Explore, discover and analyze

Qlik Sense®
2.1.2

Contents

1 About this document

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

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.

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

2 Discover and analyze

When you have created your app and loaded data into it you can start using it for data discovery and analysis.

2.1 Routine analysis

It is typical in routine analysis to follow up on key metrics on a regular basis. Here are some examples of KPIs you might want to keep a close watch on:

- 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

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.

3 Interacting with visualizations

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.

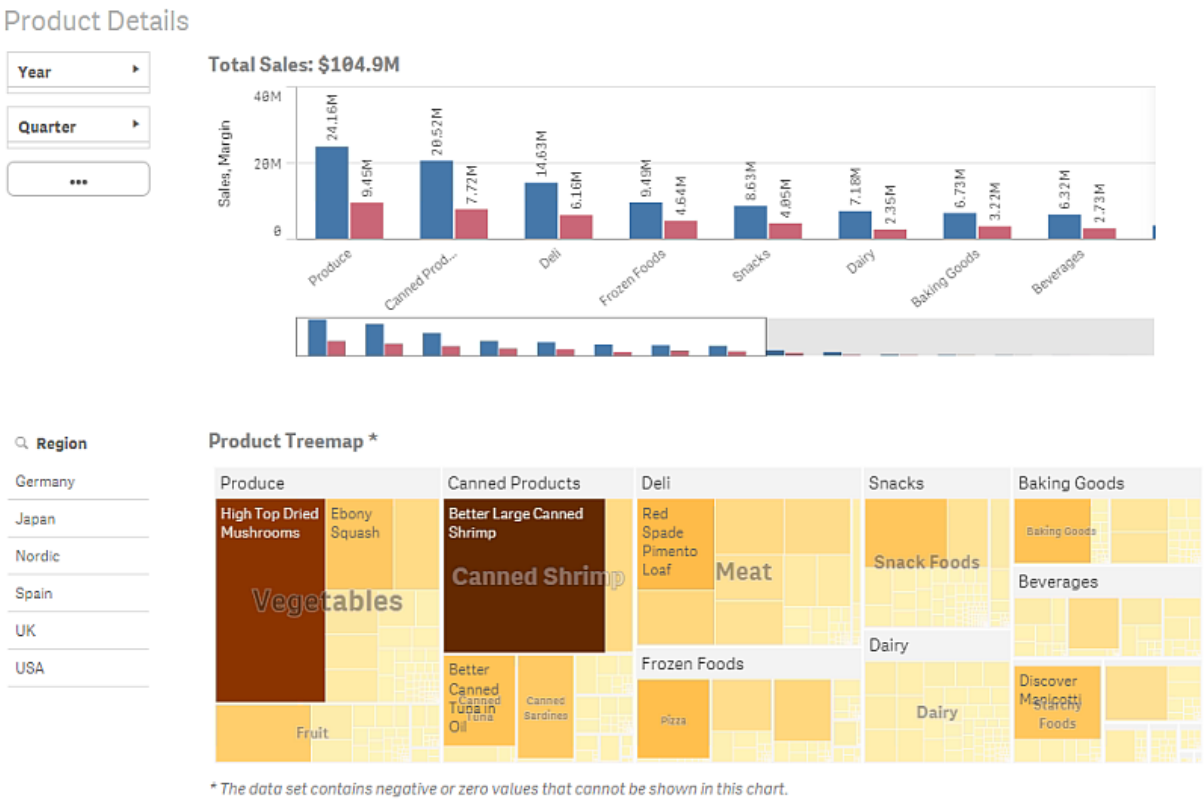
By default, new selections in a visualization are added to the previous ones. You deselect an item by clicking it. On a computer, you can hold down Ctrl while you make a selection, to automatically clear previous selections in a visualization, and only keep the new selection.

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.

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 The associative selection model

Making selections is the main interaction method in Qlik Sense. Selections filter out a subset of the data that is loaded into Qlik Sense. You use selections to focus on something you want to know more about. Qlik Sense responds by color coding values according to their different states.

You can think of your interaction (selections) as an input for Qlik Sense and the output as the result of Qlik Sense evaluating the selections and displaying the color codes on data values.

- The input state: the selection that you have made – whether the field value is selected or not.
- The output state: whether the field value is possible or not, given the logical inference of the selection.

Selection states

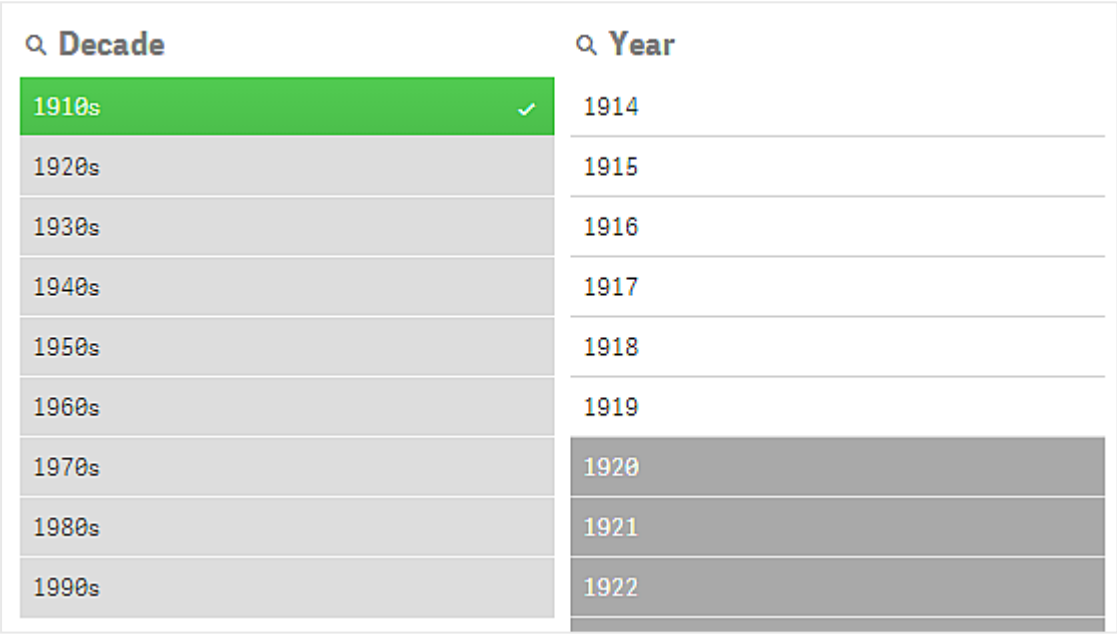
When you make selections, the colors of the values change accordingly. Color-coding is used in filter panes, selections list items, and the selections tool, with the characteristic Qlik Sense colors green, white, and gray. The colors bring you information about which field values are selected, alternative, possible and excluded, respectively.

The following table lists which colors are used for the different states.

Selected	Green, with a check mark as a selection indicator
Possible	White
Alternative	Light gray
Excluded	Dark gray
Selected excluded	Dark gray with a check mark as a selection indicator

The selected state

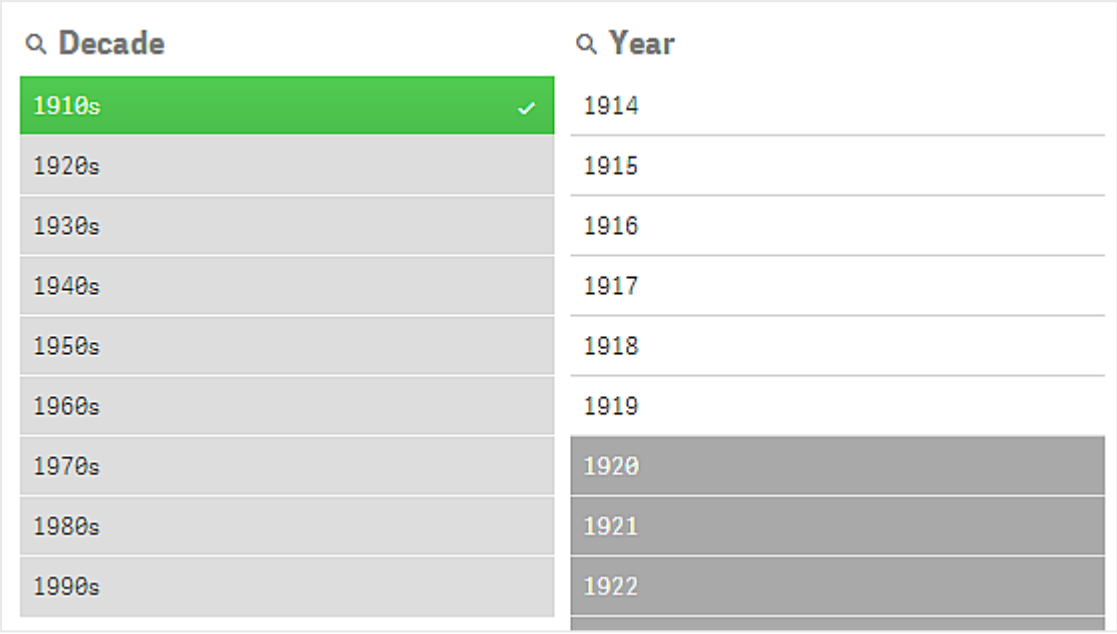
When you select one or more values in a filter pane and the values turn green, they are in the selected state. In the following image, the value *1910s* has been selected. The selection filters out a subset of the data that is loaded, and the filter panes *Decade* and *Year* are updated according to the selection.



