1/11/2022	9/1/2022 9/1/2022 9/1/2022	Program Discharge: Pa Program Discharge: Pa	rticipant Disengagemen rticipant Disengagemen rticipant Disengagemen	t Emer t No C t No C	ontact	
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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:

Inflow/Outflow Ove	r Time			
Avg Total Occup	Avg Total Occupan	Days from Entry to Mo	Entries/E	Changed in Housed S

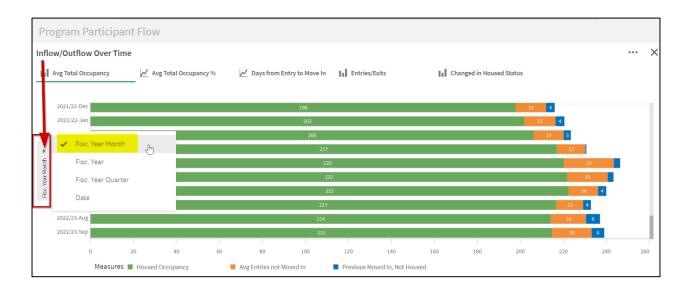
Graph Containers:

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.