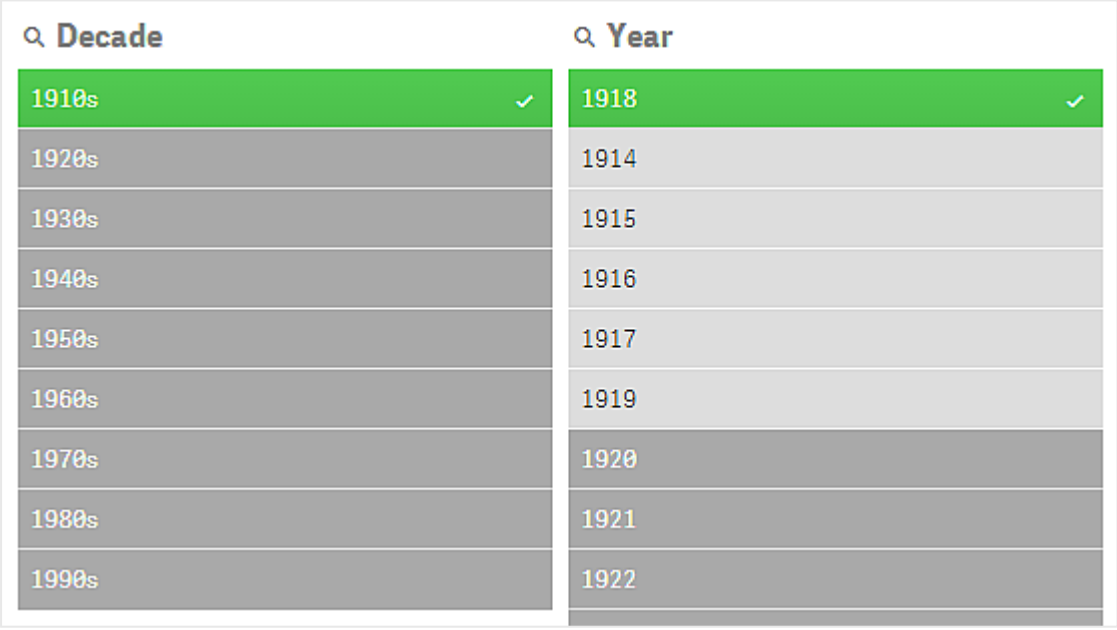
The filter panes have four states altogether. Apart from the selected state (green), there are possible values (white), light gray values (alternative), and dark gray values (excluded). These states are explained in the following sections.

The possible state

In the *Year* filter pane, the years *1914* up to *1919* are white (possible), because these values are all years from the *1910s*, the selected value in *Decade*. All possible values are 'associated' with the value *1910*. You could refine your selection by selecting one or more of the possible values.



In the following image, such a refinement has been made. The value *1918* has been selected in the *Year* filter pane.

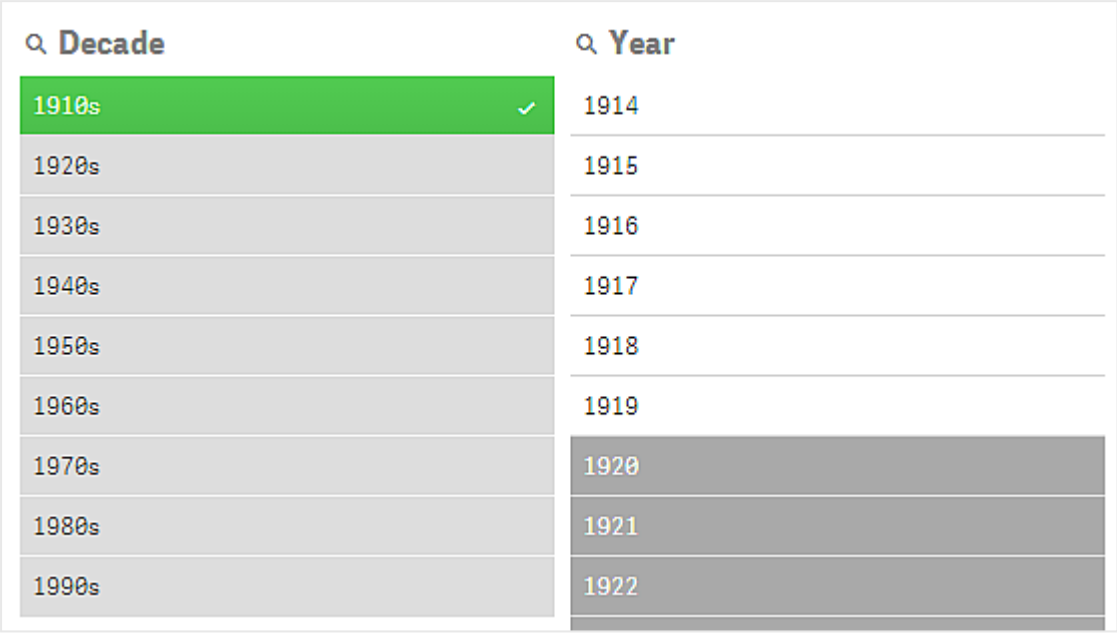


With selections in two filter panes, the possible values are only those that are associated both with *1910s* and *1918*. There is a logical AND condition between selections from different filter panes. A possible value must then be associated both with *1910s* and *1918*.

In the *Year* filter pane, there are no longer any values in the state possible, because none of the values are associated with both *1910s* and *1918*.

The alternative state

In the *Decade* filter pane, the value *1910s* has been selected, and all the other fields in the filter panes have a certain state, depending on their relationship to the selected value.



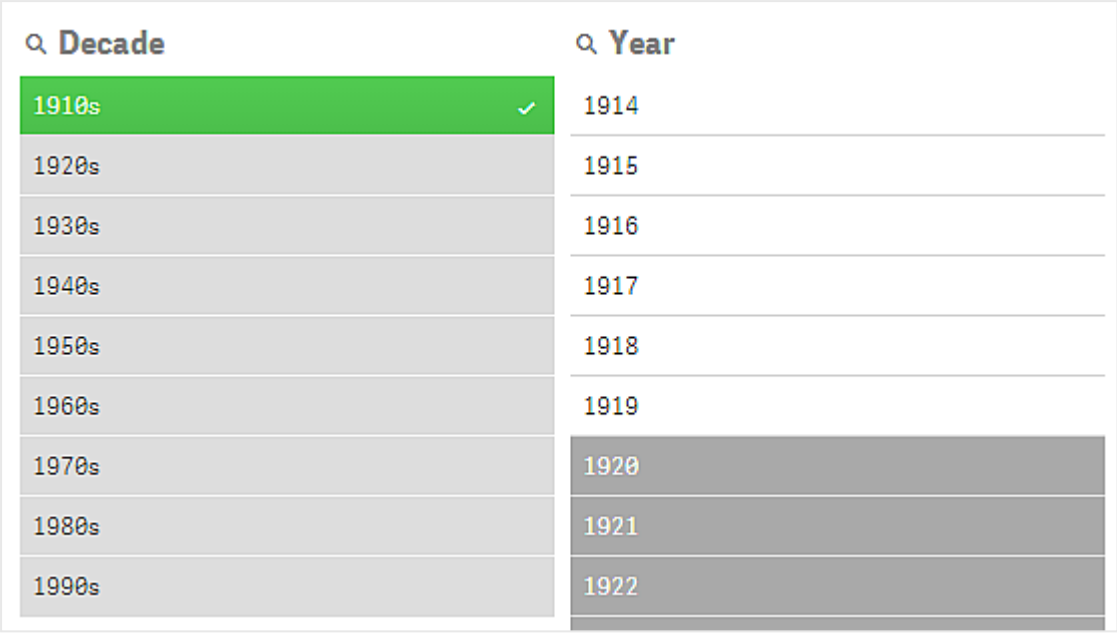
All the other values in the filter pane *Decade* are light gray, meaning that they are alternative values. The alternative state is used for values that would have been possible if a selection had not already been made in that field. Before *1910s* was selected, all the values in the filter pane *Decade* were possible values.

Logically, the alternative values are excluded, but they are only excluded by a single selection (of one or more values), in the same filter pane. If you would clear the selection of *1910s* in *Decade*, all the values would have the state possible.

Even if a value is alternative, you can still select it, but that means that you are, partly, making a new selection rather than refining your original selection. What is useful with alternative values is that you know that there are alternatives available for the same set of selections. If you have a list of sales persons, the alternative values constitute sales persons that may be able to help or replace the selected person.

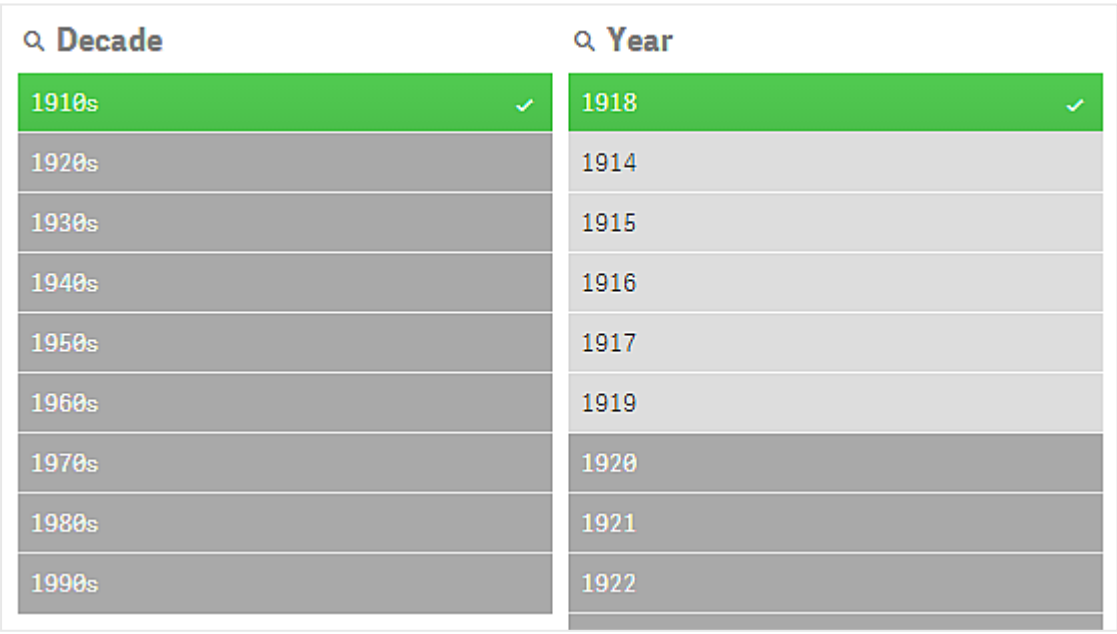
The excluded state

When a selection is made, values in other filter panes may automatically be excluded, because they are not associated. In the following image, *1910s* has been selected, and as a consequence the values *1920*, *1921*, and *1922* have been excluded. This is an obvious exclusion, because the years *1920*, *1921*, and *1922* are not part of the *1910s*. The other values in *Decade* are alternative, that is, they are excluded but you can still select them and thereby expand the selection. If you were to select *1920s* the value would turn green and have the state selected.



But if you select one of the possible values in the filter pane *Year*, all the values in *Decade* that were alternative become excluded instead. When only *1910s* was selected they were alternative, but with selections in two filter panes, values that do not match the condition *1910s*AND*1918* are excluded.

The values that are alternative in *Year* are only excluded by the selection *1918*. They are all associated with the value *1910s* and had the state possible until *1918* was selected.



The selected excluded state

When you make selections in more than one filter pane, you might run into a fifth state: selected excluded.

As mentioned previously, there are two different states for each field value:

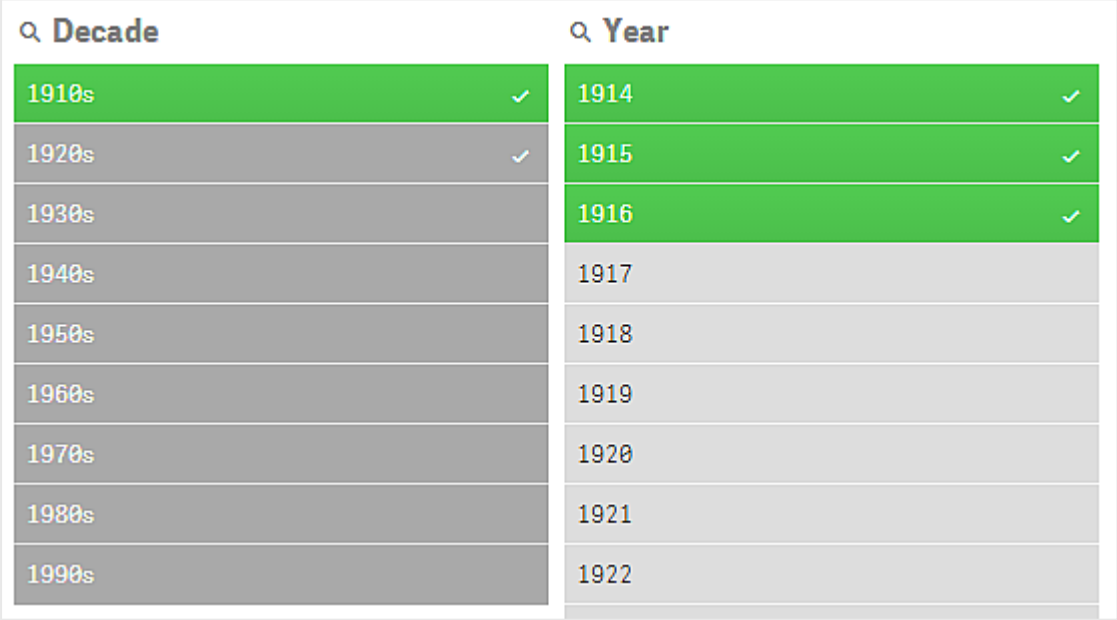
- The input state: the selection that you have made – whether the field value is selected or not.
- The output state: whether the field value is possible or not, given the logical inference of the selection.

A value enters the selected excluded state because the value was first selected, and then excluded by a selection in another field.

For the selected excluded state, the check mark is an indicator that the value was first selected and then excluded, in contrast to excluded values that have never been selected. A dark gray field with a check mark indicates that the value was previously a selected value, but a new selection has then rendered it selected excluded.

Example:

In the following image, the first selection was of the values *1910s* and *1920s*. The values *1910s* and *1920s* were both selected (green) and all the values in the filter pane *Year* were white (possible), since they are all years from the 1910s or 1920s and therefore logically possible values after the first selection. The second selection is of the years *1914*, *1915*, and *1916*. Now, *1920s* is no longer a part of the active selection, since the second selection logically excludes *1920s*. However, *1920s* is still a selected value and therefore it makes sense to denote it as a value that is selected excluded. It was originally selected, but a later selection excluded it. The check mark distinguishes it from the excluded values that have never been selected.

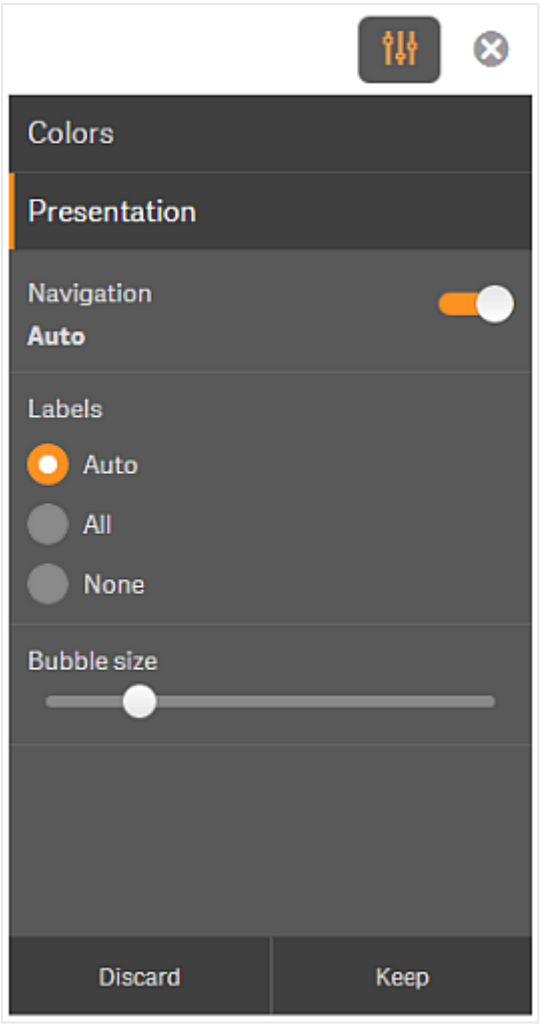


The dark gray value with a check mark is selected excluded.

3.3 Visual exploration

You can change some of the visualization properties to further analyze the data without making selections or editing the sheet. Some of the things you can change using the visual exploration menu are: sorting of data, coloring by dimension or measure, and how to display labels.

The visual exploration menu is available for the following visualizations: bar chart, line chart, pie chart, and scatter plot.



Example of visual exploration menu for a scatter plot visualization

Do the following:

1. When analyzing, hover over the visualization you want to change.
2. Click at the top right of the visualization or right-click on the visualization and select **Open exploration menu**.
3. Update the properties you want to change.
4. To close the menu and save your changes, click at the top right of the visualization. The changes are saved during this session.
   To save your changes for future sessions (and have them updated in the properties panel), click **Keep**.
   This button is only available for unpublished sheets, and for users with rights to edit the sheet.

*If you do not click **Keep** to save the changes or **Discard** to discard the changes and later click **Edit** to edit the sheet, you will be prompted to select whether to keep or discard the changes you made when analyzing the sheet.*

On a small screen

When you are using Qlik Sense on a very small screen (480 pixels wide or smaller), you access the visual exploration menu by doing the following:

1. Tap the visualization you want to change to open it in full screen.
2. Tap at the top of the visualization or long-touch on the visualization and select **Open exploration menu**.
3. Update the properties you want to change.
4. To close the menu and save your changes, tap at the top of the visualization, or long-touch and select **Close exploration menu**.

3.4 Types of 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 **Gauge**, **KPI**, and **Text & image** visualizations.*

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

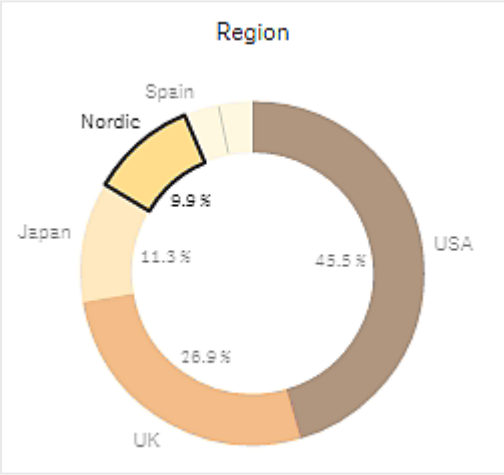
	Click selection	Draw selection	Range selection	Lasso selection	Legend selection[1]	Label selection
Bar chart	✓	✓	✓	✓	✓	✓
Combo chart	✓	✓	✓	✓	✓	✓
Filter pane	✓	✓				
Gauge						
KPI						
Line chart	✓	✓	✓	✓	✓	✓
Map	✓	✓		✓	✓	

[1] Legend selection is not available in a visualization when coloring by expression.

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

Click selection

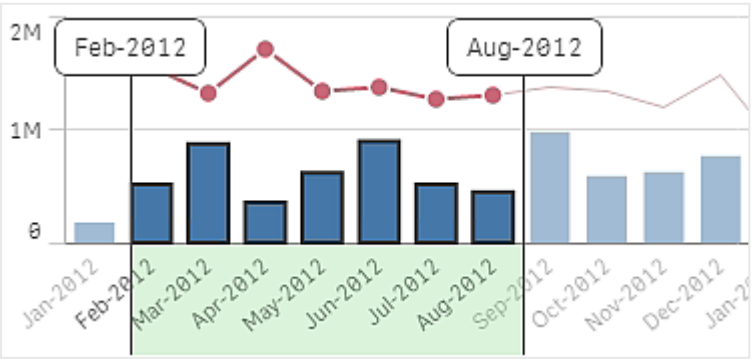
You click to select single values/data points, one at a time. If you want to deselect a value/data point, click it.



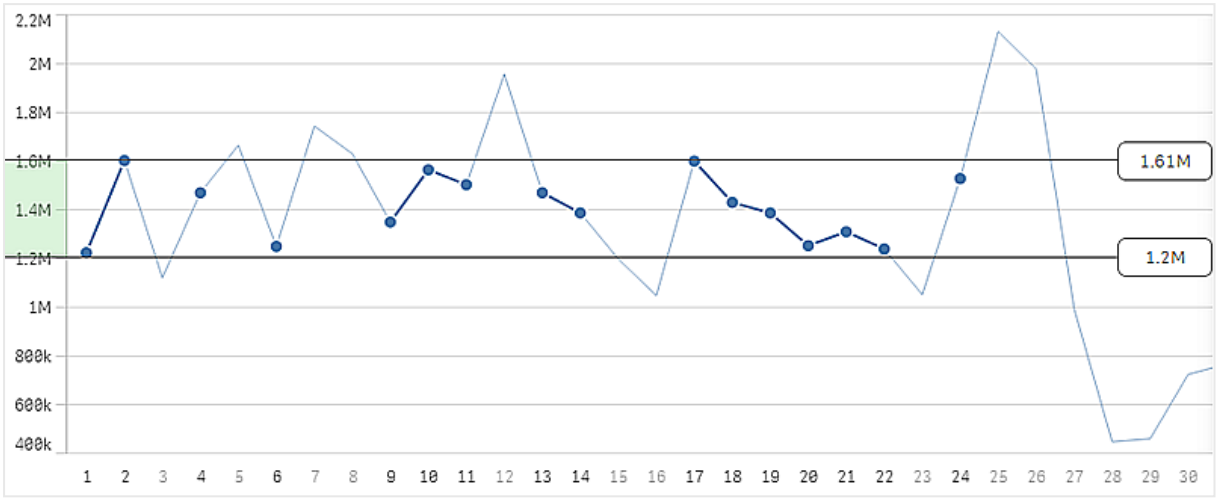
Pie chart where the sector Nordic has been selected

Range selection

You draw your selections, either on the y-axis or the x-axis. For an axis showing measure values, you are also able to click on the range bubble to enter a specific numeric value.



Bar chart example

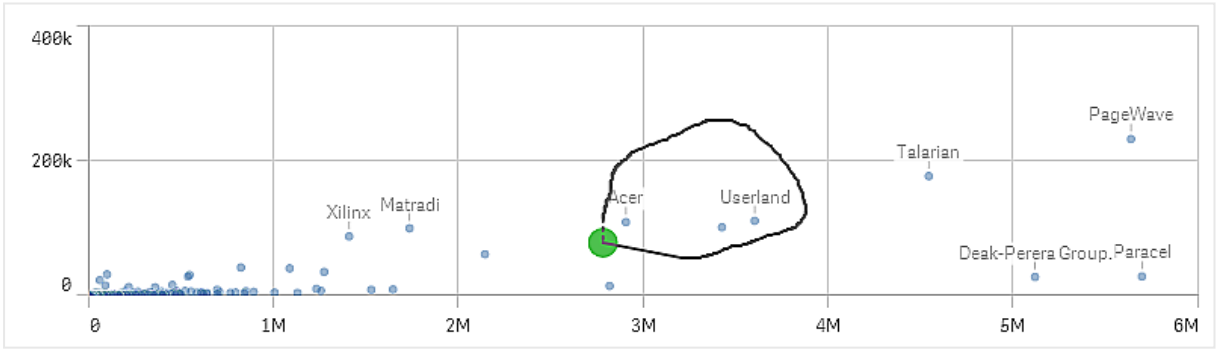


Line chart example

Lasso selection

When you want to make a draw 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.

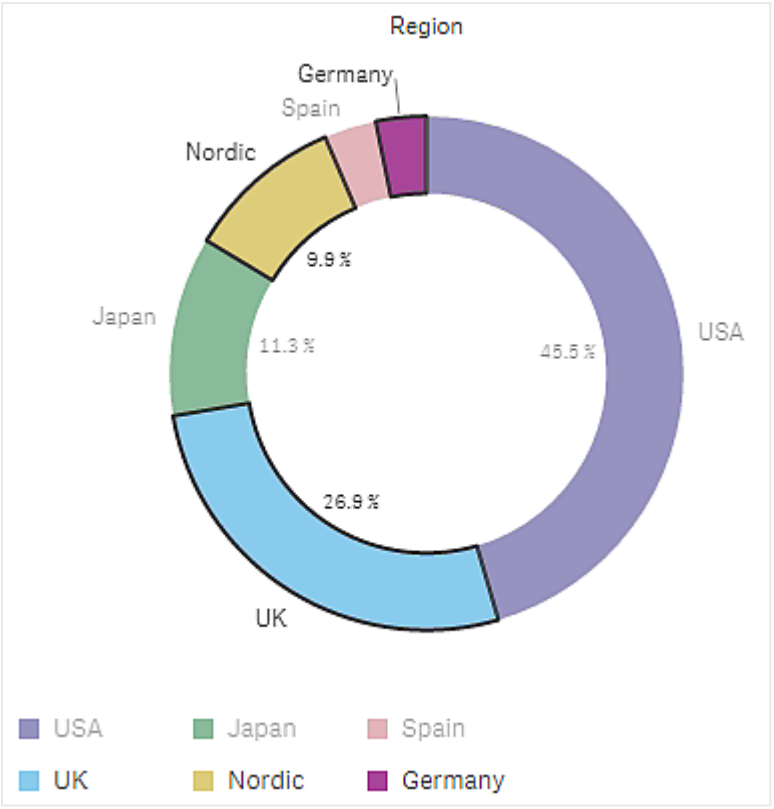


Scatter plot example

Legend selection

You can click the legend items to select the values.

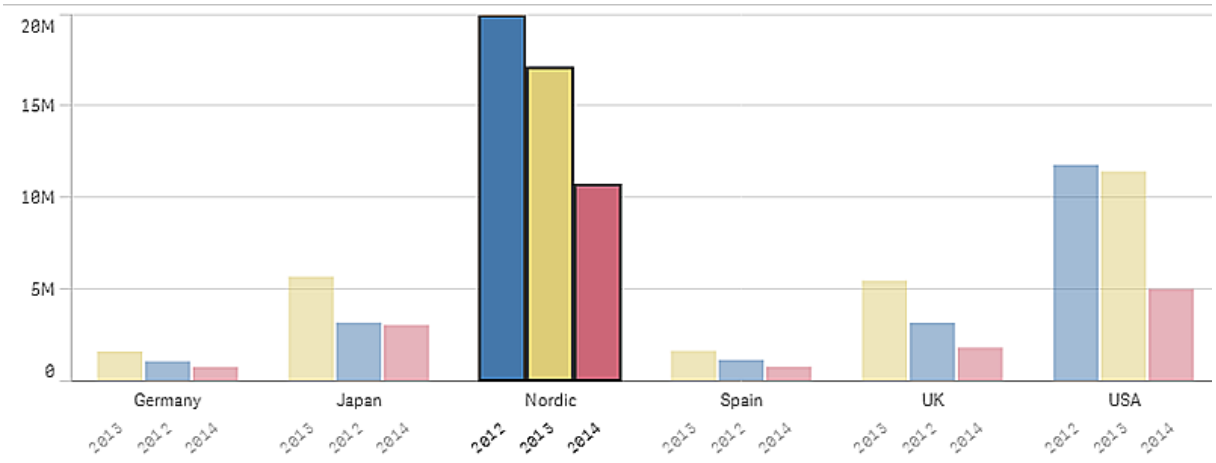
Legend selection is not available in a visualization when coloring by expression.



Pie chart example

Label selection

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

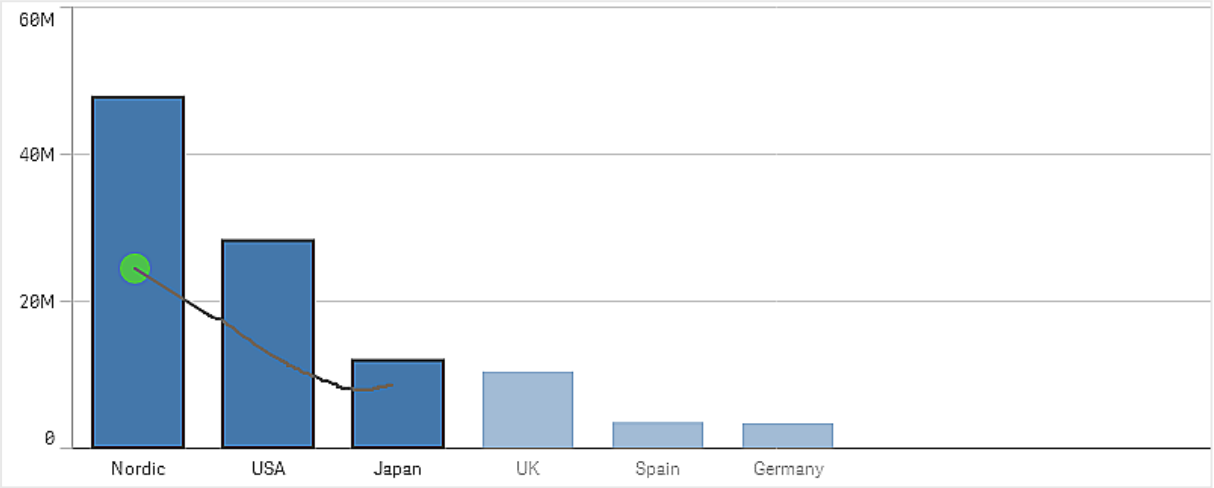


Label selection of 2011, 2012, and 2013. Clicking any of the years selects the whole group.

Draw selection

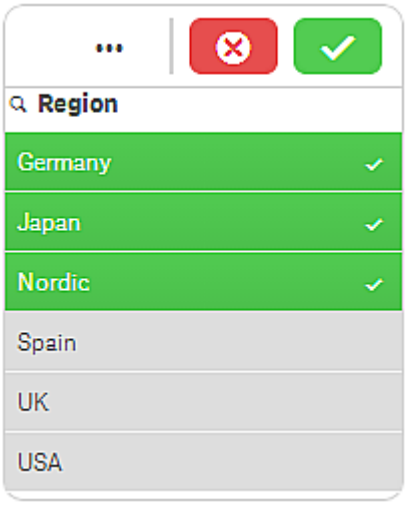
When you want to make a draw selection, you must first click inside the visualization and turn on lasso selection by clicking at the top of the visualization. On a computer, you can also press Shift and make the selection.

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



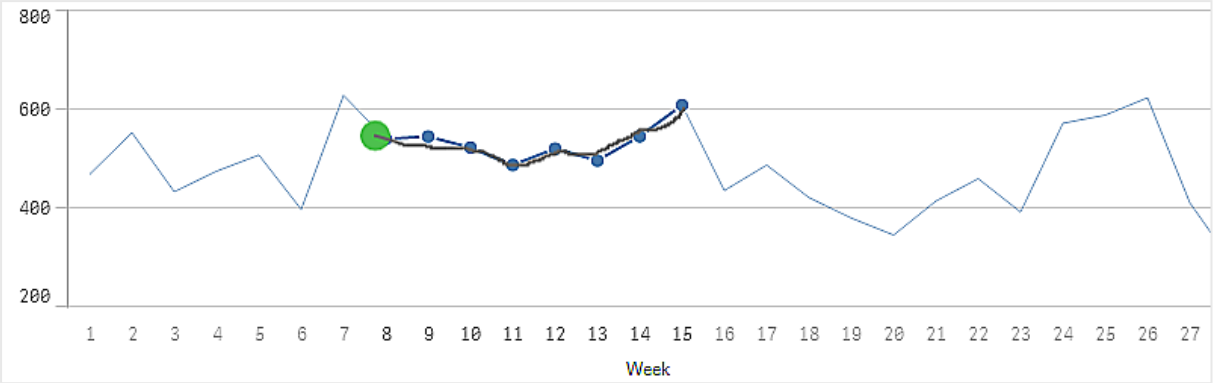
Bar chart example

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



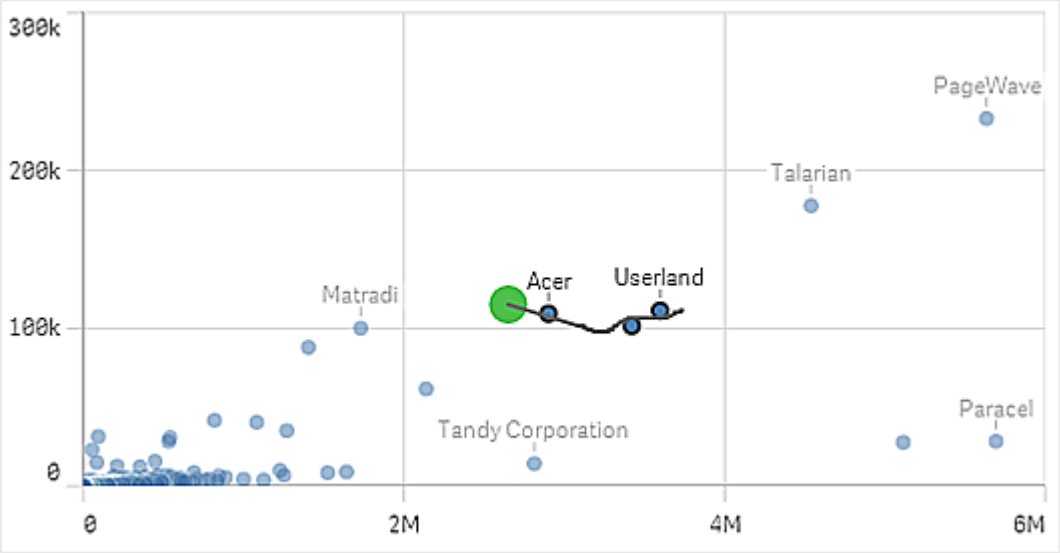
Filter pane example

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.

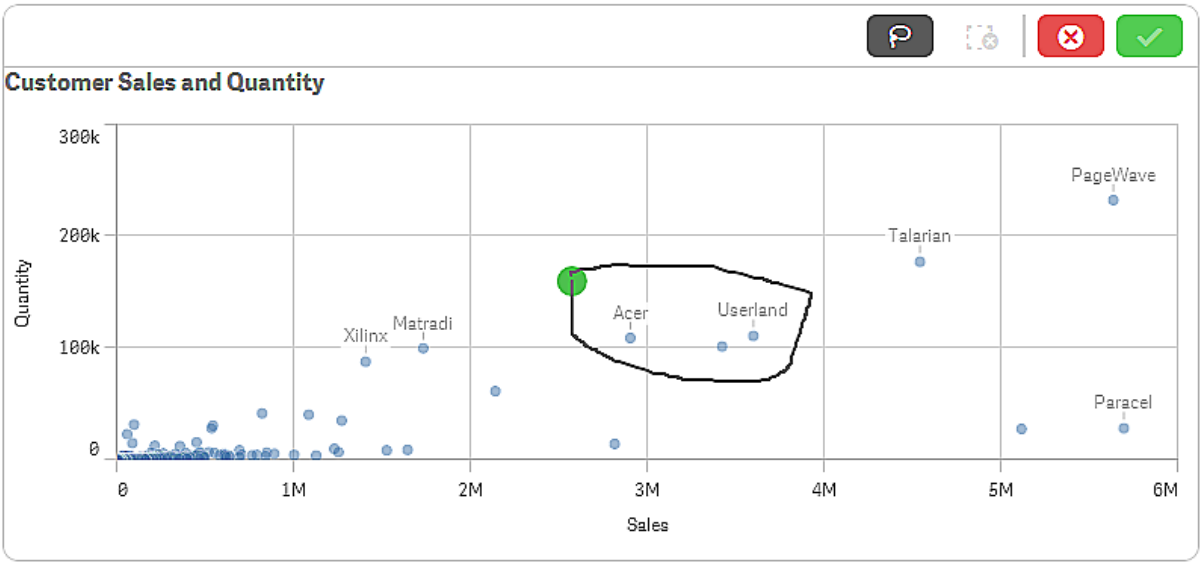


Scatter plot example

3.5 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

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.

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

3.6 Canceling data retrieval

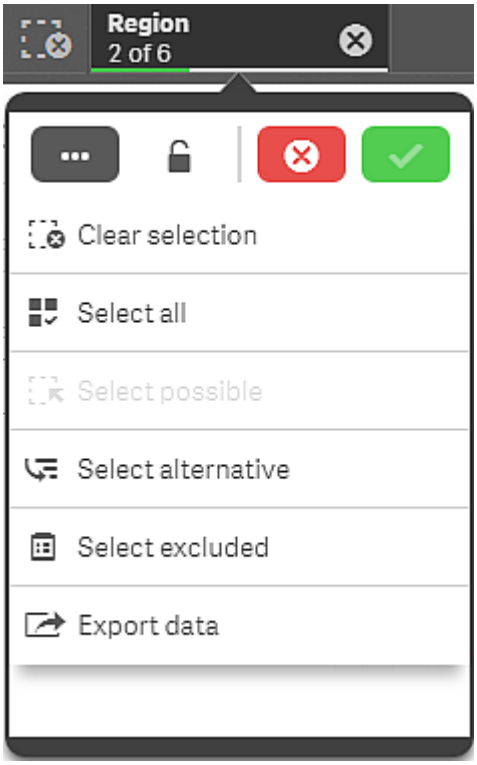
When you are making discoveries in Qlik Sense and have your data on a server, there may sometimes be waiting time before the data is retrieved. To avoid long periods of waiting time, **Cancel** buttons are displayed on each visualization after a while, so that you can choose to cancel the data retrieval 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.

4 Exploring 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).

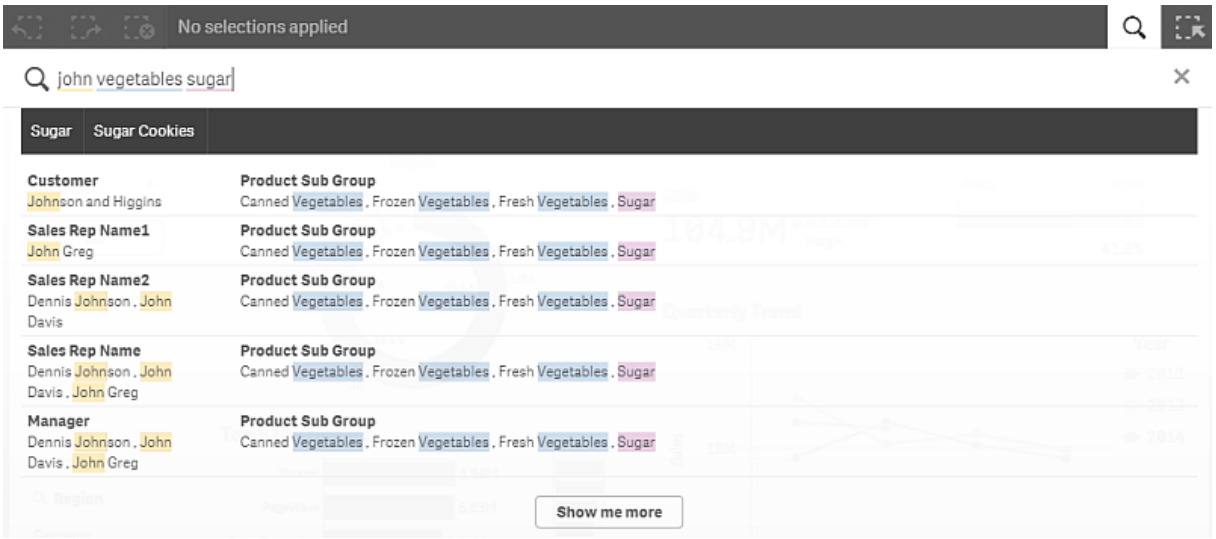
Select possible	All possible values (white) are selected. This option is never available in the selections item, because when a selection is made, the other values are either alternative or excluded. In a filter pane, however, you can have possible values as a result of another selection.
Select alternative	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. By selecting alternative values, the values that previously were selected, become alternative instead.
Select excluded	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. If there are not any alternative values, the excluded values are selected (green), and the previously selected values change state to alternative.
Export data	Export the selected data to an Excel file. See: *Exporting data from a visualization (page 37)*

4.1 Searching in the entire data set

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

Performing a search

As you type your search query, Qlik Sense filters the field values and displays the matching items. The search will search for field values and dimension values (also dimension values that are created as master items).



If you use more than one search term and separate them by spaces, they are interpreted as separate search terms. If you want them to be interpreted as only one search term, use quotation marks (" ") to link them together, for example, *"mountain bike"* or *"fresh fruit"*.

> *If you select a dimension value in the search result, the field name (not the dimension name) will be displayed in the selections bar.*

You can clear the search field by clicking ✕ to the right in the search field.

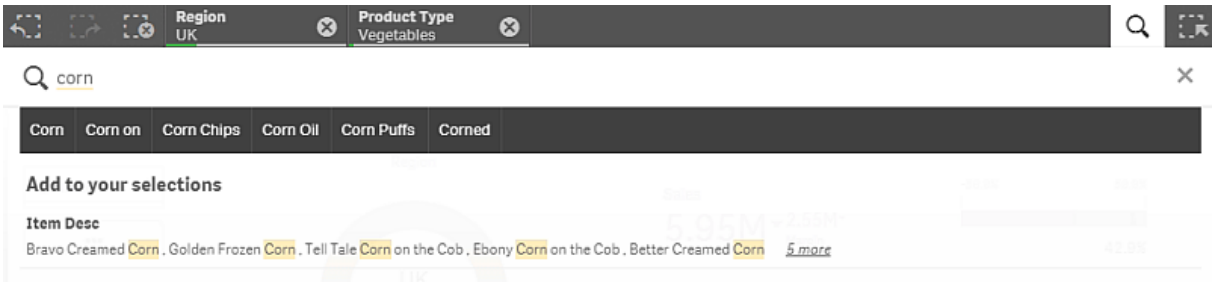
List of results

The search results show the combinations of matches found in the Qlik Sense database. The results are based on field associations and are sorted by the number of matched search terms, in descending order. If there are more than one match to your search query, a suggestion list is displayed with matches ordered by relevance. Click a suggestion to insert it into the search field. When you select a result you make an actual selection of the values, just like when you select values in the visualizations. The selections bar shows the selected values and the visualizations containing the selected data are updated.

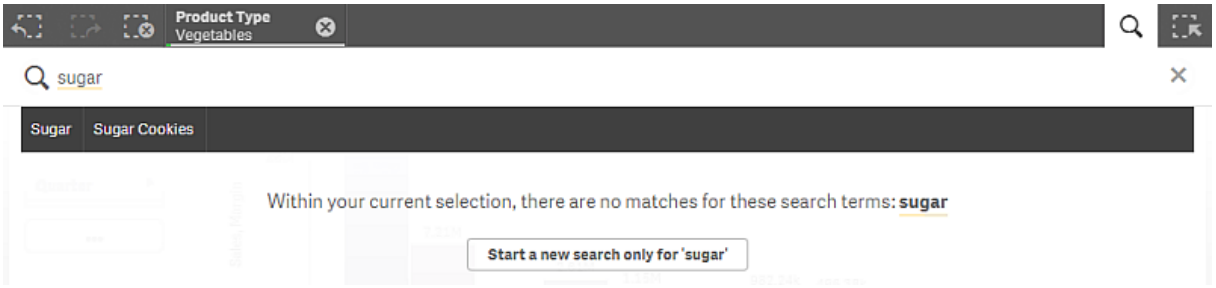
The search terms are always compared against the beginning of the words in the database. Searching for "read" does not present "bread" as a match, whereas "reader" and "Reading" would both be matches. The search terms are each given a color to support the identification of the matches. When there are more than six search terms, the colors are reused.

Search within current selection

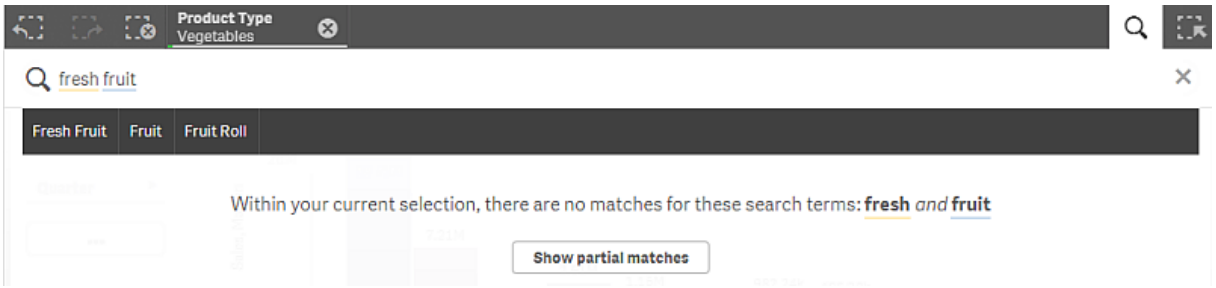
If you have made a selection, you can perform a search within that selection. Smart search does this automatically, all you need to do is add search strings and perform a new search. You can do this over and over to filter your search results.



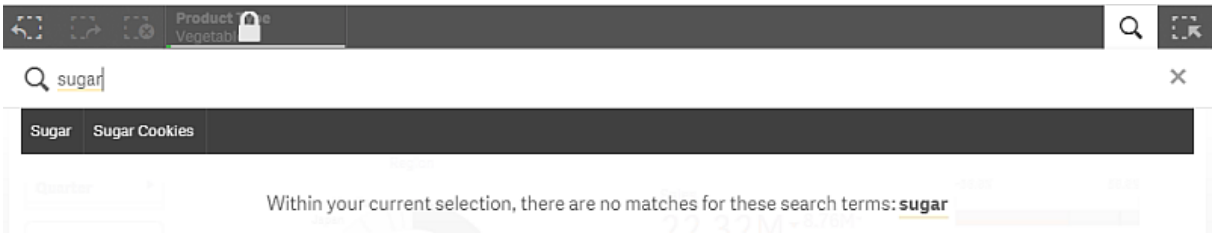
If you search within a selection and your query does not produce a result for your search term, you can start a new search by clicking **Start a new search only for'**<your search term>**'**.



If you search within a selection using multiple terms and your query does not produce a result for all of your search terms, you can view partial matches by clicking **Show partial matches**.



If you a search within a locked selection and your query does not produce a result, you will get the message "**Within your current selection, there are no matches for these search terms:** <your search terms>". Then you can consider to unlock the selection and perform a new search.



Keyboard shortcuts

The description for the keyboard shortcuts are made assuming that you are working in Windows. For Mac OS use Cmd instead of Ctrl.

Shortcut	Action
Ctrl+F	Open/close smart search.
Arrow keys	Navigate the suggestion list and search results.
Tab/right arrow	Insert suggested search string (in the search field).

Enter	Insert suggested search string (in the suggestion list). Select search results.
Esc	Clear the search field. Close smart search (if the search field is empty).

Smart search

Smart search is the global search tool in Qlik Sense. Smart search is available when you are analyzing data on a sheet and it is located in the selections bar. Smart search helps you to find associations and make selections in your data. Open it by clicking .

If you perform a search with two search terms, the search generates one search query including both of them and then displays the available combination of results, with one result per row. In the screenshot you can see an example where the categories *Product Type*, *Product Sub Group*, and *Customer* show the available results from the database.

A	Search field
B	Suggested search strings
C	Search results

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.

List search

List search makes it easier for you to find or filter in filter panes, selection items, and tables, and make selections in the resulting list.

Special conditions apply to smart search that is available in the selections bar.

Text search

As you type your search string, Qlik Sense filters the field values and displays the matching items. If you perform a normal search (without wildcards), strings that match the search string are displayed. If you use several strings, separated by blanks, each of these is interpreted as a separate search string and displays all field values that contain either of the strings. If you want the separate search strings to be interpreted as only one string, use quotation marks (" ") to link the strings together. You can also use a plus sign (+) for a similar result. By using a plus sign, you set the condition that strings with a plus sign must be included in the matching items. However, the strings need not necessarily be next to each other, nor in the same order as they were entered.

Search is not case sensitive.

Example	Result
"orange juice"	Only finds field values that contain the whole string “orange juice”.
orange juice	Without the quotation marks, all fields that contain either “orange” or “juice” would be displayed.
+orange +juice	Finds matches such as “orange juice”, “orange and apple juice” and “juice from oranges”.

Wildcards

You can use one or several wildcards in a search string. The following wildcards can be used:

Wildcard	Representation

*	Zero or more characters, including blank. This wildcard is flexible and matches any character or any block of characters in a specific position.
?	A single character, including blank. This wildcard is useful when you suspect that a string may be misspelled, when you are unsure of the spelling, or when the string contains special characters that may be difficult to reproduce correctly.

*If you use wildcards, only those records that match the entire search string are displayed, that is, a blank does not imply a logical OR. The search string '*creamed' does not get a match on "Rocky's creamed corn" since the value does not end with “creamed”. Neither does “creamed*” result in a match on "Rocky's creamed corn", since the value does not start with “creamed”.*

Example	Result
*a**	Finds all values that begin with the letter “a”, including strings with several words where the first word begins with an “a”.
**b*	Finds all values that end with the letter “b”, including strings with several words where the last word ends with a “b”.
c	Finds all values that contain the letter “c”, including strings with several words.
r?ck	Finds all values that have four letters and start with an “r”, followed by any character, and ending with “ck”, for example, “rack”, “rick”, “rock”, and “ruck”.
r?? ????d	Finds all values that consist of a three-letter word beginning with an “r” and a five-letter word ending with a “d”.

*Space in a search string makes a difference. If you search for “*corn” you get matches on strings ending with, for example, “popcorn” as well as “corn”. If you use a space in your search string, “* corn”, you only get matches that end with “corn”.*

Fuzzy search

Fuzzy search is similar to a text search, with the difference that it compares and sorts all field values according to their degree of resemblance to the search string. Fuzzy search is especially useful when items may be misspelled. Fuzzy search can also help you find multiple values that are nearly identical.

Begin your search string with a tilde "~" character. While typing, all values are sorted by the degree of resemblance to the search string, with the best matches at the top of the list. If you press Enter, the first value in the list is selected.

Numeric search

Numeric search is very similar to text search. The only difference is that the search string must begin with one of the relational operators ">", ">=", "<" or "<=".

Example	Result
>900	Finds all values greater than 900.
<=900	Finds all values less than or equal to 900.
>900<1000	Finds all values greater than 900 and less than 1000.
<900>1000	Finds all values less than 900 or greater than 1000.

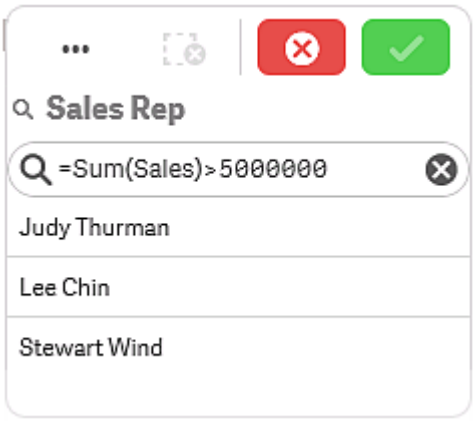
Expression search

An expression search always begins with an equals sign (=). The expression is evaluated for each field value in the search field. All values for which the search expression returns a non-zero value are selected.

In a filter pane with Sales values, you can use a search such as: *=Sum(Sales) > 1000000* to find values larger than 1,000,000. This is a simple search and you could get the same result by using the numeric search: *>1000000*. Often, an expression search is the only choice. For example, if you want to search for values in associated fields, you have to use an expression search.

Example:

Let us assume that you have a filter pane for sales representatives. You can then use an expression search for the sales representatives who have sales larger than, for example, 5,000,000. The search string is similar to the previous one: *=Sum(Sales) > 50000000*. Because the sales values are associated with the sales representatives, you can perform the search in the Sales Rep filter pane.



Sales representatives with sales larger than 5,000,000

4.3 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.

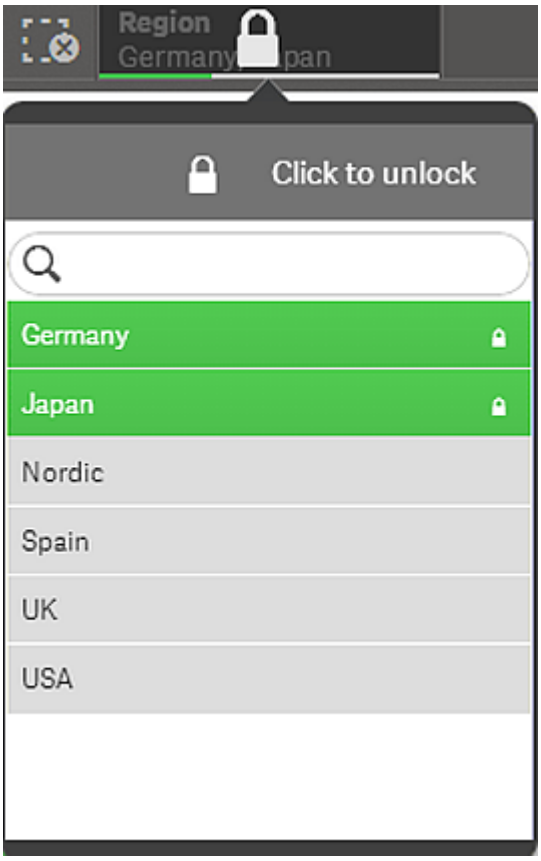
The selection is updated.

4.4 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.

4.5 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 brings you one step forward in the selection history.

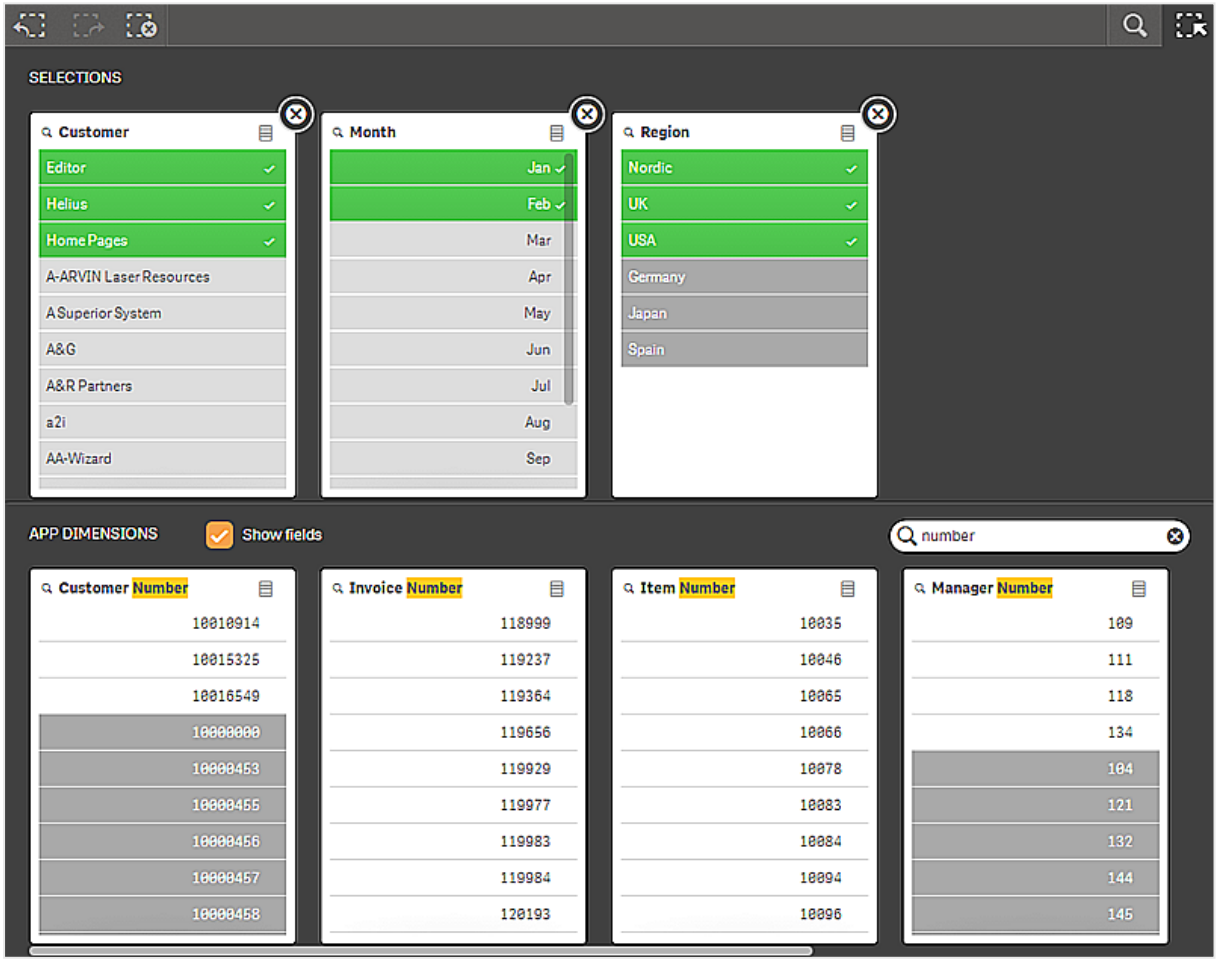
Clicking clears all selections, except the ones that are locked.

5.1 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.



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.

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.

5 Keeping track of data using bookmarks

When you are analyzing data, you might find something interesting that you want to return to, or share with others. Using bookmarks is a way to easily keep track of a certain selection state on a certain sheet.

6 Exporting data from a visualization

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.

Qlik Sense always tries to export data in number format if possible. Therefore if a number or a string is preceded by zeros, these zeros values are not exported to Excel.
Example: 02 is exported to 2.

6.1 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.

Exporting data is currently not supported for the following:

- Treemap
- Pivot table
- Bar chart (stacked, with two dimensions)
- Line chart (with two dimensions)

6.2 Exporting a visualization (touch devices)

In Qlik Sense you can export a visualization as an image or a PDF file also when you are opening an App in a small device.

Tap on the visualization you want to export to zoom it.Click on the three bars ≡ on the upper right corner and select **Export**.

Export to PDF

This is the default option. Leave **PDF** on the **Select type of file** drop-down menu.

Do the following:

1. Select the **Paper size** by scrolling the related drop down menu and clicking on the selected type.
2. Choose the **Orientation** by selecting the button **Portrait** or **Landscape**.

Click on the **Export** button to start the creation of the PDF. To download it click on the link **Click here to download your PDF file** that will appears on the screen.

Click on the **Cancel** button to go back to the visualization without exporting it.

Export as an image

Do the following:

1. Open the drop-down **Select type of file** and click on **PNG** of on **JPEG** to select the image format you want.

Click on the **Export** button to start the creation of the image. To download it click on the link **Click here to download your image file** that will appears on the screen.

Click on the **Cancel** button to go back to the visualization without exporting it.

7 Exporting a sheet

This feature is available also on mobile devices, see Exporting a sheet (touch devices) (page 39)

In Qlik Sense it's possible to export an entire sheet as a PDF file.

Do one of the following:

1. Open the sheet you want to export.
2. Click ⋮ and select **Export sheet to PDF**. The **PDF setting** dialog appears.
3. Select the **Paper size** by scrolling the related drop down menu and clicking on the selected type.
4. Click **+** or **-** on sides of **Resolution (dots per inch)** to increase or decrease the resolution accordingly. You can also type an exact value. The minimum value is 10 dpi, the maximum is 300 dpi.
5. Choose the **Orientation** by selecting the button **Portrait** or **Landscape**.
6. In the **Aspect ratio options** you can select:
    1. **Keep current size** to insert the visualization into the PDF without changing its size. If the resulting PDF is smaller than the visualization it will be cropped.
    2. **Fit to page, without keeping aspect ratio** will change height and width of the visualization to fill the entire page. Aspect ratio will change accordingly.

Click on the **Export** button to start the creation of the image.

Click on the **Cancel** button to close the window without exporting the image.

Print the PDF file to create a paper copy of the visualization.

7.1 Exporting a sheet (touch devices)

In Qlik Sense it's possible to export an entire sheet as a PDF file also from mobile devices.

Do one of the following:

1. Open the sheet you want to export
2. Click ⋮ and select **Export sheet to PDF**.
3. Select the **Paper size** by scrolling the related drop down menu and clicking on the selected type.
4. Choose the **Orientation** by selecting the button **Portrait** or **Landscape**.

Click on the Export button to start the creation of the PDF. To download it click on the link **Click here to download your PDF file** that will appears on the screen.

Click on the **Cancel** button to go back to the sheet without exporting it.

8 Exporting a visualization

This feature is available also on mobile devices, see Exporting a visualization (touch devices) (page 37).

In Qlik Sense you can export a visualization as an image or a PDF file.

Do a right click on the visualization you want to export and select one of the available output types.

8.1 Export as an image

Do the following:

1. In the shortcut menu select **Export as an image**.
2. The dialog **Image settings** appears, select to keep **Current** options or to change them by using **Custom** options.

Current options

By selecting **Current** the **Image settings** window shows the width and height of the original chart and the screen resolution in dpi.

You can select the output format between Png and Jpeg by using the **Type of file** drop-down menu.

Click on the **Export** button to start the creation of the image.

Click on the **Cancel** button to close the window without exporting the image.

Custom options

You can customize the dimensions and the resolution of the exported image by clicking on the **Custom** option and set them.

Setting a new image width

Images width is set in pixels.

Do the following:

- Click **+** or **-** to increase or decrease the width accordingly. You can also type an exact value. The minimum value is 8 pixels, the maximum is 2.000 pixels.

Setting a new image height

Images height is set in pixels.

Do the following:

- Click **+** or **-** to increase or decrease the height accordingly. You can also type an exact value. The minimum value is 8 pixels, the maximum is 2.000 pixels.

*To keep the aspect ratio you have to change **Width (pixels)** and **Height (pixels)** accordingly.*

Setting a new image resolution

Images resolution is set in dpi (dots per inch).

Do the following:

- Click **+** or **-**on the sides of **Resolution (dots per inch)** to increase or decrease the resolution accordingly. You can also type an exact value. The minimum value is 10 dpi, the maximum is 300 dpi.

You can select the output format between Png and Jpeg by using the **Type of file** drop-down menu.

Click on the **Export** button to start the creation of the image.

Click on the **Cancel** button to close the window without exporting the image.

8.2 Export to PDF

Do the following:

1. In the shortcut menu select **Export to PDF**. The dialog **PDF settings** appears.
2. Select the **Paper size** by scrolling the related drop down menu and clicking on the selected type.
3. You can increase or decrease the **Resolution (dots per inch)** by clicking on **+** or **-** . You can also type an exact value. The minimum value is 10 dpi, the maximum is 300 dpi.
4. Choose the **Orientation** by selecting the button **Portrait** or **Landscape**.
5. In the **Aspect ratio options** you can select:
    1. **Keep current size** to insert the visualization into the PDF without changing its size. If the resulting PDF is smaller than the visualization it will be cropped.
    2. **Fit to page, without keeping aspect ratio** will change height and width of the visualization to fill the entire page. Aspect ratio will change accordingly.

Click on the **Export** button to start the creation of the image.

Click on the **Cancel** button to close the window without exporting the image.

To create a paper copy of the visualization you can print the PDF file.

9 Troubleshooting - Discover

This section describes problems that can occur when discovering and analyzing in Qlik Sense.

9.1 My search does not produce any results

Possible cause

You have locked selections.

Proposed action

Unlock the selections and then perform a new search.

Do the following:

1. Click on the selection with 🔒.
2. Click 🔒 to unlock.
3. Perform a new search.